



eLeaP PSP User Guide

Manuals for all roles and modules

Table of Contents

Introduction	4
Login	5
eLeaP PSP User Roles	6
Side Menu	7
Dashboard	8
Dashboard - Permissions	11
Goals	12
Goals - List view	12
Goals - Hierarchy view	24
Checkbox Selection	29
Goals - Permissions	29
Goal Creation	29
Goal Details (KRs, Comments, Attachments, Goal Progress)	30
Weekly Items	31
Weekly Status	31
Mine	32
By User	36
Dashboard	38
Weekly Status - Permissions	41
Weekly Item Creation	41
Weekly Items Comments, Timeline, Attachments	41
Reviews	42
Reviews - Permissions	46
Check-ins	46
Checkbox Selection	50
Check-ins - Permissions	51
Surveys	51
Checkbox selection	58
Surveys - Permissions	58
Teams & People	59
Teams	59

People	60
Checkbox Selection	66
“Teams”	66
People section	67
Teams & People - Permissions	68
Teams creation permissions	68
Adding users to existing teams permissions	68
People creation permissions	68
People Activity permissions	69
Form Templates	69
Form Templates - Permissions	75
Audit Trail	75
Audit Trail - Permissions	76
Settings	76
General	77
Custom Fields	79
Open API	80
Smart Assigning	80
Branding	81
Modules	81
Pricing	85
Categories	86
Settings - Permissions	87
My Profile	88
My Profile - Permissions	89
Global Search	89
Notifications & Emails	91

Introduction

The eLeaP People Success Platform is the unified performance review, goal alignment, employee engagement, and learning management platform.

For over 18 years, eLeaP has been helping organizations develop their people. With our people success platform, they can now manage OKRs & Goals, Performance Reviews, Feedback, 1-on-1 Meetings, Engagement Surveys, Weekly Status Tasks, and much more - all in one place.

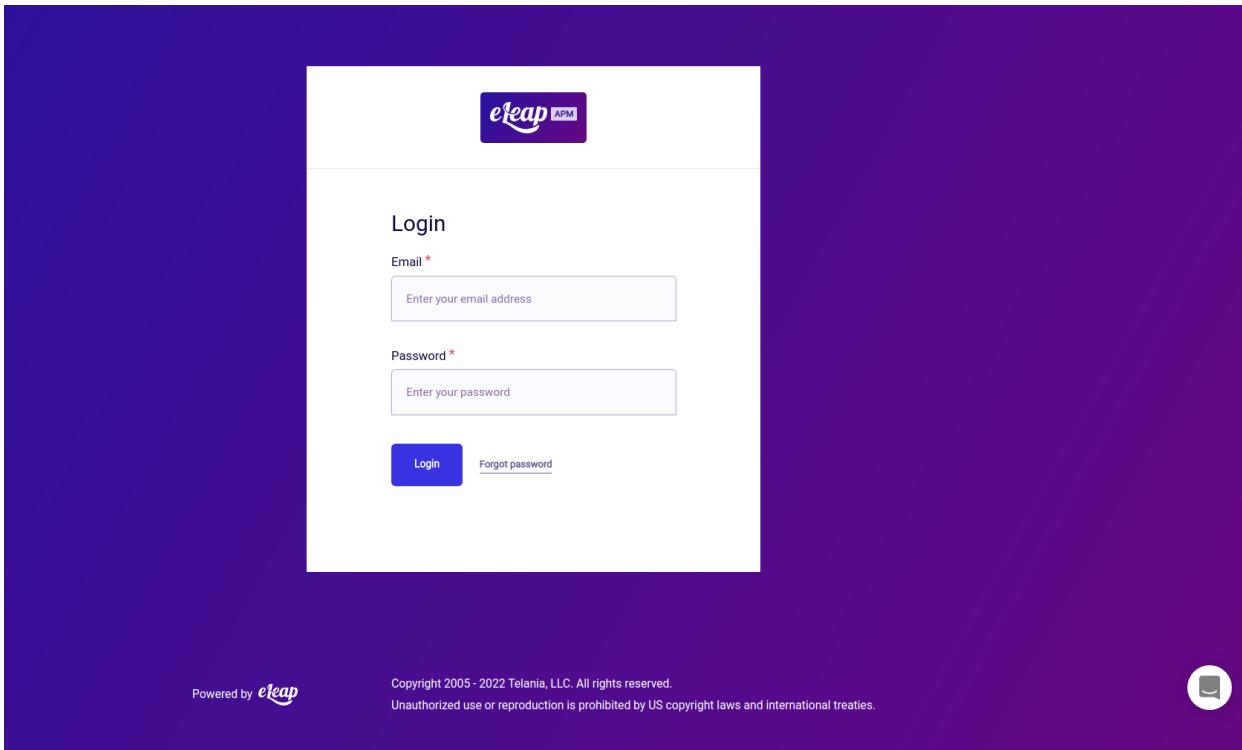
eLeaP PSP does something that annual reviews can't do. It enables organizations to adjust individual team members (employee, trainee) goals and expectations as conditions change. Annual reviews, according to critics, are too focused on the past and not on forward-looking needs. eLeaP PSP helps organizations manage their performance by gathering team members around organization goals and analyzing their performance.

The purpose of this document is to introduce all the functionality available to all the roles in the system in their respective sections. The user guide describes the differences in roles concerning the permissions, the content, and the functionality available.

Hint: For easier navigation, use the links in the Table of Contents or the references included throughout the whole guide.

Login

Entering the URL for the eLeaP application (your specific account URL) into your browser's address bar displays the **Login** screen, illustrated below. Simply enter your email address within the **Email** field, enter your password in the **Password** field, and then click **Login** to access the system. If you get an error message or [Your email or password is invalid] message, check your account website URL to make sure it is correct. Contact eLeaP PSP support from the chat in the lower right part of all pages if necessary.



Click the **Forgot Password** link if you forget your password. The **Login** screen expands, displaying a field into which you can enter your email address to retrieve your password. Once you have entered your email, click the **[Send Email]** button. The system will send you a password reset email.

Email address *

 [Get back to the login page](#)

eLeaP PSP User Roles

eLeaP PSP platform has four types of users: **Administrator**, **Senior Manager**, **Manager**, and **Member**. In eLeaP PSP, these are called **User Roles**. Each organization assigns a user role to every user in the system. The user role affects the permissions that are given to the user and changes the content accordingly. User roles are listed in descending order by functionality:

1. **Administrator**
2. **Senior Manager**
3. **Manager**
4. **Member**

When we describe the details of each section, we'll discuss the differences between user roles specific to that section. The higher the user role, the richer the functionality available to the user. The purpose of user roles is to ensure privacy and security on different levels so that their website experience replicates one in real life.

The role of the user is displayed on the upper right side of web pages, underneath the username.



Smith, John ▾
Administrator

To simplify the process of assigning user roles, here is a small hint for organizations:

1. **Administrator** - Upper management and C-level, and/or specifically assigned eLeaP PSP Administrators.
2. **Senior Manager** - organization managers who manage multiple teams.
3. **Manager** - organization managers who manage small teams, typically just one or two.
4. **Member** - Regular users who are not involved in the management process but are a member of one or more teams.

By reading this guide, the organizations will have a complete picture of what each user role offers, and they can always refer to the document for making decisions on assigning roles. Every section has specific permissions described in a separate subsection of every module.

Side Menu

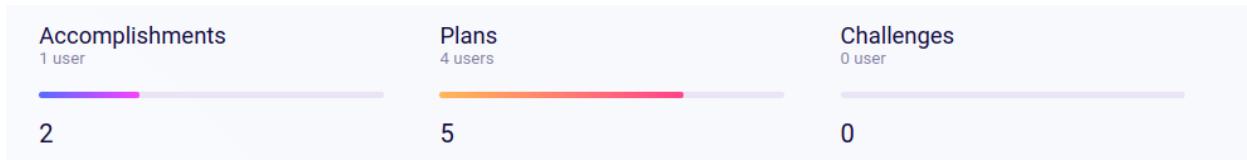
eLeaP PSP's side menu is the area for accessing all the sections on the platform. Users can collapse the menu with  button. Depending on the user's role, the side menu will display different sections. The list below includes all sections with brief descriptions and the roles that can access each section.

 Dashboard	Check the overall performance of your users and access an overview of organization data.	All user roles
 Weekly Status	Track individual user activity using weekly data on plans, accomplishments, next week's plans, and challenges faced.	All user roles
 Goals	Set goals on individual, team, and organization levels and track progress with statuses, objectives, and key results.	All user roles
 Reviews	Share constructive peer feedback across your organization and gather valuable insights and data.	All user roles
 Check-ins	Organize meetings, assign team members, and document important meeting outcomes.	All user roles
 Surveys	Create and distribute questionnaires and track their completion status and engagement.	All user roles
 Teams & People	Create organization users, store data, and group users into teams.	Administrators, Senior Managers, and Managers
 Form Templates	Create Surveys and Review questionnaire templates.	Administrators, Senior Managers, and Managers
 Audit Trail	Gather company-wide activity records across the organization.	Only Administrators
 Settings	Customize settings for a better platform experience and explore various pricing packages.	Only Administrators

Dashboard

After a successful login, the users are redirected to the organization **Dashboard** section. The **Dashboard** presents a performance overview of the organization's users and provides easy and quick access to the items in other sections. As the Dashboard contains content generated in other sections of the platform, we recommend getting acquainted with other sections before cruising through the Dashboard.

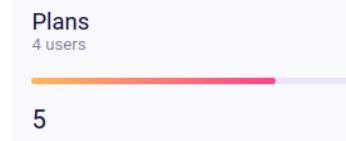
This part of the Dashboard shows the overview of Weekly Status items created in the system.



Shows the number of users who have added weekly status items with **Accomplishment** status and the total number of **Accomplishments** for the current week.



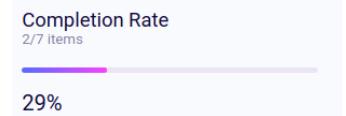
Shows the number of users who have added weekly status items with **Plan** status and the total number of **Plans** for the current week.



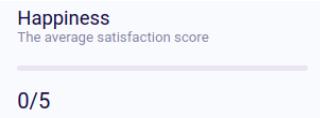
Shows the number of users who have added weekly status items with **Challenge** status and the total number of **Challenges** for the current week.



Shows the percentage of Accomplishments in the total number of Weekly Status items (**Challenges** excluded).



Shows the average **Happiness** score of the organization for the current week.



Please refer to the [Weekly Status](#) section description in this manual for more details.

The header above the **Dashboard** chart shows the period for which the data is displayed in the chart. The dots near the dates show the average **Happiness score** for the selected period. To see more details on the organization's weekly activity, click the [See full details](#) button.

Weekly Status for 4 - 7 July



[See full details](#)

The **Dashboard chart** collects the data from the **Goals** and **Weekly Status** sections. Pick a period and see Organizational activity collected in one chart. Hovering the cursor over the chart will show the number of **Weekly Items** and the average **Happiness Score** created on specific dates. Get familiar with [Weekly Status](#) in the respective section of this document.

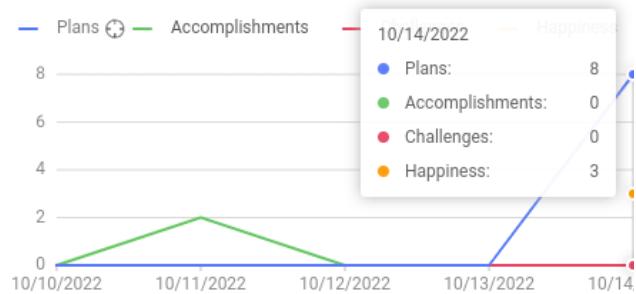
Percentages show the ratio of goals in given statuses to the total number of goals in the selected period. The horizontal bar chart represents the distribution of goal statuses.

Switch between periods with arrows to see previously recorded data.

Weekly Status for 10 Oct - 11 Oct

Week

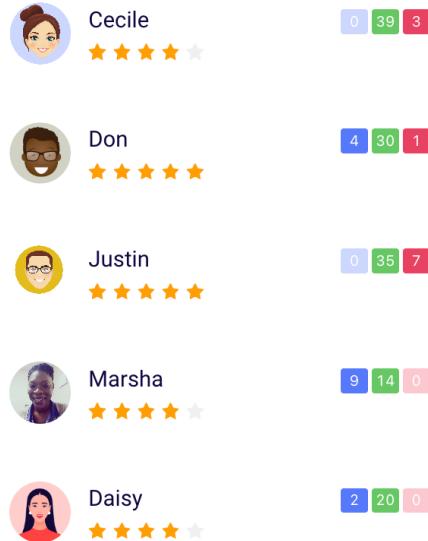
0% Progressed | 100% On Track | 0% At Risk | 0% Off Track | 0% Exceeded | 0% Completed



Click on the names of Weekly Status item names to filter the chart according to the selected type. Multiple filters can be set.

Plans Accomplishments Challenges Happiness

Most Active Users show the users who have created and completed the most weekly items in the selected period. The system counts the largest **Plans + Accomplishments** numbers and lists the users accordingly. Challenges are not counted in this case.



Not sure what's coming next? **My To-do List** shows the upcoming tasks that are due in the near future. The list sorts the items from nearest to latest. You can easily access the item details page by clicking on item names. The icons near the name indicate the sections that the item belongs to. In the place of the **Marketing** team badge, you might see user avatars, which are the preview of the item's assignee list. **My To-do List** contains more info, so let's click

[See full list](#)

to learn more about it.

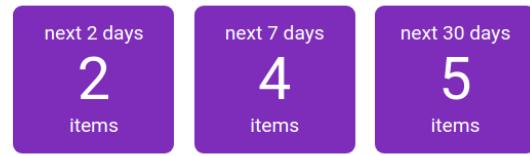
My To-Do List

-
- | Icon | Name | Due Date | Category |
|-----------|-------------------------------------|--------------------|-----------|
| Flag | Admin and Senior Mana... | Less than 24 hours | Marketing |
| Bar chart | Finish the weekly report by Friday. | 2 days remaining | |
| Flag | Q2 Marketing Campaign | 7 days remaining | Marketing |
| Flag | Q2 Marketing Campaign | 7 days remaining | Marketing |

[See full list](#)

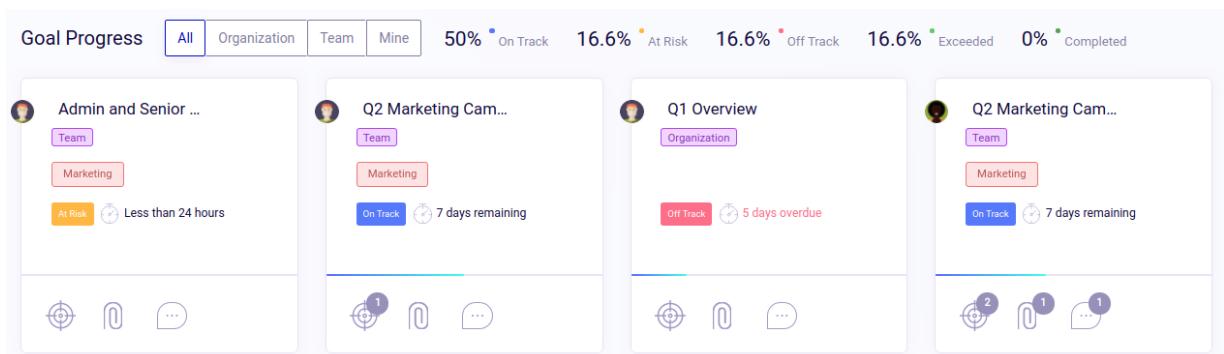
Clicking [See full list](#) opens a window with more information in it. The window is divided into tabs based on the timeframe of to-dos we want to see. The tabs with larger timeframes (next 7 days, next 30 days) include the items of previous timeframes. **My To-do** list will help you organize your activity and avoid missing any important tasks.

My To-Do List



- | Admin and Senior Manager Goal | Marketing |
|-------------------------------------|-----------|
| Less than 24 hours | |
| Finish the weekly report by Friday. | |
| 2 days remaining | |
| Q2 Marketing Campaign | Marketing |
| 7 days remaining | |

The lower part of the Dashboard section presents the Goals data. The goals are presented in a card format, but the data is the same as in the Goals section. Learn more about [Goals](#) further in the guide.



Dashboard - Permissions

Dashboard permissions are affected by the separate permissions of the sections, as it collects data from other modules.

Goals

Goals - List view

The **Goals** system in eLeaP is designed to align teams and individual members of organizations around a common purpose and a shared set of objectives. Organizations can track the status of goals and even break them down into smaller objectives. Every goal has a dedicated details area where all interactions with the goal take place.

A **Goal** can have one of these five statuses on the platform.

The goal is projected to be completed within the set deadline. The goal key results are progressing as planned.

On Track

When there are more than 24 hours left until the deadline, and the goal progress is already 100%. Basically, you achieve success with your goal!

Exceeded

When the goal has achieved a 100% progress rate and it has been completed in the last 24 hours.

Completed

The goal deadline has passed, and the goal has not achieved 100% progress. Goals with this status have limitations on certain functions. To remove limitations in this goal, the deadline must first be extended.

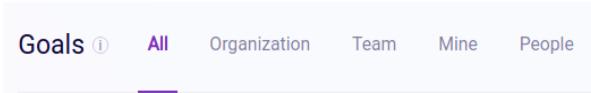
Off Track

If there is less than 20% of the deadline left, and the goal progress is not 100% yet, the goal completion is **At Risk**. For example, if the deadline of the goal is set to 5 days, and the goal is not completed after four days, the goal will have an **At Risk** status on the 5th day.

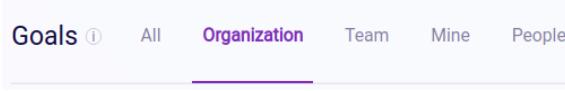
At Risk

The Goals module has several sub-tabs: **Organization**, **Team**, **People**, and **Mine**. We do this to better organize the platform for ease of use when it comes to which users or teams are involved.

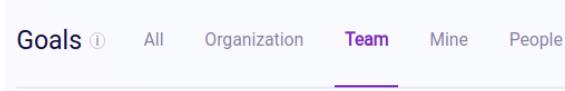
The **All** tab includes all available goals of every category. Organization and team goals are easily indicated.



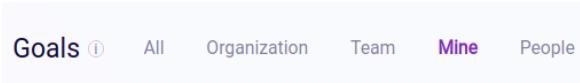
The **Organization** tab shows goals that have been assigned to all users in the system.



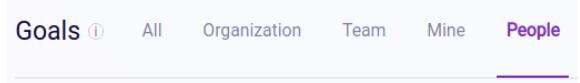
Team goals are assigned to specific teams. Team names are indicated in the goal listing.



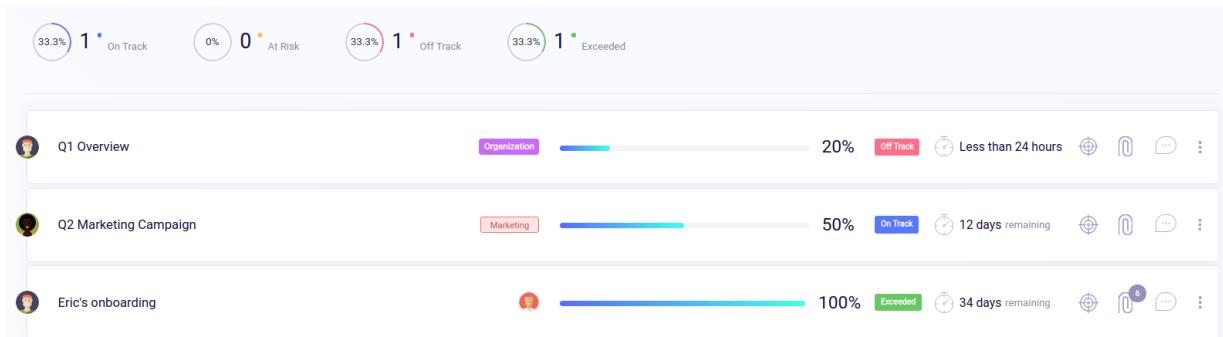
Mine includes the goals which are assigned to or created by the currently logged-in user.



People's goals are assigned to or created by individual organization members.



See an example of **Goals** below. Ready to create a goal to learn more about this section?



Click **Add New Goal** to start creating your goal. On click, an input window opens, requiring specific details about the goal being created.

This is the window for creating a **goal** in eLeaP PSP. We'll now go through all the fields and describe their uses and behavior.

Add a new goal

Goal Name *

Goal Deadline *

Assign To *

People

Team

Organization

Add Goal Cancel

Advanced settings

Is the goal private?

Is the goal active?

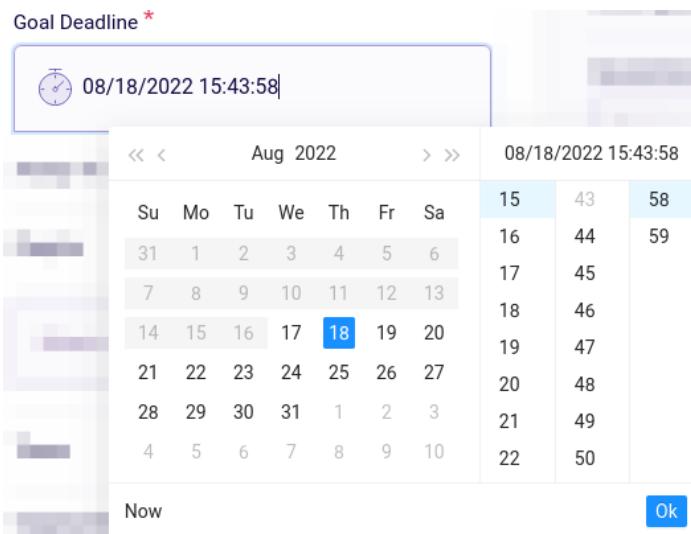
Description

[Hide Advanced Actions](#)

Start by adding a **Goal Name**. The goal name is going to be visible to all goal assignees, so choose wisely.

Goal Name *

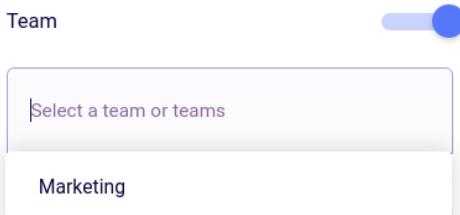
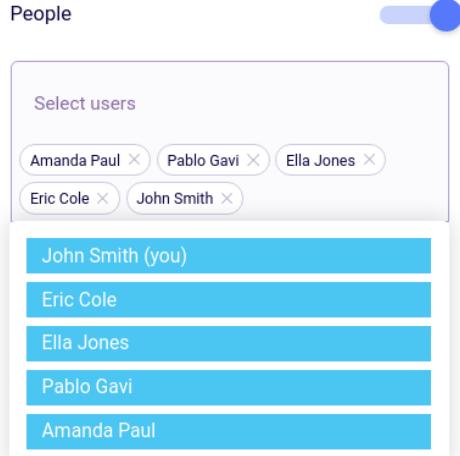
Next, select the **Goal Deadline**. The **Goal deadline** will determine the status of the goal in the system and even certain functionality available to assigned users. Deadlines can only be set to a future date.



The assignment step is important as this step determines the goal category as well as the participants in achieving the goal. A goal can be assigned to **People**, **Teams**, or the entire **Organization**. Use the assignment toggle to select the right assignment option for your goal. For example, the **People** toggle is for assigning the goal to specific individuals in your organization. See the example indicated.

If the **Team** toggle is used, the goal is able to be assigned to teams. Multiple teams can be selected from the list. You might need to scroll to see all your teams.

Organization goals are assigned to every member of the organization. These types of goals are the easiest to assign. However, you have to be careful to ensure that goals are being assigned to the relevant parties. An organization-level



Organization

goal is automatically and instantly available to all users in your account.

Clicking [See Advanced Options](#) opens the window of advanced settings. The first setting is for setting the goal as **private**. **Private Goals** are only visible to goal assignees. The creator and assignees can perform any action within the goal, and it won't be visible to others outside the goal assignee list, including Admins and higher roles.

Turning the '**Is the goal active?**' toggle on activates the goal. If the switcher is not on, the goal is **Inactive** by default.

Inactive goals are visible to every assignee, but the assignees are unable to perform any actions within the goal.

Add an optional description for the goal. This field has a character limit of 256.

Advanced settings

Is the goal private?



Is the goal active?



Description

We are going to execute a new marketing campaign, which is going to include members of Marketing and Sales teams.

Here's an example. We have a goal that was created by **John Smith**. The goal is both **private** and **inactive** . We've named it "Q2 Marketing Campaign" and assigned it to the "Marketing" team. As this is a newly created goal, the progress of the goal is 0%. Next to the progress percentage is the status of the goal, which we'll discuss next in the user guide. The deadline for the goal is 12 days. The icons on the right of the deadline provide additional functionality for the goal. For example, the is for editing and deleting the goal, while the indicates the number of key results to track. The icon provides an opportunity for goal attachments. The icon represents an option to add or see goal comments.



As we've successfully created our first goal, let's access the **Goal details** area to see additional functionality.

First, we notice that the goal has been set as inactive, which means we can't perform any actions until the goal is activated as indicated.

The screenshot shows the 'Goals / Q2 Marketing Campaign' page. At the top right, there is an 'Edit' button. Below it, the status is shown as 'INACTIVE' with a person icon. The date 'August 31, 2022' and '12 days remaining' are displayed. A red 'Marketing' tag is present. A message box states 'This goal is inactive! You cannot update this goal until you activate it.' with a link 'Activate this goal'. Below this, a progress bar shows '0%' with 'On Track' status. A summary section includes 'Key Results 0', 'Weekly Items 0', 'Comments 0', 'Attachments 0', and 'Timeline 2'. At the bottom, there is a text input field 'Write key result title...' and a 'Add key result' button.

Let's activate the goal using the Activate this goal link. Goal activation can also be done by clicking the **Edit** button and activating the goal from the **Advanced Settings** section. Once the goal is activated, we can proceed.

The screenshot shows the same 'Goals / Q2 Marketing Campaign' page after activation. The status is now 'ACTIVE' with a person icon. The 'Edit' button is still present at the top right. The date 'August 31, 2022' and '12 days remaining' are shown. A red 'Marketing' tag is present. A message box states 'This goal is active! You can now update this goal.' with a link 'Edit goal'. Below this, a progress bar shows '0%' with 'On Track' status. A summary section includes 'Key Results 0', 'Weekly Items 0', 'Comments 0', 'Attachments 0', and 'Timeline 3'. At the bottom, there is a text input field 'Write key result title...' and a 'Add key result' button.

The screenshot shows a goal titled "Goals / Marketing team goal". It includes a profile picture of the creator, the deadline "August 31, 2022 | 7 days remaining", and a button labeled "SB66".

Goal details show the goal name as well as additional general information. Near the goal name, we have the avatar of the goal creator. Below the goal name, we have the goal deadline and the time remaining until the deadline. Below that, there is a place for **goal assignees**. Also, look for teams, user avatars, and goal descriptions to be displayed here.

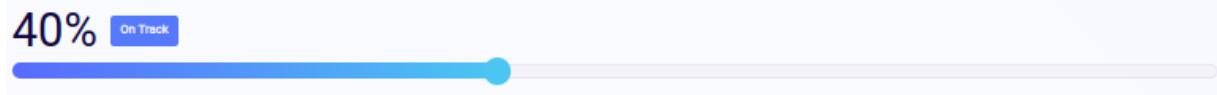
Click the **Edit** button to access the Goal settings window. The settings of the goal can be edited here. You can edit the goal name, deadline, and assignment as well as private settings and description.

The screenshot shows the "Edit a goal" dialog. It includes fields for "Goal Name" (Q2 Marketing Campaign), "Goal Deadline" (08/31/2022 15:58:56), "Assign To" (People and Team toggles), and a "Description" box (We are going to execute a new marketing campaign, which is going to include members of Marketing and Sales teams). Advanced settings like "Is the goal private?" and "Is the goal active?" are also shown.

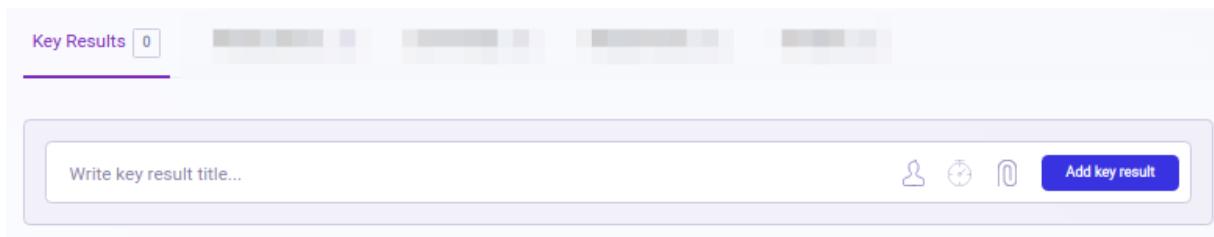
An example of the goal description appears below. Note that you can edit the goal description from your advanced options sections.

We are going to execute a new marketing campaign, which is going to include members of Marketing and Sales teams.

The **Goal Progress bar** is an important indicator of progress toward completion. Goal progress can be modified by manually dragging the circle along the range. Besides manual adjustment, the **Progress bar** is linked to available Key Results (KRs), which we will discuss next.



Goals have additional tabs for maximum utilization. The goal details page tabs are Key Results, Weekly Items, Comments, Attachments, and Timeline. See an illustration of the **Key Results** or **KRs** tab below



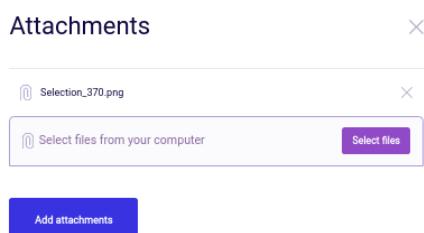
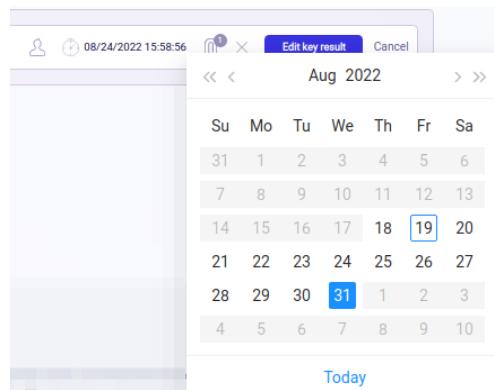
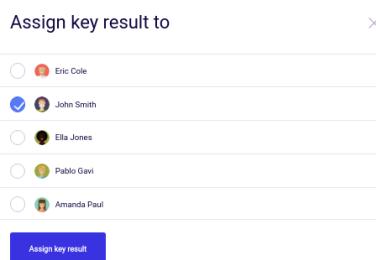
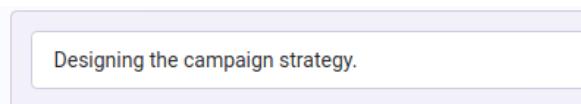
Let's create a key result to see how it affects the progress of our goal.

Add a title for the **Key Result**. A Key Result is a quantitative measure of how you achieve your Goal Objective. We use the OKR methodology in eLeaP. The Key Result must be completed before the deadline to avoid an adverse goal status.

Assign a **Key Result** to one of the Goal assignees with the button. A window with a list of goal assignees will open when clicked.

Key Results can have their own deadline, but they cannot be later than the overall goal deadline. Similar to the goal, **Key Results** can only have deadlines in the future.

Goal assignees can attach files to Key Results. The file attachment process is a popular feature in the system. By clicking, the assignees can select files and attach them to **Key Results**.



After we're done inputting the necessary details, we click the **Add key result** to add the Key Result to the Goal. **Comments** can also be added to a KR using the button. Added comments have the comment creation date on the right side of the screen.

The screenshot shows a single Key Result (KR) card for "Designing the campaign strategy". The card has a progress bar at 0% completion, labeled "On Track" and "4 days remaining". There are two comments: one from John Smith ("I think this KR must be done in a team.") and one from Ella Jones ("I agree, I'll organize a Check-in for this matter."). A placeholder for a new comment is provided at the bottom with a "Add comment" button.

Key Results (KRs) have statuses that are similar to **Goal** statuses. The most important action that can be performed with the **KRs** is the progress bar. When at least 1 KR is added to the goal, the progress bar of the overall goal becomes inactive so that users can no longer manually adjust the progress of the goal. Instead, the progress of the goal is calculated as the average of the progress of the **KRs**. In our example, Goal progress (40%) is the average of **KR1** = 50% and **KR2** = 30%.

The screenshot shows a goal card with a progress bar at 20% completion, labeled "On Track". Below the progress bar are three Key Results (KRs): 1. "Resolve 85% of tier-2 support ti..." (3 Days, On Track, 44 days remaining). 2. "Close 10 customers" (3 Sales, On Track, 44 days remaining). 3. "Decrease first response from 1..." (1 Pounds..., On Track, 44 days remaining). A placeholder for a new key result is provided at the bottom with a "Add key result" button.

Key Results Settings (KRS) enable you to customize your Key Results settings. To get started, first add a key result and then click on the Key Result Settings (it defaults to a percentage % setting). Once clicked, select the Metric, Start value, Max value and Decimals you prefer for this Key Result.

Metric

Start value

Max value

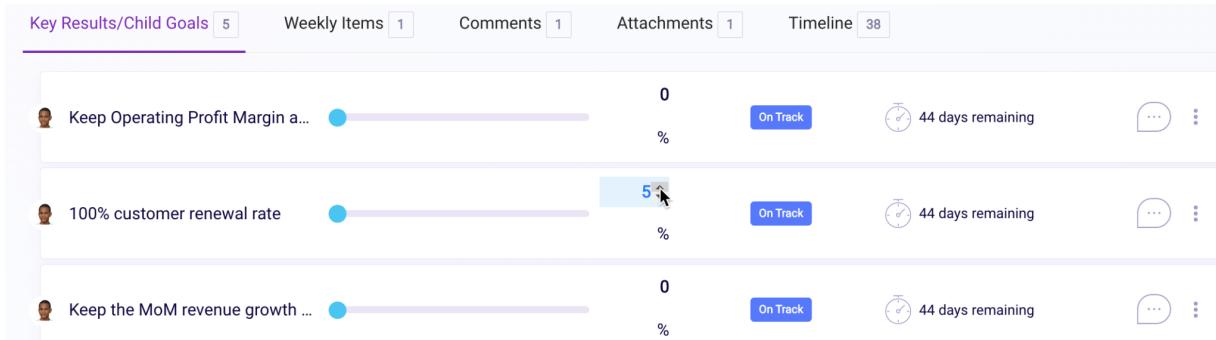
Decimals

0 1 2

The Metric setting contains several pre-created values you can select or use the Units area to select or create your custom units for your Key Results. For example, if you want to track sales, you can select the [Sales] unit or select a currency and enter in a target amount. You can also leave the % sign and simply increment your goals based on a 100% completion key result.

By default, the start value is zero (0), but you can change this. The Max value represents the target objective for this key result. If, for example, your goal is to make 12 sales, then the Max value should be set to 12. This way, every time you make a sale, you increment your Key Result by the number of sales made till you reach your goal of 12 goals. The PSP system is highly customizable, so you can set your own criteria for goal key results and make steady progress to achieve them.

Current Key Result Value (CKRV) is what your current key result status is. This also corresponds to your key result progress bar. To change your current key result value, click the CKRV box and use the up or down arrows to change the value.



To update the overall goal progress and save your changes, click anywhere outside the CKRV box. Remember, you can also adjust your KRS to ensure that your settings are still relevant. Note that all changes are being logged in your [Timeline] section.

Weekly Items is where you can link your Weekly Status items to the Goal. The [Weekly Status](#) section of this user guide describes Weekly Items and how to create them. Click [Link a weekly item](#) to open the list of weekly items.

No weekly items linked yet. [Link a weekly item](#)

Select one or multiple **Weekly Items** from the list to add to the Goal.

Hint: Use the search bar to quickly find Weekly Items.

Choose weekly items

Search for a weekly item by name

- Discuss short-term strategies with partners.
- Discuss short-term strategies with partners.
- Upload a new blog post to our website.
- Upload a new blog post to our website.
- Upload a new blog post to our website.
- Order T-shirts for employees.
- Order T-shirts for employees.

[Link weekly items](#)

The linked weekly items may look like the illustration below. Note that you can perform familiar actions like **attaching files** and **comments**.

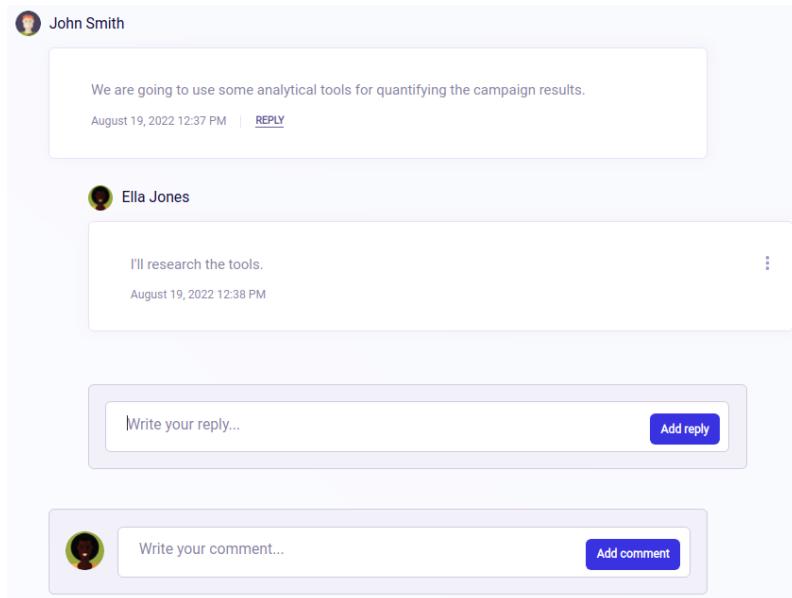
- Discuss short-term strategies with partners.
- Upload a new blog post to our website.
- Upload a new blog post to our website.

The **Comments** section is particularly well-suited for any goal-related discussions.

Comments 1

Note that the comments feature on the platform works just like most comment sites and is based on commonly accepted best practices. At the basic level, users can post comments, and others can reply to comments. In the example below, **John** has posted a comment, and **Ella** replied to that comment.

Commenters can edit their comments/replies. The comment tab title has a comment counter but this does not count replies.



Next in the Goal tabs is the **Attachments** tab. Here the users can attach files to the goal. Click [Browse for files](#) and select the files you want to attach from your device. The added file looks like the illustration in the screenshot below. The item includes the avatar of the creator, the file name, the file size, and the date the file was attached to the goal.

A screenshot of the 'Attachments' tab. It shows a single file named 'Selection_405.png' (177.8 kB) attached by a user with a yellow profile picture. The file was attached on August 23, 2022, at 9:53 AM. To the right of the file is a blue 'Delete' button with a trash icon. Below the file is a light gray box containing the text 'Click to attach one or more files' and a blue 'Browse for files' button.

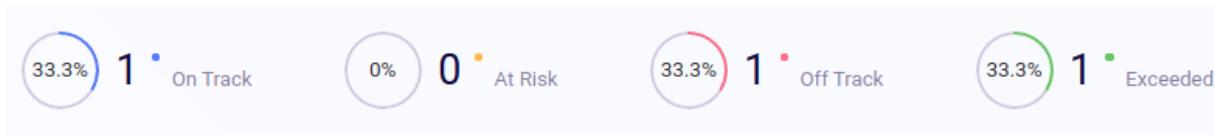
The last tab is **Timeline**. The **Timeline** includes all activity that has been recorded in the goal. All of these actions are also logged in the [Audit Trail](#) section, which is described further in the user guide.

Key Results [2] Weekly Items [3] Comments [1] Attachments [1] **Timeline [40]**

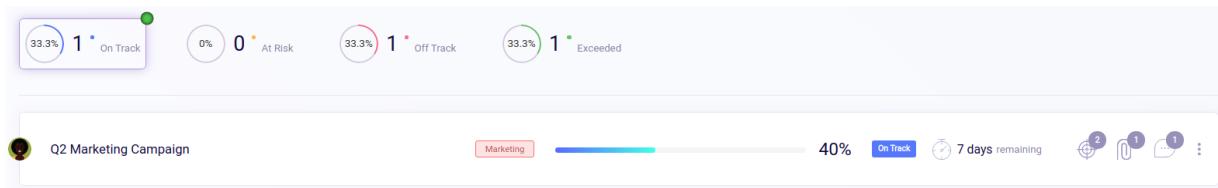
 Ella Jones added attachment  Selection_405.png to the goal  Q2 Marketing Campaign	August 23, 2022 9:53 AM
 Ella Jones Updated a goal  key result  Hiring new Marketing Specialist.  50%	August 22, 2022 8:59 AM
 Ella Jones Deleted a goal  key result  Designing the campaign strategy. comment 	August 22, 2022 8:32 AM
 Ella Jones Added a goal  key result  Designing the campaign strategy. comment 	August 22, 2022 8:32 AM
 Ella Jones Added a comment to a goal  Q2 Marketing Campaign	August 19, 2022 12:38 PM
 John Smith Added a comment to a goal  Q2 Marketing Campaign	August 19, 2022 12:37 PM
 John Smith added weekly items  Upload a new blog post to our website., Upload a new blog post to our website	August 19, 2022 12:33 PM
 Ella Jones updated the goal  Q2 Marketing Campaign progress to 40%  40%	August 19, 2022 12:20 PM
 Ella Jones Updated a key result  Designing the campaign strategy. progress to 30%	August 19, 2022 12:20 PM

Sadly, this concludes our journey through the goal details ;)

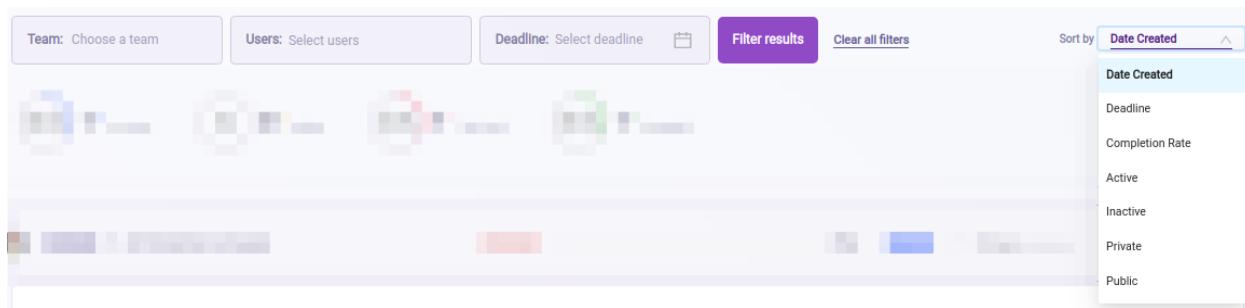
After creating lots of goals, it might become necessary to quickly find them by filtering them according to their status or details. Make use of the powerful filters in the system! In the top section of the **Goals** module, we have easy-to-follow status filters. The percentages in each chart show the ratio of goals with that status in relation to the total number of goals. The count of goals within the various statuses is indicated by the larger font number.



You can click on the individual statuses. The status that is clicked will be highlighted, and only the goals with the selected status will appear in the list.



Goals can also be filtered by **teams** and **assigned users**, and **deadlines** and as well as sorted by **Date Created**, **Deadline**, **Completion Rate**, and **Status** (active, inactive, private, public), both in ascending and descending order. Click **Filter results** to get the filter results and **Clear all filters** to clear the results of the filter.



Goals - Hierarchy view

As we're now aware of how to create and use **Goals** in our system, we introduce the new Hierarchy view of all Goals created in the organization. Hierarchy goals are a fresh bird-sight view of all the goals created in the system, the relations of which can be easily manipulated by users.

The relationships of Goals in our system, and later in this document, will be described as **parent** and **child** goals. **Parent** goals are the ones of higher levels, and the **child** goals are the ones that belong to the parent goal. Let's run through creating a few goals with hierarchy relations to better understand the concept.

Firstly, we've created a new Organization goal named **Yearly Goal** that is due in a year. This goal will serve as the **Parent goal** in our example. We have not touched the goal progress yet, and no activity has been recorded in the scope of the goal.



After the goal is created, the goal will be available for selection as the **Parent** goal for the goals that are created after. Let's create a few more goals, this is where the hierarchy magic comes in!

Again, we are adding a new goal. In **Advanced Settings**, we have a new selection menu where we select the parent goal. Consequently, the **Yearly Goal** becomes the **parent** goal of the created **Q1 Overview** goal.

The screenshot shows the 'Add a new goal' dialog box. It includes fields for 'Goal Name' (Q1 Overview), 'Goal Deadline' (12/31/2023 15:58:05), and 'Assign To' (People, Team, Organization). A blue 'Add Goal' button is at the bottom. To the right is the 'Advanced settings' sidebar, which contains sections for 'Is the goal private?' (off), 'Is the goal active?' (on), 'Description' (Enter a short description), and a 'Parent Goal' dropdown menu showing 'Yearly Goal' under 'Organization'. A 'Hide Advanced Actions' link is at the bottom of the sidebar.

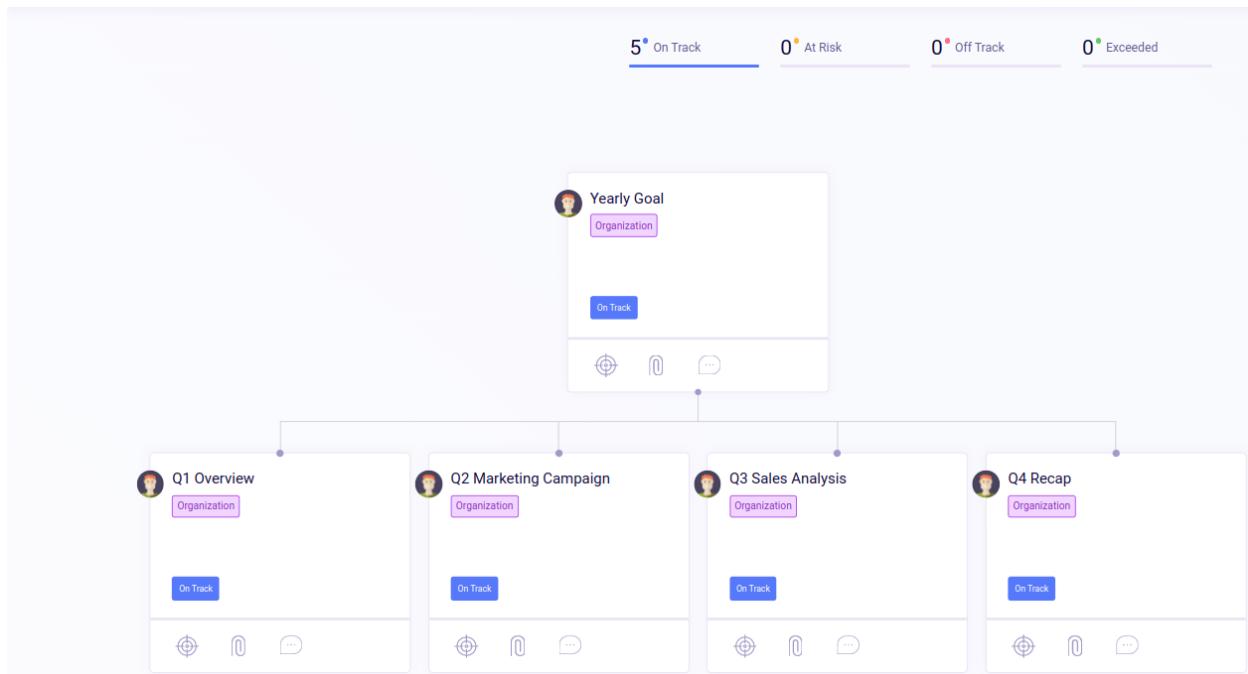
We've created a few other goals, which are **child** goals to our Yearly Goal as well.

Q4 Recap	Organization	0%	On Track	374 days remaining				
Q3 Sales Analysis	Organization	0%	On Track	374 days remaining				
Q2 Marketing Campaign	Organization	0%	On Track	374 days remaining				
Q1 Overview	Organization	0%	On Track	374 days remaining				
Yearly Goal	Organization	0%	On Track	374 days remaining				

Once the goals are created and linked to each other, we can check their relation on our separate page

called **Hierarchy view**. The switcher on the top part of the page is designated for switching between the default **List view** and the **Hierarchy view**. Click on the Hierarchy button to switch the view. The system will redirect us to another section where the goals are represented in a

And here is our **Hierarchy view!** Look how the **Yearly Goal** is listed above the child goals. The process is simple from this point on. Whenever we add a goal and select a goal to be their parent, the new goal appears below the existing goal (the new **child** goal appears below the **parent**).



For demonstration purposes, we've added another goal and selected the **Q4 Recap** goal as the **parent**. This action will add another layer of goals below our second line.

Important! Maximum of five levels of goal relations are allowed in the system, meaning that we'll be able to add two more layers after the goal that we just created.

Check the screenshot below and see how our goal tree looks after the latest addition.

Add a new goal

Goal Name *

Goal Deadline *

Assign To *

People

Team

Organization

Add Goal Cancel

Advanced settings

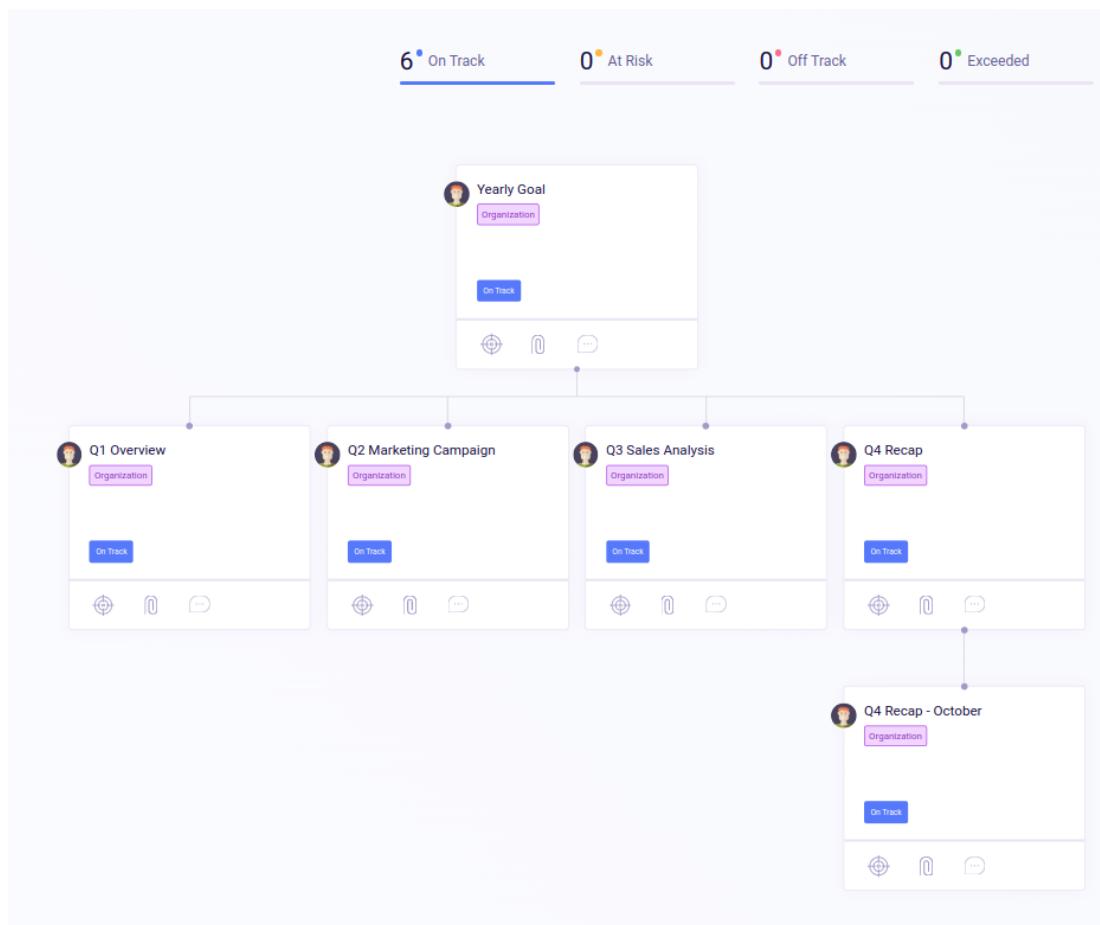
Is the goal private?

Is the goal active?

Yearly Goal	Organization
Q1 Overview	Organization
Q2 Marketing Campaign	Organization
Q3 Sales Analysis	Organization
Q4 Recap	Organization

X ^

[Hide Advanced Actions](#)



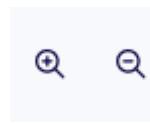
Goals Hierarchy view has some tools for simplifying the navigation when the Goal tree “grows” larger.



This button downloads the full goal tree in a .pdf format, in case you want to make a presentation or a poster for hanging on your wall ;)



Zoom in/out and check the goal tree from different perspectives.



Switch to a full-screen view to see the whole tree on a bigger scale.



Aside from the visual representation of Goal relations, creating **parent** and **child** provides functionality to track the parent goal's progress by calculating the average of the child goals' progress.

In the Details page of the **Yearly Goal** parent goal, we have all the child goals listed separately. The current goal does not have any Key Results.

Goals / Yearly Goal

December 31, 2023 | 374 days remaining | Organization

0% On Track

Key Results/Child Goals 4 Weekly Items 0 Comments 0 Attachments 0 Timeline 1

Enter key result... Add key result

Child Goals

- Q1 Overview Organization 0% On Track 374 days remaining
- Q2 Marketing Campaign Organization 0% On Track 374 days remaining
- Q3 Sales Analysis Organization 0% On Track 374 days remaining
- Q4 Recap Organization 0% On Track 374 days remaining

To demonstrate how the parent goal's progress is tracked in the hierarchy, let's change the progress of one of the goals. We have changed the **Q1 Overview** goal's progress to 100%, and the progress of the parent goal **Yearly Goal** has already changed to 25% percent, which is the average of all four child goals. This is the same working principle of Goals and Key results that we discussed earlier in the document.

Goal	Status	Progress (%)	Remaining Days
Q1 Overview	Exceeded	100%	374 days remaining
Q2 Marketing Campaign	On Track	0%	374 days remaining
Q3 Sales Analysis	On Track	0%	374 days remaining
Q4 Recap	On Track	0%	374 days remaining
Yearly Goal	On Track	25%	374 days remaining

Important! If there are both Key results and Child goals under a goal, there are both included in the calculation of the progress average. This logic works on every level of goals:

Level 5: Average of goal's KR

Level 4: Average of all Level 5 child goals and KR of the same goal

Level 3: Average of all Level 4 child goals and KR of the same goal

Level 2: Average of all Level 3 child goals and KR of the same goal

Level 1: Average of all Level 2 child goals and KR of the same goal

Checkbox Selection

It's a common scenario when we want to bulk-delete multiple items. Just tick the checkboxes near goal

names to select them. Once they are selected, click the **DELETE SELECTED GOALS** button to delete the selected goals. Click the **RESET SELECTION** button to uncheck all selected checkboxes.

The screenshot shows the 'Goals' section of the eLeaP PSP interface. At the top, there are filters for 'All', 'Organization', 'Team', 'Mine', and 'People'. It displays 7 total goals. Below this, a summary bar shows progress: 100% On Track, 0% At Risk, 0% Off Track, and 0% Exceeded. The main list contains five items:

- KR Progress 2 (checked)
- KR Progress 1 (unchecked)
- Q4 Recap (checked)
- Q3 Sales Analysis (checked)
- Q2 Marketing Campaign (unchecked)

Each item has a progress bar, a due date of 322 days remaining, and various action icons. At the bottom, there are 'DELETE SELECTED GOALS' and 'RESET SELECTION' buttons. A callout box points to the 'DELETE SELECTED GOALS' button, which has a red circle with the number '3' indicating three selected items.

Goals - Permissions

Goal Creation

View

Administrator

- all public/active goals

Add

- add goals for all

Edit/Delete

- edit/delete goals

	<ul style="list-style-type: none"> • Organization goals • private/inactive goals created by themselves 	users and for themselves	created by themselves or by a Senior Manager, Manager or Member.
Senior Manager	<ul style="list-style-type: none"> • Organization goals • goals assigned to them or created by them • goals (public /active) assigned to a user who is a team member 	<ul style="list-style-type: none"> • add goals for themselves, all users (except Admins) who are members of a team 	<ul style="list-style-type: none"> • edit/delete goals created by themselves, Managers or Members.
Manager	<ul style="list-style-type: none"> • Organization goals • goals that are assigned to users or created by themselves • goals (public/active) assigned by the manager used to a member of their team 	<ul style="list-style-type: none"> • add goals for themselves and their team members 	<ul style="list-style-type: none"> • edit/delete goals created by themselves or Members of their team.
Member	<ul style="list-style-type: none"> • Organization goals • goals that are assigned to users or created by themselves • goals (public/active) assigned by the member user to a member of their team 	<ul style="list-style-type: none"> • add goals ONLY for themselves 	<ul style="list-style-type: none"> • edit/delete/ elements created by themselves.

Goal Details (KRs, Comments, Attachments, Goal Progress)

Note: If a user can view a goal, they can view all comments/key results/attachments of the goal.

	Add	Edit/Delete
Administrator	<ul style="list-style-type: none"> • on Organization goals • goals created by themselves • goals assigned to themselves • Senior Manager, Manager, or Member goals 	<ul style="list-style-type: none"> • on Organization goals • goals created by themselves • goals assigned to themselves • Senior Manager, Manager, or Member goals
Senior Manager	<ul style="list-style-type: none"> • on Organization goals • goals created by themselves • goals assigned to themselves • Manager or Member goals 	<ul style="list-style-type: none"> • on Organization goals • goals created by themselves • goals assigned to themselves • Manager or Member goals

Manager	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves• Member goals	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves• Member goals
Member	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves

The Administrator and goal creator can edit/delete goal's comments.

Weekly Items

View/Add/Edit/Delete

Administrator	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves• Senior Manager, Manager, or Member goals
Senior Manager	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves• Manager or Member goals
Manager	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves• Member goals
Member	<ul style="list-style-type: none">• on Organization goals• goals created by themselves• goals assigned to themselves

Weekly Status

The **Weekly Status** section helps users organize their weekly activity by adding what we call **Weekly Items**. Weekly items are activities that are of a shorter time frame and less complicated than the **Goals** and **Key Results (KR)s** that we discussed in the [Goals](#) section. The eLeaP Performance platform has four types of weekly items, which you'll encounter in the different sections of the Weekly Status.

Plans are small tasks that a user plans to perform during the ongoing week.



Accomplishments are the plans that have been completed.



Challenges are the tasks or plans that have caused difficulties for the user to complete. Typically these might require a manager to 'unblock'.

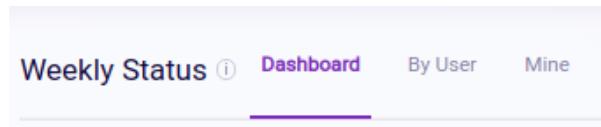


Next Week's Plans are the plans for the upcoming week. When the new week comes, the **Next Week's Plans** from the previous week become plans for the new week.

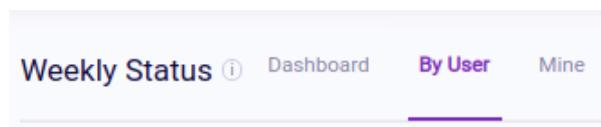


Let's navigate through the **Weekly Status** section to learn more.

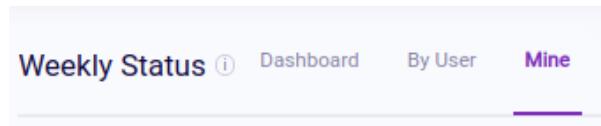
Dashboard shows an overview of the Weekly Status section.



The **By User** sub tab gives users of higher roles the ability to check the weekly items of other users and even interact with them.



The **Mine** subsection belongs to the user themselves. This is the place where the user creates and controls their weekly items.



Mine

We'll start with the **Mine** section to see how the weekly items of individual users are created.

First, add the title for the weekly plan item. Add emojis to the title to make them more fun.

Finish the weekly report by Friday.

You can attach goals to the Weekly Item by clicking on the **Goals** icon.



Clicking the goal icon opens a window with the Goals available to attach (depending on the user's role). Users can attach only one goal to one weekly item.

Attach a Goal

- Q1 Overview
- Q2 Marketing Campaign
- Eric's onboarding

Attach a Goal



Click the attachment icon to attach files or attachments to a **Plan**.

The file attachment window looks like this. Select the files from your device. Note that you can remove the file by clicking the button. Close the window for discarding changes.

Attachments

Selection_264.png

Select files from your computer

Select

Add attachments

The added **Plan** looks like the illustration below. A new comment icon appears in the plan. This comment icon enables users to add comments to the plan.

■ What are your plans this week?

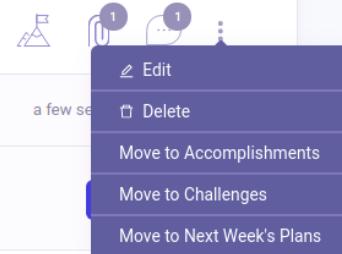
Finish the weekly report by Friday.



John Smith I'm about to finish this earlier than the deadline.



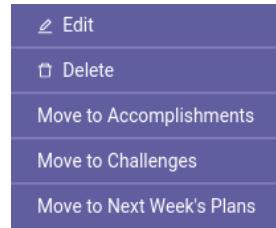
Write your comment...



Finish the weekly report by Friday.

Save Cancel

Clicking opens the menu of actions that can be performed within the specific **Plan** item. The actions are described below:



To change the **Plans** status to **Accomplishments**.

[Move to Accomplishments](#)

To change the **Plans** status to **Challenges**.

[Move to Challenges](#)

To change the **Plans** status to **Next Week's Plans**.

[Move to Next Week's Plans](#)

Accomplishments and **Challenges** have the same sub-functionality as **Plans**. For demonstration purposes, we display "*John's goal*" as an **Accomplishment** and "*Finish the weekly report by Friday*" as a Challenge. The sub-actions in the dropdown menu are the same, with the difference being that the **Accomplishment** can be changed back to a **Plan**.

✓ What are the accomplishments for this week?

Finish the weekly report by Friday.

John's goal

Write an accomplishment...

⋮

>Edit

Delete

Move to This Week's Plans

Move to Challenges

Move to Next Week's Plans

As explained above, **Challenges** are also similar to **Plans** or **Accomplishments**. In our example below, we've included the list of files that have been attached to the challenge.

▲ What are the challenges you encountered?

Finish the weekly report by Friday.

Selection_267.png

Add an item to your weekly challenges...

⋮

>Edit

Delete

Move to This Week's Plans

Move to Accomplishments

Move to Next Week's Plans

The **Next Week's Plans** share similar functionality as the other weekly plans, except there is one extra functionality here. Users can add a deadline for the **Next Week's Plan**. Please note that as it is a **Next Week's Plan**, the deadline calendar only has the 5 working days of the next week available to select.

The screenshot shows a user interface for managing tasks and planning. At the top, there is a list item: "What are your plans for next week?". Below this is a task card with the title "Talk with team members about our goals." and various icons for smiley face, location, file, and a counter showing "6". To the right of the card is a calendar for August 2022, with the date "August 19, 2022" highlighted. The calendar shows the days of the week from Sunday to Saturday and the dates from 31 July to 10 August. Below the calendar is a horizontal progress bar with several colored segments (orange, grey, blue) and a small orange square icon. At the bottom of the interface, there is a satisfaction rating section with the question "How satisfied are you with your progress week?", a "Rate your satisfaction this week" button, and a 5-star rating displayed as "5/5".

Weekly Satisfaction or Happiness Score:

Here, users can rate their satisfaction for the week on a 5-star scale. At eLeaP, we call this the **Happiness score** of the week. This is quite flexible data as the user rates the overall satisfaction of the week. We'll discuss the **Happiness score** in more detail in other sections as well.

How satisfied are you with your progress week?

Rate your satisfaction this week

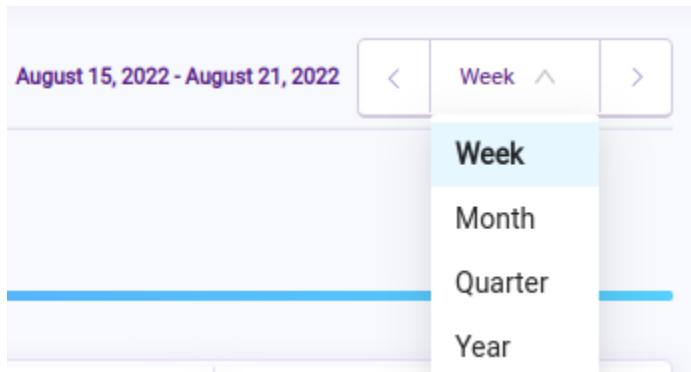
★★★★★ 5/5

The top of the **Mine** section has a circle chart with a percentage that shows the ratio of **Accomplishments to Plans**.

My Weekly Status



At the top of the pages, the users will see a menu for picking periods of time. Based on the selected time period, the system displays the corresponding **weekly items** for the selected period. With down and horizontal arrows, users can navigate between periods. For example, if we choose **Month** from the menu by clicking the down arrow, the system will display data in a monthly time frame period.



By User

The **By User** section is available only to **Administrators** and **Senior Managers**. This functionality comes in handy when the users of higher roles want to check the weekly activity of other users and, in some cases, modify them. They can leave comments on the weekly items if needed.

The **By user** section looks like the illustration below. It includes user cards that have summary information about the users and their weekly activity.



The name and avatar of the user in the user card are displayed on the left.



The Completion percentage indicator is the same percentage of completion that we described in the [Mine](#) section. The percentage here shows the weekly item completion rates of different users.

50% Completion

These numbers of **Accomplishments**, **Plans**, and **Challenges** accordingly. We use a color scheme for the Accomplishments Plans and Challenges as indicated. **Green** is for Accomplishments. **Blue** is for Plans. **Red** is for Challenges. Try to get used to the color scheme

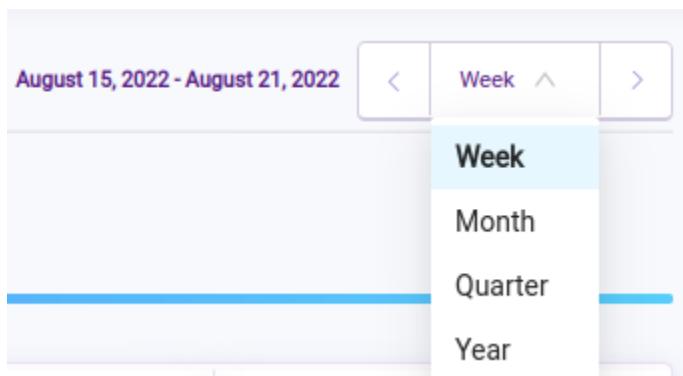
1 | 1 | 1

of these items, as they are used extensively throughout the system.

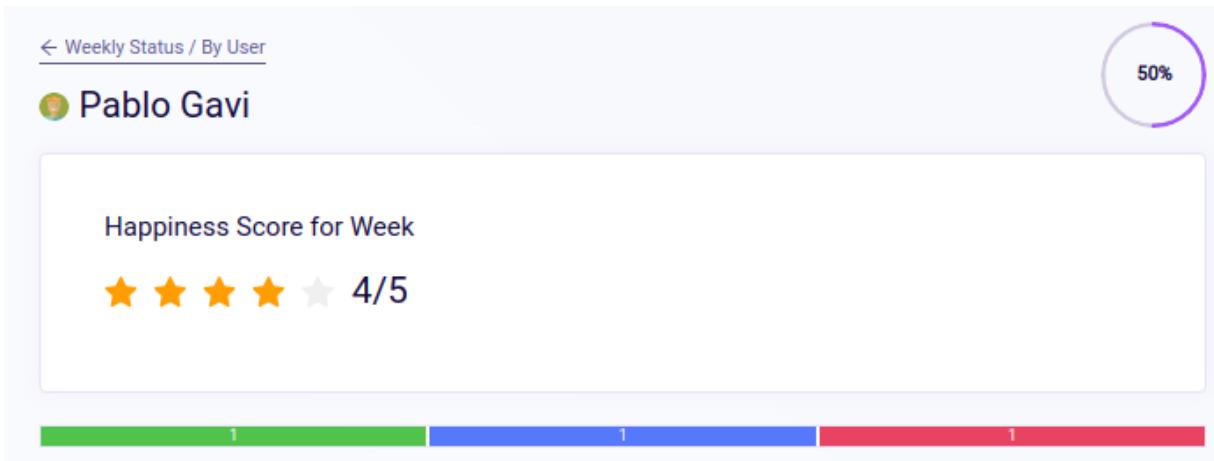
This comment icon displays information regarding any available comments in the associated Weekly Plan item. It shows the number of comments that have been given in the associated weekly items. Clicking on the icon will redirect the user to the user's **Weekly Status** section.



The **By User** section has a period picker as well. It helps filter data according to the period the item was created.



When we click on the user card from **By user**, the user interface looks just like the **Mine** section. The only difference here is that **Administrators** and **Senior Managers** cannot modify the **Happiness score** of the user. They can only view the score. Below the Happiness Score, the system displays the totals for the various weekly plan items.



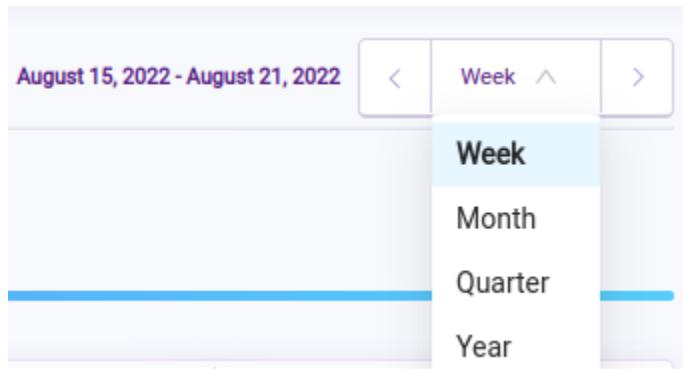
Dashboard

The **Weekly Status Dashboard** presents an overview of the Weekly Status section. As this section pulls together several elements of the Weekly Status system, we decided to cover the other sub-section first before discussing this section.

The Weekly Status **Dashboard** shows the progress of **Goals** and their statuses. The Progression rate shows how much your goals have progressed during the ongoing week or period of time selected.

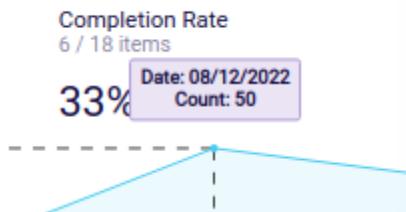


With the period picker on the right, the users can pick a period to see filtered data.

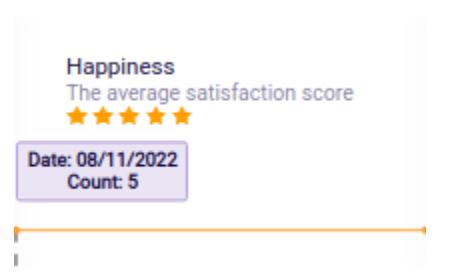


The **Dashboard** has also mini charts, which represent an overview of the organization's weekly data. When the user hovers their cursor over the charts, they can see the count of items recorded on specific dates.

The Completion Rate chart shows the overall completion rate of the organization's weekly items. If you're interested in the formula used, it is **Accomplishments/Plan + Accomplishments**.



The **Happiness** score chart shows the progression of 'happiness' across your whole organization over a time period. Keep an eye on Happiness!



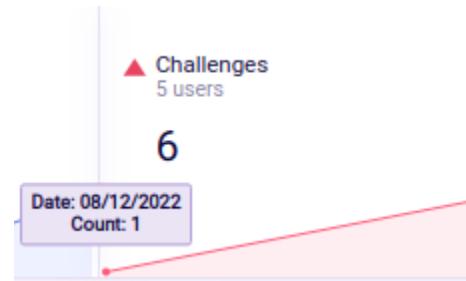
The **Accomplishment** chart shows how many **Accomplishments** were recorded on specific dates and what trends we are seeing.



The **Plans** chart shows how many **Plans** have been recorded on specific dates and what trends we are seeing.



The **Challenges** chart shows how many **Challenges** have been recorded on specific dates and of course, the trends we are witnessing.



Since the organization already has data in **Weekly Plans**, we display an overview of all the plans as illustrated in the list below. Unlike the **Mine** and **By User** sections, the **Plans** have a dropdown arrow on the right side of the page. This dropdown opens an activity list, which shows log entries of the weekly item. Every action performed within the weekly item is recorded here. Users can also leave comments regarding the specific weekly item directly from here by clicking on the comment icon.

The screenshot shows the 'Plans' section of the eLeaP PSP interface. It displays a list of items with user activity and timestamps. The items are:

- Discuss short-term strategies with partners.
- Upload a new blog post to our website.

Activity logs show:

- John Smith updated a weekly item 'Discuss short-term strategies with partners.' on August 16, 2022, at 10:33 AM.
- Ella Jones added an accomplishment 'Discuss short-term strategies with partners.' on August 16, 2022, at 9:54 AM.

The **Accomplishments**, **Challenges**, and **Next Week's Plans** work via a similar logic. Only the **Next Week Plans** have the deadline for the weekly item displayed in the list. You can see how the other weekly items are listed below.

The screenshot shows three sections: 'Accomplishments', 'Challenges', and 'Next Week's Plans'. Each section lists four items with user activity and timestamps.

Accomplishments:

- Discuss short-term strategies with partners.
- Upload a new blog post to our website.
- Order T-shirts for employees.
- Start recording and keeping our meetings.

Challenges:

- Discuss short-term strategies with partners.
- Upload a new blog post to our website.
- Order T-shirts for employees.
- Start recording and keeping our meetings.

Next Week's Plans:

- Discuss short-term strategies with partners. (Deadline: August 26, 2022)
- Upload a new blog post to our website. (Deadline: August 26, 2022)
- Order T-shirts for employees. (Deadline: August 26, 2022)
- Start recording and keeping our meetings. (Deadline: August 26, 2022)

Use the **Weekly Status** system to organize your weekly activity to ensure maximum productivity. The **Top Weekly Performers** list is one to keep an eye on and encourage your users to try to get on that list. The Top Weekly Performers list is available on our organization's [Dashboard](#).

Weekly Status - Permissions

Weekly Item Creation

	View weekly items	Add weekly items	Edit/Delete/Change Status of weekly items
Administrator	<ul style="list-style-type: none">• views all items	<ul style="list-style-type: none">• for themselves• Senior Managers• Managers• Members	<ul style="list-style-type: none">• for themselves• Senior Managers• Managers• Members
Senior Manager	<ul style="list-style-type: none">• items assigned to themselves• items assigned to a user who has a team	<ul style="list-style-type: none">• for themselves• Managers• Members	<ul style="list-style-type: none">• for themselves• Managers• Members
Manager	<ul style="list-style-type: none">• items assigned to themselves• items assigned to a user who is in the same team	<ul style="list-style-type: none">• for themselves• Members	<ul style="list-style-type: none">• for themselves• Members
Member	<ul style="list-style-type: none">• view items that are assigned to themselves.	<ul style="list-style-type: none">• for themselves	<ul style="list-style-type: none">• for themselves

Weekly Items Comments, Timeline, Attachments

	View comments, timeline, attachments	Add comments and attachments
Administrator	<ul style="list-style-type: none">• views all items	<ul style="list-style-type: none">• for their weekly items• Senior Manager's weekly items• Manager's weekly items• Member's weekly items
Senior Manager	<ul style="list-style-type: none">• items assigned to themselves• items assigned to a user who has a team	<ul style="list-style-type: none">• for their weekly items• Manager's weekly items• Member's weekly items
Manager	<ul style="list-style-type: none">• items assigned to themselves	<ul style="list-style-type: none">• for their weekly items• Managed Member's weekly

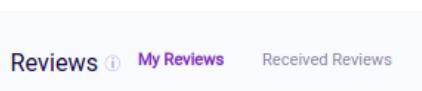
- | | | | |
|---------------|--|-------|------------------------|
| Member | <ul style="list-style-type: none">• items assigned to a user who is in the same team• view items that are assigned to themselves. | items | for their weekly items |
|---------------|--|-------|------------------------|

Only Administrators and Weekly Item creators can edit/delete weekly item's comments.

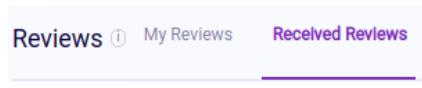
Reviews

The **Reviews** section is for providing and gathering valuable feedback throughout the organization. With our fully customizable **Form Templates**, organizations can design questionnaires to capture insights about their users. The [Form Templates](#) and [Settings -> Modules](#) sections have more detailed descriptions on how to create questionnaire templates and also use them in the Reviews system. The **Reviews** section is divided into two major sections: **My Reviews** and **Received Reviews**. The breakdown of the Reviews section is presented below.

The **My Reviews** tab includes reviews that the user has given to others depending on user role permissions.



The **Received Reviews** tab includes reviews that the current user has received from others.



Export all given reviews in .PDF format by clicking the **Export My Reviews** dropdown. The system will export all reviews the user has given to other users.

Export My Reviews ▾

Note: The Export feature is available only for **Administrators** and **Senior managers**.

Export all received reviews in .PDF format by clicking **Export Received Reviews** dropdown. The system will export all reviews that the user has received from other users.

Export Received Reviews ▾

Note: Export feature is available only for **Administrators** and **Senior**

managers.

Administrators and Senior managers can export individual user reviews. This button appears when we click the individual review card of the user from the **My Reviews** section. **Note:** The Export feature is available only for **Administrators** and **Senior managers**.

If there are no submitted reviews, the export functionality is disabled.

Users can switch between review periods and check reviews recorded in previous periods. The review period start and end dates are also displayed.

In the **My Reviews** section, we have several types of designs that the users will encounter.

Export Review

Reviews cannot be exported because
there are no submitted reviews

Export Received Reviews

July 14, 2022 - September 13, 2022



Review Period

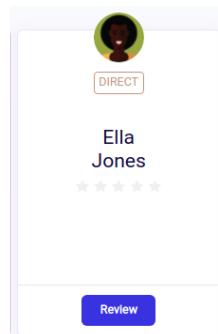


John
Smith

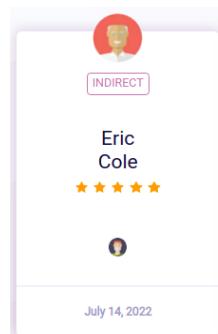
Self Assessment

This type of card belongs to the current user. This card has a purple background. The current can review themselves using the **Self Assessment** option. The self-assessment has the same format as the other reviews.

This is a card for another user who is about to be reviewed. In our example, we are **John Smith**, who is about to give a review to **Ella Jones**. Notice that Ella Jones does not have any reviews as the star rating section is blank. Also, note we don't display any other user avatars on this card, further indicating this user has not received any reviews.



Here's an example of a card showing the user (**Eric Cole**) has already been reviewed by **John Smith**. We display the date of the given review instead of the **Review** button when no review has yet been submitted. As **Eric Cole** already has a review, we see a 5-star rating and the reviewer's (**John Smith**) avatar showing on the card. If the user has multiple reviews, we display the reviewers' avatars as indicated.



The review cards also have labels that indicate their relationship to the user they are about to review. The labels are:

Users of equal user roles or statuses see this label on the review card. For example, if we're logged in as a **Member**, we'll see the "**Peer**" label on the review cards of other **Members**.

PEER

If the difference between the roles of the users is just 1 level (e.g., Admin & Senior Manager or Manager & Member), we see this label on the review card.

DIRECT

If the difference between the roles of the users is more than 1 level (e.g., Admin & Senior Manager or Manager & Member), we see this label on the review card.

INDIRECT

Now, let's move on to the actual reviewing process. As we already mentioned, the **Reviews** section is closely linked to the **Form Templates**, which is why **Surveys** and **Reviews** are similar in structure. Once you click the **Review** button on one of the user cards, you will be presented with the review form, which comes from a pre-created Form Template. To complete the review, fill out the review form, including the Overall Performance Rating (OPR). Note that the OPR requires an explanation of your score to reduce bias in reviews. The **Surveys** section of the user guide has a full description of forms and how to complete them. In terms of structure, the only difference in **Reviews** is presented below:

Overall Performance Rating is a required field that automatically appears in every review form. This field is a simple 5-star rating system with a field for explaining your rating. The review input provided is available much like inputs in Surveys.

Overall Performance Rating *



Eric has become a crucial part of the team very quickly.

You can refer to the [Surveys](#) section of the user guide for a more detailed description of the completed form results. The case below illustrates how to view completed reviews of other users.

At the top of the review page, we see the average Overall Performance Rating of the user based on the individual reviews provided. Below that section, the system lists the individual responses with user avatars, roles, and the dates of review submissions. In this case, we can see that **Lime Turtle** has received reviews from **Pete Sam** and **Harold Klac**.

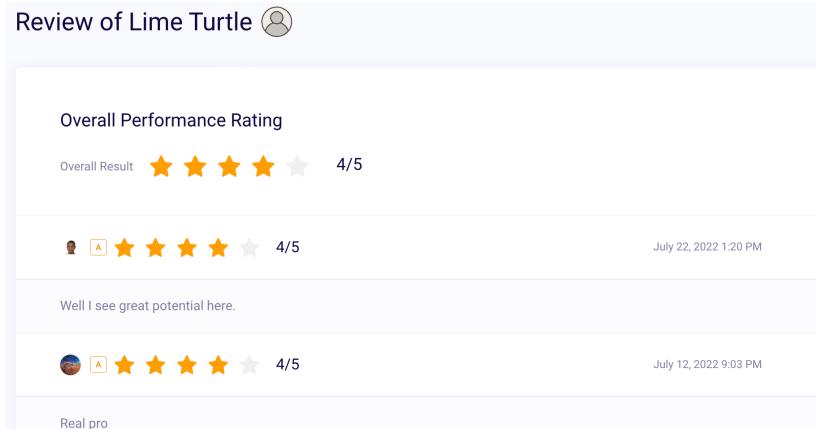
Review of Lime Turtle

Overall Performance Rating

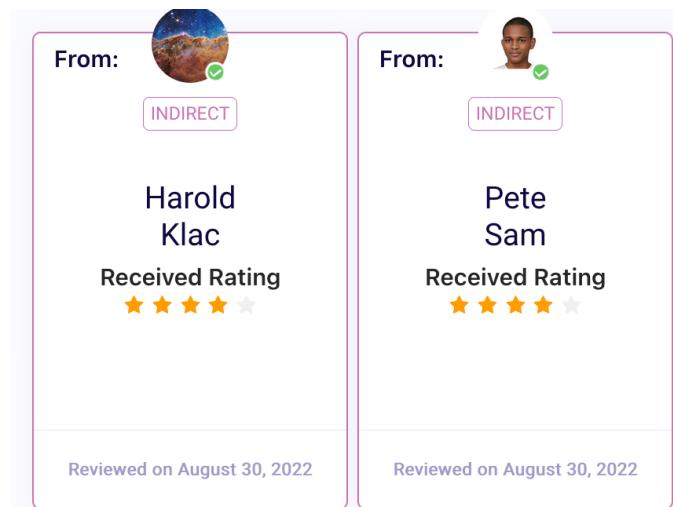
Overall Result 4/5

4/5 July 22, 2022 1:20 PM
Well I see great potential here.

4/5 July 12, 2022 9:03 PM
Real pro



Next, we'll check reviews that we received from other users. We'll enter the **Received Reviews** section to see the individual users given by others to **Eric Cole**.

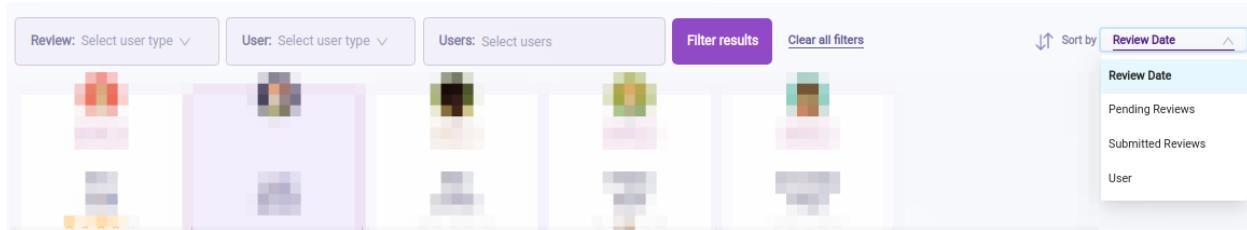


From: INDIRECT
Harold Klac
Received Rating
Reviewed on August 30, 2022

From: INDIRECT
Pete Sam
Received Rating
Reviewed on August 30, 2022

On this page, we can see that **Harold Klac** and **Pete Sam** have submitted reviews for **John Snow**. The cards indicate the date on which the review has been submitted and the **Overall Performance Rating** that the users have given to **John Snow**.

The results of the **Received Reviews** are individual, and they do not show overall results. **Reviews** can be filtered by **review user type (Peer, Direct, Indirect)**, **user role**, and **name**, as well as sorted by **review date, status (pending or submitted)**, and **name** in alphabetical order, both in ascending and descending orders. Click **Filter results** to get the filter results and **Clear all filters** to clear the results of the filter.



Reviews - Permissions

	View Reviews	Perform Reviews
Administrator	<ul style="list-style-type: none">views all users	<ul style="list-style-type: none">perform reviews on all users
Senior Manager	<ul style="list-style-type: none">themselvesall users who have a team	<ul style="list-style-type: none">on themselveson all users who have a team
Manager	<ul style="list-style-type: none">themselvesall users who are in their teams	<ul style="list-style-type: none">on themselveson all users who are in their teams
Member	<ul style="list-style-type: none">themselvesall users who are in their teams	<ul style="list-style-type: none">on themselveson all users who are in their teams

Check-ins

The **Check-ins** system is the perfect place for organizing meetings, assigning team members, and documenting important meeting outcomes. The section allows users to schedule upcoming meetings or document past meetings with accurate records and data. Below we will explain and create Check-ins so you can follow along.

Click **Add New Check-in** to add a new check-in to the system.

Start by adding a name for the **Check-in**. Users can name the meetings however they want. The system has a 64-character limit for the Check-in name. You can also add a description for the Check-in.

Select a **category** from the list of available categories for easier filtering. The categories created by Admins are available in the list. When the user picks a category, a category label is assigned to the Check-in. Only one category can be assigned to a Check-in.

Next, add team members to the Check-in. All added members will be able to access the information in the check-in meeting. They will be notified when they are assigned to the check-in or the check-in details are modified. Inviting users to a Check-in is dependent on user roles.

Users, teams, or organizations can be added to a Check-in. Click on the checkboxes near the user or team names and click the “Add” button below. With the

Organization button, the check-in is assigned to every user in the Organization. Until the switcher is on, user and team checkboxes are disabled for edit. The **Organization** option is available to Admin users only.

To quickly find users on teams in the list, use our filters, which work just like any other filter on our platform.

Meeting Name *
Give the meeting an identifiable name

Select Category
Select a category for the check-in for easier filtering in the form list.

Add a category for this meeting... ▼

Who do you want to invite?

Team: Choose a team User: Select user level ▼ Clear

Users Teams Organization ▼

<input checked="" type="checkbox"/>  John Smith (you)	Administrator
<input checked="" type="checkbox"/>  Eric Cole	Member
<input checked="" type="checkbox"/>  Ella Jones	Senior Manager
<input checked="" type="checkbox"/>  Pablo Gavi	Manager
<input checked="" type="checkbox"/>  Amanda Paul	Member
<input checked="" type="checkbox"/>  Varuj Varujyan	Senior Manager

Add Organization

Invited Member *
Who are you inviting to this meeting?

 Amanda Paul, John Smith, Ella Jones

Select the **date & time** for the check-in. Both past and future dates can be selected. Users can select past dates to record and document previous meetings and store past meeting data.

Before the check-in starts, users can create **talking points**. These are discussion points that might need to be discussed during the meeting. Talking points can be added and modified at any point. We'll discuss the actions that can be performed with **Talking points** later.

Meeting Date & Time *
Add a date and time for the meeting

08/03/2022 16:36:57

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Now

Talking Points
Add agenda items for the meeting

- Start with an icebreaker exercise
- Make sure we're on the same page
- John will introduce annual goals

Write a talking point... Add

After the required information is completed, the user clicks the **Save Check-in** button to save the check-in. Once the check-in is created, the check-in assignees are sent a notification on the assigned check-in and a brief summary of the main talking points. The final look of your check-in list might look something like this:

Dev team 1&1	August 31, 2022 12:08	4
Need guidance on priorities	August 11, 2022 14:08	3
SOP 2662AB	August 9, 2022 18:08	1

When the check-in meeting begins, the assignees can enter the check-in card and start their interaction with the check-in in the meeting area. The check-in details description is presented below:

At the top of the **Check-in details** page, there's general information about the check-in as well as a description, if available. All Check-in data can be exported in .PDF format using the **Export Check-in** button. We indicate both the Check-in creation

[Back to Check-ins](#) Export Check-in

John's reporting meeting
August 10, 2022 17:08 Created by John Smith on July 14, 2022 17:07

3 0

date as well as Check-in start date. The details also include the name of the check-in creator. Below the export button, we have the icons which indicate the total **Talking points**  and **Notes**,  respectively.

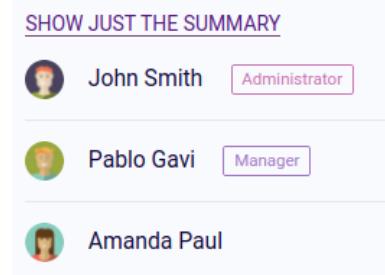
The invited member's section displays details on the assignees to the check-in. This is general information regarding these users and their user roles.

Talking points refer to an agenda or outline of what is to be discussed in the Check-in meeting. You add/edit or delete Talking points as the Check-in creator. Assignees can mark the **Talking points** as discussed. This action can be performed either by individually clicking on the checkboxes near the Talking points or by clicking **Mark all as a discussed** button. Users can edit and delete Talking points anytime. New Talking points using the [Add] input option.

The **New Plans** section of the system is designed to provide next steps planning opportunities. Based on the outcome of the Check-ins, you can add New Plans to be undertaken. Users can also attach files to **New Plans**.

Notes can help the users document any information that can later be used for reference purposes. Notes can be made private using the  button. Private notes can only be seen by the creator of the note. You can also attach files to Notes.

SHOW JUST THE SUMMARY



John Smith Administrator
Pablo Gavi Manager
Amanda Paul

Talking points
Talking points or agenda

Start with an icebreaker exercise
 Make sure we're on the same page
 John will introduce annual goals

Mark all as discussed

Edit Delete

Add a new talking point... Add

New plans
New plans from Check-in

Meet the new team members

Establish the OKRs for Q1

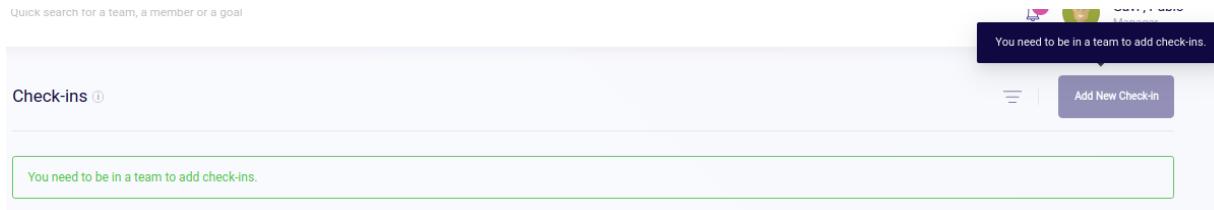
Add a new plan... Add

Notes
Notes from Check-in

Let's add our meeting outcomes into our task board for later reference.

Add a new note... Add

NB: If the user does not belong to a team, they cannot add Check-ins. However, Administrators can add Check-ins without being in a team. Admins cannot add Check-ins in an empty system when there are no other users besides them.



Check-ins can be filtered by **Member name** and **Check-in name** and sorted by **Check-in date and time**, and **Name** in alphabetical order, both in ascending and descending. For filtering by **category**, select a category from the list. Only one category can be selected.

A screenshot of the eLeaP PSP interface showing the 'Check-ins' page. The page includes a header with '1 TOTAL CHECK-INS' and a 'Check-ins' button. Below the header are several filter options: 'Member: Enter member name', 'Name: Enter meeting name', 'Category: Learning' (with a dropdown menu showing 'Learning'), 'Filter results' (button), 'Clear all filters' (button), and 'Sort by Date Time' (button). A list of check-ins is displayed, including 'Meeting with Ella' under the 'Learning' category. The check-in details show it was on August 17, 2022, at 17:08, and includes icons for file sharing and more.

Checkbox Selection

For bulk-deleting the check-ins, just tick the checkboxes near check-in names. Once they are selected,

click the **DELETE SELECTED CHECK-INS** button to delete the selected goals. Click the **RESET SELECTION** button to uncheck all selected checkboxes.

A screenshot of the eLeaP PSP interface showing a list of check-ins. Each check-in has a checkbox to its left. The first two check-ins have their checkboxes checked. The bottom check-in has an unchecked checkbox. At the bottom of the page, there are two buttons: 'DELETE SELECTED CHECK-INS' (highlighted with a purple border) and 'RESET SELECTION'.

Check-ins - Permissions

	View	Add	Edit/Delete
Administrator	<ul style="list-style-type: none"> • all check-ins 	<ul style="list-style-type: none"> • for all users 	<ul style="list-style-type: none"> • all check-ins
Senior Manager	<ul style="list-style-type: none"> • check-ins created by themselves • check-ins of every user who has a team 	<ul style="list-style-type: none"> • for all team members (if the user has a team) 	<ul style="list-style-type: none"> • check-ins created by themselves • created by Managers • check-ins created by Members
Manager	<ul style="list-style-type: none"> • check-ins created by themselves • check-ins of manager's team members • check-ins assigned to the Member 	<ul style="list-style-type: none"> • for all manager's team members (if the user has a team) 	<ul style="list-style-type: none"> • check-ins created by themselves
Member	<ul style="list-style-type: none"> • check-ins created by themselves • check-ins assigned to the Member 	<ul style="list-style-type: none"> • for all team members (if the user has a team) 	<ul style="list-style-type: none"> • check-ins created by themselves

If there are no users in the system yet, Check-ins cannot be added.

Surveys

The **Surveys** section is designed for conducting organization-wide surveys and gathering valuable data. The survey creation process is really simple. The survey system relies on a form template being created in the **Form Template** section. Once that is done, you can create and launch your survey quickly.

To get started with the process of creating a survey, we first need to go to the **Form Templates** section.

Click the  button to start creating your first survey.

Start by adding a **Survey title**. Make sure to select a name that can be easily searched in the system,

Survey Title *

Give the survey an identifiable name

Select a **category** from the list of available categories for easier filtering. The categories created by Admins are available in the list. When the user picks a category, a category label is assigned to the Survey.

Next, add a **Survey description** for more context on what the survey is about. The field is optional, but it can help survey assignees understand its purpose.

After creating your survey name and optional description, select the **Form Template** that will be used in the survey. This is one of the most important steps in the survey creation process because the form template selected decides the structure of the survey. The **Form Templates** must be prepared prior to the survey creation. We've already created the survey that is going to be used here, but you can refer to the [Form Templates](#) section in this document for more details.

Set your **Start and End dates** for the survey. Adding the start and end dates add urgency to the survey respondents and help increase completions. Being able to set the Start and End dates also enables account executives to pre-schedule their survey deployment. Survey assignees are notified of new surveys or edits to the existing surveys.

Assign users, teams, or organization to the survey. As surveys may be organization-wide events, creators can add teams, individual users, or entire organizations to surveys. See the next illustration on how to add users to surveys.

Select Category

Select a category for the survey for easier filtering in the survey list.

Add a category for this survey...

Survey Description

Typically used as an internal description

The survey is going to repeat at the last week of every quarter, so make sure to include your honest opin

Select Prepared Form Template For Your Survey *

Choose the form template you want to use for this survey

Company-wide Quarterly Feedback

Set Survey Start and End Dates *

Set the dates that this survey starts and ends

09/25/2022

→ 09/30/2022

Assign Survey to Users, Teams or entire Organization *

Assign this survey to users, teams or your entire organization

Organization

Assign Teams or Users

Assigning users and teams to surveys is pretty simple. Just click on the checkboxes near the user or team names and click the "Add" button below. With the

Organization  button, the survey is assigned to every user in the Organization. Until the switcher is on, user and team checkboxes are disabled for edit. The **Organization** option is available to Admin users only.

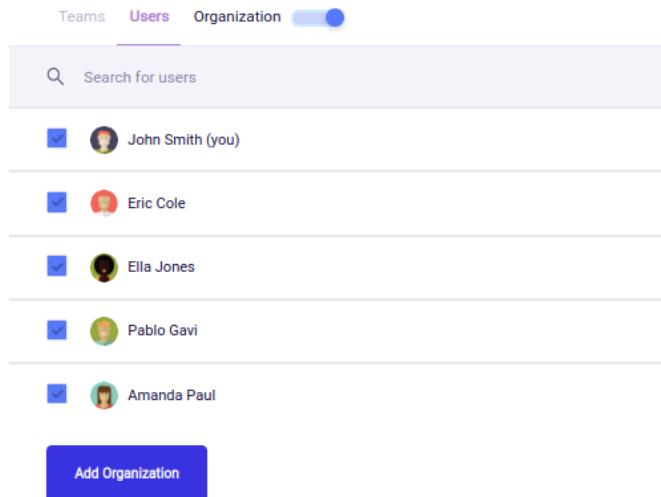
Survey creators can add an option for respondents to submit the survey anonymously. If the switcher is on, respondents will have a similar switcher when they enter the survey and submit the form.

If the users want to edit an existing survey to have an anonymous option, they can only do that if the survey does not have submitted responses yet.

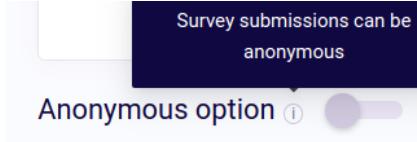
Respondents will see this option available when submitting a survey response.

Users who submitted a survey anonymously will appear with a **blank avatar** and "**Anonymous user**" instead of the name in the survey results.

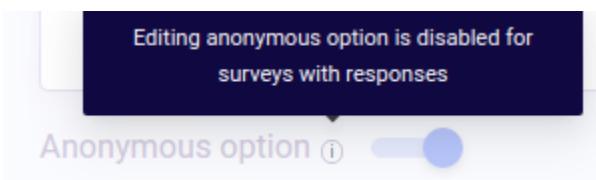
Assign to teams/users



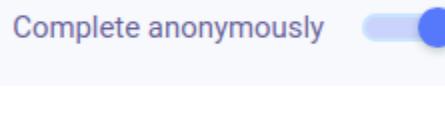
The screenshot shows a list of users under the 'Users' tab. There are five users listed: John Smith (you), Eric Cole, Ella Jones, Pablo Gavi, and Amanda Paul. Each user has a checkbox next to their name. Below the list is a blue button labeled 'Add Organization'.



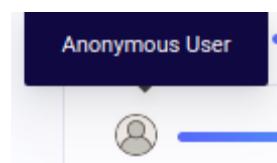
A dark overlay box contains the text "Survey submissions can be anonymous". Below it is a switcher labeled "Anonymous option" with a blue handle.



A dark overlay box contains the text "Editing anonymous option is disabled for surveys with responses". Below it is a switcher labeled "Anonymous option" with a grey handle.



A dark overlay box contains the text "Complete anonymously". Below it is a switcher with a blue handle.

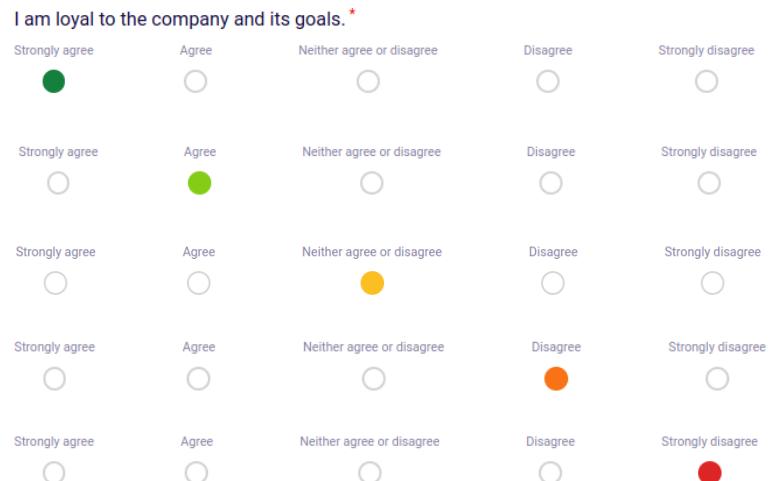


After clicking , the survey is created. The look of the survey card is attached below. Survey information and settings are now visible on the survey card.



Notice that the card has **Overview** and **Complete** buttons. You can start completing the survey so you can view it as any assignee would. Make sure to take a look at the [Form Templates](#), as the whole process of creating the survey form template is described in that section.

This is a field called **Rating**. As you can see, this is a mandatory field. Marking each answer has its color, as visible from the screenshots. We'll mark **Neither agree nor disagree** as an answer for this field.



This is a **Grading** type field. We've previously added an explanation of this field. In this Grading field, however, we're also required to provide an explanation under the star rating. We've given a 5-star rating as an illustration.

How would you grade your manager?*

Select the stars according to the rating.



He has done a great job in engaging new team members.

This is a **Range** type field. As an answer to this question, the assignees must drag the circle to make their selection on the scale.

How many teams are you in?*

Select a number from 0-20.



This is a **Multiple-choice option** type field. The assignee should select one of the answers.

How many direct teammates do you have?*

Make sure to select the correct range.

- 0-5
- 6-10
- 11-20
- 21+

This is a **Multiple selection option** type field. The assignees can select multiple answers, which are recorded.

What are your favorite places in the office?*

Select multiple answers if applicable.

- Kitchen
- Lounge room
- Open space
- Main work area

This is a **Short text-type** field. Assignees can add short text as an answer to this question. The answer is limited to 128 characters.

How would you describe your workplace?

Please write associated words.

A place full of wonderful people full of potential.

This is a **Long text-type** field. Assignees can add longer text as an answer to this question. The answer is limited to 256 characters.

Is there anything that we can improve in Q2?

This field is free of format.

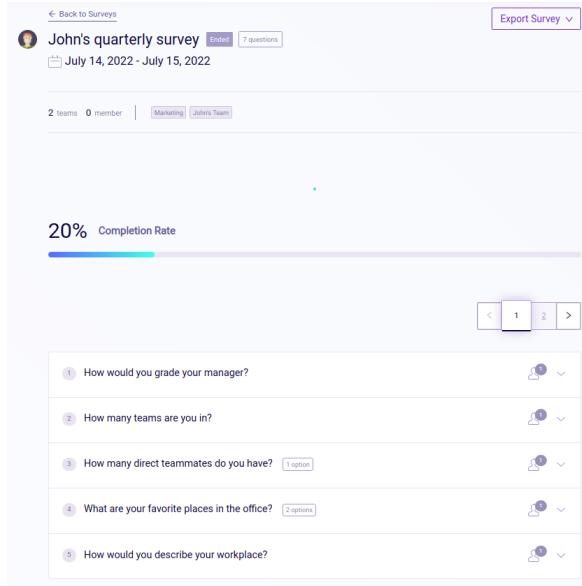
I think we can concentrate on bringing all the teams together, cause they are too isolated and I feel we should get closer together.

The **Overview** button is for the creator of the survey so that they can overview the survey at any point.

The **Survey overview** displays the general information on the survey. If the survey already has some responses, the survey creator can see each survey field and individual answers.

With  the dropdown menu, the survey creators and **Administrators** can download the survey results in **.pdf** and **.csv** formats. This can help in storing visualized historical data and analyzing and sharing survey results.

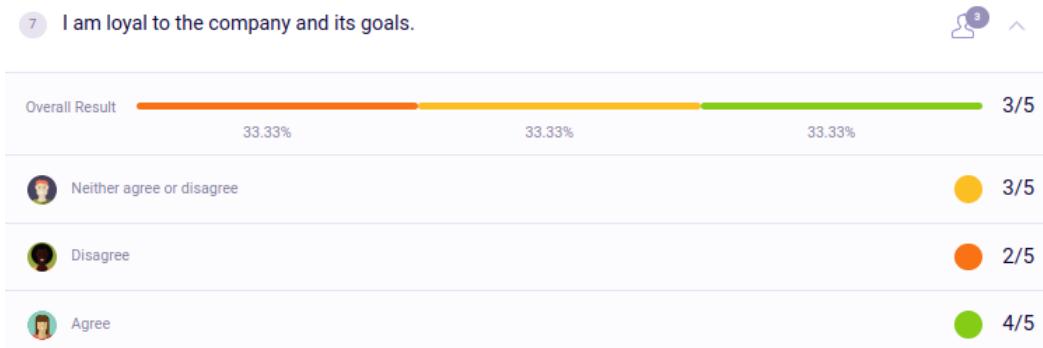
Completion rate shows the percentage of assigned users who completed the survey.



The screenshot shows the 'John's quarterly survey' overview. It includes a completion rate of 20%, a navigation bar with pages 1 and 2, and a list of five survey questions:

- 1 How would you grade your manager? (3 options)
- 2 How many teams are you in? (2 options)
- 3 How many direct teammates do you have? (1 option)
- 4 What are your favorite places in the office? (2 options)
- 5 How would you describe your workplace? (2 options)

The results recorded from previous types of questions are pretty self-explanatory, but the results of the **Rating** type field might need some explanation. As you can see, we've recorded different answers in this field. Each answer has its color and number, which are used here to calculate an average for the whole question. The **Overall results** represents the distribution of answers recorded by users. At the very end of the line, we show the average of all recorded answers, which is 3 out of 5 in our case. It's calculated by taking the average of the 3 answers below. For more information on this type of field, please refer to the [Form Templates](#) section of this document.



The **Surveys** section has filters as well. The table below describes each field of the filter.

Simply search for a survey by name.

Name: Survey name

Filter surveys based on the teams assigned.

Team: Choose a team

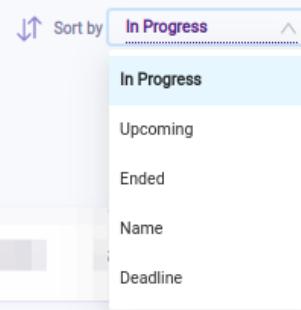
Filter surveys based on the users assigned.

Users: Select users

Filter surveys based on the deadline. The user selects a date and the system brings up the surveys with deadlines up to the selected date.

Deadline: Select deadline

Like in other sections, the surveys can be sorted by their status (**In progress**, **Upcoming**, **Ended**), **Name** in alphabetical order, and **Deadline**, both in ascending and descending order.



Click **Filter results** to get the filtered results and **Clear all filters** to clear the results of the filter.

The circular charts show the completion rates and numbers of surveys grouped according to their statuses.



For filtering by **category**, select a category from the list. Only one category can be selected.

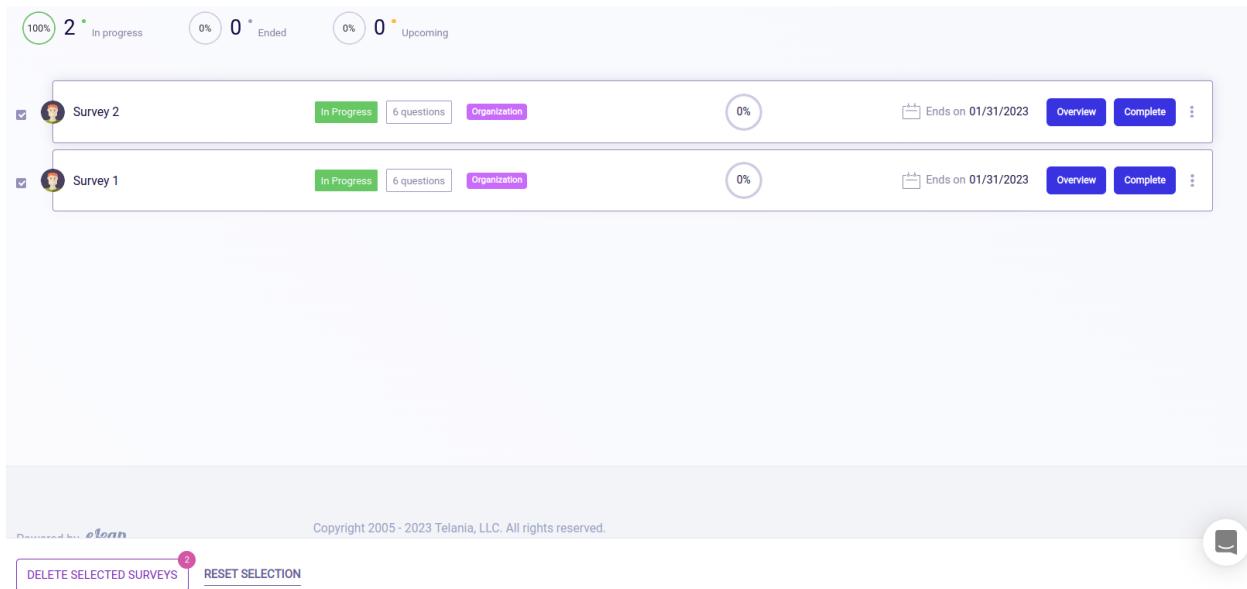
Screenshots illustrating the survey management interface:

- Surveys** page header with 1 TOTAL SURVEYS and Add New Survey button.
- Filtering section with fields: Name, Team, Category, Users, and Deadline. The Category field is set to "Learning". A dropdown menu shows "Learning" selected.
- Completion status summary charts:
 - In progress: 0% (0 surveys)
 - Ended: 100% (1 survey)
 - Upcoming: 0% (0 surveys)
- Survey details card for a survey named "Survey":
 - Status: Ended
 - Questions: 6 questions
 - Participants: 33% (Learning)
 - Ends on: 10/31/2022
 - Created: 10/07/2022 10:17:50

Checkbox selection

For bulk-deleting Surveys, just tick the checkboxes near the Survey cards. Once they are selected, click

the  button to delete the selected surveys. Click the [RESET SELECTION](#) button to uncheck all selected checkboxes.



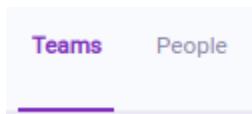
Surveys - Permissions

	View	Add	Edit/Delete
Administrator	<ul style="list-style-type: none"> ● all surveys 	<ul style="list-style-type: none"> ● for all users 	<ul style="list-style-type: none"> ● all surveys
Senior Manager	<ul style="list-style-type: none"> ● surveys created by themselves ● surveys assigned to them ● surveys created by Managers ● surveys created by Members 	<ul style="list-style-type: none"> ● for all users who have a team 	<ul style="list-style-type: none"> ● surveys created by themselves ● created by Managers ● check-ins created by Members
Manager	<ul style="list-style-type: none"> ● surveys created by themselves ● surveys assigned to them 	<ul style="list-style-type: none"> ● for all users who are in the same team 	<ul style="list-style-type: none"> ● surveys created by themselves

Member	• surveys assigned to them	• No Permission	• No Permission
---------------	----------------------------	-----------------	-----------------

Teams & People

The **Teams & People** section enables organizations to create profiles for their team members in the system and also to have quick access to their information. The section is divided into two subsections: **Teams** and **People**. We'll discuss the process of creating **Teams** and **People** and their usage in the whole system. As we've already mentioned in the [eLeaP PSP User Roles](#) section, the **Teams & People** section is available for **Senior Managers** and **Administrators**. Thus, only these roles can create and manage teams and users.



Teams

The process of creating a **team** is really simple. Users who have permission to create teams simply enter the name of the team and choose a team color. Choosing a team color is important because it'll help you easily recognize users that are on the same team.

In our example, we successfully created a **Marketing** team that has a light green color. Later on, you'll see that the team members of the marketing team have a badge in this color with the name **Marketing**.

Add a new team

Team Name *

Team Color *

Add Team



The team gets created instantly and automatically assigns the creator to the team. In our example, John has created the team. The team card features brief, useful information about the team.

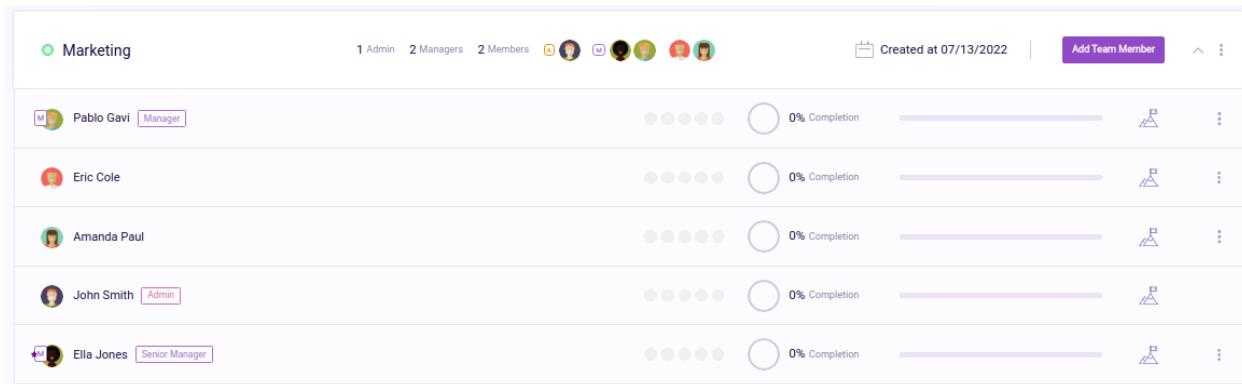
The name and the color of the team  Marketing

The number of users in every user role category (**Managers** and **Senior Managers** are grouped into Managers on the team card).

The date on which the team was created.  Created at 07/13/2022

Some quick actions with the team like **Add Team Member**, a drop-down menu that opens the data on individual team members, and an  for edit and delete functionality.

Here's what an opened drop-down menu looks like.



Member	Role	Completion (%)	Action
Pablo Gavi	Manager	0%	
Eric Cole		0%	
Amanda Paul		0%	
John Smith	Admin	0%	
Ella Jones	Senior Manager	0%	

You can always search for a team from the filters that exist on every page. Click  to get the filter results and  to clear the results of the filter.



The **Teams** section describes how the users can be grouped into teams. Now, let's discuss the creation process for individual users.

People

The **People** section is where users are created. Adding users requires more information compared to creating a team. Clicking the  button opens a window where we must input all the necessary information for adding a new user to the system.

Add the **First Name** of the new user. The field is required.

Add the **Last Name** of the new user. The field is required.

Add the **Email** of the new user. It is important to enter a valid email address because the activation and the first login of the account must be done from the email address. The field is required.

Add the **Role** of the new user. This will decide the permissions of the user that you're adding. The field is required.

Note: Senior Managers can only add users of lower roles (e.g., Senior Managers can only add Managers and Members)

Add the new user to a **Team**. This field is optional because you can add the user to a team at any point.

On the right side of the window, we see the **Custom fields** that we added previously from the Settings section. These fields accept any info, which can help the organizations store more data on their users.

Add a New User

First Name *

Last Name *

Email *

Role *

Team

Marketing

Add User

Company Fields

Relatives

Linda Cole (sister)

Military Background

N/A

Medical ID

ID432-3942

After entering all the required information, the new Member user **Eric Cole** was successfully added to the system. Besides the main flow of adding users, the website has an easier way to import multiple users at the same time. Clicking  **BULK IMPORT** the button in **People** opens a window that instructs the users on how to proceed.

Import Users

[Click here](#) downloads a spreadsheet file in Excel format that contains all the fields necessary for importing new users to your eLeaP PSP company.

To import users into your account, [Click here](#) to download our easy to use template (Excel forma

Complete and save this template, then click "upload batch file" to import your users.

Your Users will immediately be sent their login information via email. Please make sure they have whitelisted office@eleapsoftware.com

 [Upload batch file](#) Update info for existing users from the list

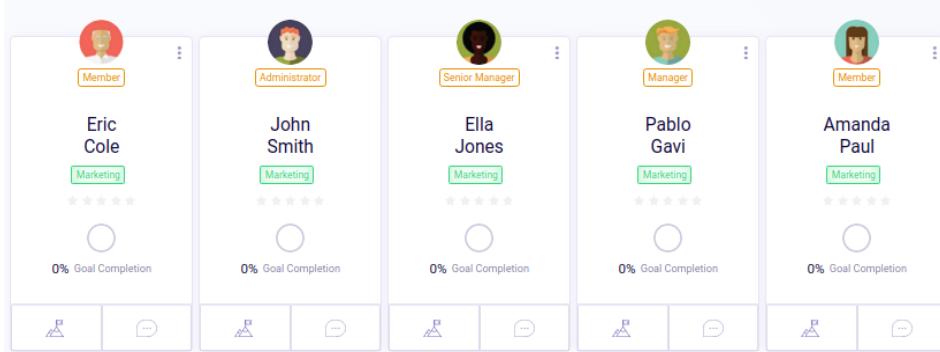
The fields in the file are pretty simple. Administrators can just input all the information and import all users to the system at once. The "**Is Administrator**" field determines whether the user you want to add is an Admin or not. If you put 1, the user on that row will be created as an Admin. All users with a "0" value in the **E Column** will be added as **Members**. Check the [eLeaP PSP User Roles](#) section of this document for more info on user roles.

	A	B	C	D	E	F
1	First Name	Last Name	Middle Name	Email	Is Administrator	To make User an Administrator, change to 1
2	John	Smith		johnsmith@mail.com	1	
3	Ella	Jones		ellajones@mail.com	0	
4	Pablo	Gavi		pablogavi@mail.com	0	
5	Amanda	Paul		amandapaul@mail.com	0	
6	Eric	Cole		ericcole@mail.com	0	

After all the information is in the file, save your changes and upload the same file by clicking on the **Upload batch file** button. If you want to update some information regarding the same users, check the checkbox on the right, and the users who have matching emails in the system and in the file will have their info updated.

 [Upload batch file](#) Update info for existing users from the list

We have added a few other users using the **Bulk import** feature.



Users have their own profile section, which contains all their activity and associated data in one convenient and easy-to-access area. The sub-tabs include Goals, Weekly Status, Reviews, Activity, and About. The table below includes a detailed description of each sub-tab in the user profile section.

The **Goals** sub-tab provides insight into the progress of the Goals that Eric is assigned. If available, individual **Goals** can easily be accessed by clicking on the goals in this tab. You can refer to the Goals section in this document for more details.

The **Weekly Status** tab includes the weekly status items of the user. **Administrators and Senior Managers** can add weekly items for the user directly from this section. The main **Weekly Status** section description has more details on its functionality.

Eric Cole

Goals Weekly Status Reviews Activity About

100% 1 * On Track 0% 0 * At Risk 0% 0 * Off Track 0% 0 * Exceeded 0% 0 * Completed

Goals in progress 1

Eric's onboarding 50% On Track Less than 24 hours

Eric Cole

Goals Weekly Status Reviews Activity About

Status for Week

Happiness Score
0/5

The **Reviews** tab displays reviews that have been given to the owner of the profile. In our example, Lime Turtle received reviews from 3 users. The main Reviews section of this document has more details.

The screenshot shows the 'Reviews' tab selected in the top navigation bar. It displays three reviews from different users:

- User 1:** Overall Performance Rating: 4/5. Review: "Well I see great potential here." (July 12, 2022, 9:03 PM)
- User 2:** Overall Result: 4/5. Review: "Ok" (September 1, 2022, 9:03 PM)
- User 3:** Overall Result: 4/5. Review: "Well I see great potential here." (July 12, 2022, 1:20 PM)

The **Activity** tab describes the individual activity of the user. Any action performed by the user is recorded here in the profile. The main Audit Trail section also provides data on user activity and more.

The screenshot shows the 'Activity' tab selected in the top navigation bar. It lists several actions taken by the user:

- Added a team Marketing member (July 13, 2022, 5:57 PM)
- Added a team Marketing (July 13, 2022, 5:20 PM)
- Completed a survey Q2 Survey (July 13, 2022, 12:54 PM)
- Created a survey Q2 Survey (July 13, 2022, 12:53 PM)
- Updated a module surveys (July 13, 2022, 12:53 PM)

The **About** tab includes general information on the user, including any associated teams and access level.

The screenshot shows the 'About' tab selected in the top navigation bar. It displays the following information:

User Details:
Name: Lime Turtle
Email Address: telania+jss2t222s4@gmail.com

Additional Details:
Access Level: MEMBER
Team: S866

The **Set password** button enables setting a new password for users in case they have some issues with their older password.

Set New Password

Clicking the **Set password** button opens a window for setting a new password. Create a new password for the selected user, type the same password in **Repeat Password** field, and the password will automatically update. Next time the user logs in, they have to use the new password. Communicating the new password to the user is not available inside the system, so it can be done outside eLeaP PSP.

Set New Password



To set a new password for **Ella Jones**, complete the form below. You need to communicate this new password to **Ella Jones**

New Password *

Repeat Password *

Set Password

Resend email access button performs the same action as during user creation. It will resend the email access to the user once again.

The previous password of the user will be reset after this action. That is why Admins will receive a warning inside the browser with the content on the right.

Important: Set new Password and Resend email access features are only available to the Administrator role.

Resend Email Access

usermanual.2leapappdev.com says

This will void previous password. Continue?

Cancel

OK



Hello!

You are receiving this email because we received a password reset request for your account.

Reset Password

This password reset link will expire in 60 minutes.

If you did not request a password reset, no further action is required.

The users can be filtered according to **Team**, **User Role**, **Name**, or **Active/Inactive** status. Users can also be sorted according to **Date Created**, **Completion Rate (Goal)**, **User Name** (alphabetical order both ascending and descending), and **Active** or **Inactive** status. Click **Filter results** to get the filter results and **Clear all filters** to clear the results of the filter.

A screenshot of the eLeaP PSP user interface. At the top, there are three input fields: 'Team: Choose a team', 'User Type: Select user type', and 'Name: Search user by name'. To the right of these is a purple button labeled 'Filter results' and a link 'Clear all filters'. Further right is a 'Sort by' dropdown menu set to 'Date Created', with other options 'Completion Rate' and 'User' available. Below the header is a grid of user cards, each with a small profile picture and some text. The cards are partially visible, showing only their tops.

Checkbox Selection

“Teams”

For deleting multiple teams, check the checkboxes near team cards. Once they are selected, click the

DELETE SELECTED TEAMS

button to delete the selected teams. Click the **RESET SELECTION** button to uncheck all selected checkboxes.

A screenshot of the 'Teams & People' section. At the top, there are tabs for 'Teams' (which is selected), 'People', and 'Deleted'. On the right, there are buttons for 'Add New Team' and '2 TOTAL TEAMS'. Below this is a table with two rows. Each row represents a team: 'Sales' and 'Manager'. Each team card has a checkbox to its left, which is checked for both. To the right of each card are statistics ('1 Admin', '2 Managers', '0 Member') and a group of small user icons. Further right are a date ('January 17, 2023'), a 'Add Team Member' button, and a more options button. At the bottom of the table are buttons for 'DELETE SELECTED TEAMS' (with a count of 2) and 'RESET SELECTION'.

People section

Checkbox selection in this section allows for performing multiple actions with selected users. The action bar below includes some additional buttons compared to other sections. Here are the actions that we can perform with selected users.

DELETE SELECTED PEOPLE

Delete the selected users.

DEACTIVATE SELECTED PEOPLE

Deactivate the selected users.

ACTIVATE SELECTED PEOPLE

Activate the selected users.

RESET SELECTION

Uncheck all selected users.

We're familiar with all the actions, cause they can be performed with individual user cards as well.

The screenshot shows the 'People' section of the eLeaP PSP interface. At the top, there are navigation tabs: 'Teams & People' (with a question mark icon), 'Teams', 'People' (which is the active tab), and 'Deleted'. To the right of the tabs are buttons for '7 TOTAL USERS', 'BULK IMPORT', and 'Add New User'. Below the tabs is a search bar with placeholder text 'Search for people...'. The main area displays a grid of seven user profiles. Each profile card includes a checkbox for selection, the user's name, their title (e.g., 'Senior Manager', 'Manager', 'Member', 'Administrator'), a small profile picture, a 5-star rating icon, a 'Goal Completion' progress bar (all at 0%), and three small icons at the bottom (a person, a document, and a gear). Below the grid, the Telania logo and copyright information ('Copyright 2005 - 2023 Telania, LLC. All rights reserved.') are visible. At the very bottom, there is a horizontal bar with four buttons: 'DELETE SELECTED PEOPLE' (with a red circle containing the number 5), 'DEACTIVATE SELECTED PEOPLE', 'ACTIVATE SELECTED PEOPLE', and 'RESET SELECTION'.

Teams & People - Permissions

Teams creation permissions

	View	Add	Edit/Delete
Administrator	• all teams		• teams created by themselves • teams created by Senior Managers • teams created by Managers
Senior Manager	• all teams	All roles can add teams	• teams created by themselves • teams created by Managers
Manager	• their teams		• teams created by themselves
Member	• No Permission	• No permission	• No permission

Adding users to existing teams permissions

	Add
Administrator	• teams created by themselves • teams created by Senior Managers • teams created by Managers
Senior Manager	• teams created by themselves • teams created by Managers
Manager	• teams created by themselves
Member	• No permission

People creation permissions

	View	Add	Edit/Delete
Administrator	• all users	• can add Admins • can add Senior	• can edit/delete Admins • can edit/delete Senior Managers

		Managers	<ul style="list-style-type: none">• can edit/delete Managers• can edit/delete Members
Senior Manager	<ul style="list-style-type: none">• all users	<ul style="list-style-type: none">• can add Managers• can add Members	<ul style="list-style-type: none">• can edit/delete Managers• can edit/delete Members
Manager	<ul style="list-style-type: none">• their users	<ul style="list-style-type: none">• can add Members	<ul style="list-style-type: none">• can edit/delete Members
Member	<ul style="list-style-type: none">• No Permission	<ul style="list-style-type: none">• No permission	<ul style="list-style-type: none">• No permission

People Activity permissions

View

Administrator	<ul style="list-style-type: none">• activity of themselves/Admins• activity of Senior Managers• activity of Managers• activity of Members
Senior Manager	<ul style="list-style-type: none">• activity of themselves• activity of Managers• activity of Members
Manager	<ul style="list-style-type: none">• activity of themselves• activity of Members
Member	<ul style="list-style-type: none">• No Permission

Form Templates

Form Templates is the section where Administrators and Senior Managers can create forms that can be used in [Surveys](#) and [Reviews](#). Forms can be used unlimited times and provide great flexibility for creating questionnaire templates of varying complexity. New accounts won't show any Form Templates, as illustrated below:

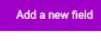
The screenshot shows a web-based application interface for managing form templates. At the top, there is a header bar with the title "Form Templates" and a "Add New Form" button. Below the header, a message box states "No form templates available." The main content area is currently empty, indicating that no forms have been created yet.

Clicking the  button opens a separate page where the form details and fields are created. Here's the template creation process in a step-by-step format.

The process of adding a new form starts with the **template name**. Choose an appropriate and memorable name because the template will be easier to find later when the template list gets larger. You can use the filtering options to easily find your form templates.

Select a **category** from the list of available categories for easier filtering. The categories created by Admins are available in the list. When the user picks a category, a category label is assigned to the Form Template. Only one category can be assigned to a form.

The template **description** provides important additional information to users as to what the template is about. This is an optional field that provides the opportunity to add extra info if needed.

After entering the template name and description, it's time to add template fields to the form. The  button opens a section for filling out field-related information and selecting the type of field we want to create.

Template Name *

Give the template an identifiable name

Add a name for this template...

Select Category

Select a category for the form template for easier filtering in the form list.

Add a category for this template... ▾

Template Description

Typically used as an internal description

Add a description for this template

Template Fields *

Add the fields you need for this form.

Add a new field

Label Text is the question field

Description is an optional explanation of the question field

Field Type is for selecting the question type (see below)

Allow Explanation enables extra space so that the users can fill in the explanation of the choice they made.

Mandatory field enables you to make the field required.

Clicking the **Field Type** dropdown opens a selection of options to choose from. The table below describes how each field type functions and what input they might require.

Add a New Field

Label Text *

Description Text

Field Type *

Allow explanation i

Mandatory i

Save Field

Rating
Rating
Grading
Range
Single choice group
Multi-choice group
Short text
Long text

In the examples below, we'll create a **Form Template** from scratch to demonstrate what each field does. The illustration on the left includes the field name and description, and the right side includes sub-settings of fields that need more configuration.

The **Rating** type field is Likert scale type field, which allows users to mark down their level of agreement with the statement described in the **Label text**. The numbers corresponding to every degree are later used to calculate average scores for questions.

Label Text *

Description Text

Field Type *

Allow explanation i

Mandatory i

Rating

Rating field type is a simple 5-point Likert scale with values:

1. Strongly disagree
2. Disagree
3. Neither agree or disagree
4. Agree
5. Strongly agree

The **Grading** field type creates a question that asks the users to input a grade. The users can choose between Star and Dot formats. Grade points can be customized.

Label Text *

Description Text

Field Type *

Allow explanation (i)

Mandatory (i)

Grading options

Please add grading type and points system

Which grading type you need?

Stars Dots

How many points of grading you need in system?

5

The **Range** field provides an option for users to fill in a number, ranging from 0 to the max number set.

Label Text *

Description Text

Field Type *

Allow explanation (i)

Mandatory (i)

Range options

Please add a max numbers for range bar, the min number is 0. All added numbers will be located between the max number and 0.

Min number: 0

Max number: 20

20

The **Single choice group** field type accepts a single answer from the answer options provided.

Label Text *

Description Text

Field Type *

Allow explanation (i)

Mandatory (i)

Single choice group options

Please add your options for the Single choice group

0-5 X

6-10 X

11-20 X

21+ X

Write an option name...

Add

The **Multi-choice group** field type accepts the selection of multiple answers if necessary. This is also known as the checkbox question type.

Label Text *

What are your favorite places in the office?

Description Text

Select multiple answers if applicable.

Field Type *

Multi-choice group

Allow explanation ⓘ

Mandatory ⓘ

Multi choice group options

Please add your options for the Multi choice group

Kitchen

Lounge room

Open space

Main work area

Write an option name...

The **Short text** accepts short text in the field as the answer. There are no extra settings for this field as the answer is in free format. Also known as a single textbox type field.

Label Text *

How would you describe your workplace?

Description Text

Please write associated words.

Field Type *

Short text

Allow explanation ⓘ

Mandatory ⓘ

Long text accepts longer text in the field as the answer. There are no extra settings for this field as the answer is free of format. Also known as a comment box-type field.

Label Text *

Is there anything that we can improve in Q2?

Description Text

This field is free of format.

Field Type *

Long text

Allow explanation ⓘ

Mandatory ⓘ

When we're done setting up the fields for the form template, we'll get the list of all fields with appropriate labels. You can refer to the table above if you have any questions about how the fields were created. Don't forget to click **Save Form Template** to save your work. **Administrators** can edit/delete the fields at any point. The section also has a duplication feature, so you can quickly create new fields from the existing ones.

How would you grade your manager?	mandatory	Grading	include explanation
How many teams are you in?	mandatory	Range	
How many direct teammates do you have?	mandatory	Single choice options	
What are your favorite places in the office?	mandatory	Multi-choice options	
How would you describe your workplace?	Short Text		
Is there anything that we can improve in Q2?	Long Text		

That's it! We've successfully created our Form Template. Note that the created Form Templates can be used in the **Surveys** and **Reviews** sections.

Important: Form Templates fields cannot be edited/deleted when they are being used in **Surveys** or **Reviews** which have responses. If there are no responses, the fields can still be edited.

Form Templates can be filtered by their **creators** and template **name** and sorted by **created date** and **name** in alphabetical order, both in ascending and descending orders. Click **Filter results** to get the filter results and **Clear all filters** to clear the results of the filter. For filtering by **category**, select a category from the list. Only one category can be selected.

Form Templates - Permissions

	View	Add	Edit/Delete
Administrator	• All templates	• Can add form templates	• form templates/fields created by themselves • form templates/fields created by Senior manager or Manager.
Senior Manager	• All templates	• Can add form templates	• form templates/fields created by themselves • form templates/fields created by a Manager.
Manager	• All templates	• Can add form templates	• form templates/fields created by themselves
Member	• No permission	• No permission	• No permission

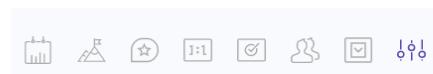
Administrators, Senior Managers, and Managers can all duplicate the form templates that they see in the section.

Audit Trail

The **Audit Trail** is the section of the system that logs the activity of various individual users across the whole platform. Any activity that users perform is recorded here and can be easily found and accessed via filtering. The **Audit Trail** stores the data for the last three months. Audit trail data older than three months ago is automatically deleted.

As illustrated below, clicking the  icon will open a set of filters for **Administrators**.

The icons represent the sections on the website. Clicking each of them will filter the activity based on the section it was performed in.



Note: The icons on the side menu can be used for reference until you get used to the icon-section relation.

The field near the icons is for entering **user names** or **emails**. Administrators can use the combination of section activity and users to find more specific activity

User name: John Smith	Filter results	Clear all filters
-----------------------	----------------	-----------------------------------

data. [Clear all filters](#) button will reset all the filters and show all the activity data for the last three months.

The Audit Trail data can be sorted according to the created date, both in **Descending** and **Ascending** orders.

Sort by Date Created

In the scenario below, we searched for John Smith's activity in the Settings section. Note that John's activity is sorted from the latest to the earliest. Action logs also include the user's IP address.

A screenshot of the Audit Trail section. At the top, there are several icons for filtering: a bar chart, a map, a star, a person, a gear, a document, and a magnifying glass. Below these is a search bar with the placeholder "User: John" and a purple "Filter results" button. To the right of the search bar is a "Clear all filters" button. Further right is a sorting dropdown set to "Sort by Date Created". The main area displays a list of activity logs for "John Smith". Each log entry includes the user's profile picture, the action performed, a brief description, the date and time of the event, and the IP address. The logs show various actions related to goal creation, update, and deletion across different months.

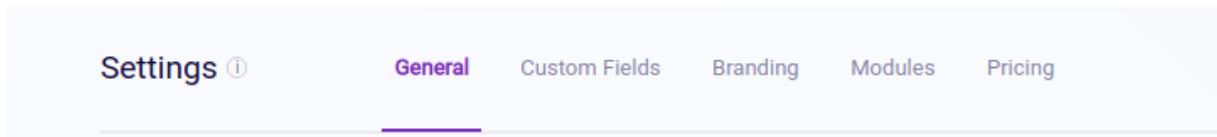
User	Action	Description	Date	IP
John Smith	Administrator	John Smith has logged in	October 11, 2022 11:39 AM	IP: 109.75.38.12
John Smith	Administrator	John Smith has logged out	October 10, 2022 5:33 PM	IP: 109.75.38.12
John Smith	Created a goal	February Overview	October 10, 2022 3:28 PM	IP: 109.75.38.12
John Smith	Created a goal	December Overview	October 10, 2022 3:26 PM	IP: 109.75.38.12
John Smith	Updated a goal	January Overview	October 10, 2022 3:25 PM	IP: 109.75.38.12
John Smith	Created a goal	January Overview	October 10, 2022 3:25 PM	IP: 109.75.38.12
John Smith	Deleted the goal	Admin Goal	October 10, 2022 3:24 PM	IP: 109.75.38.12
John Smith	Deleted the goal	Admin and Senior Manager Goal	October 10, 2022 3:24 PM	IP: 109.75.38.12

Audit Trail - Permissions

The Audit Trail section is available only to Administrators. Users of other roles will not see this section.

Settings

Settings section is only available to **Administrator** level users. The Settings area allows organization admins to customize their users' experiences on the platform. Settings are how you manage the main content and behavior of your account. The section is divided into five subsections, illustrated below.



The **General** subsection includes the customization of settings that are universal for your account and controls the general behavior of the system.

General

The **Custom fields** give Administrators and Senior Managers an option to add additional data fields. With the use of **Custom fields**, Admins and Senior Managers can create, store and manage organization-specific data fields for users. Find more useful info on Custom fields in the [Teams & People](#) section description.

Custom Fields

Organization Administrators can add their organization logo in the **Branding** section. Any changes to the organization logo will change on the [Login](#) page and the top of the [Side menu](#). Note that the logo background can be toggled from light to dark mode.

Branding

Modules enable the Administrators to turn on/off modules like Weekly Status, Goals, Reviews, Check-ins, and Surveys. This is an option for Administrators who may feel they need to disable some modules.

Modules

The **Pricing** subsection enables Administrators to upgrade/downgrade the eLeaP PSP package. Note that the selected package plan determines what modules are available to the users.

Pricing

Next, we'll go into the details of each sub-section.

General

The **General Settings** area contains account-wide settings. The left side of the illustration below lists the current settings.

General Settings

These general settings affect your organization's account. Complete the settings and click the [Save General Settings] button to finalize your settings.

Current Settings

Interface Language
English

Date Format
MM/DD/YYYY

Default Timezone
US/Eastern (GMT-05:00)

Logout users after
120 minutes

Interface Language
English

Date format
MM/DD/YYYY

Default Timezone
US/Eastern (GMT-05:00)

Logout users after
120 minutes

Save General Settings

Changes the **Interface Language**. Additional languages will be deployed soon. The current language is English.

Changing the **Date Format** will impact your entire account. Dates written in text form will remain as is. However, dates in number format will update accordingly. Click the drop-down to select your account date format.

Select the dropdown to select your organization's preferred **Default Timezone** for the whole system. As the Settings configure the experience of the platform as a whole, the timezone can reflect any changes here.

Interface Language ⓘ

English

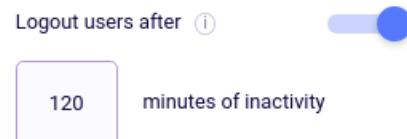
Date format ⓘ

MM/DD/YYYY

Default Timezone ⓘ

US/Eastern (GMT-05:00)

The auto log-out feature is a safety tool to prevent users from staying logged in ad infinitum. Administrators can enter a time limit, and the users will be logged out after the selected minutes of inactivity. The feature can be toggled on and off.



Custom Fields

Custom Fields provide organizations with additional user data fields. Custom fields help organizations store more data on users so that they are not limited to the fields provided by default. For example, when the **Administrator** adds a 'Medical ID' custom field, the new field will appear among the fields in the **Add/Edit user modal** (see the illustration below). This applies to the other custom fields, 'Relatives' and 'Military Background' fields. The Administrators can add as many Custom fields as they want.

In addition to having extra fields for user data, Custom fields are used in the custom **Smart Assigning** feature, which is described in detail in the upcoming section.

Custom Fields
Create custom company fields for easy filtering and keeping extra information on users

Custom fields input

Add custom field **Add**

Relatives

Military Background

Medical ID

Add a New User

First Name *

Last Name *

Email *

Role *

Company Fields

Relatives

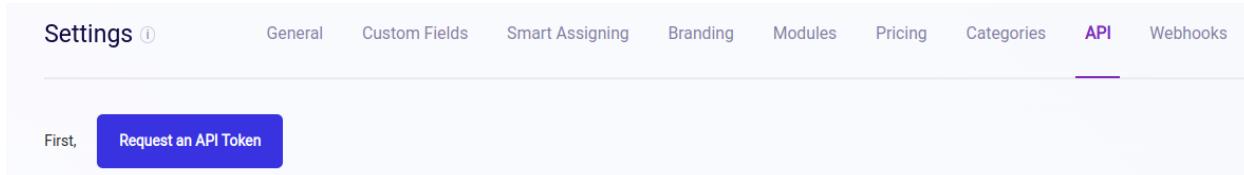
Military Background

Medical ID

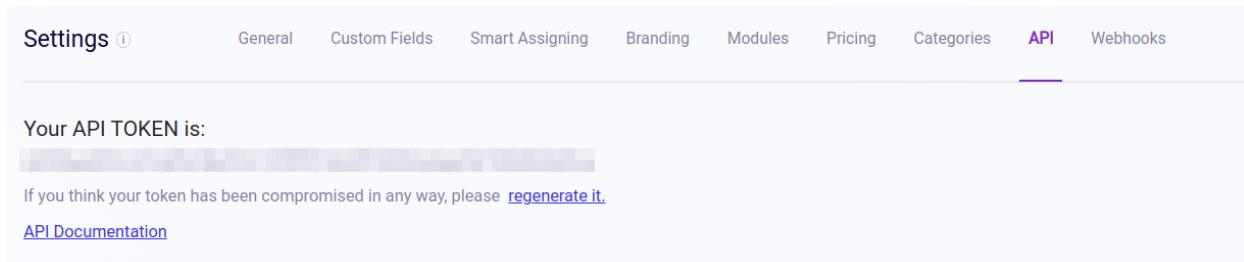
Open API

When the API service is activated for the organization to use, a new section **API** appears in the Company **Settings**. API services enable customers to send a request to an API endpoint, and a response will then be sent back to you.

Firstly, the company Admins have to manually request an API token, which will be used to access the endpoints of the application. To get the API token, simply click on the [Request an API Token](#) button.



After clicking the button, the interface changes, and the API token for your organization instantly appears. The blurred area in the screenshot is where the token will appear. Just copy and paste the token, and you're ready to go. If you fill that the API token you received has been compromised, click on the [regenerate it](#) button, and the system will instantly generate a new token.



Detailed instructions on how to use the API service are described in the [API Documentation](#) link.

Smart Assigning

Assigning users to items across the system can become time-consuming, especially if there is a large number of users in your organization. In this situation, the **Smart Assigning** feature will come to help. **Smart Assigning** allows company Administrators to assign users to items automatically based on values in their respective **Custom fields**. Be sure to read more about [Custom fields](#) if haven't done so already. The assigning automation in our system is called **Smart Assigning Rules**. Let's start creating our first Smart Assigning Rule.

The first step is to have a couple of users who have the same value in their custom fields. As you can see in the screenshots below, both **John** and **Pablo** have the "Yes" value in their "Military Background" custom field.

The figure consists of three side-by-side screenshots of a user editing interface. The left screenshot shows a user with 'First Name' as 'John', 'Last Name' as 'Smith', 'Email' as 'johnsmith@apm.com', 'Role' as 'Administrator', and 'Team' as 'Sales'. The middle screenshot shows a user with 'First Name' as 'Pablo', 'Last Name' as 'Gavi', 'Email' as 'pablogavi@apm.com', 'Role' as 'Manager', and 'Team' as 'Manager, Sales'. The right screenshot shows a user with 'First Name' as 'Pablo', 'Last Name' as 'Gavi', 'Email' as 'pablogavi@apm.com', 'Role' as 'Manager', and 'Team' as 'Manager, Sales'. All screenshots include a 'Save' button at the bottom.

Branding

The Branding sub-tab enables organizations to upload their own logo to customize their PSP instance. Please note that the logo uploaded here will appear on your login page and in the application (top left menu) area. In addition, we provide an option to select your logo background color scheme. Light-colored logos look best on a dark background. Dark logos look best on a light background, so select your background color accordingly. Feel free to reach out to eLeaP if you need help figuring out the best logo options.

Gamification

Want to add a little fun to the platform usage? Gamification adds a game component and a bit of a friendly “competition” inside the organization. As users perform certain activities inside the system, they get rewarded with Gamification points, which can help determine the most active users. Let’s go through the settings to see how we can configure Gamification for your users.

Each organization has its own Gamifications settings, and it can be fully customized to meet the company's needs.

As you can see, all the switches are turned on by default. We'll look at what actions they perform and how the user interface changes.

The screenshot shows the Gamification settings page. At the top is a trophy icon. Below it is the heading "Gamification" with the subtext: "You can choose to encourage your user's engagement by activating the gamification". There are three sections with icons and descriptions: "Engage users with achievement points" (trophy icon), "Offer badges to designate proficiency" (trophy icon), and "A little competition can be exciting" (trophy icon). Each section has a link: "See how points are awarded", "See badges", and "See leaderboard example". To the right of these sections are three toggle switches labeled "Activate gamification", "Show leaderboard", and "Use badges", all of which are turned on (blue).

Once we turn off the **Activate Gamification** switch, the whole gamification feature is deactivated for all users. See the trophy icon on the top right disappear when we switch off **Activate Gamification**.

This screenshot shows the same Gamification settings page as above, but with a key difference: the "Activate gamification" toggle switch is now turned off (gray). As a result, the trophy icon that was previously in the top right corner of the main content area has disappeared. The rest of the interface remains the same, including the other two active toggle switches and their respective sections.

The screenshot shows the eLeaP PSP platform's Gamification settings. At the top, there's a search bar with placeholder text "Quick search anything on the platform". To the right of the search bar are several icons: Feeds, a notification bell with a '21' badge, and a user profile for "Smith, John" (Administrator). Below the header is a navigation menu with links: Settings, General, Custom Fields, Smart Assigning, Branding, Gamification (which is highlighted in purple), Modules, Pricing, Categories, API, and Webhooks.

The main content area is titled "Gamification" and contains three sections:

- Engage users with achievement points**: Includes a link to "See how points are awarded".
- Offer badges to designate proficiency**: Includes a link to "See badges".
- A little competition can be exciting**: Includes a link to "See leaderboard example".

To the right of these sections is a toggle switch labeled "Activate gamification" with a status indicator.

The **Show Leaderboard** and **Use Badges** switches will automatically disappear when we turn off the Gamification feature as they become irrelevant.

Click [See how points are awarded](#) to see the points that are awarded to the users. On the left, you see the familiar actions that we already discussed throughout the user manual. On the right side, the default points of Gamification are listed.

However, those are just recommended amounts of points, so feel free to modify them based on your company's needs.

After any change in points, be sure to **Save** the changes so that they are applied to each user's profile.

Action points

NO.	TITLE	POINTS
1	Login	5
2	Weekly item creation/Status change	5
3	Goal completion	25
4	KR advancement	10
5	Peers Reviewed	10
6	Survey completed	10
7	Comment/reply/post added	5
8	Check-in added/completed (when the Check-in time passes)	10
9	Teams/People created	10
10	Profile picture added	10

Save **Cancel**

[See badges](#) opens a preview of badges that are given to users based on their goal completion. The badge awarding works like this:

up to 25% - no badge

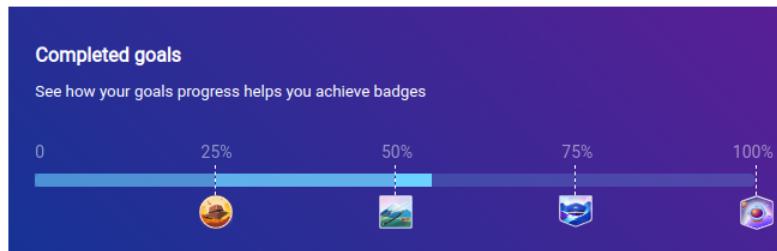
25% - 50% - Pioneer

50% - 75% - Ninja

75% - 99% - Trailblazer

100% - Elite

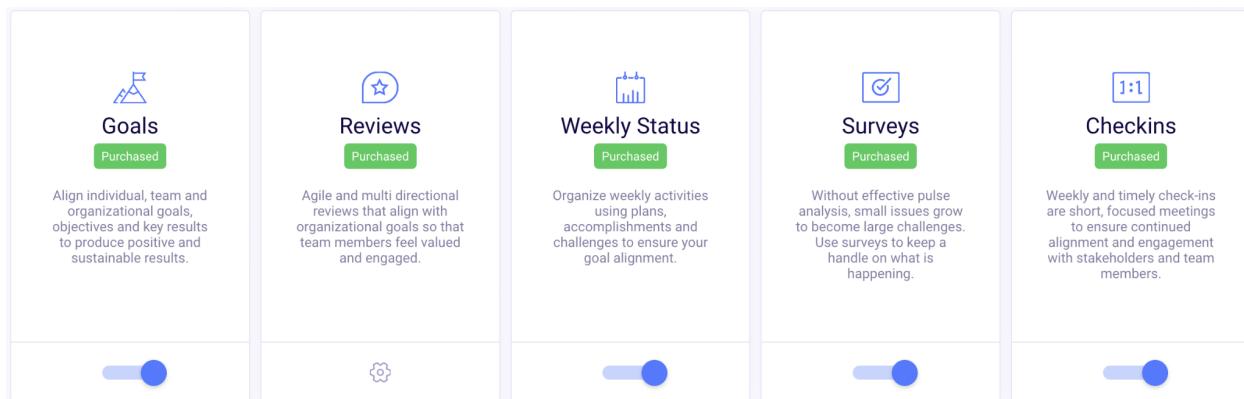
Badges



Modules

Administrators can turn on/off the modules from the **Modules** section with switcher. In the illustration below, all sections are included in the current Pricing package, which is why they all have the **Purchased** label. Note that each module card has a brief description of its functionality.

If you notice, the **Reviews** section has a gear icon instead of the switcher. That is because the **Reviews** section contains additional settings which will need to be set before use.



Each organization can customize their **Reviews** settings. You can refer to the **Reviews** section description in this user guide for more details.

The **General** subsection of the Reviews section refers to the overall settings of the Reviews section.

Review period subsection is for customizing the settings of the review period. Each organization can set their reviews period and cadence.

Activate/deactivate the **Reviews** module by toggling the switcher on/off. If the switcher is turned off, users won't have access to the Reviews section. This might come in handy if Administrators are changing Review settings and do not want the users accessing that section. Note that if Reviews is toggled off, all data stored in the section will remain.

This switcher determines whether users will be sent an in-application notification and an email regarding the start of the upcoming **Review period**.

The same functionality exists for the approaching deadline for submitting **Reviews**.

Don't forget to save your General Review settings by clicking the **Save Review Settings**.

The **Review Period** settings which control the review period are contained in a separate subsection.

Reviews

General

Review period

Reviews

General

Review period

Module is active 



Send review start announcement 



Send review deadline reminder 



The organization Administrator selects the date for the **next review period**. Once set, the admin can also set the review frequency, which automates the cycle and cadence of your reviews.

Next review period starts on [\(i\)](#)

November 30, 2023



Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Today

Review period frequency [\(i\)](#)

4 months



3 months

4 months

6 months

12 months

In this step, the admin selects the **frequency** of review periods. The system has four review period frequencies to select from, as illustrated here.

Wait time between review periods [\(i\)](#)

5 days



5 days

10 days

2 weeks

1 month

Organizations might want to add a small buffer between review periods. Use this option to set the **wait time** between review periods. Simply select one of the available options so the next review period begins a little later.

In eLeaP, review periods are divided into two subperiods: **Review Submission period** and **Review Analysis period**. Every review period starts with the submissions of reviews. After the submission deadline passes, users can only view the submitted reviews and can no longer give new reviews. In this menu, Administrators can select their submission deadline. For example, if the review period frequency is every four months, and the “**In the middle of the review period**” is selected, the submission deadline will be right after two months into the review period.

Submissions deadline ⓘ

In the middle of the review period ▾

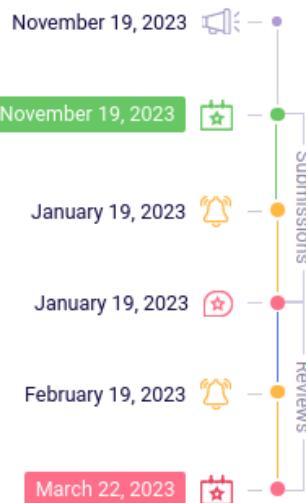
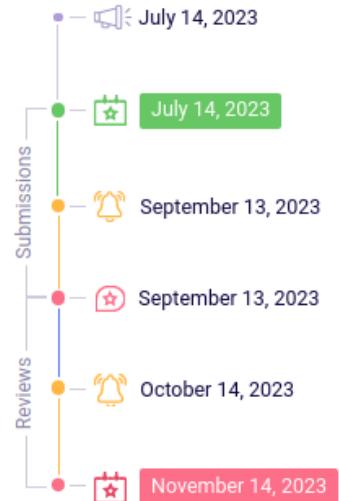
In the middle of the review period

1 weeks before the end of the review period

2 weeks before the end of the review period

3 weeks before the end of the review period

On the right side of the review period settings section, we have a visual representation of the settings. The system shows the exact deadlines for **submissions** and **reviews** for the current period and the next review period.



After adjusting all the Review period settings, click the  **Save Review Period Settings** button to save the changes.

Pricing

The **Pricing** section includes the pricing packages offered in eLeaP PSP. Each package provides access to different modules. The modules available in each pricing package are listed on the pricing package cards.

Starter (SC)	Pioneer (RWC)	Elite (GWC)	Enterprise (T)
 Check-ins  Surveys	 Check-ins  Reviews  Weekly Status	 Check-ins  Goals  Weekly Status	
Subscription info \$4/user	Subscription info \$8/user	Subscription info \$10/user	Subscription info \$14/user
Downgrade	Downgrade	Downgrade	Current

Administrators can change their pricing package at any time. The table below lists the labels/buttons that you will encounter in this section:

Indicates the current pricing package that the organization is subscribed to now.

Current

Shows the pricing package that the organization requested to upgrade/downgrade to. This button will stay until the eLeaP PSP admins change the pricing package. You will be notified that the change has been confirmed.

Pending

The **Upgrade** button appears on the pricing packages which are **higher** than the current pricing package of the organization.

Upgrade

The **Downgrade** button appears on the pricing packages which are **lower** than the current pricing package of the organization.

Downgrade

When the **Administrator** upgrades/downgrades to another pricing package, an alert appears on the top of the page, and the buttons on pricing package cards get disabled. The pricing package that the **Administrator** is switching to will change its status to “**Pending**.” While the package change request is being processed by eLeaP admins, the alert will stay visible, and the buttons will be disabled. Once the

request is done processing, you will get notified, and the page will show the new package as your “Current”.

Pricing package change from Enterprise (T) to Pioneer (RWC) is pending. Please wait or contact admins for more information

Starter (SC)	Pioneer (RWC)	Elite (GWC)	Enterprise (T)
Check-ins Surveys	Check-ins Reviews Weekly Status	Check-ins Goals Weekly Status	Total Platform
Subscription info \$4/user	Subscription info \$8/user	Subscription info \$10/user	Subscription info \$14/user
<button>Downgrade</button>	<button>Pending</button>	<button>Downgrade</button>	<button>Current</button>

Note: Pricing packages, their names, and the modules included are subject to change. eLeaP PSP users and customers will always get notified of any changes.

Categories

Categories are an easy-to-use feature for simplifying the filtering inside certain sections of eLeaP PSP. Creators of certain items can assign a category to the item and then use the category to group and filter items. Surveys, Check-ins, and Form Templates sections have this feature available.

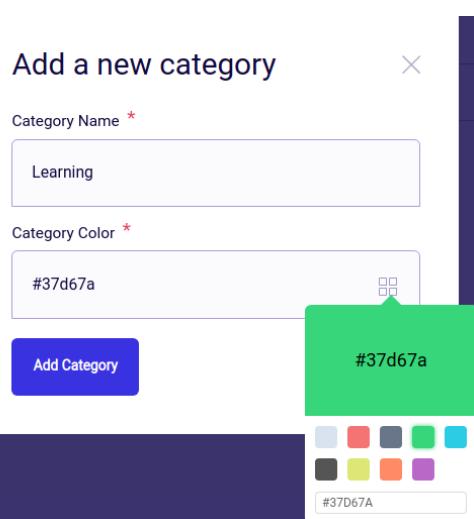
Note: As **Settings** is available to **Administrators**, only Admins can add categories. However, all users can use categories by assigning them to items in the Surveys, Check-ins, and Form Templates sections.

Let's get started by creating new categories. Click [Add New Category](#) to create your first category.

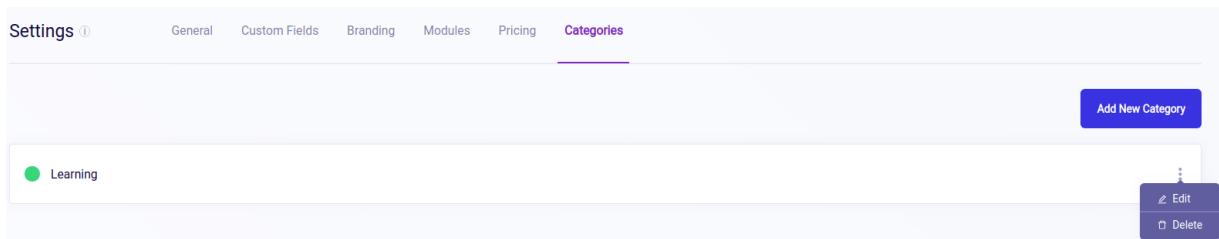
Add a name for the category in the **Category name** field. Try to keep them short and descriptive, as categories are going to be displayed on some items. The field is limited to 64 characters.

Category color lets you pick a color for the category label. The system suggests some colors, but the users can set any color by inserting a color code. The chosen color is for the category label background.

Congrats! You've successfully created your first category. The “Learning” category can now be used as a label for easier filtering.



The added category in **Settings -> Categories** looks like this. The color indicates the background of the label that the users are going to see on platform items. Edit/delete the categories from the  menu.

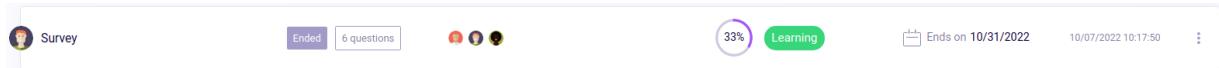


Below are examples of how the “**Learning**” category looks like on Check-ins, Survey, and Form Templates.

Check-in



Survey



Form templates



The process of assigning a label to an item is described in detail in [Check-ins](#), [Survey](#), and [Form Templates](#) sections, respectively.

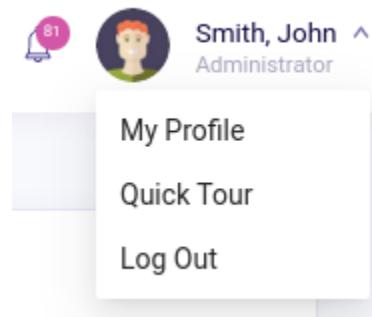
Settings - Permissions

The Settings section is available only to Administrators. Users of other roles will not have access to this section.

My Profile

On the top right of the application, you can access My Profile, Quick Your, and Log Out. The **Quick Tour** starts a guide through the system by presenting an easy-to-follow overview of information on the system. We recommend you view the Quick Tour at least once. It's a great way to orient yourself on the system.

My Profile is the area that includes personal information about the user.



The first area we see is the user avatar. Every user can add their avatar from the **My Profile** section. While it is not mandatory, it certainly makes the system work much better. Click on the photo icon near the avatar to upload a photo. To delete the avatar, click the icon. Below the avatar, we display the full name and the role of the user.



On the right side of the avatar, we display the **email address** of the user that is used for logging into the system.

E-mail: johnsmith@apm.com

Below the email address, we have the **team badges**. The user can be a member of as many teams as needed. Team badges are listed next to each other.

Marketing

The **Personal info** section includes the full name of the user and their email address. The **Middle name** field is an optional field. **First name** and **Last name** are required fields.

Note: Changing the email address is only available to Administrators for security reasons.

Personal info	First Name	Middle name	Last Name
Account security	John		Smith
	Email	johnsmith@apm.com	
		Save	

Users can change their password from the **Account Security** section. Users will need their old (current) password to be able to change their password. This is so the system can be sure the user is the legitimate owner of the profile.

Personal info	Old password	New password	Confirm password
Account security			
	Save		

My Profile - Permissions

All users can edit their personal My Profile page.

Global Search

The **Global Search** simplifies navigation on the platform. The working principle of the search bar is really simple. We call it **Global Search** because everything searched here brings up results from the entire platform quickly and seamlessly.

In the example below, we searched for **John**, and the system brought up every instance that has John's name mentioned. In addition, the **Global Search** will bring up results that have **John** as an assignee. You can also search by email address in Global Search. The search is performed in comments/replies/posts as well. If you want to instantly find a comment or find an item by its comment, just type in a word, and our Global Search will bring up all comments and items that match your search.

Use this powerful tool to surface information quickly and easily.

Q John

Goals

John's goal 0% On Track 6 days remaining

Check-ins

John's weekly checkup Talking points July 15, 2022
John will introduce annual goals

Surveys

John's quarterly survey In Progress 7 questions Mark... John... 0% Completion Ends on July 28, 2022

Teams

John's Team 1 Admin 0 Manager 0 Member Created at 07/14/2022 17:58:02

People

Administrator John Smith Marketing +1

Notifications & Emails

Notifications are an integral part of our platform's communication methodology. Most activities in the system generate some kind of notification to the account of the user if they are associated with it. Examples of actions that can trigger notifications include:

1. Items assigned/unassigned to/from the user
2. Successful add/edit/delete items
3. Deadline changes
4. Approaching deadlines
5. Attached/detached files
6. Item status changes
7. Received reviews
8. Comment mentions (**tagging**)
9. Password reset

We've listed the triggers in grouped format, but look for smart notifications to be sent as needed. In some cases, the system sends a summary notification in order not to overwhelm users with notifications. Note that the system also sends email notifications, so there is less chance that important events are missed. All emails include direct links to the platform for easier and quicker access.

Mark all as read and **Delete all** buttons for managing the notifications. **Mark all as read** makes the notifications background white to indicate a read notification. Users can access them again at any point. **Delete all** permanently deletes all notifications. Notifications can be deleted individually with the  button. Notice that all notifications have section icons near them for easy recognition.

