Insights

Insights User Guide

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Welcome!

Congratulations on choosing Insights!

By now you should have received a welcome email providing your login credentials to get started.

Click the link in the email or go to: http://account.insightsapp.net and it will take you to the login page where you will enter your email address, password and/or create a password.

In this guide, you will be taken through the action steps to get started with Insights and facilitate ongoing performance conversations.

If you forget your password, click on the "Don't remember your password?" link on the log in page.

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Getting Started

Log In: Log in to Insights (www.insightsapp.net) with the username and password provided in the Welcome email.

My Account: The My Account page allows access to:

- First Name
- Last Name
- Title
- Email
- Password
- Link your Calendar
- Profile Picture

To access the My Account page, hover over your name (upper right hand corner), click My Account from the dropdown menu:

- Make Changes to your Account:
  - Update the applicable fields and click Save.

- To change your Password:
  - Enter your new password, enter password again, click blue "Save" button.

- Profile Picture:
  - To add or change your profile picture: click "My Picture" then "Change my picture" and upload a photo.

- Link Calendar:
  - Click on Link my Calendar
  - Insights is using Cronofy to securely access your calendar so you can:
    - create calendar events
    - delete events that this app creates
    - read events in your calendars
    - change the participation status for an event
  - Click on the calendar application you use
  - Agree to the Cronofy Terms of Service and Privacy Policy
  - Click "Link Calendar"
  - Follow the steps as instructed to Link your Calendar.

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Me Page:

The Me page allows access to:

- My Responsibilities
- My Goals
- My 1:1's
- My 360 feedback

To Access the Me Page, click the Me tab on the top left side of the tool bar.

My Responsibilities:

Responsibilities Overview:

Your Responsibilities are not intended to replace your job description, but should reflect the high-level responsibilities of your job. Responsibilities are broad in scope and describe your on-going major functions.

- Responsibilities are the high level, key functions of your job.
- They are on-going duties that you are continually held accountable for. They are stagnant, unless you change jobs.
- Responsibilities are outcome based and do not require quantification or a specific deadline.

Writing Your Responsibilities:

Start with a verb and write short, concise sentences that describe the essential question, "what were you hired for?" or "what does the organization rely on me for?". You should have between 5 and 7 primary responsibilities. Add an adjective so that the responsibility describes the picture of success.

Examples*:*

- Identify opportunities to innovate and grow the brand.
- Ensure global brand consistency in all deliverables.

Creating Responsibilities:

- Click the My Responsibilities link in the middle of the page.

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- Click "Add a Responsibility" at the bottom of the page to create a new Responsibility.

Helpful Hint: Strive for a maximum of 5 concise Responsibilities and use an adjective so it becomes dynamic. Responsibilities are the high level functions of the job, the on-going commitments that generally do not have end dates. Ask yourself "What does the company need me to do?" when creating your Responsibilities.

- Click "Submit For Approval" the Responsibilities that you are ready to have your manager review. Or click "Save for later" to continue editing at a later time. Continue this process for all of your responsibilities.

Helpful Hint: To see examples of Responsibilites, go to our Help page (the Help link is located on the top right hand side), select "Training Resources" then select "Responsibilities Database."

Edit a Responsibility:

- Click on the Responsibility you want to edit.
- Put your cursor on the front of the responsibility content (shown in black font).
- Once you place your cursor there, the font color will turn to blue for editing.
- Once updated, click "Submit for Approval" button on bottom right hand corner.

Delete a Responsibility:

- Click on the Responsibility you want to delete.
- Click the three grey dots on the top right hand side within the responsibility card.
- Click delete.
- You will receive a warning popup asking if you're sure you want to delete this responsibility.
- Click yes, and your responsibility will now be deleted.

Add a Comment to a Responsibility:

- Click on the dialog box (with a + sign in the middle) at the end of the responsibility.
- The grey watermark states "Write Something".
- Place your cursor in the box, enter your comment and hit save.
- The comment will now appear next to that specific responsibility.

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Created Date:

- Next to each responsibilty, there is a "Created date" noted. For example, "Created 13 Days Ago". This date refers to when the respsonsibility was created.

Print/Export a Responsibility:

- On the Me Page, click the My Responsibilities box
- On the right hand side, click the cogwheel/gear symbol
- Click on Print or Export (csv export supported)

Responsibility Status:

- On the right hand side of each responsibility you will see a status of Behind, On Track or Ahead.
- The status of Behind, On Track or Ahead is shown per the final score given on your last 1:1 meeting.
- For example, during the employee's last 1:1 meeting with their manager, they agreed on a final score of "On Track" for Responsibility #1. Under the employee's My Responsibilities, an "On Track" will show up as the status on the right hand side of Responsibility #1.

My Goals:

Goals Overview:

Goals represent how you will participate in contributing to reaching the company's initiatives. A goal is something that you will achieve (or not achieve) by a specific date that can then be marked as complete. Goals should reflect your specific objectives and answer the question "what do I want/need to accomplish, by when?"

Goals represent how you are involved in contributing to and achieving the company's initiatives.

- They are concrete, specific and measurable.
- They are written so that everyone understands your unique contributions to the company's initiatives.

Ask Yourself: What do I want to accomplish in support of the company's initiatives?

Examples:

- Increase marketing newsletter subscriptions and readership by 20%.
- Redesign and release a new product catalog by Q3.

Creating Goals:

- Click the Me tab on the top tool bar on the home page.
- Click "My Goals" tab, at the bottom click 'Add a Goal' at the bottom of the page to create a new Goal.
- Fill out the template to create a new Goal. Pay special attention to the type of goal, target date, privacy and measurements. In addition, link your goal to an initiative(s).
- Goal Type - There are five types of Goals:

  1. **Individual**: Your own contribution to the department's or company initiatives.
  2. **Team**: If you are leading a team, you will select this goal and add members. The team can be within a department or across departments, functions or levels.
     a. **Add a Team Member**: Click on the circle with the + sign, put your cursor on the "Name or Title" line, type in the team members name, click on their name then click the save team (blue button).
     b. **To change or add a Team lead**: Click on the circle with the + sign, click on "Change to Team Lead" (in blue underlined font), click save.
  3. **Management**: Your department's contribution towards initiatives. This is a goal that the members of the department share, but the manager owns.
  4. **Development**: What are the skills, competencies or knowledge that you need to develop within yourself?
  5. **Innovation**: Your goal that is visionary and exciting, never been done before and innovative.

- Enter Target Date for the Goal: Click on the date next to "Due On" and enter your goal's target due date.

- Set Privacy to on or off:

  - ON = Only my manager can see
  - OFF = Everyone can see

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- Establish and Enter Goal Measurement Criteria:

  - Behind: Describe the lower limit of the goal - what does missed look like?
  - On Track: Ok, you have completed this goal - what does it look like?
  - Ahead: You nailed it! Now describe.

Examples:

- Behind: New training program for managers not developed or implemented.
- On track: New training program for managers developed and implemented on time:
- Ahead: New training program for managers developed and implemented two weeks early so we could get feedback from initial group and incorporate changes to curriculum.
- Attach a Goal to the Company Initiative:

  - Click on Initiatives: Select a Company Initiative to connect your goal to. Each time you are scored on your goal, the goal status will be reflected in the overall status of the company initiatives.

Once your New Goal template is completed, click the "Submit for Approval" blue button in the lower right hand corner.

Helpful Hint: Goals are your contribution to reaching and achieving the departmental and Company initiatives.

Helpful Hint: Goals should be simple and clearly defined. Don't labor over the 'perfect' wording. Remember – these can always be edited or updated.

Edit Goals:

- You can edit your goal after you have created it (even if it has already been approved by your manager).
- Click the Me tab (located at the top of the tool bar on the home page).
- Click "My Goals" tab, click on the Goal you want to edit.
- Edit the goal. Save again and click the "Submit for Approval" blue button (lower right hand corner).

Delete/Archive Goals:

- Click the Me tab (located at the top of the tool bar on the home page).
- Click "My Goals" tab, click on the Goal you want to archive.

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- Click on the three grey dots on the top right hand corner within the Goal form
- Click on Archive
- A warning notification will ask, "Are you sure you want to archive this goal?"
- Click "Yes"and a notification will get sent to your manager for final approval. Your goal will show as "awaiting final approval." Once your manager approves, your goal will be archived and no longer visable on the "My Goals" Tab on the Me Page.
- If you are a Manager and you are archiving a goal, you will be asked to "select a score, then click archive." Select the status score that applies and click "archive."

Add a Comment to a Goal:

- Click the Me tab (located at the top of the tool bar on the home page).
- Click "My Goals" tab, click on the
- Click on the dialog box (with a + sign in the middle) at the end of each Goal.
- The grey watermark states "Write Something".
- Place your cursor in the box, enter your comment and hit save.
- The comment will now appear next to that specific Goal.

Created Date:

- Next to each Goal, there is a "Created date" noted. For example, "CREATED 9 MONTHS AGO". This date refers to when the Goal was created.

Print/Export a Goal:

- On the Me Page, click the My Goals tab
- On the right hand side, click the cogwheel/gear symbol
- Click on Print or Export (csv export supported)

Goal Status:

- On the right hand side of each goal, you will see a status of Behind, On Track or Ahead.
- The status of Behind, On Track or Ahead is shown per the final score given on your last 1:1 meeting.
- For example, during the employee's last 1:1 meeting with their manager, they agreed on a final score of "On Track" for goal #1. Under the employee's My Goals, an "On Track" will show up as the status on the right hand side of goal #1.

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Tasks

Tasks Overview:

Tasks are the actions tied to reaching a goal. They are activities that "step" you towards goal attainment. Consider your tasks as your 'to-do' list or action steps.

Writing Tasks:

- Go to Me Page, then click on My Goals, select and open the Goal that you want to add a task to.
- Scroll all the way down to locate the Task area (below Initiatives section).
- The task area has a grey watermark that says "Your to-do" list that helps keep you on track…
- Place your cursor on this grey watermark area to add a new task.
- Add a due date for your task.
- Click "Add task" button.
- Your Tasks will be automatically saved.

Edit a Task:

- Go to Me Page, then click on My Goals, select the Goal that you want to edit the task for.

- Scroll to the very bottom of the page, locate the task you want to edit.
- Click on the grey "Edit" button.
- Edit your goal and when finished, click "Save Changes" button.
- Your changes will be saved.

Completing a Task:

- Once a task is completed – click the check box and it is now completed.

Helpful Hint: Only a user can add tasks to their own goals (not their managers). The only exception is for "team goals." If you are associated with a team goal you can edit the tasks.

1:1 Meetings:

Schedule a 1:1 - Option1: If you have no upcoming 1:1's scheduled: Go to Me page, go to the "My Next 1:1's" area, click "Schedule" and follow steps #1-3 below.

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Option 2: If you already have an upcomin g 1:1 meeting and would like to schedule additional future 1:1's: Go to Me page, click the "My 1:1s" link and click 'Schedule a 1:1' at the bottom of the page.

1. Select the date, time, meeting length and location to meet with your Manager and click save.
2. Once a 1:1 had been scheduled, you may begin to prep for the 1:1.
3. A meeting notice will be sent to both you and your manager via email.

Helpful Hint: Email notifications will be automatically sent to you 3 days and 1 day prior to your scheduled 1:1 meeting to remind you to Prep for it.

Prep for your 1:1:

- There are two ways to access a Prep for your 1:1 Meeting:
    - Option 1: On the Me Page, under "My Next 1:1," click the blue "Prep" button.
    - Option 2: To prep for future 1:1 meetings, go to Me Page, under the "My Next 1:1" area, click on "My 1:1's".
    - Select the future meeting you would like to prep for. Click the blue "Prep" button.
    - The "My Prep" template will populate.
    - Follow the steps and give a self assessment of Behind, On Track or Ahead for each item.

Helpful Hint: Under the Goal section, click on the Goal itself to see each of the goal's measurements.

Add a Note on 1:1 Prep:

- To add a note, click the dialog box (with the plus sign) on the right hand side.
- To save a note for the upcoming 1:1, click save.
- To save a note and have it continue to show on all future 1:1's, select "Save and Pin."
- You can add a Pin to any note, by clicking on the "Pin" symbol.
- To edit or delete a note: click on the three grey dots within the note dialog box. Select edit or delete.

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Add a Comment on 1:1 Prep:

- You can add Comments to each section (Responsibilities/Goals/Core Behaviors/Company Inititatives) within the Prep Template.
- To add general comments, scroll to the bottom of each section, place your cursor where it states, "Type your comments here." Add your comments. It will automatically save the content you enter.

Access your past 1:1:

- To access past 1:1 meetings, go to Me Page, go to the "My Next 1:1's" section (at top left hand side), click the "My 1:1's," click on My Past 1:1's (top right hand side)
- Locate the past 1:1 you would like to review. Click the "review" button to access your past 1:1.

My 360 Feedback:

You can request 360 feedback from anyone in the organization.

Request 360 Feedback:

- Go to Me Page, locate the "My 360 Feedback" section.
- Click the blue "Request" button.
- Select "From Whom" – who are you asking for feedback? Add their name.
- Select a due date for the feedback to be returned by.
- Click blue "Save" button.

Edit or Delete 360 Feedback request:

- Go to Me Page, locate the "My 360 Feedback" section.
- Click the blue "My Feedback" section.
- The feedback you requested will show "Awaiting Completion."
- Click on the three grey dots.
- Click edit, to revise any of the details.
- Click delete if you would like to delete the request.

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Notification 360 Feedback has been requested and completed:

- A notification will automatically be sent to the person whom you requested feedback from.
- When they log into Insights, the notification flag (upper right hand side) will provide a notification reminder stating, "Jane Doe has requested your feedback."
- They can select "start" from the notification flag to begin providing your feedback.
- Once feedback is complete, it will show as "Completed" under your 360 Feedback section.
- Your manager can then share your feedback results with you.

Access your 360 Feedback:

- Go to Me Page, locate the "My 360 Feedback" section.
- Click the blue "My Feedback" button.
- You will be able to see that your feedback has been completed here.
- You can also request feedback from additional people, by click the "Request Feedback" bar at the bottom.

Helpful Hint: Any feedback you request will be sent directly to your manager. You will not be able to review feedback submitted (only your manager will have access to feedback results).

Notifications:

Notification Flag Reminders: At the upper right hand side (next to your name and picture), there is a flag for notifications. If you see a blue number next to the flag, this indicates you have to-do item(s). For example: If a user requests 360 feedback from you, the notification flag will show a blue number on the flag, if you click on the flag it will indicate: "John Smith has requested your feedback." You can click the blue "start" link to begin providing feedback.

Email notificiations: Email notifications are sent to users one and three days prior to your scheduled 1:1 meeting to remind users to prep for their upcoming meeting.

Manager notifications: Managers also have notification reminders at the top of the My Team page. Examples include: 1:1 Requests (click "Accept" blue button) and feedback requests.

My Team Page:

The My Team page allows access to the following two views (based on position):

The Manager View:

- Schedule 1:1's with their direct reports
- Prep for upcoming 1:1 meetings with their direct reports
- Ask for Team 360 Feedback from anyone within the organization
- View direct reports' goal status and next 1:1 meetings
- Review/edit/approve direct reports' responsibilities and goals

The Employee View:

- Access other employees in their department
- Access to their team goals and the scores for each of their team goals

To Access the My Team Page, click the My Team tab on the top left side of the tool bar.

My Team Page "Manager" View:

Schedule 1:1 meetings with your direct reports:

- Go to "My Team" Page, locate the "Team 1:1" section.
- To schedule a 1:1 with your direct report, click the blue "Schedule" button.
- Under "Who" enter your employee's name.
- Select the date, time, meeting length, location and type, then click save. (Please note that if the employee has not linked their calendar to Insights, you will not be able to view their calendar availability)
- Once a 1:1 had been scheduled, you may begin to prep for the 1:1.
- A meeting notice will be sent to both you and your direct report via email.

Helpful Hint: Email notifications will be automatically sent to you 3 days and 1 day prior to your scheduled 1:1 meeting to remind you to Prep for it.

Prep for your 1:1 meetings with your direct reports:

- Go to My Team Page, locate the "Team 1:1" section.

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- Click on the "My Team 1:1's" button.
- Locate the direct report that you need to Prep for. Click the blue "Prep" button.
- The "Prep" template will populate.
- Follow the steps and give a self assessment of Behind, On Track or Ahead for each item.

Helpful Hint: Under the Goal section, click on the Goal itself to see each of the goal's measurements.

Add a Note on 1:1 Prep:

- To add a note, click the dialog box (with the plus sign) on the right hand side.
- To save a note for the upcoming 1:1, click save.
- To save a note and have it continue to show on all future 1:1's, select "Save and Pin."
- You can add a Pin to any note, by clicking on the "Pin" symbol.
- To edit or delete a note: click on the three grey dots within the note dialog box. Select edit or delete.

Add a Comment on 1:1 Prep:

- You can add Comments to each section (Responsibilities/Goals/Core Behaviors/Company Inititatives) within the Prep Template.
- To add general comments, scroll to the bottom of each section, place your cursor where it states, "Type your comments here." Add your comments. It will automatically save the content you enter.

Conduct a 1:1:

- Go to My Team page, scroll down to "Direct Reports" tab, select the employee you are meeting with.
- Click the blue "Meet" button.

Meet Now, Reschedule or delete upcoming 1:1:

Meet Now:
- If you need to Meet now (rather than the original schedule day/time) you can click the "Meet Now" button to get started on your 1:1 meeting.

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- Go to "My Team" page, click on "My Team 1:1's, click the three grey dots (right hand side), select Meet Now.

Rechedule a 1:1 meeting:

- If you need to reschedule your 1:1 meeting, go to "My Team" page, click on "My Team 1:1's, click the three grey dots (right hand side), select Reschedule.

Delete a 1:1 meeting:

- If you need to delete an upcoming 1:1 meeting, go to "My Team" page, click on "My Team 1:1's, click the three grey dots (right hand side), select delete.

Access your Past Team 1:1's:

- To access past 1:1 meetings with your direct reports, go to My Team Page, go to the "My Team 1:1s" section, click the "My Past Team 1:1's" (top right hand side).
- Locate the past 1:1 you would like to review. Click the "review" button to access your past 1:1.

Helpful Hint: You can print or export, by clicking the cogwheel/gear at top right hand side.
Print or Export a 1:1 Meeting:

Print 1:1 Meeting:

- To print a past 1:1 meetings with your direct report, go to My Team Page, go to the "My Team 1:1s" section, click the "My Past Team 1:1's" (top right hand side).
- Locate the cogwheel/gear button (upper right hand side) and select print.

Export 1:1 Meeting:

- To export a past 1:1 meetings with your direct report, go to My Team Page, go to the "My Team 1:1s" section, click the "My Past Team 1:1's" (top right hand side).
- Locate the cogwheel/gear button (upper right hand side) and select export. (It will export into a csv file).

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Direct Reports View:

- Managers have access to view their direct reports' goal status and next 1:1 meetings.
- On the direct reports tab, Managers can click the "schedule a 1:1 meeting" button on the bottom.

Department View:

- Managers have access to everyone in their department.
- View an employee's name and email address.
- Click on an employee to view their responsibilities and goals.

Team Goals View:

- Click on "Team Goals" to view all of the team goals you're associated with and the scores for each of their team goals.

Team 360 Feedback:

You can request Team 360 feedback (for your direct reports) from anyone in the organization.

Request Team 360 Feedback:

- Go to My Team Page, locate the "Team 360 Feedback" section.
- Click the blue "Request" button.
- Select "For Whom" – which one of your direct reports? Add their name.
- Select "From Whom" – who are you asking for feedback? Add their name.
- Select a due date for the feedback to be returned by.
- Click blue "Save" button.

Edit or Delete Team 360 Feedback request:

- To edit or delete your feedback request, go to My Team Page, locate the "Team 360 Feedback" section.
- Click the blue "My Team Feedback" section.
- The feedback you requested will show "Awaiting Completion."
- Click on the three grey dots.

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- Click edit, to revise any of the details.
- Click delete if you would like to delete the request.

Notification for Team 360 Feedback (requested and completed):

- A notification will automatically be sent to the person whom you requested feedback from.
- When they log into Insights, the notification flag (upper right hand side) will provide a notification reminder stating, "Jane Doe has requested your feedback."
- They can select "start" from the notification flag to begin providing your feedback.
- Once feedback is complete, it will show as "Completed" under your Team 360 Feedback section.
- Your can then share feedback results with your direct reports.

Access your Team 360 Feedback:

- Go to My Team Page, locate the "Team 360 Feedback" section.
- Click the blue "My Team Feedback" button.
- You will be able to review feedback here.
- You can also request feedback from additional people, by click the "Request Feedback" bar at the bottom.

Helpful Hint: Any feedback you request for your direct reports will be sent directly to you (not your direct report). Your direct report will not have access to the feedback that was provided. You can choose to share the feedback with your direct report at the appropriate time.

Manager process for approving & editing Responsibilities and Goals:

- Once an employee adds a new goal or responsibility, the manager needs to review and approve it. The manager will receive a flag notification (upper top right hand side) reminding them to review and approve the goal or responsibility.
- The manager can click on the flag notification which will show, for example, "Dave Johnson has updated a goal." Click on the blue "review" link to proceed.
  - o To approve the goal, click the blue "approve" button (bottom right hand side).
  - o To edit the goal and send back to the employee, click "Send back to edit." You will then be prompted to "Add a note for Dave" so Dave can edit as needed.
  - o It is the same process to review, edit and approve a responsibility.

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1:1 Requests from direct reports for Managers:

- 1:1 requests from direct reports are shown at the top of the My Team page. A manager can accept by clicking the blue "accept" button or reschedule or delete by clicking the ellipsis (three dots) which shows options to reschedule or delete.

My Team Page "Employee" View:

Department View:

- Managers have access to everyone in their department.
- View an employee's name and email address.
- Click on an employee to view their responsibilities and goals.

Team Goals View:

- Click on "Team Goals" to view all of the team goals you're associated with and the scores for each of their team goals.

My Company Page:

On the My Company Page, all users have access to:

- Foundation Data: Vision, Purpose and Core Behaviors of the company.
- Initiatives for the company.
- Goals under each Initiative and bar graph showing the percentage of goals trending Behind, On Track or Ahead.

**Note: Only designated Company Admins can edit Company Foundation Data and Initiatives.

My Company page:

- Click on the "My Company" tab on the top tool bar.

  - **Vision**: a description of where the organization is and will become in the future.
  - **Purpose**: the organization's reason for existing.
  - **Core Behaviors:** How we act while at work.
  - **Initiatives:** the organizational objectives for the year

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- Foundation Data is at the top and includes: Vision, Purpose and Core Behaviors. Click on each one to view additional detail.
- Company Initiatives are listed on the left hand side.
- Individual and Team Goals are connected to Company Initiatives.
- The status (Behind, On track or Ahead) for each of the goals is tied to a Company Initiative and listed on the right hand side in the form of a bar graph.
    - ❖ Each goal is scored during a 1:1 meeting and given a status of Behind, On track or Ahead.
- The bar graph shows the percentage of how each goal is trending: either Ahead, On Track or Behind.
- If you click on the bar graph itself, a card will populate showing all goals tied to that initiative. It shows who is responsible for each goal.
    - ❖ Click on the bar graph to sort by status (Ahead, On Track or Behind).

Company Initiatives:

- Click on a specific Company Initiative.
- The Initiative detail will populate including all the Goals and Priorities associated with it.
- Filter by Department, Manager or Staus for each goal.
- Click on any of the goals listed to see who is responsible for each goal.
    - ❖ Note: If there is more than one person shown, it is a team goal and whomever has a blue ribbon around their name is designated the team lead for the that goal.
- Sort by Status, Updated, or Target.
- To print, click the gear on the right hand side.

Helpful Hint: Only Managers can view the status for each individual goal shown. Individual contributors will see the percentage on the bar graph for goals but will not be able to view the status for each individual goal.

Helpful Hint: Goals that are designated with privacy "on" will not show up on the My Company page.

Shoutouts:

Shoutouts Overview: The Shoutouts section is intended to provide praise and recognition to anyone within the organization. Any employee can add a shoutout.

Add a Shoutout:
1. Go to left hand side and click the plus + sign.
2. Add a comment (limit is 140 characters).
3. Click enter to save the Shoutout.

Detele a Shoutout:

1. Go to left hand side and select the Shoutout you want to delete.
2. Click the X symbol next to the Shoutout.
3. The Shoutout will be removed.

Reports Overview:

Insights has a selection of reports for employees, managers and leadership teams to access vital company trends and performance information. Below is a summary of available reports.

Employee Progress Report:

The Employee Progress Report (example below) provides an overview of an employee's progress throughout the year. This report shows past 1:1 scores from each of the 4 following categories: Resposibilities, Goals, Core Behaviors and Company Initiatives. The "F" in the last column represents the Final score agreed between the employee and their manager. If it is blank in a column with no content, the 1:1 was missed for that date. If there are blank scores in a column, the 1:1 took place but the manager and employee chose not to score that section.

1:1 Proficiency Report:

The 1:1 Proficiency report provides an overview of how often employee and managers are having their 1:1 meetings. You can sort by employee, manager and department. On the right hand side you can see how many 1:1's have been completed, how many are scheduled (Upcoming) and the total count.

Employee Participation Report:

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The Employee Participation report provides an overview and percentage of how many employees have uploaded their responsibilities and goals after onboarding. This report provides the stage and count of users' responsibilities and goals. There are four stages: approved, awaiting approval, not submitted, and archived. The Goal types section allows you to view which type of goals an employee has created. The last login column represents the last time a user logged in.

1:1 Comments Report:

The 1:1 Comments report represents any comments noted during the "Prep" or "Meet" process. In the example below, Jackie (the manager) added a comment under Jennifer's Responsibilities (the employee) during the prep process. Under Goals, Jennifer added a comment during her prep process to discuss with Jackie (the manager). During Jennifer's 1:1 meeting, they added comments together shown in the "Meet Comments" section.

Employee Summary Report:

The Employee Summary report provides an overview of an employee's Responsibilties and Goals. Measurements and target dates are included for goals. Any manager or employee comments are included in the notes section. You can set a date range for each Employee Summary.