



**I-PERFORM  
Performance Management  
System**

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*System Administrator Guide*

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**DHR** Idaho Division of  
Human Resources  
*Executive Office of the Governor*

208.334.2263

<http://dhr.idaho.gov/>

# I-PERFORM General Information

I-PERFORM is an online application that supports a statewide performance management system for state agencies. In addition to the ability to document, create, review, finalize, and retrieve employee evaluation records, supervisors have the ability to quickly document day-to-day performance. The development of I-PERFORM is a collaborative effort between the Division of Human Resources (DHR), and the State Controller's Office (SCO).

If you experience any problems with this application please contact your agency I-PERFORM system administrator or the Division of Human Resources (208) 854-3080. If you have any suggestions for this help manual please contact the Division of Human Resources.

Division of Human Resources  
304 N. 8th Street, Suite  
Boise, ID 83720-0066 (208) 854-3080

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# I-PERFORM User Guide: Administrator Role

## EMPLOYEE PERFORMANCE EXPECTATIONS (STANDARDS) CROSSWALK Rev: 3/4/2012

This cross walk will help you and your staff members understand the correlation between the performance standards as listed in the previous performance evaluation and the 2012 performance expectations. Note: Standards from prior evaluation form will be duplicated within the revised performance expectations.

2012 Performance Expectations:	Previous Performance Standards:
<p><b>PROFESSIONALISM</b> This performance expectation evaluates the employee's competence in quality of work, dependability, adaptability/flexibility, and respect for others.</p>	<p><b>Adaptability/Flexibility:</b> This describes how well the employee adapts to change and is open to different and new ways of doing things.  <b>Dependability:</b> This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements.  <b>Interpersonal Skills:</b> This describes how well the employee establishes and maintains effective work relationships. Demonstrates good communication and listening skills. Practices respect for others. Demonstrates conflict resolution skills.  <b>Quality:</b> This describes the employee's work in terms of consistency, thoroughness, and accuracy.  <b>Work Environment/Safety:</b> This describes how well the employee promotes a respectful workplace and complies with general conditions of employment, EEO, security, and workplace safety policies.</p>
<p><b>PROMOTING RESPONSIBLE GOVERNMENT</b> This performance expectation evaluates the employee's competence in adaptability, dependability, productivity, efficiency, work environment and safety.</p>	<p><b>Adaptability/Flexibility:</b> This describes how well the employee adapts to change and is open to different and new ways of doing things.  <b>Dependability:</b> This describes how well the employee completes assigned work in a timely manner. The employee meets attendance requirements.  <b>Productivity:</b> This describes how the employee manages and completes workload expectations and demonstrates the knowledge and skills needed to do the job.</p>
<p><b>CUSTOMER FOCUS:</b> This performance expectation evaluates the employee's competence in customer service, conflict resolution, interpersonal skills, and communication.</p>	<p><b>Adaptability/Flexibility:</b> This describes how well the employee adapts to change and is open to different and new ways of doing things.  <b>Customer Service:</b> This describes how well the employee works with internal and external customers to achieve desired results and maintain positive relationships.  <b>Interpersonal Skills:</b> This describes how well the employee establishes and maintains effective work relationships. Demonstrates good communication and listening skills. Practices respect for others. Demonstrates conflict resolution skills.  <b>Work Environment/Safety:</b> This describes how well the employee promotes a respectful workplace and complies with general conditions of employment, EEO, security, and workplace safety policies.</p>
<p><b>PERFORMANCE EXPECTATION: LEADERSHIP</b> This performance expectation evaluates the employee's competence to motivate people and efficiently manage resources in achieving the agency's mission.</p>	<p>Encompasses all facets of previous standards from supervisor/manager level.</p>

## Performance Management Best Practices

Performance evaluations assist employees in developing their careers and being successful in their jobs. They describe expectations and objectives for all state employees. Performance evaluations help to ensure:

1. The agency mission and vision are achieved.
2. There is statewide consistency to the extent possible.
3. Legal requirements are met (Ref. I.D.A.P.A 67-5309(h)).
4. Personnel decisions are justifiable and equitable based on performance documentation.

Effective performance management establishes a year-round partnership between the employee and the supervisor while creating a shared understanding about the work that is to be accomplished and how that work is to be done.

The best performance management systems include the components of:

- Setting expectations and resetting them as they change.
- Evaluating current skills, identifying missing skills, and creating a development plan to close existing skill gaps.
- Providing consistent, effective, and timely feedback and coaching.
- Immediately and consistently documenting effective and ineffective actions and behaviors to demonstrate trends.
- Creating an environment where employees can feel motivated.
- Ensuring complete, shared understanding of the State and agency performance ratings.
- Utilizing a system to bring consistency and reporting of performance ratings across agencies.
- Delivering an evaluation that is fair, accurate, free of bias, and informative.



*Our focus today:*



# I-PERFORM User Guide: System Administrator Role

## I-PERFORM Roles

Role	Responsibility	Access Rights
<b>Employee</b>	<ul style="list-style-type: none"> <li>Review both current and past performance evaluations for clarity of:                             <ul style="list-style-type: none"> <li>Expectations</li> <li>Developmental opportunities</li> <li>Agreed up actions to be taken for development</li> <li>Documentation of performance</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>View draft evaluation once forwarded by supervisor</li> <li>Add comments to the evaluation on the cover sheet</li> <li>View documentation and attachments once the evaluation is marked complete by the supervisor</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>Maintain documentation in the Supervisors Employee Folder</li> <li>Create and maintain performance evaluations for staff</li> <li>Follow routing and approval processes of the agency</li> <li>Utilize the four Performance Expectations as set forth by the Office of the Governor</li> <li>Obtain a clear understanding of the individual rating distinctions, and apply them consistently and without bias</li> </ul>	<ul style="list-style-type: none"> <li>Create and delete "Draft" status evaluations</li> <li>Review comments by reviewers and employees</li> <li>Add and delete documentation and attachments as necessary, before the evaluation is transmitted to SCO</li> <li>Approve evaluation and send to employees</li> <li>Return an evaluation to "Draft" Status (if the evaluation has not yet been</li> </ul>
<b>Reviewer</b>	<ul style="list-style-type: none"> <li>Assist the supervisor in creating a clear, concise, specific, informative, and legally-defensible performance evaluation</li> <li>Check for common errors</li> </ul>	<ul style="list-style-type: none"> <li>View evaluations</li> <li>Enter comments into the review window, which are submitted back to the supervisor</li> </ul>
<b>Administrator</b>	<ul style="list-style-type: none"> <li>Create the agency-specific routing structure within I-PERFORM</li> <li>Create additional administrators if necessary for the agency</li> <li>Create and maintain agency evaluation standards, if utilized</li> <li>Input and maintain Agency Goals</li> <li>Create agency appointees, if used</li> <li>Assist supervisors and employees with questions or issues related to I-PERFORM</li> <li>Edit routing structures. Any changes to the employee's PCN require updating the routing groups, ie, promotion, no longer in position.</li> <li>A request form for assigning administrators is available on the Division of Human Resources website <a href="#">IPerform Administrator Request</a></li> </ul>	<ul style="list-style-type: none"> <li>View/edit routing structure</li> <li>Create agency structures within I-PERFORM</li> <li>Create/Maintain performance expectations</li> <li>Create Agency Goals</li> </ul>
<b>Agency Appointee</b>	<ul style="list-style-type: none"> <li>Act as the last sign off on the performance evaluation after it has been discussed with the employee</li> </ul>	<ul style="list-style-type: none"> <li>View/review performance evaluations</li> <li>Sign performance evaluations</li> </ul>
<b>DHR</b>	<ul style="list-style-type: none"> <li>Provide oversight on the I-PERFORM system</li> <li>Provide training and support to agencies</li> </ul>	<ul style="list-style-type: none"> <li>View all routing options</li> <li>View all performance evaluations</li> <li>Return performance evaluations to draft status if it has not been transmitted</li> <li>Perform all Administrative functions</li> </ul>

## Accessing I-PERFORM

Sign on to the State Controller's Office Application Menu and click on **DHR I-PERFORM** from the right-hand column on the bottom of the screen.



The left frame functions as navigation between the areas of I-PERFORM. Depending on the individual's role this menu will have different options:

1. **Performance Evaluation** is available to supervisors and allows access to create and/or maintain their employee's evaluations.
2. **Performance Review** allows designated employees to view pending evaluations that have been assigned to them for review.
3. **Administrative** functions are for designated agency I-PERFORM administrative personnel. Allows for role assignments and system set-up.
4. Supervisors can capture notes during the review period by selecting **Supervisor Employee Folder**.
5. All employees can access their performance evaluation by clicking on **My Evaluation**.
6. The main navigation bar at the top of the screen will remain static; however available options may change from page to page based in the employee's assigned role.



## General Navigation Tips

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Use **EXIT** on each screen to return to the home screen. Depending where you are in the system, clicking the browser “back” button may give you an error message or keep returning to the same screen. You will receive a message reminding you to save.



I-PERFORM uses Microsoft Outlook to send notifications during the routing process. To ensure that emails do not get caught in your junk or blocked folders, add the system email address to your safe list.

- In Outlook click on the drop down list for **Junk** from the home tab.
- Click on **Junk E-mail Options**.
- Click on the **Safe Senders** tab.
- Copy or type in this address: [SCOapps\\_Admin/SCO.APPS@apps.sco.idaho.gov](mailto:SCOapps_Admin/SCO.APPS@apps.sco.idaho.gov).
- Click **Add**.
- Click **OK**.



A **Spell Check** feature is available for all text in the evaluation.

- Clicking the Spell Check button in the top navigation bar checks the entire evaluation.
- Clicking on one of the red check marks  displayed throughout the document checks that specific section.



### Windows Internet Explorer 8

Your version of Internet Explorer (IE) is important to the complete functionality of I-PERFORM. If your agency has moved to IE9 you will experience errors related to incompatibility. IE8 provides optimal performance.



When **copy and paste** is needed from one document into I-PERFORM, remove the formatting by pasting into the Notepad program first, then copy and paste again into I-PERFORM. This will remove all unwanted characters that are not always visible.



Like I-Time, your systems will **time-out** for security reasons. The length of time before timing out is 3-4 hours. To avoid losing work, save **VERY** frequently.

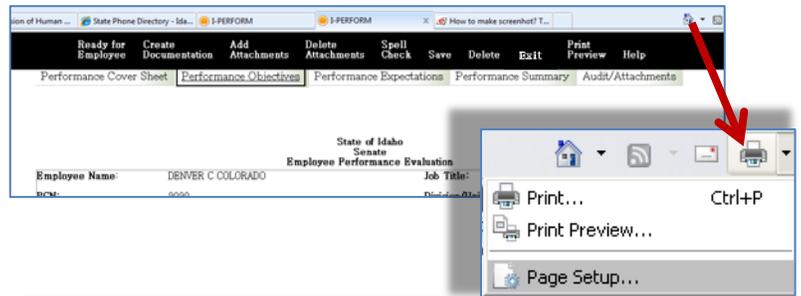


Agency **security changes** typically will take 20-30 minutes to update after being made.

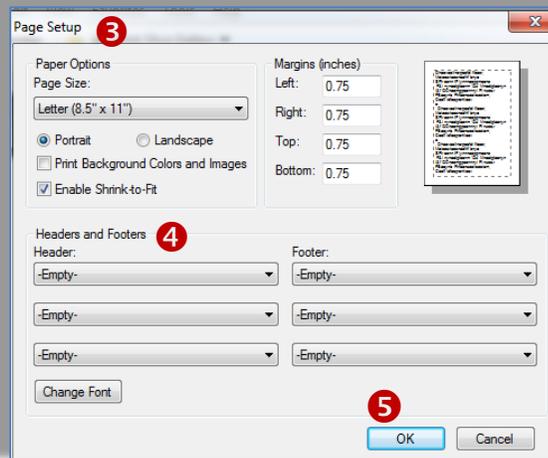
## Printing

The **Print** feature in I-PERFORM requires specific printer settings due to the web based application. By setting up the printer correctly for this application your pages will print without overlapping text.

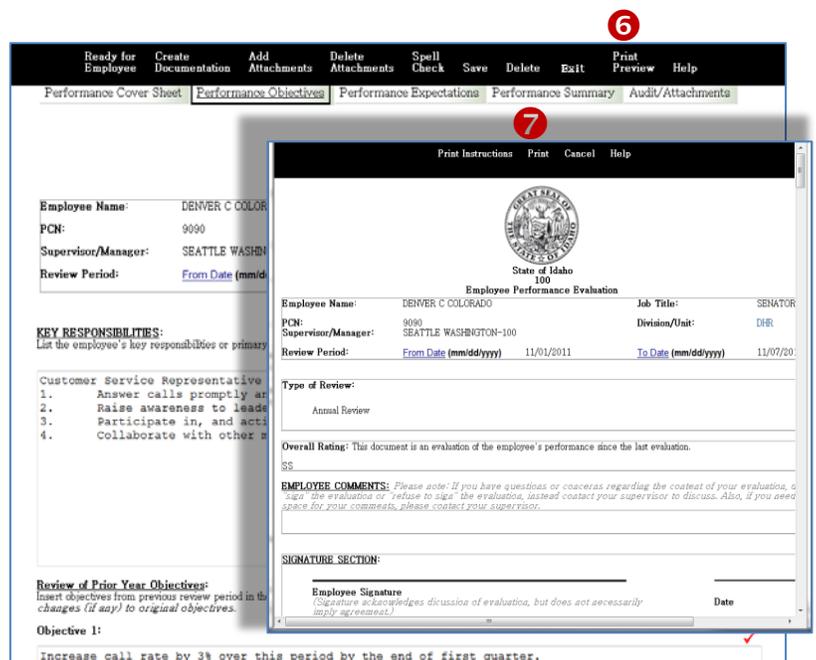
1. Click on the **drop down arrow** next to the printer icon at the top of the web page.
2. Select **Page Setup**.



3. A new screen will open. Ensure **Enable Shrink-to-Fit** is checked.
4. Under **Headers and Footer**, click on each field and change the option to **Empty**.
5. Click **OK**.



6. To print, click on **Print Preview**.
7. A new screen will pop up, click **Print**. Select your printer from the pop up as normal, and click **OK**.



# Administrator Role

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The role of System Administrator is critical to the successful implementation of I-PERFORM. This user guide is designed to provide the information, tools, and resources needed for a smooth transition to, and management of, I-PERFORM for your agency.

The system administrator is designated by the agency Director and is the person within an agency that is responsible for:

- Creating additional system administrators.
- Creating and maintaining performance management routing.
- Creating and maintaining agency evaluation standards.
- Creating and maintaining Agency Goals.
- Creating agency appointees.

The system administrator may be your employee that provides your internal HR functions or another highly trusted employee that provides operational support or both. When the person(s) are identified to serve in this role, DHR will make the necessary appointments in I-PERFORM for you.

## ADMINISTRATOR SET-UP CHECKLIST FOR DELEGATED AGENCIES

### AGENCY CHECKLIST

- ✔ Complete designated I-PERFORM system administrator form with Director's signature. The required form is available on the Division of Human Resources website <http://dhr.idaho.gov/ipperform.html> Send the completed form to your designated DHR Human Resource Consultant.
- ✔ Since employee information within I-PERFORM is based on the agency structure in I-Time you may want to verify that agency TELs are updated. This will make organizing your agency routing options easier.

### DHR CHECKLIST

- ✔ Create agency system administrator based on designation by agency director.
- ✔ Download Agency TELs note: Does not apply to agencies that do not currently use I-PERFORM
- ✔ Schedule training for agency system administrator, if needed.
- ✔ Contact SCO to set up agency group and activate I-PERFORM icon on the agency personnel desktops.

# I-PERFORM User Guide: System Administrator Role

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The view in I-PERFORM includes an option on the left column menu titled **Administrative Functions**.



From the I-PERFORM home page, the assigned administrator can:

- Add a new administrator
- Create/Change the routing structure
- Create/Change/Add expectations for inclusion of agency-specific responsibilities
- Create/Change agency goals
- Create an Agency Appointee, who will have the final signature on ALL evaluations processed

## Create New Performance Management Administrator

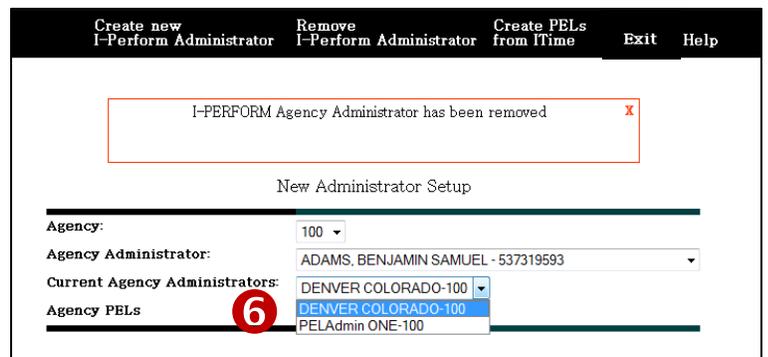
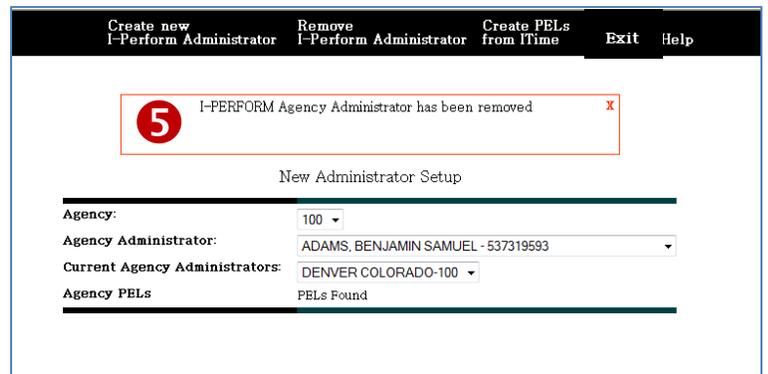
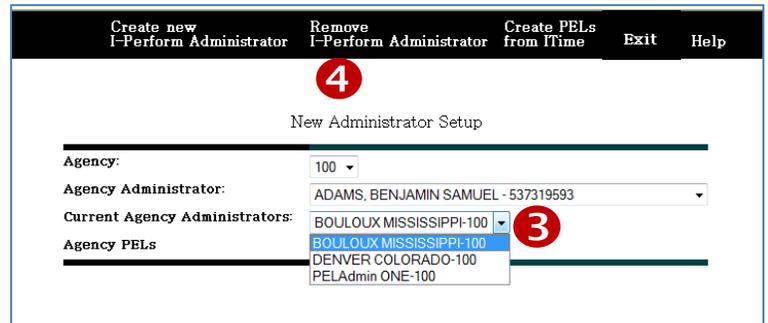
- This function allows a current system administrator to create additional system administrators.
- The role of Administrator is selected and approved by the Agency Director.
- A current system administrator may create additional system administrators in the agency. This may be helpful for the initial set up of the routing groups if there are multiple routing groups to set up.

1. Click **Create New Performance Management Administrator** from the I-PERFORM home page.
2. Click the **list box** to show current administrators.
3. Click on the **Agency Administrator** list box and select the **name of the individual** being added as an administrator.
4. Click on **Create New I-PERFORM Administrator** from the top menu bar.
5. When a change is made you will receive a message letting you know the action is complete.
6. Click **Exit** to return to the I-PERFORM main screen.

The screenshot displays the I-PERFORM system administrator interface. At the top, there is a navigation bar with links for Home, Applications, Menu, Help, and Logoff. Below this, the page header includes the State of IDAHO logo and the I-PERFORM title. The main content area shows a sidebar with a menu where 'Create/Maintain Evaluation Expectations' is highlighted with a red circle '1'. The main content area contains a 'New Administrator Setup' form with the following fields: Agency (100), Agency Administrator (ADAMS, BENJAMIN SAMUEL - 537319593, highlighted with a red circle '2'), Current Agency Administrators (BENJAMIN ADAMS-100), and Agency PELs (BENJAMIN ADAMS-100, DENVER COLORADO-100). Below the form, there is a navigation bar with buttons for 'Create new I-Perform Administrator' (highlighted with a red circle '4'), 'Remove I-Perform Administrator', 'Create PELs from ITime', 'Exit', and 'Help' (highlighted with a red circle '6'). The 'New Administrator Setup' form is repeated below the navigation bar. At the bottom, a message box (highlighted with a red circle '5') displays 'I-PERFORM Agency Administrator created'.

## Remove an Administrator

1. From the Home Page, select **Administrative Functions**.
2. Select **Create New Performance Management Administrator**.
3. Expand the **Current Agency Administrator** list box. Highlight the administrator you wish to remove.
4. Click **Remove I-PERFORM Administrator**.
5. The update will be immediate and the screen will display a message indicating the action was successful.
6. Their name will no longer be in the list.



### Create/Maintain Performance Management Routing

- This function allows the system administrator to verify and revise the routing groups and/or set up new groups in I-PERFORM.
- The system administrator will verify the employees, supervisor, and reviewer for the routing and approval process for employees' evaluations since the PELS will initially mirror the supervisory "set up" in I-TIME. **Each time an employee's PCN is changed the administrator must update I-PERFORM.**
- Each supervisor needs a separate Routing Group/Title for the employees they supervise.
- If the agency does not currently use I-TIME employee information will have to be manually entered.

#### The BASIC Process



DHR encourages you to put a lot of thought into determining the routing strategy. As you can see from the diagram above, the routing process is described using only one person reviewing the review. The more reviewers added to the mix, the more back and forth there is, and the more time it will take to complete the review process.

## Assigning Routing Roles

1. Click **Create/Maintain Performance Management Routing** to do maintenance. The agency(s) assigned to you will be populated in the list box. Select the one for which you are maintaining.
2. There may be different **Routing Titles** set up. Select a title you wish to review. The title name will be displayed in the **Title** field.
3. Other fields that will be filled after selecting the title are **Reviewer(s)**, **Supervisor(s)**, and **Employee(s)**.
4. If you are assigning a role to someone not currently displayed, click on the list box by the **appropriate role** you are assigning. A new window will open, displaying all employees available to be assigned.
5. Select the individual(s) you wish to assign to the role. Click on **ADD**.
6. Click **SAVE**.

**6**

Home Save Exit Help

Performance Management Routing

Agency: **1** 194 HUMAN RESOURCES **2**

Title: **2**

Routing Title  
ADMINISTRATIVE  
EMPLOYEE RELATIONS  
PROJECTS  
Z-PRACTICE

use dropdown arrow to select or deselect entries

**3** Reviewer(s):

**3** Supervisor(s):

**3** Employee(s):  **4**

Select Name for Supervisors

Available:

ADA COUNTY-100-519251672-9595

BAKER OREGON-100-518625057-9090

BART DAVIS-100-519689859-9090

Currently Selected:

ADA COUNTY-100-519251672-9595

Buttons: Add>> <<Remove Cancel Ok



To **remove** and assigned individual from their role, simply follow the same process, except after you select their name from the role list you will click on **Remove** rather than Add.

## Create/Maintain Evaluation Expectations

This function will allow the system administrator to add, delete, or modify agency specific performance expectations in addition to the four state required performance expectations of Professionalism, Promoting Responsible Government, Customer Focus, and Leadership. The four (4), pre-set, statewide, performance expectations cannot be modified. Currently, agency specific performance expectations can only be created for use on an agency-wide basis.

### Create a New Expectation

1. Click on **Create/Maintain Evaluation Expectations** from the Home Page.
2. Provide an **Expectation Title** for the specific Performance Expectation. *If you have a current expectation pulled up, you will need to select "New" to create an additional expectation.*
3. Provide a clear **Overall Description** of what is being evaluated.
4. Create a short **Performance Description** for each level of performance.
5. Describe the performance **Details** for what the performance should look like listing various expected behaviors, competencies or tasks for each performance level.
6. On the top Menu bar, select whether the expectation is to be applied to all employees or for a **supervisor only**.
7. Click **Save**, if expectation is not final; Click **Save and Publish** when the expectation is ready for use.
8. Click **Cancel** from the top menu bar to return to the Administrative Functions Menu.

### Delete an Existing Expectation

9. To **DELETE** an expectation, simply select the **Expectation Title** you wish to delete.
10. Click **Delete** at the top of the screen on the menu bar.

The screenshot shows the 'Evaluation Expectations' form in the I-PERFORM system. The interface includes a top menu bar with options: Home, New, Supervisor Only (selected), Save & Publish, Save, Exit, Delete, and Help. The main content area is titled 'Evaluation Expectations' and displays the message 'Expectation has been published.' The form fields are as follows:

- Expectation Title:** Teamwork (Step 2)
- Overall Description:** This performance expectation evaluates the employee's competence in positive (Step 3)
- Exemplary Performance Description:** Performance level AND consistently demonstrates performance such as: (Step 4)
- Exemplary Performance Details:** \* Serves as a project lead on improvement initiatives; \* Ensures all efforts relate to the strategic goals of the department.; \* Creatively initiates activities that strengthen positive relationships. (Step 5)
- Solid Performance Description:** Employee meets and often exceeds expectations for performance expectations listed at Achieves (Step 6)
- Solid Performance Details:** of projects and priorities.; \*Remains focused on the common desired outcome.; \*Shares resources and time with others to achieve common goals.; \*Shares thoughts, ideas, and concerns openly and respectfully with appropriate members of the team. (Step 7)
- Achieves Performance Description:** Employee consistently meets performance (Step 8)

On the right side, there is a list of existing expectations with the title 'Teamwork' highlighted in green. The list includes 'ladeans second', 'ladean third', and 'Teamwork' (Step 9).

At the top of the screen, there are red circles with numbers 6, 7, 8, and 10, indicating the steps for saving and publishing the expectation (Step 10).

## Create/Maintain Goals

This function will allow the system administrator to add, delete, or modify agency-specific goals. The intent of this component is to ensure goal alignment from the agency's overall goals to the contributor level.

1. Click on **Create/Maintain Goals** from the Home Page.
2. **To add a new goal:**
  - a. Type a **Title** for the goal. This should be the name of the agency's strategic goal.
  - b. Create the **Description** for the goal.
3. Click **Save**. The new goal will now show in the list to the right of the screen, and will be available for selection in each performance evaluation. This process is described in the *Supervisor User Guide*. The supervisor is able to link specific employee functions to the agency goals.
4. **To Delete an existing goal:**
  - a. Click **on the goal** to be deleted from the list on the right side of the screen.
  - b. Click **Delete**.
5. **To Modify an existing goal:**
  - a. Click on the **goal** to be modified.
  - b. Make changes needed to the title or description.
  - c. Click **Save**.

Home Save Exit Help

Goals

Agency Goal Title: **2**

Description: **3**

Goal Title

- Goal 1: Support Human Resources and Related Business Operations to ensure integrity and efficiency of the states merit system
- Goal 2: Leverage Technology in providing human resource services for efficiency and cost effectiveness
- Goal 3: Assure appropriate analysis for employee compensation
- Goal 4: Maximize successful employment practices
- Goal 5: Develop a DHR Quality Assurance Plan

Home New Save Exit **4** Help

Agency Goal Title:

Goal 3: Assure appropriate analysis for employee compensation **4**

Description: **5**

Research and evaluate compensation trends and reporting methods, and ensure the right data is collected to determine statewide internal compensation equity.

Goal Title

- Goal 1: Support Human Resources and Related Business Operations to ensure integrity and efficiency of the states merit system
- Goal 2: Leverage Technology in providing human resource services for efficiency and cost effectiveness
- Goal 3: Assure appropriate analysis for employee compensation **4**
- Goal 4: Maximize successful employment practices
- Goal 5: Develop a DHR Quality Assurance Plan

## Create an Agency Appointee

This function allows the system administrator to identify the employee in the agency that has appointed authority as the final approver on an employee's evaluation.

- This is the last person to sign off on the performance evaluation after it has been discussed with the employee; typically an agency director or division administrator as determined by the agency.
- Each agency can determine whether or not to have an Agency Appointee in the routing/signature process. Use this function if the agency director desires to sign every performance evaluation processed.
- If no appointee is set up in the routing, a signature line will not print on the evaluation.

Agency Maintenance	
Agency	100
Agency Description	Senate
I-PERFORM Signer	
Current Signer	ORANGE COUNTY-100
Select a new Signer	<ul style="list-style-type: none"><li>ORANGE COUNTY-100-518849833-9090</li><li><b>IPLAN TOSCOOT-100-332332003-9090</b></li><li>ORLANDO FLORIDA-100-392448262-9090</li><li>BOULOUX MISSISSIPPI-100-478625771-9090</li></ul>

### Creating an Appointee

1. Click on **Create Agency Appointee** from the Home Page.
2. The **Current Signer** field will be blank initially.
3. To add a new signer expand the drop down list for **Select a New Signer**.
4. Click the **desired name** from the list of employees.
5. Click on **SAVE**. You will receive a **message** indicating a successful change, and informing you of a 30 minute delay for updating.

I-PERFORM Agency Appointee was successfully created. The security update process can take up to 30 minutes to complete. When updates are complete the new agency appointee name will show in the current signer area.

### Changing the Appointee

6. The **displayed name** is the employee that has already been established in the agency's process.
7. Click the **desired name** from the list of employees.
8. Click on **SAVE**. You will receive a **message** indicating a successful change, and informing you of a 30 minute delay for updating.

# Troubleshooting

## TROUBLESHOOTING CONTENTS

[Copy and Paste into I-PERFORM](#)

[Print to PDF \(If available on your system\)](#)

[IE Compatibility Mode](#)

[Showing Script Errors](#)

[Issues and Solutions](#)

# I-PERFORM User Guide: System Administrator Role

## Topic: Copy and Paste into I-PERFORM

When you first use I-PERFORM there is information required that is not pre-populated. You have choices; you can either re-enter all of the information needed, or copy or paste it from any other document.

### ERROR:

When copying and pasting directly into I-PERFORM you may see interesting characters where you did not see them before.

Because there is so much formatting within documents, some that you are not even able to see, it is important to strip all of the formatting before inserting into I-

PERFORM. This will prevent characters and formatting that make it difficult to read the information.

#### KEY RESPONSIBILITIES:

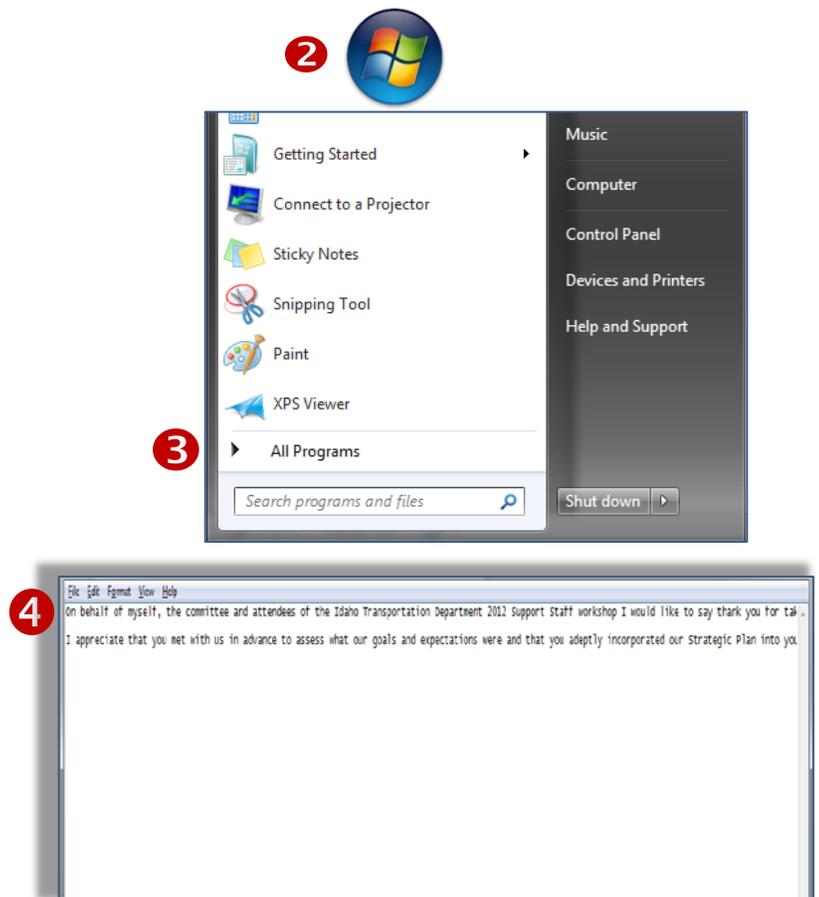
List the employee's key responsibilities or primary purpose:

Admin Assistant 2 Key Responsibilities

• Answer phones promptly and professionally. Route calls a  
• Bring Vicki food on a daily basis.  
• Arrange department fun times.  
• And, of course, complete other duties as assigned.

### How To:

1. Open any document or email that contains information required. Use your Microsoft Word copy feature to select the data you would like to copy.
2. Click on the **Start** icon in the lower left corner of your monitor screen.
3. In the *Search programs and files* field, type **Notepad**.
4. A new window will open, allowing you to now paste the information you copied into the open field. You will notice the lack of formatting available.
5. Now that the formatting is erased, you can again copy and paste it into I-PERFORM without carrying "junk" with it.



# I-PERFORM User Guide: System Administrator Role

## Topic: Print to PDF

When printing a performance evaluation you may experience some challenges with the formatting. This is due to the application being a web-based application. If the printing setup instructions on Page 8 of this document do not solve the issue, you can print it to a PDF format and have a more professional looking document. The convert to PDF application is not standard for all state agencies.

## How To:

1. While in I-PERFORM, select **Print Preview**.
2. A new screen will open, showing the preview of the document. **Right-click** to display options.
3. Select **Convert to Adobe PDF**.
4. Save it where you wish.
5. You will see a progress window letting you know the conversion has started.
6. If you get a message stating that some of the content may not be available for download, select **OK**.
7. The PDF version will open in a new window.
8. Follow normal processes for printing the document.

The screenshot shows the 'Print Preview' interface for an 'Employee Performance Evaluation' in the I-PERFORM system. The interface includes a navigation menu at the top with 'Exit', 'Print Preview', and 'Help'. Below the menu, there are tabs for 'Performance Cover Sheet', 'Performance Objectives', 'Performance Expectations', 'Performance Summary', and 'Audit/Attachments'. The main content area displays the following information:

State of Idaho  
Senate  
Employee Performance Evaluation

Employee Name: DENVER C COLORADO      Job Title: SENATORS  
PCN: 9090      Division/Unit: One  
Supervisor/Manager: SEATTLE WASHINGTON-100  
Review Period: From Date (mm/dd/yyyy) 01/01/2013      To Date (mm/dd/yyyy) 01/15/2013

Type of Review:  
 Annual Review    Entrance Probation    Promotion Probation  
 Transfer    Separation from State Service    Other

Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.  
 Exemplary Performance: This rating is used for special circumstances for employees that should receive special recognition for assigned projects that are completed with significant results and have a significant impact on agency business.  
 Solid Performance: This employee exceeds performance expectations.  
 Achieves Performance: This employee meets performance expectations OR this employee is developing new skills, gaining new knowledge, or new to the position.  
 Does Not Achieve Performance: This employee's performance needs improvement OR is unacceptable in accordance with Rule 190, 152, and 153.  
 NA Not applicable.

EMPLOYEE COMMENTS: Thank you for your feedback. I appreciate your input.

Print Instructions   Print   Exit   Help

State of Idaho  
100  
Employee Performance Evaluation

Create PDF

Employee Name: DENVER C COLORADO      Job Title: SENATORS  
PCN: 9090      Division/Unit: One  
Supervisor/Manager: SEATTLE WASHINGTON-100  
Review Period: From Date (mm/dd/yyyy) 01/01/2013      To Date (mm/dd/yyyy) 01/15/2013

Type of Review:  
Transfer

Overall Rating: This document is an evaluation of the employee's performance since the last evaluation.  
APS

EMPLOYEE COMMENTS: Please note: If you have questions or concerns regarding the content of your evaluation, click "Sign" the evaluation or "Refuse to Sign" the evaluation instead contact your supervisor to discuss. Also, if you

## Allowing/Showing Error Pop-Ups

Understanding errors that are occurring in I-PERFORM are important to DHR and SCO so the errors can be identified and fixed. To help with that endeavor please take steps necessary to display errors as they occur. You only need to this when working within I-PERFORM.

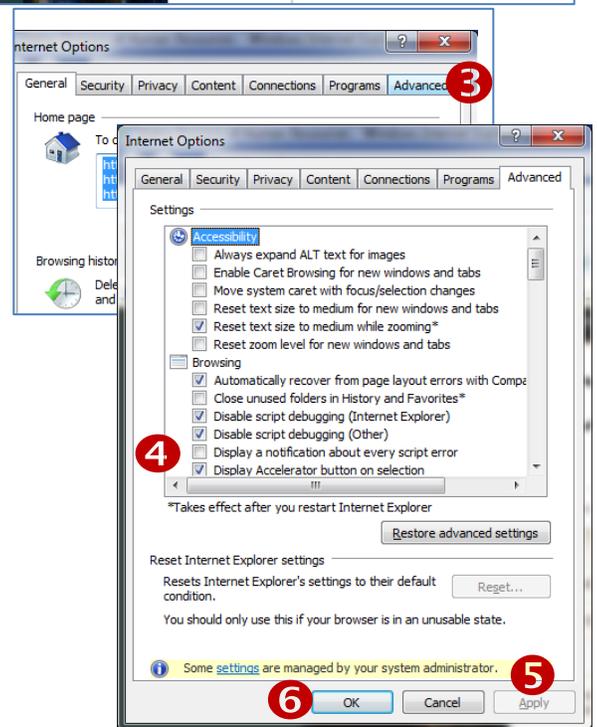
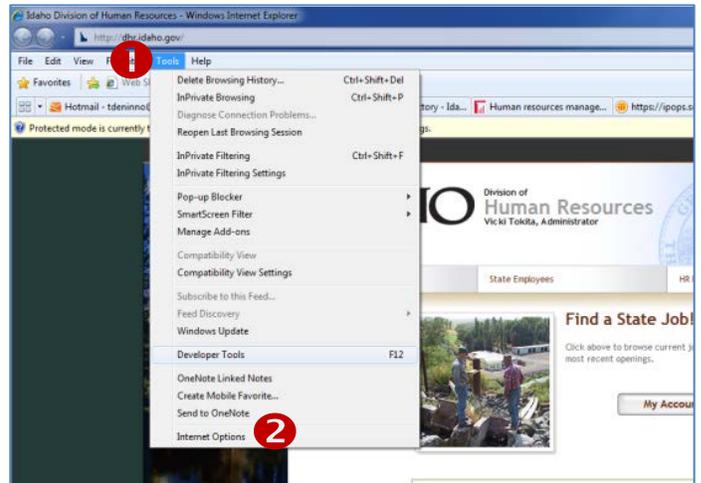
To change settings to allow the errors:

Sign into Internet Explorer. Select Tools from the Menu Bar.

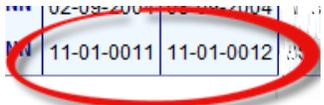
1. Click on Internet Options.

2. Click on the Advanced tab.

3. Click within the box labeled Display a notification about every script error.
4. Click Apply.
5. Click OK.



## Issues and Solutions

Issue	Description	Solution
Empty Red Box	On the Cover Sheet when I-PERFORM is opened, there is an empty red box with an <b>X</b> in the upper right corner of the box.	<p><b>Why:</b> Currently the state systems, I-PERFORM, ATS, and others, do not support versions above 8.</p> <p><b>Do:</b> Check to see what version of Internet Explorer the system is using. Revert back to an earlier version until the new version is tested and ready for use.</p>
Evaluation not showing in DHR's Performance Evaluation system (IPOPS)	The evaluation went through the entire process and was marked complete. The evaluation is not showing in the DHR Performance Evaluation system. Error in creating salary actions show there is no previous evaluation completed.	<p><b>Why:</b> Two issues come together in this scenario. Currently the state systems, I-PERFORM, ATS, and others, do not support versions above 8, and the dates were most likely entered incorrectly. As an example, "0011" instead of "2011". In other versions of IE an error message would be provided; Version 8 will not provide this message and will accept the erroneous date.</p> <p><b>Do:</b> Revert back to an earlier version until the new version is tested and ready for use and contact DHR to return the evaluation to draft status to allow the supervisor to correct the dates.</p>
The system times out	After working in I-PERFORM SAVE is clicked, and the screen goes back to the log in screen. Work was not saved.	<p><b>Why:</b> Timeout is a security function of the state system, not a part of I-PERFORM.</p> <p><b>Do:</b> Save VERY frequently while working in I-PERFORM.</p>
Printing	The printed evaluation does not show all information and/or looks bad.	See page 39 of the I-PERFORM User Guide.
Error HTTP404; Web Page Not Found		<p><b>Why:</b> Currently the state systems, I-PERFORM, ATS, and others, do not support versions above 8.</p> <p><b>Do:</b> Check to see what version of Internet Explorer the system is using. Revert back to an earlier version until the new version is tested and ready for use.</p>
Cannot forward the evaluation to someone else	The only option to forward an evaluation to someone else is "Forward to Employee".	<p><b>Why:</b> Other users are not listed in the routing process.</p> <p><b>Do:</b> Contact your agency's I-PERFORM Administrator. They will need to add names to the reviewer role list. Once done, the names will be listed in the list box at the top of the screen.</p>
Message "No Current Evaluation Found"	This message may be received when performing salary actions. After checking you find there was a current evaluation submitted.	<p><b>Why:</b> If your browser was on IE9 or 10 when the evaluation was created an incorrectly entered date will not be caught by I-PERFORM. A year entered as 0011 – 0012 will be allowed to stay and therefore posted to IPOPS with the same date that will not be recognized as 2011 – 2012.</p> <p><b>Do:</b> Contact DHR. The evaluation must be reset to Draft Status and resubmitted overnight to IPOPS.</p> 

# I-PERFORM User Guide: System Administrator Role

## I-PERFORM Glossary

Agency Goals	Statements describing what an agency intends to accomplish, stemming from the agency's strategic plan.
Developmental Objectives	Specific actions related to training and educational needs that are included in the development plan.
Documentation	A record of employee performance and behavior.
Effectiveness	The degree to which an individual, organization, or group produces a desired result.
Efficiency	The degree to which an individual, organization, or group produces a desired result (productivity) with a minimum expenditure of time, effort, money, or resources.
Employee Development Plan	A documented form of shared discussion where managers or supervisors work together with subordinates to identify objectives, resolve performance-related concerns and determine and create an appropriate development plan designed to stimulate an individual's professional growth by increasing his or her skills, knowledge or abilities(i.e.: training, education).
I-PERFORM	A web-based performance management tool developed for State of Idaho employees.
Key Responsibilities	Primary functions of an employee's job.
Mission	The expression of an organization's vision.
Objectives or Goals	Short-term, measurable steps within each key responsibility that clarifies performance expectations.
Performance Evaluation	An assessment of an employee's performance based on established expectations for the position.
Performance Expectations	Describes desirable level of competence an employee would be demonstrating at a particular level.
Performance Improvement Plan	A formal process designed to facilitate constructive discussion between a subordinate and his or her supervisor and to clarify the work performance to be improved. The performance improvement plan, or PIP, as it is sometimes called, identifies performance and/or behavioral issues that need to be corrected and creates a written plan of action with time frames to guide the improvement and/or corrective action.
Performance Management	A strategic and integrated approach to increasing agency effectiveness by planning, assessing, and measuring both employee and agency performance.
Performance Measurement	The ongoing monitoring and reporting of program accomplishments, particularly progress toward agency goals.
Performance Measures	A quantitative or qualitative process for evaluating progress toward agency goals.
Performance Summary	A narrative explanation of the overall performance of an employee.
Rating Levels	An assigned level of evaluated performance (Exemplary, Solid, Achieves).
Strategic Plan	A document that outlines the long range goals of an agency in support of achieving its mission and vision.