eLeaP PSP User Guide

Manuals for all roles and modules

a product of telania

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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.

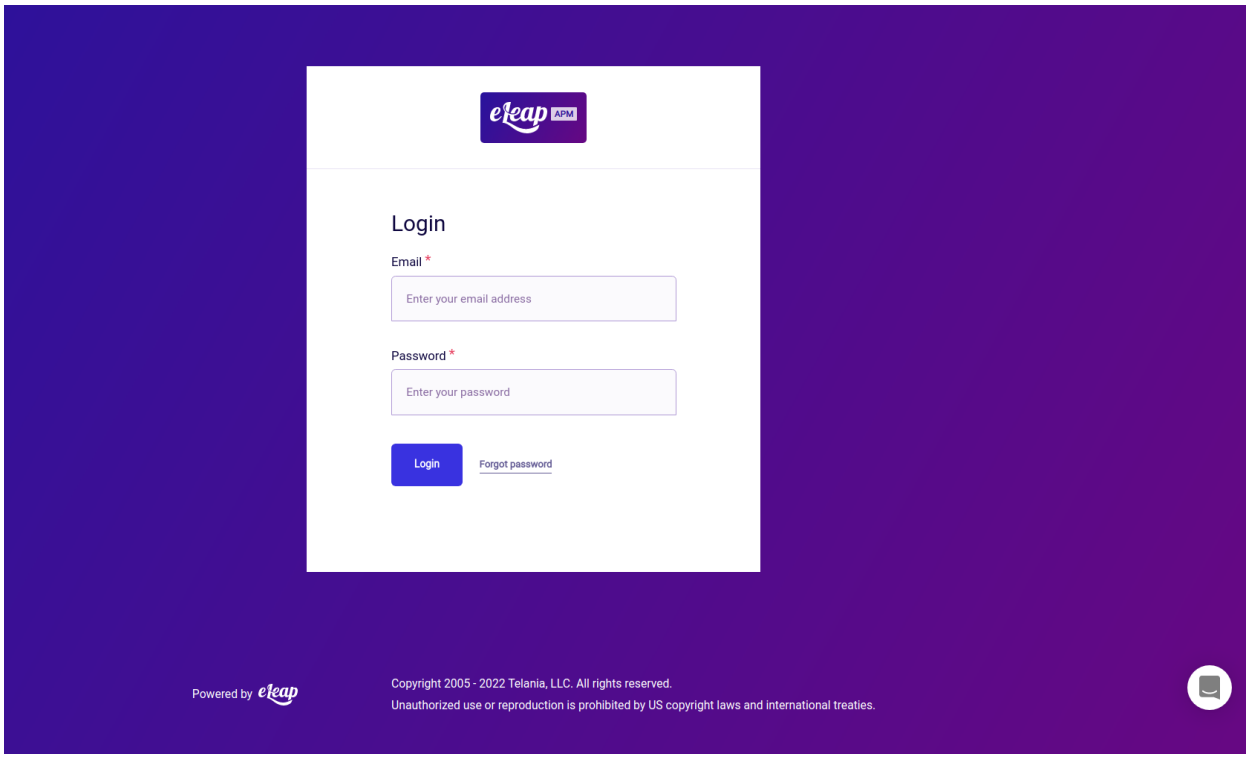
eLeaP PSP does something that annual reviews can't do. It enables organizations to adjust individual team members (employee, trainee) goals and expectations as conditions change. Annual reviews, according to critics, are too focused on the past and not on forward-looking needs. eLeaP PSP helps organizations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

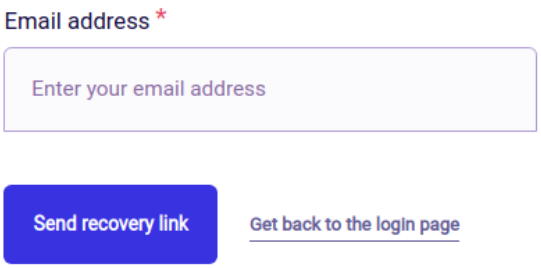
Hint: For easier navigation, use the links in the Table of Contents or the references included throughout the whole guide.

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.



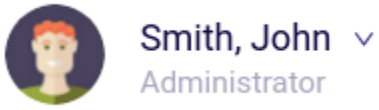
eLeaP PSP User Roles

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.



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

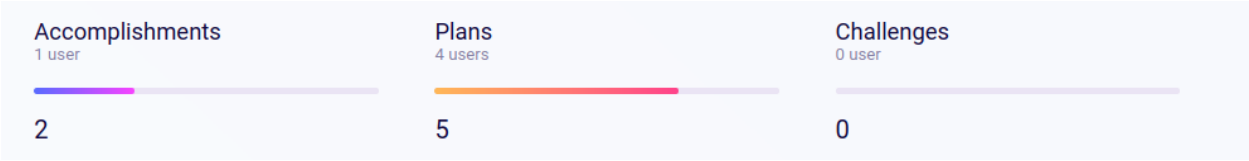
eLeaP PSP's side menu is the area for accessing all the sections on the platform. Users can collapse the menu with button. Depending on the user's role, the side menu will display different sections. The list below includes all sections with brief descriptions and the roles that can access each section.

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.

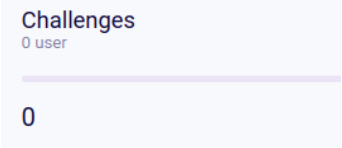
This part of the Dashboard shows the overview of Weekly Status items created in the system.



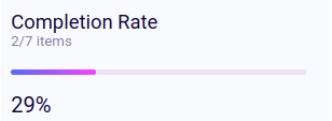
Shows the number of users who have added weekly status items with **Accomplishment** status and the total number of **Accomplishments** for the current week.

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

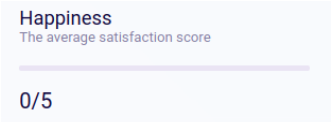
Shows the number of users who have added weekly status items with **Challenge** status and the total number of **Challenges** for the current week.



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.



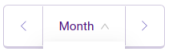
Please refer to the **Weekly Status** section description in this manual for more details.

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 

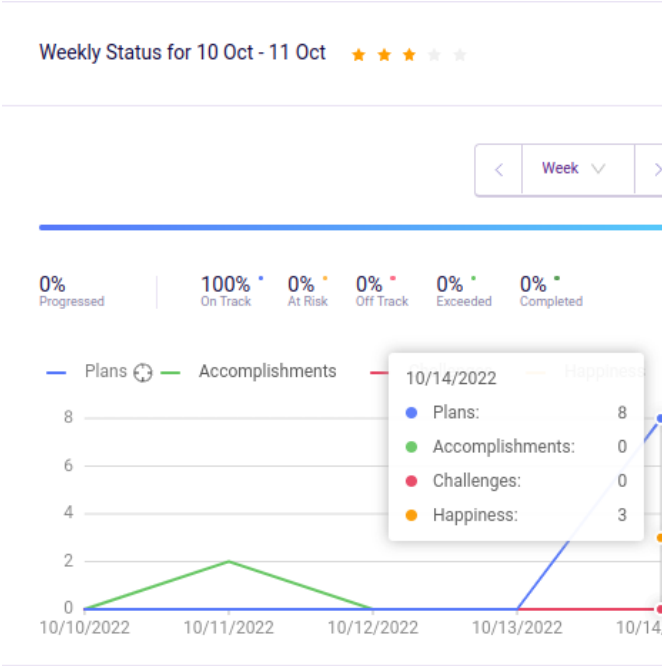
button.

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.

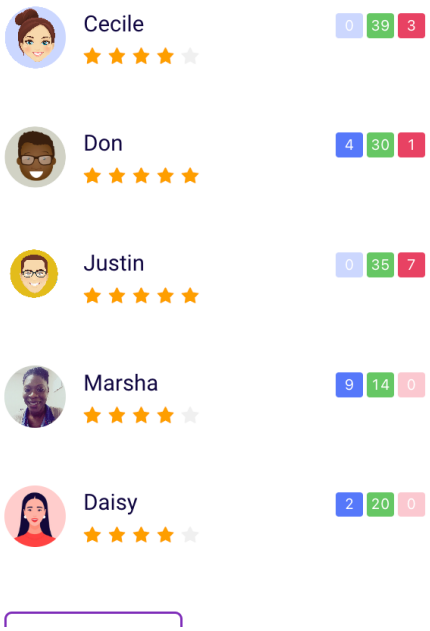
Switch between periods with 

arrows to see previously recorded data.

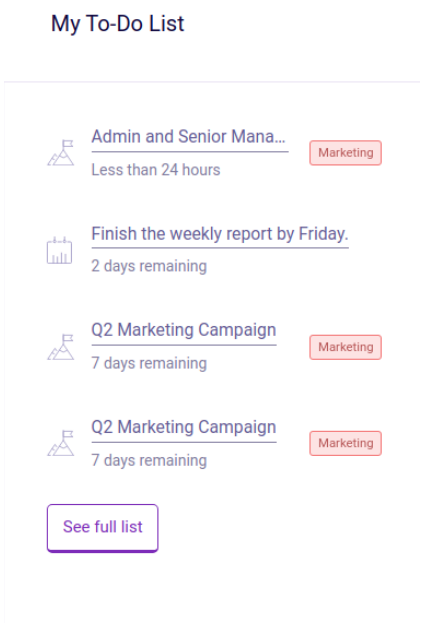


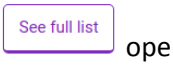
Click on the names of Weekly Status item names to filter the chart according to the selected type. Multiple filters can be set.

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.

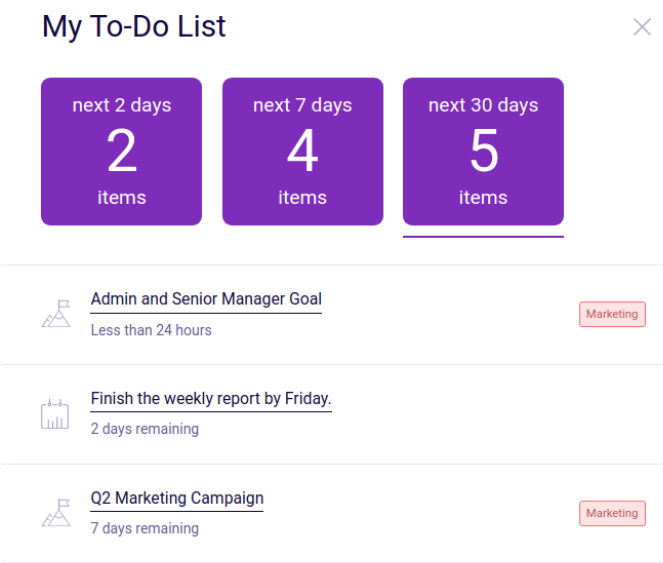


Not sure what's coming next? **My To-do List** shows the upcoming tasks that are due in the near future. The list sorts the items from nearest to latest. You can easily access the item details page by clicking on item names. The icons near the name indicate the sections that the item belongs to. In the 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.

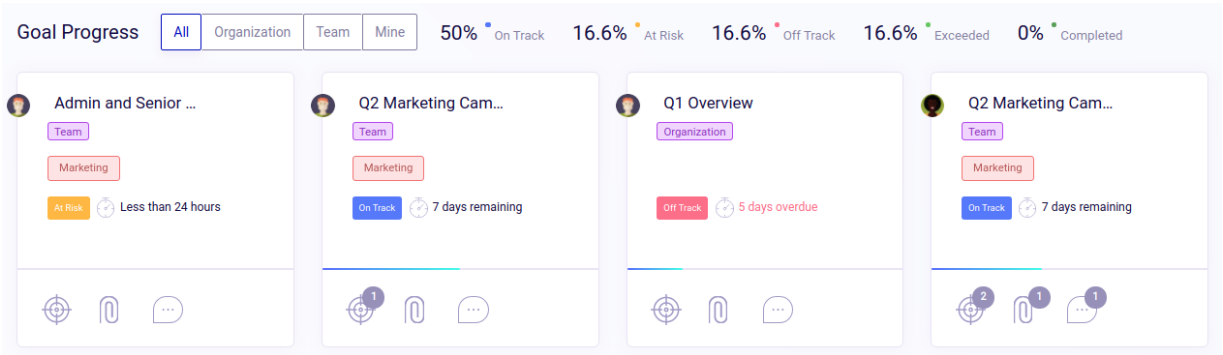


Clicking 

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.



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

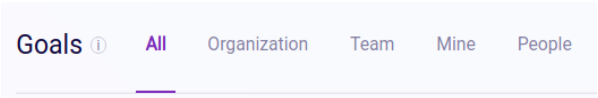
The **Goals** system in eLeaP is designed to align teams and individual members of organizations around a common purpose and a shared set of objectives. Organizations can track the status of goals and even break them down into smaller objectives. Every goal has a dedicated details area where all interactions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

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

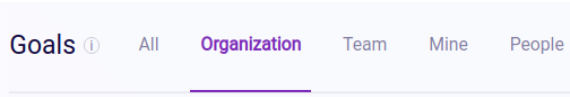
The goal is projected to be completed within the set deadline. The goal key results are progressing as planned.	On Track
When there are more than 24 hours left until the deadline, and the goal progress is already 100%. Basically, you achieve success with your goal!	Exceeded
When the goal has achieved 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.

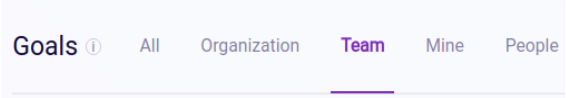
The **All** tab includes all available goals of every category. Organization and team goals are easily indicated.



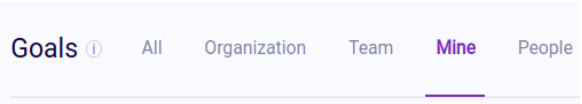
The **Organization** tab shows goals that have been assigned to all users in the system.



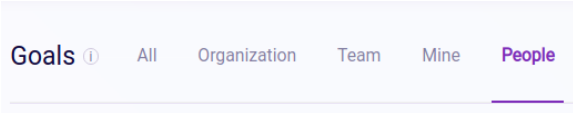
Team goals are assigned to specific teams. Team names are indicated in the goal listing.



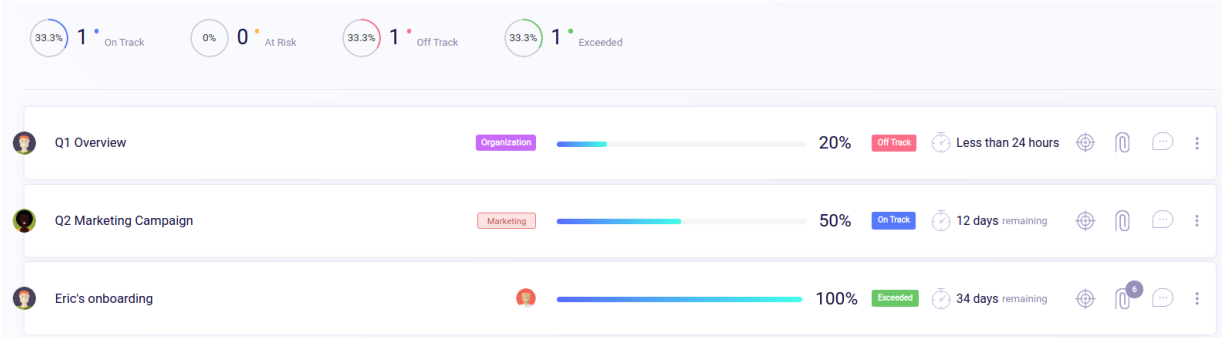
Mine includes the goals which are assigned to or created by the currently logged-in user.



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



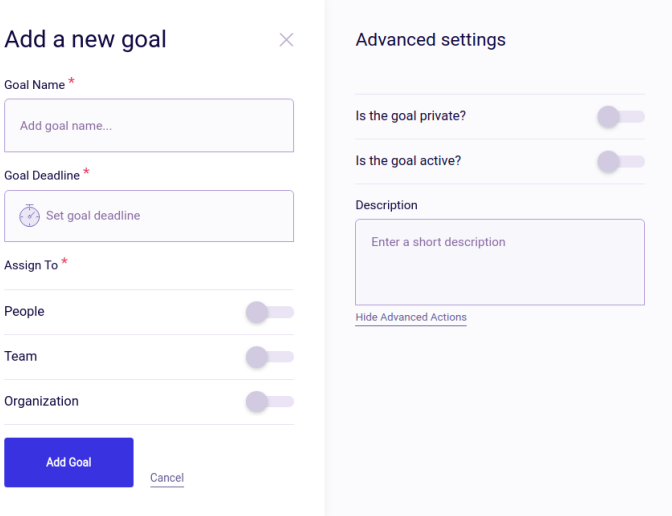
See an example of **Goals** below. Ready to create a goal to learn more about this section?



Click 

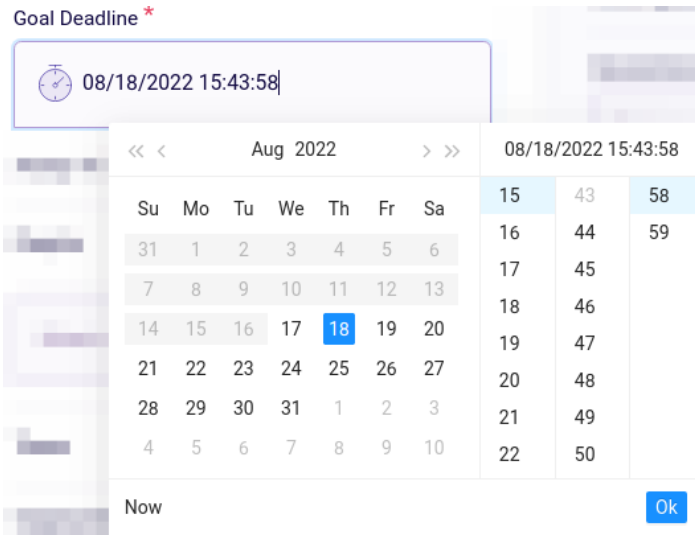
to start creating your goal. On click, an input window opens, requiring specific details about the goal being created.

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.

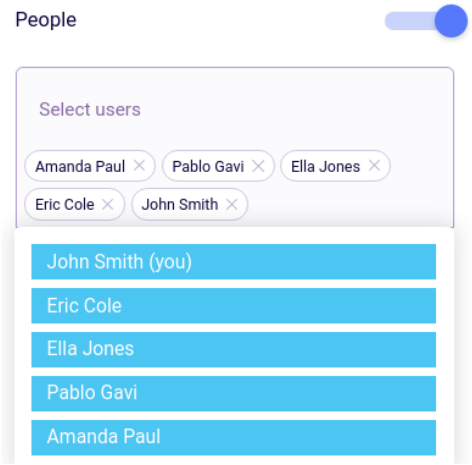


Start by adding a **Goal Name.** The goal name is going to be visible to all goal assignees, so choose wisely.

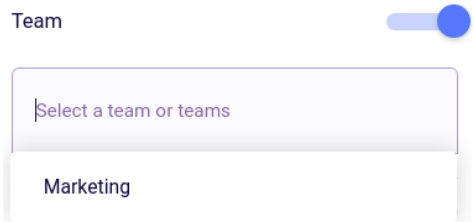
Next, select the **Goal Deadline.** The **Goal deadline** will determine the status of the goal in the system and even certain functionality available to assigned users. Deadlines can only be set to a future date.



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.



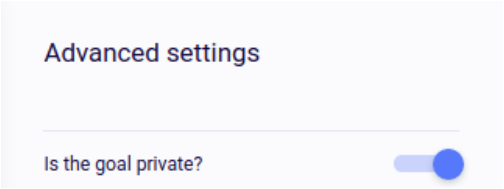
If the **Team** toggle is used, the goal is able to be assigned to teams. Multiple teams can be selected from the list. You might need to scroll to see all your teams.



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

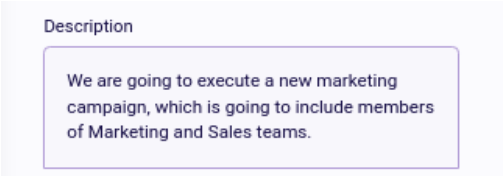
goal is automatically and instantly available to all users in your account.

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.

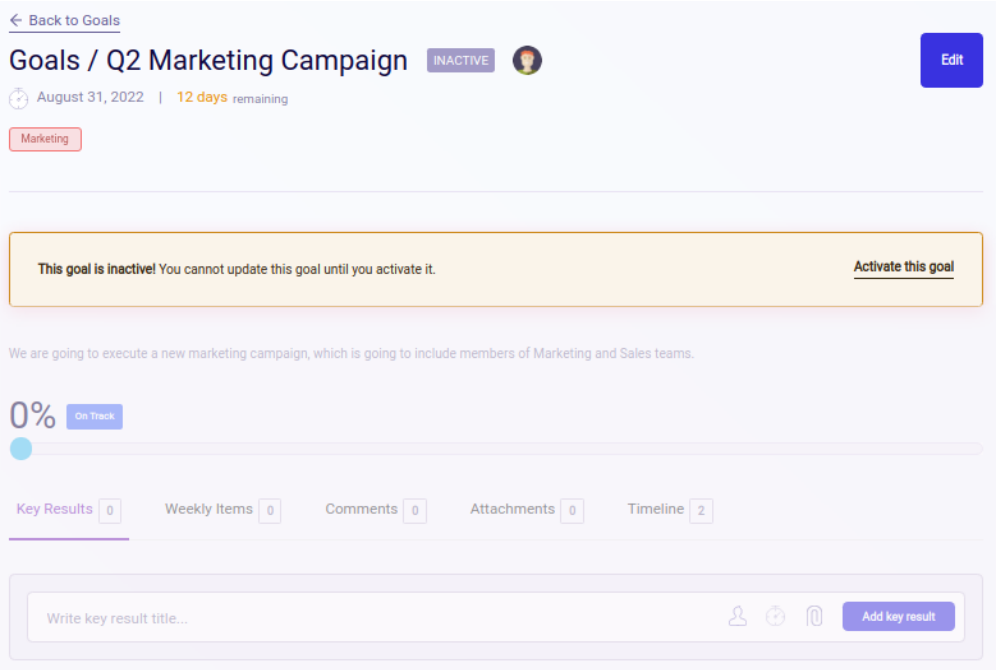
Add an optional description for the goal. This field has a character limit of 256.



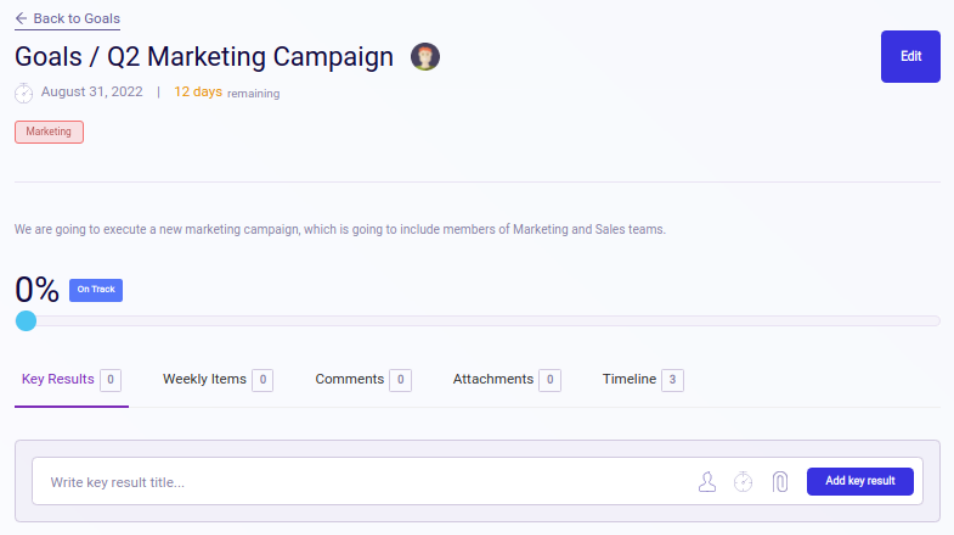
Here's an example. We have a goal that was created by **John Smith.** The goal is both **private** and **inactive** INACTIVE **.** We've named it "Q2 Marketing Campaign" and assigned it to the "Marketing" team. As this is a newly created goal, the progress of the goal is 0%. Next to the progress percentage 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.

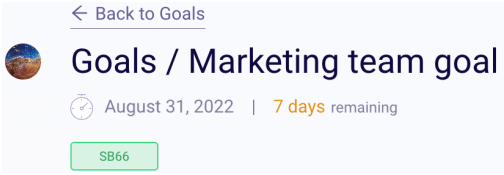
As we've successfully created our first goal, let's access the **Goal details** area to see additional functionality.

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.



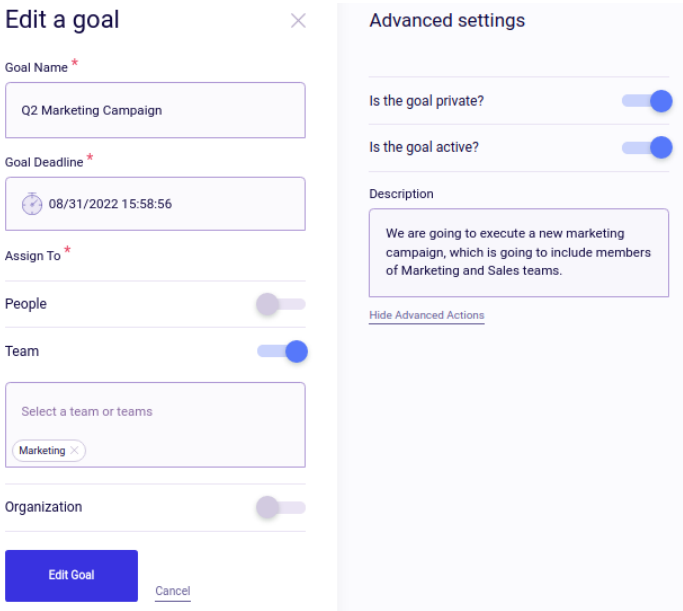
Let's activate the goal using the Activate this goal link. Goal activation can also be done by clicking the Edit button and activating the goal from the **Advanced Settings** section**.** Once the goal is activated, we can proceed.



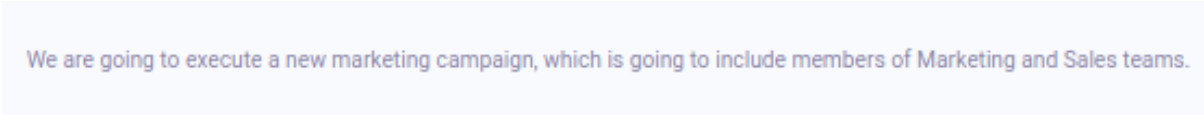


Goal details show the goal name as well as additional general information. Near the goal name, we have the avatar of the goal creator. Below the goal name, we have the goal deadline and the time remaining until the deadline. Below that, there is a place for **goal assignees**. Also, look for teams, user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

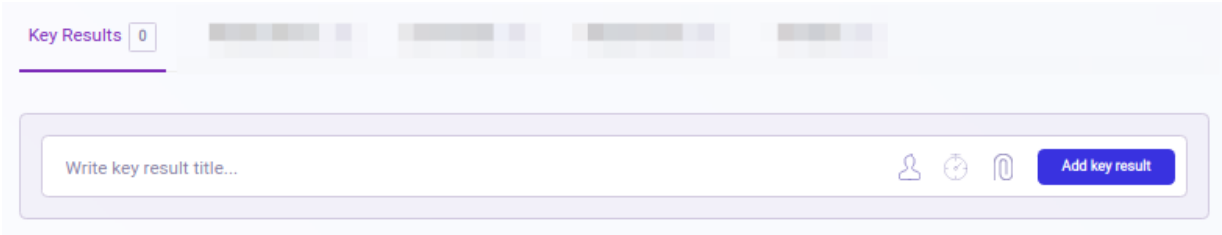


An example of the goal description appears below. Note that you can edit the goal description from your advanced options sections.



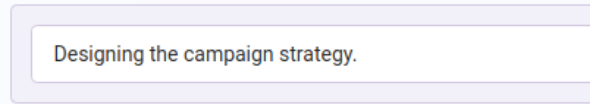
The **Goal Progress bar** is an important indicator of progress toward completion**.** Goal progress can be modified by manually dragging the circle along the range. Besides manual adjustment, the **Progress bar** is linked to available Key Results (KRs), which we will discuss next.

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

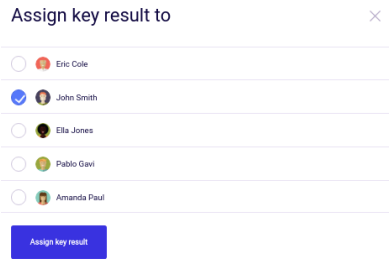


Let's create a key result to see how it affects the progress of our goal.

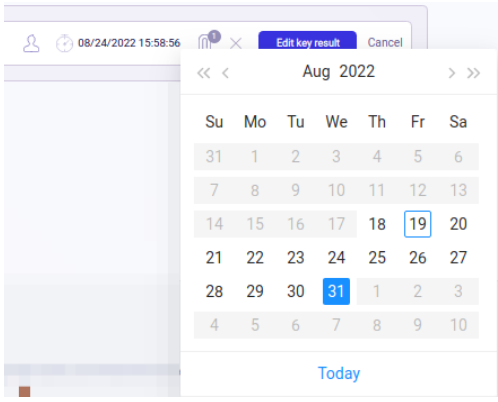
Add a title for the **Key Result**. A Key Result is a quantitative measure of how you achieve your Goal Objective. We use the OKR methodology in eLeaP. The Key Result must be completed before the deadline to avoid an adverse goal status.



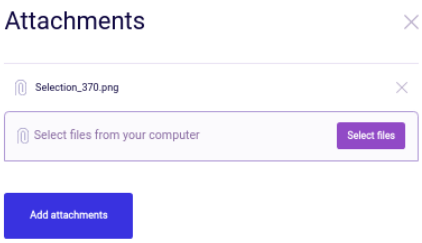
Assign a **Key Result** to one of the Goal assignees with the button. A window with a list of goal assignees will open when clicked.



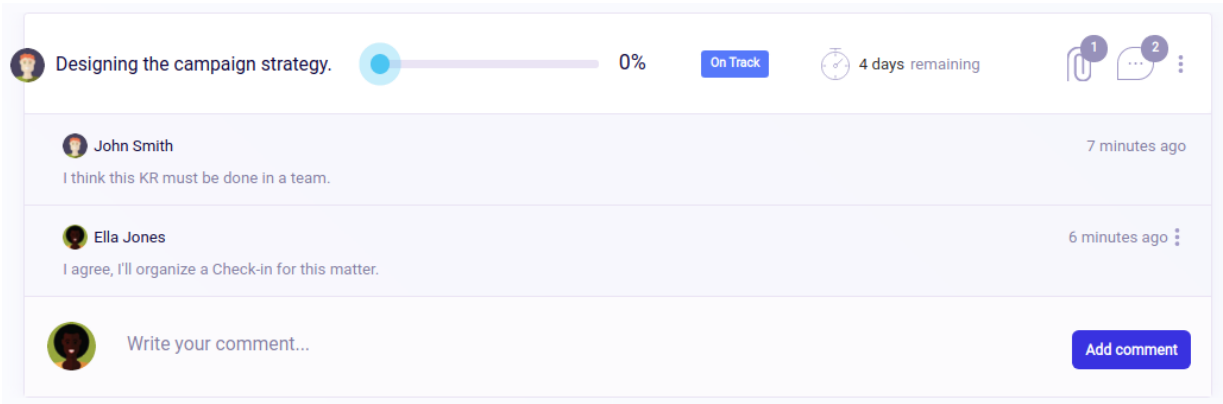
Key Results can have their own deadline, but they cannot be later than the overall goal deadline. Similar to the goal, **Key Results** can only have deadlines in the future.



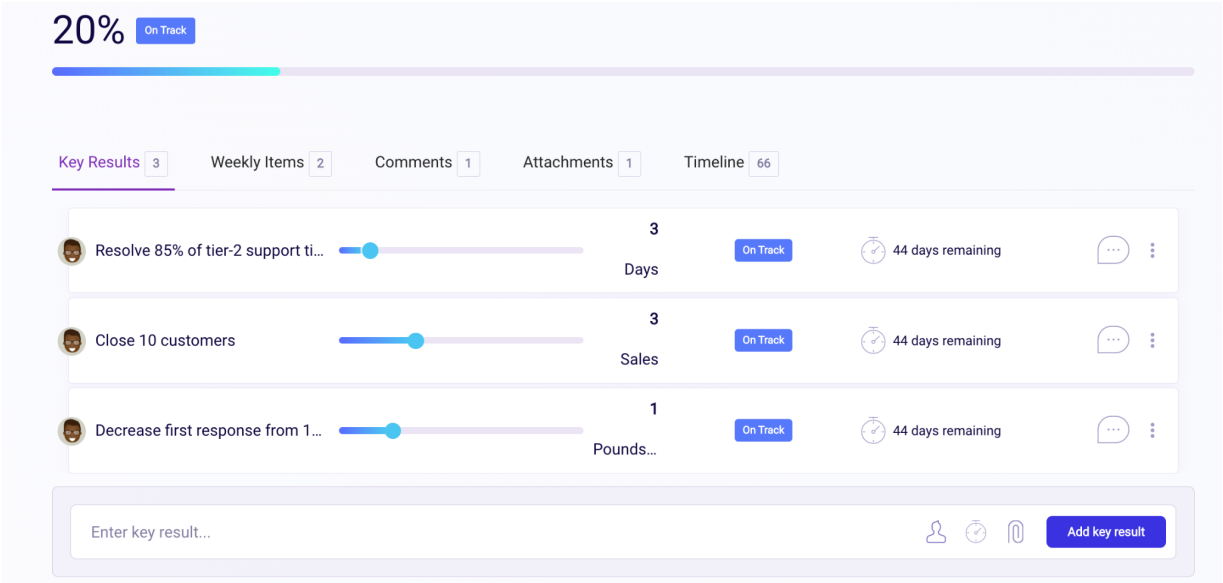
Goal assignees can attach files to Key Results. The file attachment process is a popular feature in the system. By clicking, the assignees can select files and attach them to **Key Results.**



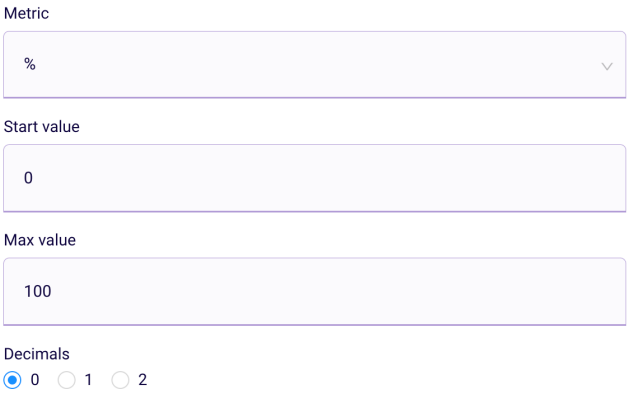
After we're done inputting the necessary details, we click the Add key result to add the Key Result to the Goal. **Comments** can also be added to a KR using the button. Added comments have the comment creation date on the right side of the screen.



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%.



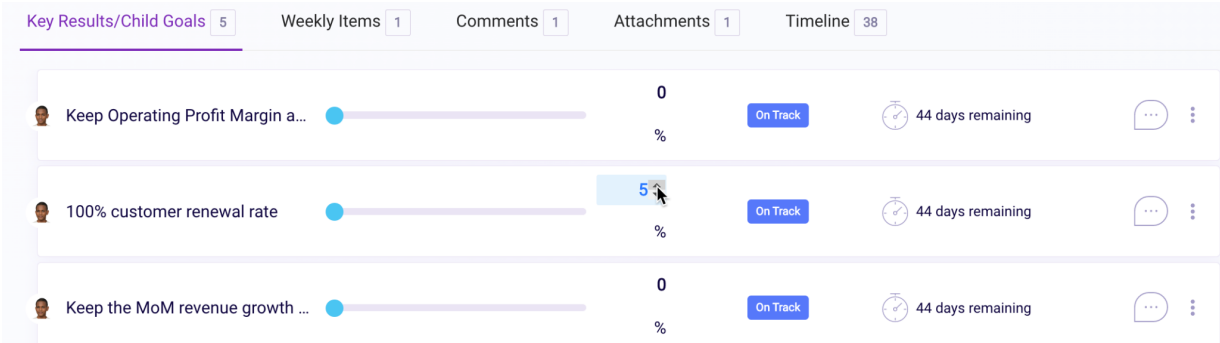
Key Results Settings (KRS) enable you to customize your Key Results settings. To get started, first add a key result and then click on the Key Result Settings (it defaults to a percentage % setting). Once clicked, select the Metric, Start value, Max value and Decimals you prefer for this Key Result.



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.

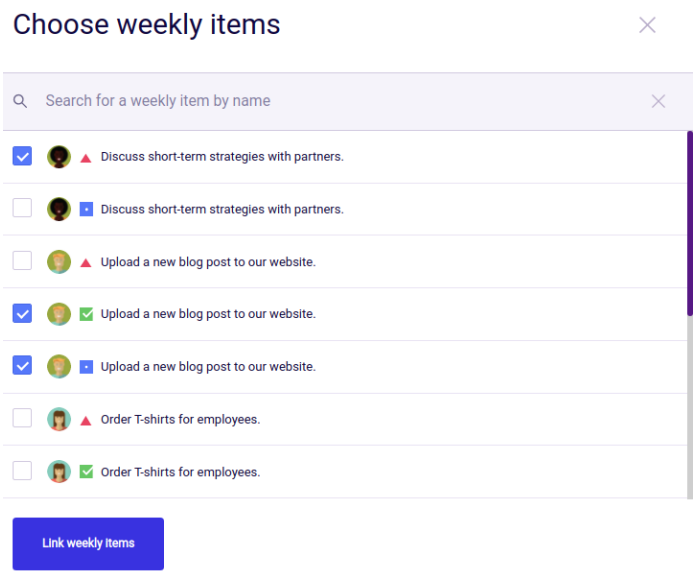
Current Key Result Value (**CKRV**) is what your current key result status is. This also corresponds to your key result progress bar. To change your current key result value, click the CKRV box and use the up or down arrows to change the value.



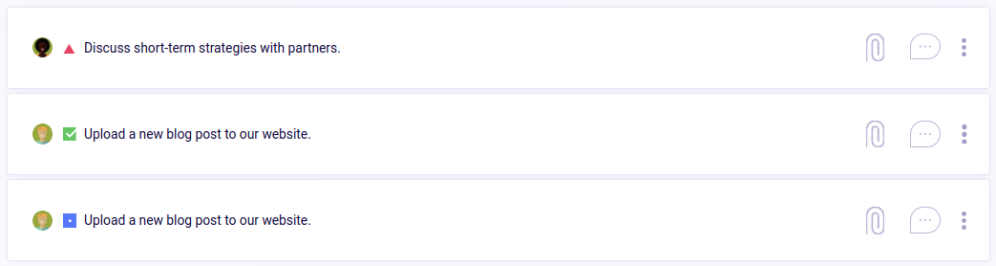
To update the overall goal progress and save your changes, click anywhere outside the CKRV box. Remember, you can also adjust your KRS to ensure that your settings are still relevant. Note that all changes are being logged in your [Timeline] section.

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.

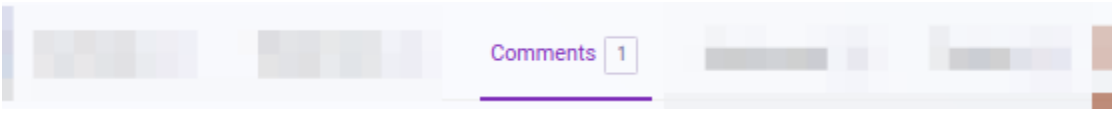
Select one or multiple **Weekly Items** from the list to add to the Goal.
Hint: Use the search bar to quickly find Weekly Items.



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

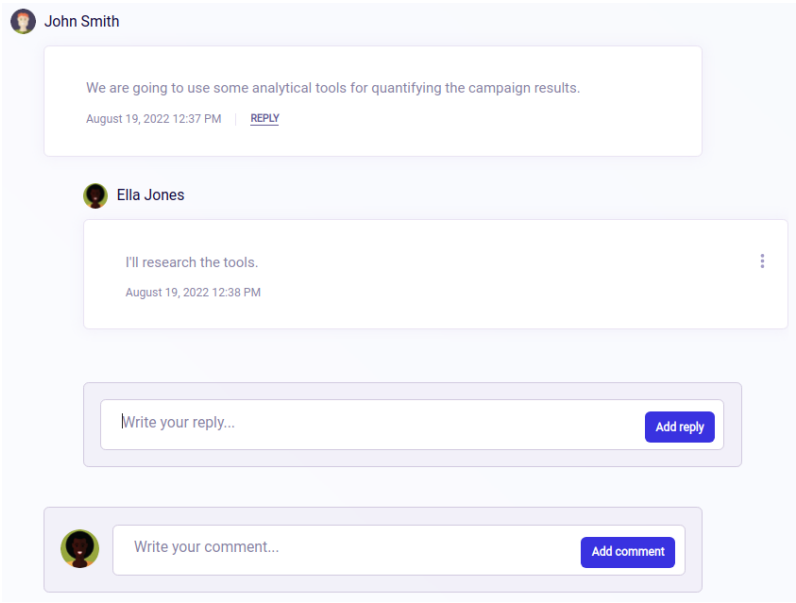


The **Comments** section is particularly well-suited for any goal-related discussions.

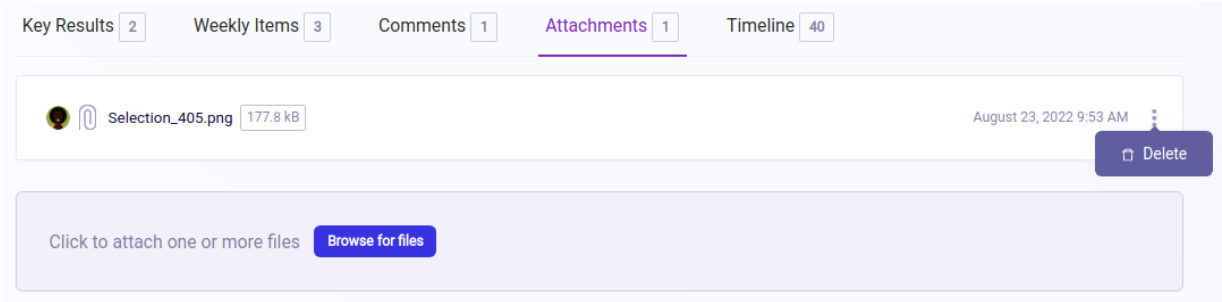


Note that the comments feature on the platform works just like most comment sites and is based on commonly accepted best practices. At the basic level, users can post comments, and others can reply to comments. In the example below, **John** has posted a comment, and **Ella** replied to that comment.

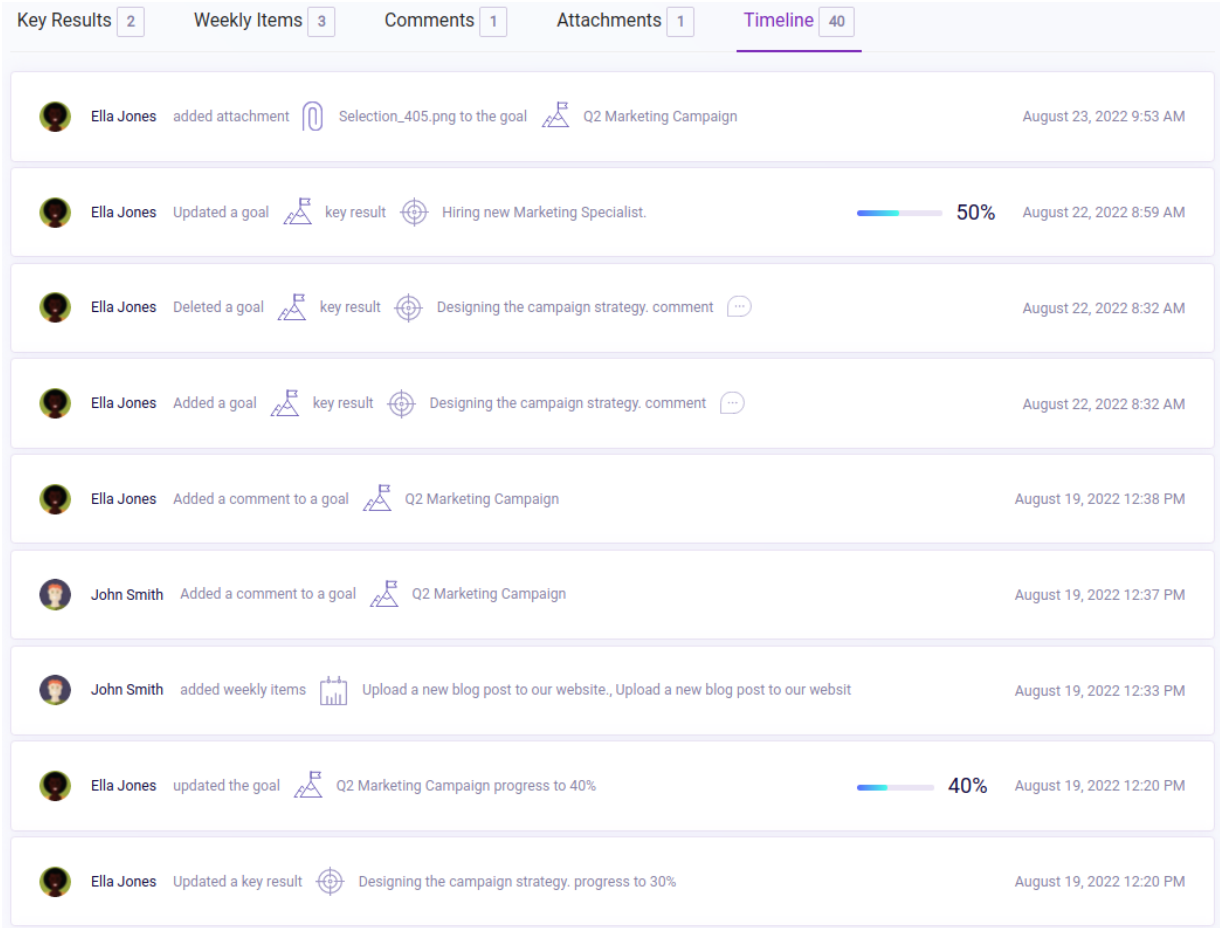
Commenters can edit their comments/replies. The comment tab title has a comment counter but this does not count replies.



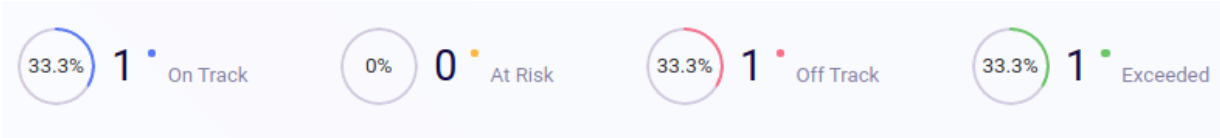
Next in the Goal tabs is the **Attachments** tab. Here the users can attach files to the goal. Click Browse for files and select the files you want to attach from your device. The added file looks like the illustration in the screenshot below. The item includes the avatar of the creator, the file name,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



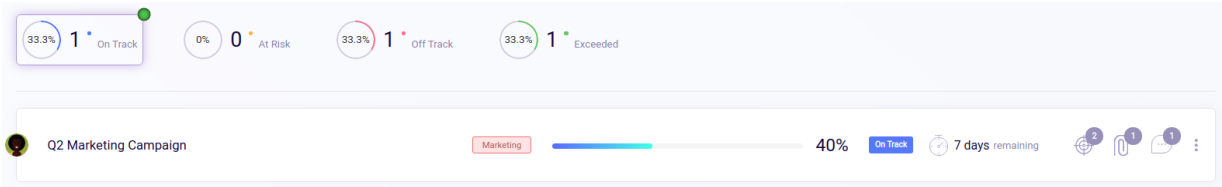
The last tab is **Timeline.** The **Timeline** includes all activity that has been recorded in the goal. All of these actions are also logged in the **Audit Trail** section, which is described further in the user guide.



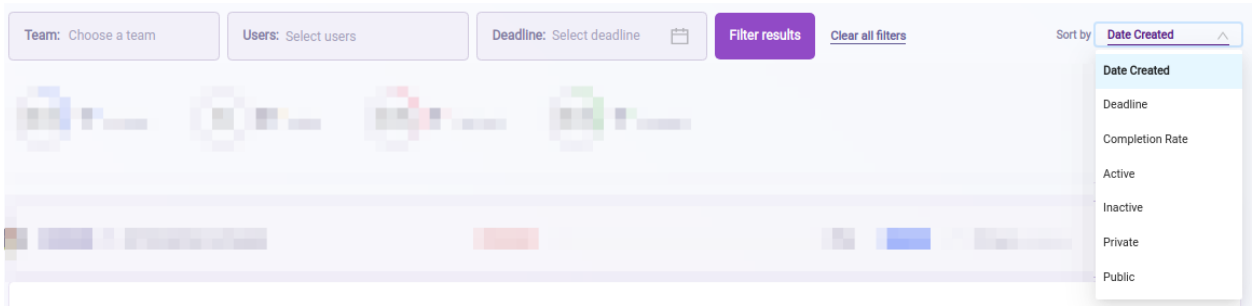
Sadly, this concludes our journey through the goal details ;)
After creating lots of goals, it might become necessary to quickly find them by filtering them according to their status or details. Make use of the powerful filters in the system! In the top section of the **Goals** module, we have easy-to-follow 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

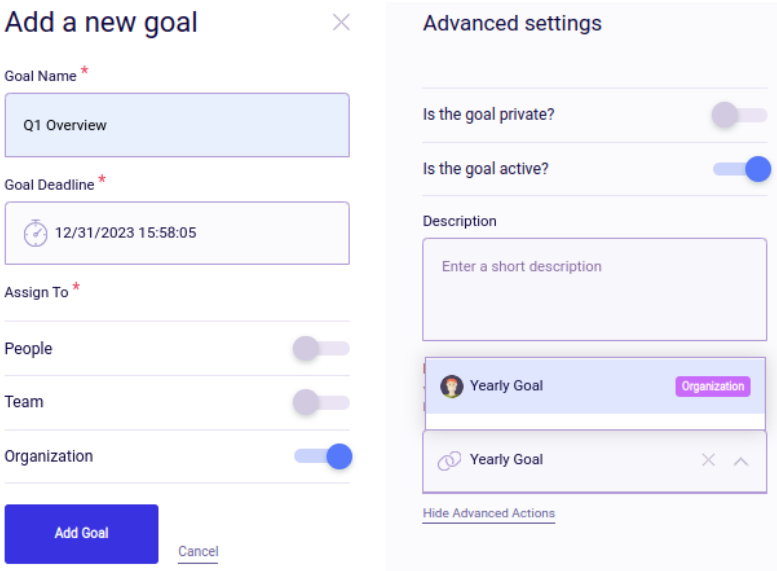
As we're now aware of how to create and use **Goals** in our system, we introduce the new Hierarchy view of all Goals created in the organization. Hierarchy goals are a fresh bird-sight view of all the goals created in the system, the relations of which can be easily manipulated by users.

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.

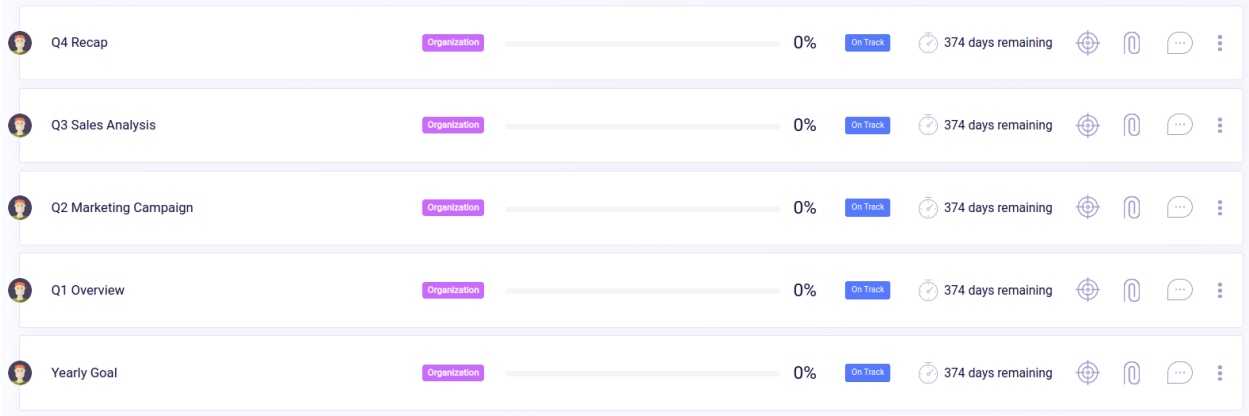
Firstly, we've created a new Organization goal named **Yearly Goal** that is due in a year. This goal will serve as the **Parent goal** in our example. We have not touched the goal progress yet, and no activity has been recorded in the scope of the goal.

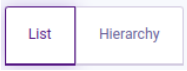
After the goal is created, the goal will be available for selection as the **Parent** goal for the goals that are created after. Let's create a few more goals, this is where the hierarchy magic comes in!

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.



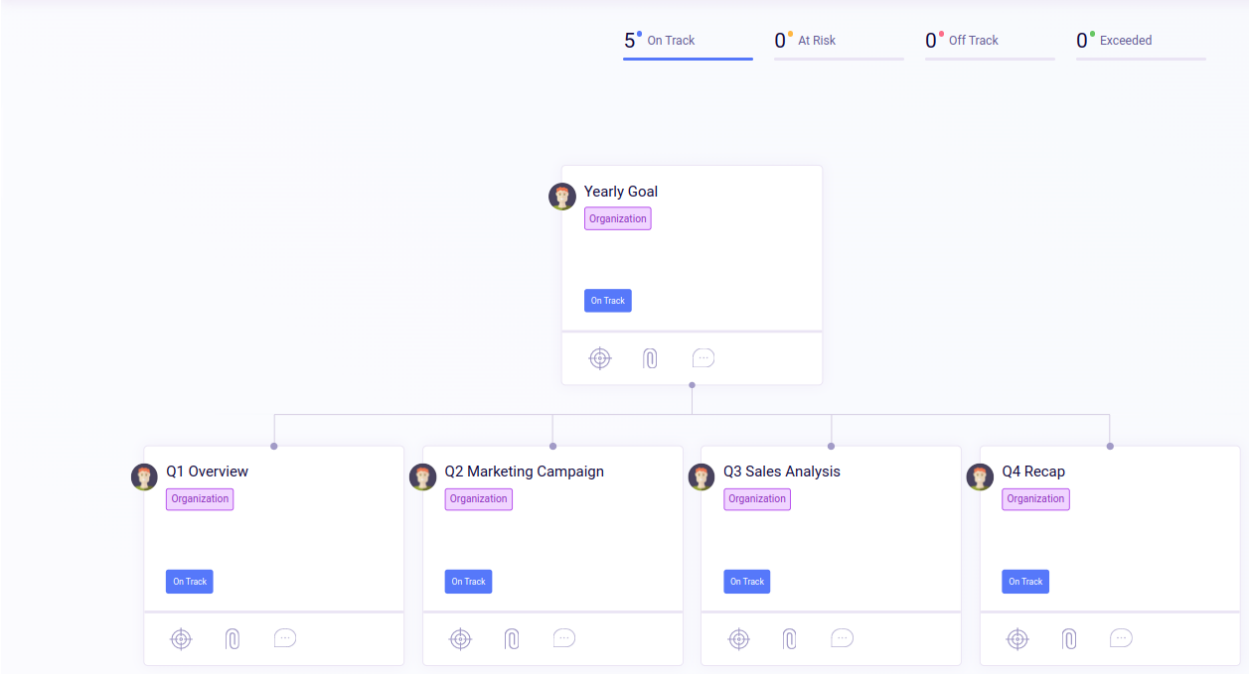
We've created a few other goals, which are **child** goals to our Yearly Goal as well.



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

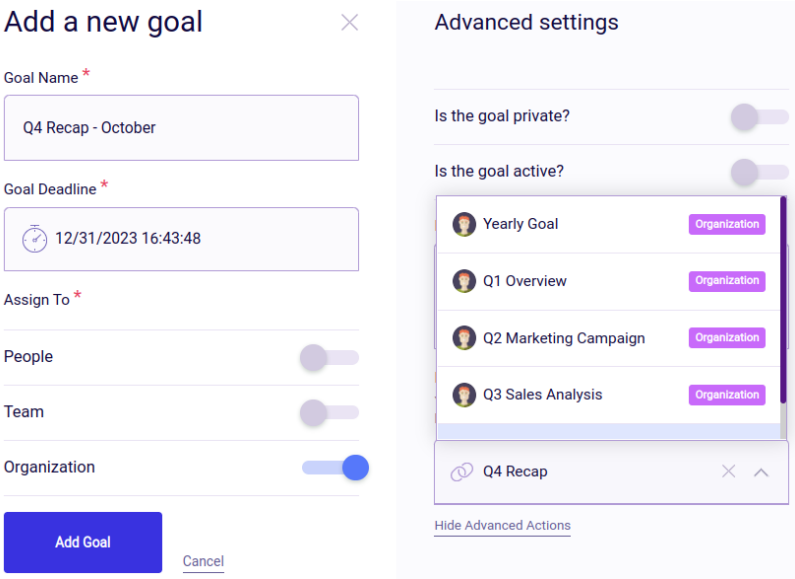
And here is our **Hierarchy view!** Look how the **Yearly Goal** is listed above the child goals. The process is simple from this point on. Whenever we add a goal and select a goal to be their parent, the new goal appears below the existing goal (the new **child** goal appears below the **parent).**

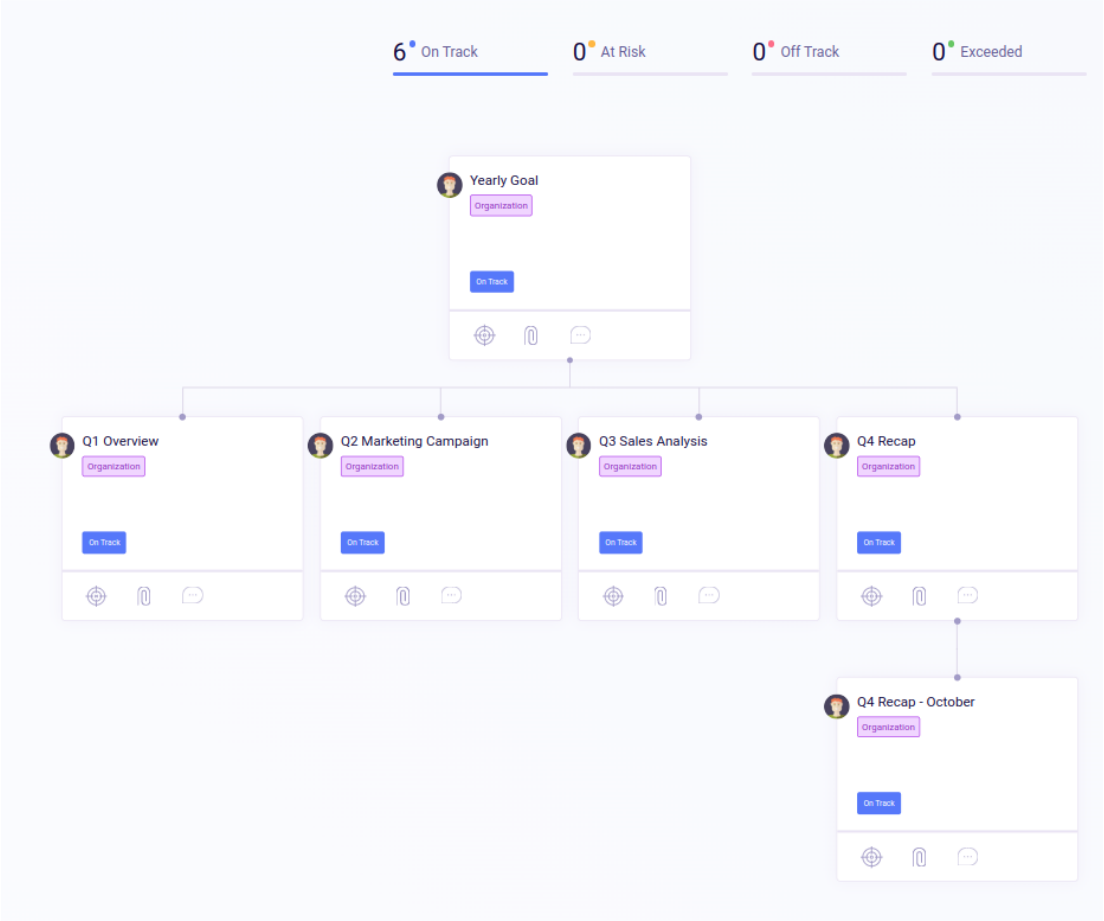


For demonstration purposes, we've added another goal and selected the **Q4 Recab** goal as the **parent**. This action will add another layer of goals below our second line.

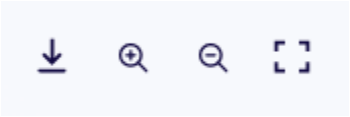
Important! Maximum of five levels of goal relations are allowed in the system, meaning that we'll be able to add two more layers after the goal that we just created.

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





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



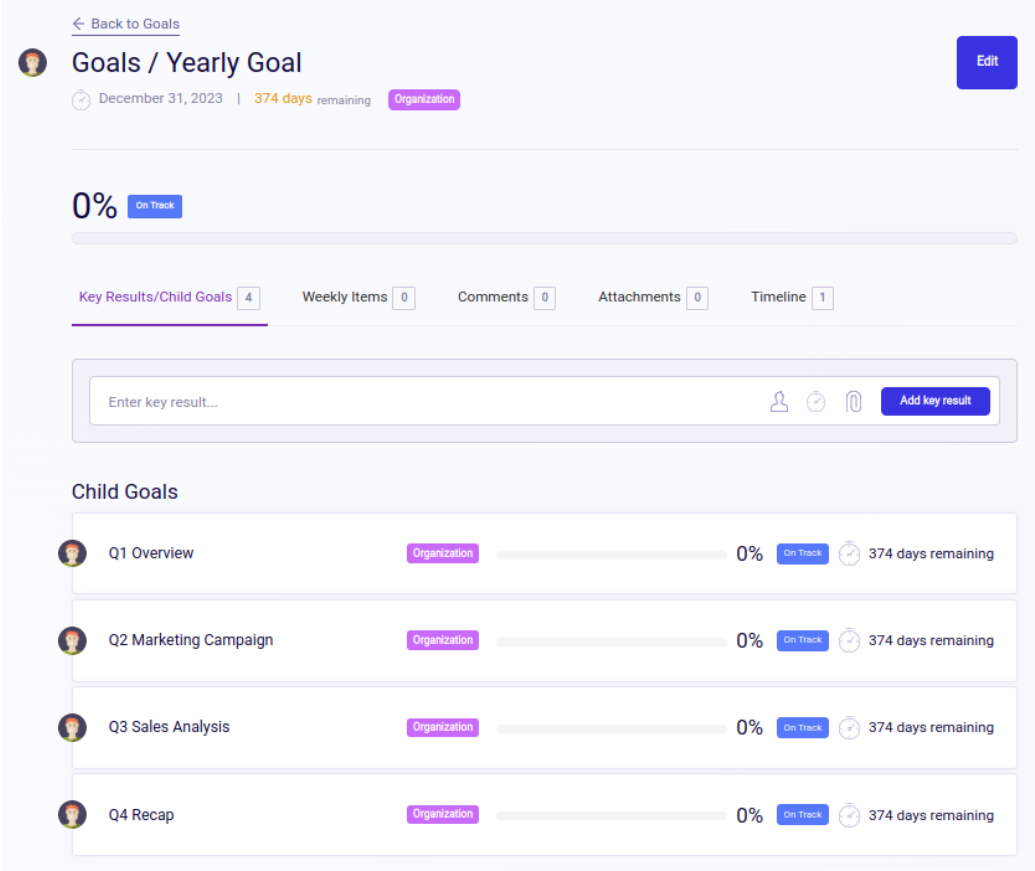
This button downloads the full goal tree in a .pdf format, in case you want to make a presentation or a poster for hanging on your wall ;)

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

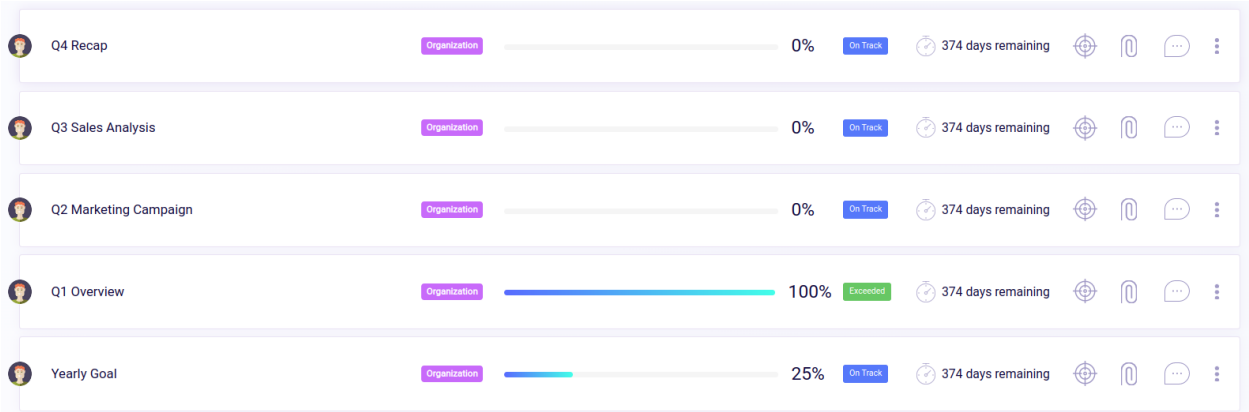
Switch to a full-screen view to see the whole tree on a bigger scale.

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.



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.

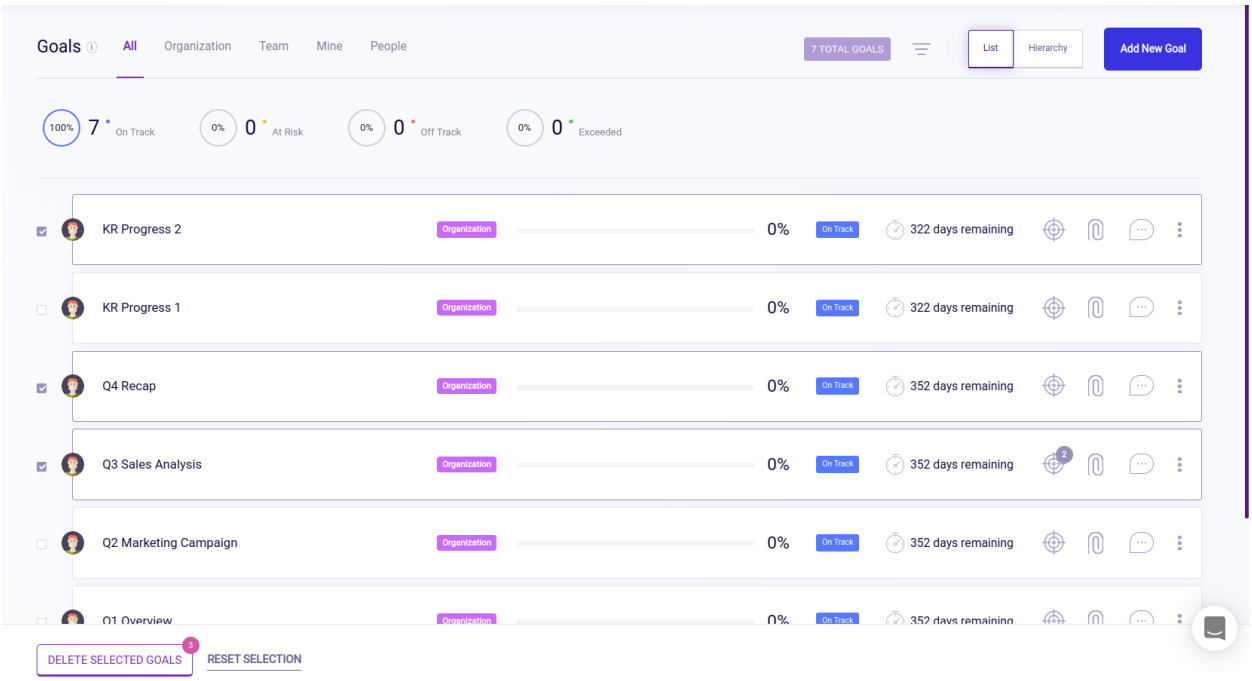


Important! If there are both Key results and Child goals under a goal, there are both included in the calculation of the progress average. This logic works on every level of goals:

Level 5: Average of goal's KRs
Level 4: Average of all Level 5 child goals and KRs of the same goal
Level 3: Average of all Level 4 child goals and KRs of the same goal
Level 2: Average of all Level 3 child goals and KRs of the same goal
Level 1: Average of all Level 2 child goals and KRs 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.



Goals - Permissions

Goal Creation

	View	Add	Edit/Delete
Administrator	● all public/active goals	● add goals for all	● edit/delete goals

	● 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	● **Organization** goals ● goals assigned to them or created by them ● goals (public /active) assigned to a user who is a team member	● add goals for themselves, all users (except Admins) who are members of a team	● edit/delete goals created by themselves, Managers or Members.
Manager	● **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	● add goals for themselves and their team members	● edit/delete goals created by themselves or Members of their team.
Member	● **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	● add goals ONLY for themselves	● 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	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Senior Manager, Manager, or Member goals	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Senior Manager, Manager, or Member goals
Senior Manager	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Manager or Member goals	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Manager or Member goals

Manager	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Member goals	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Member goals
Member	● on Organization goals ● goals created by themselves ● goals assigned to themselves	● on Organization goals ● goals created by themselves ● goals assigned to themselves

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

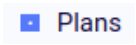
Weekly Items

	View/Add/Edit/Delete
Administrator	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Senior Manager, Manager, or Member goals
Senior Manager	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Manager or Member goals
Manager	● on Organization goals ● goals created by themselves ● goals assigned to themselves ● Member goals
Member	● 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 (KRs)** 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.



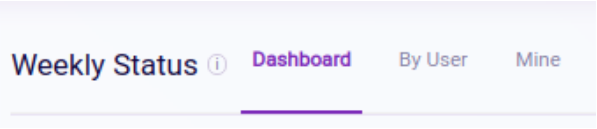
Accomplishments are the plans that have been completed.

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

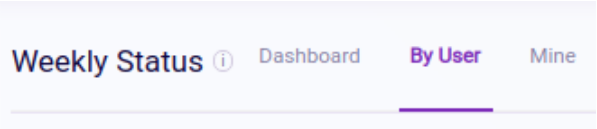
Next Week's Plans are the plans for the upcoming week. When the new week comes, the **Next Week's Plans** from the previous week become plans for the new week.

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

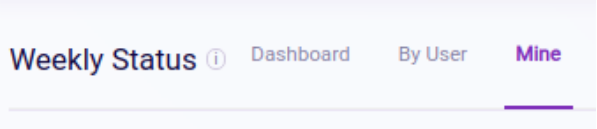
Dashboard shows an overview of the Weekly Status section.



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.



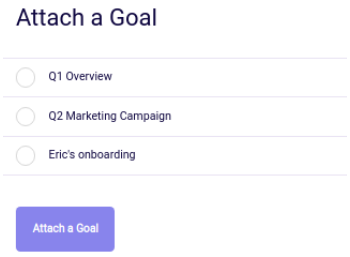
Mine

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.

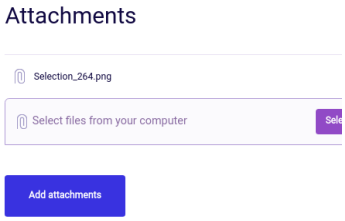
You can attach goals to the Weekly Item by clicking on the **Goals** icon.

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.

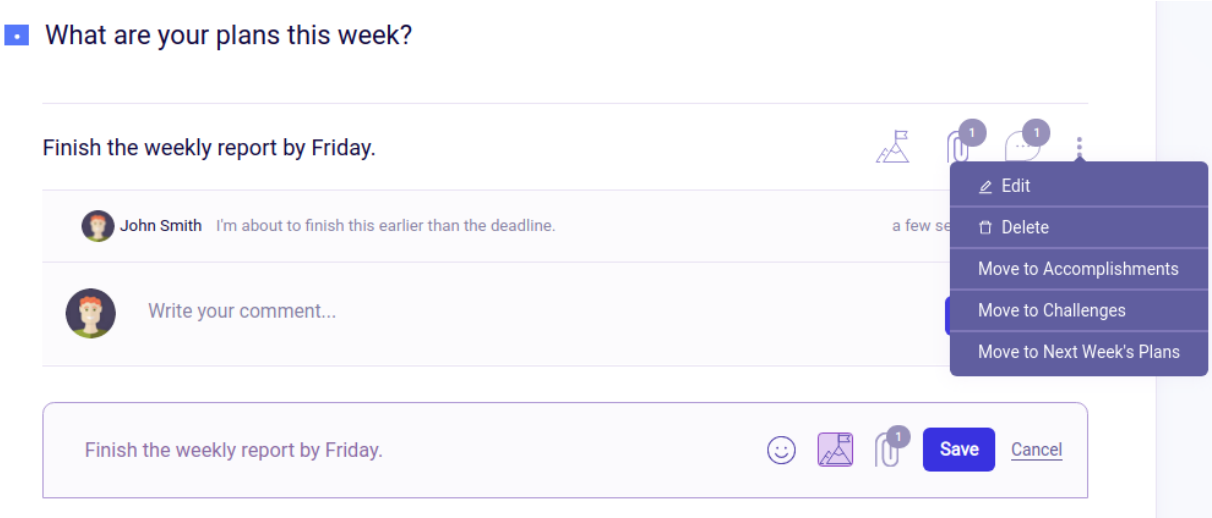


Click the attachment icon to attach files or attachments to a **Plan.**

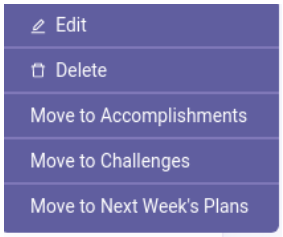
The file attachment window looks like this. Select the files from your device. Note that you can remove the file by clicking the × button. Close the window for discarding changes.



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.



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

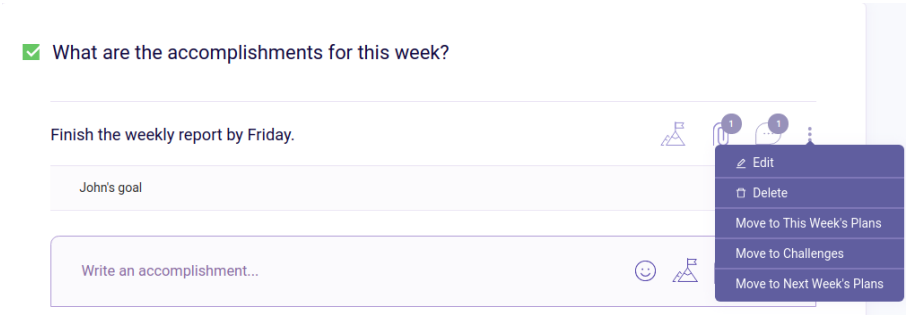


To change the **Plans** status to **Accomplishments.**

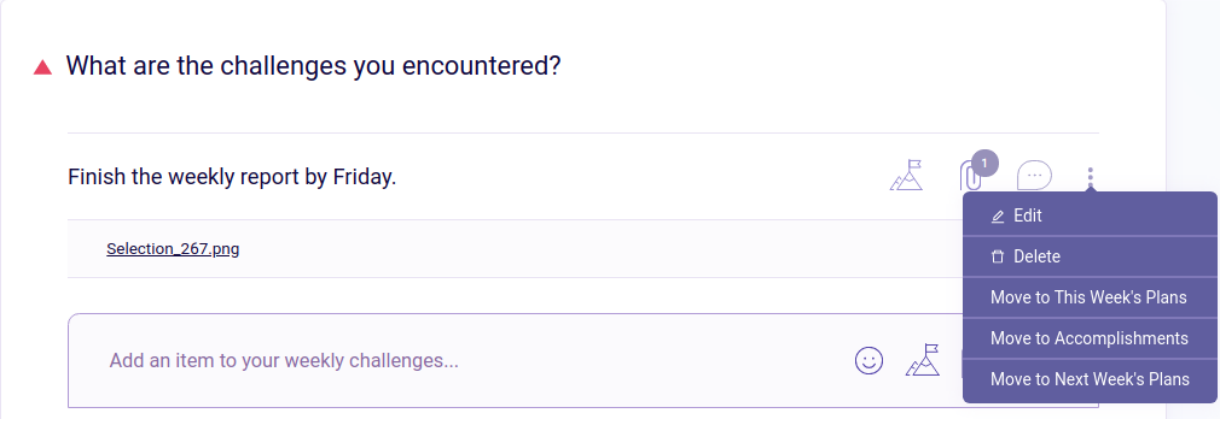
To change the **Plans** status to **Challenges.**

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

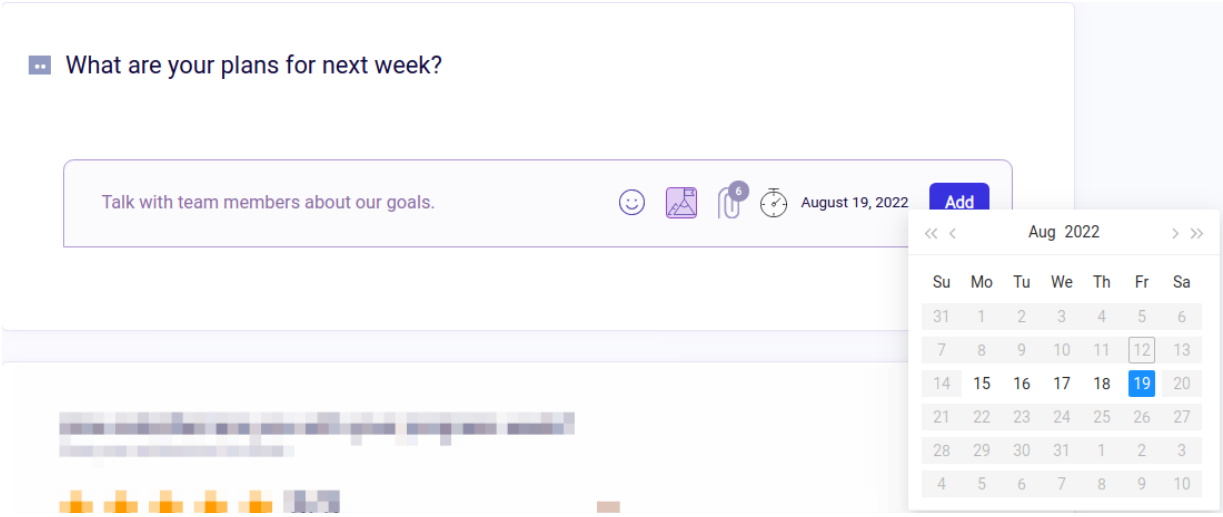
Accomplishments and **Challenges** have the same sub-functionality as **Plans**. For demonstration purposes, we display "*John's goal"* as an **Accomplishment** and "*Finish the weekly report by Friday*" as a Challenge. The sub-actions in the dropdown menu are the same, with the difference being that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



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.



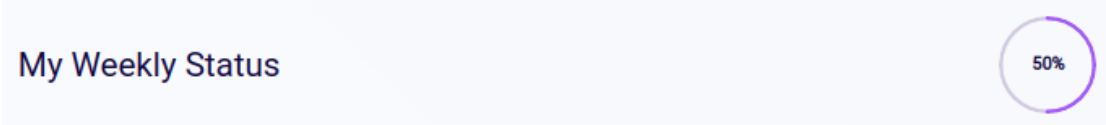
The **Next Week's Plans** share similar functionality as the other weekly plans, except there is one extra functionality here. Users can add a deadline for the **Next Week's Plan**. Please note that as it is a **Next Week's Plan,** the deadline calendar only has the 5 working days of the next week available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



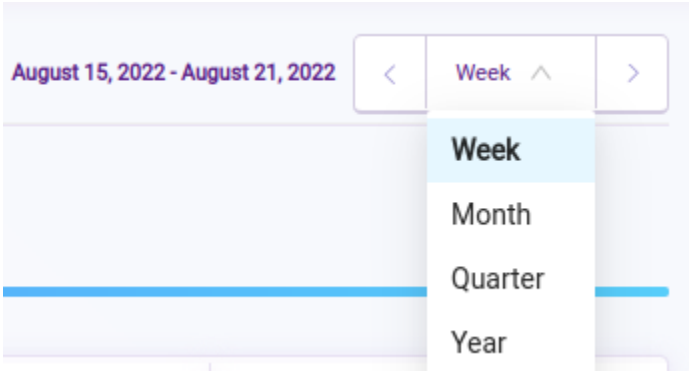
Weekly Satisfaction or Happiness Score:

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.

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



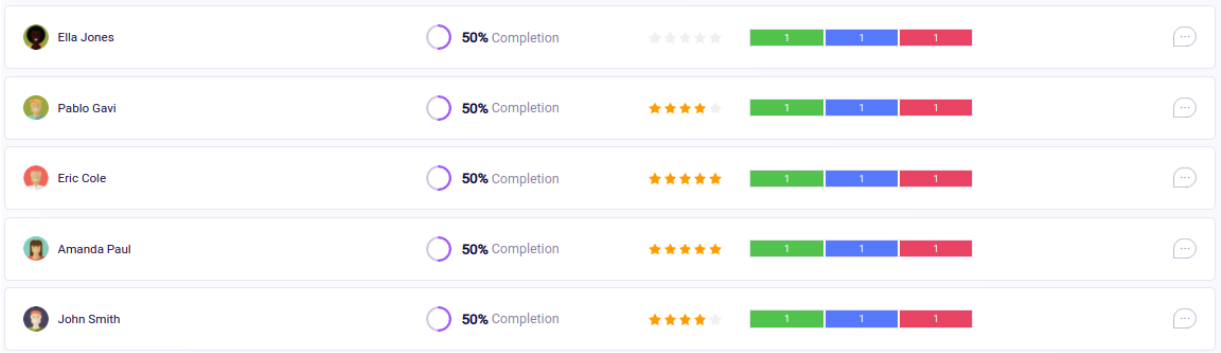
At the top of the pages, the users will see a menu for picking periods of time. Based on the selected time period, the system displays the corresponding **weekly items** for the selected period. With down and horizontal arrows, users can navigate between periods. For example, if we choose **Month** from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



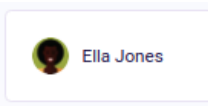
By User

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.

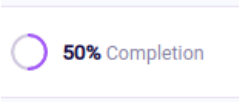
The **By user** section looks like the illustration below. It includes user cards that have summary information about the users and their weekly activity.



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.

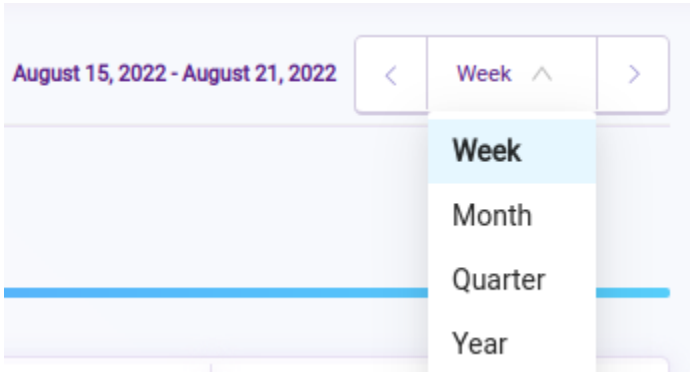


These numbers of **Accomplishments, Plans,** and **Challenges** accordingly. We use a color scheme for the Accomplishments Plans and Challenges as indicated. **Green** is for Accomplishments. **Blue** is for Plans. **Red** is for Challenges. Try to get used to the color scheme

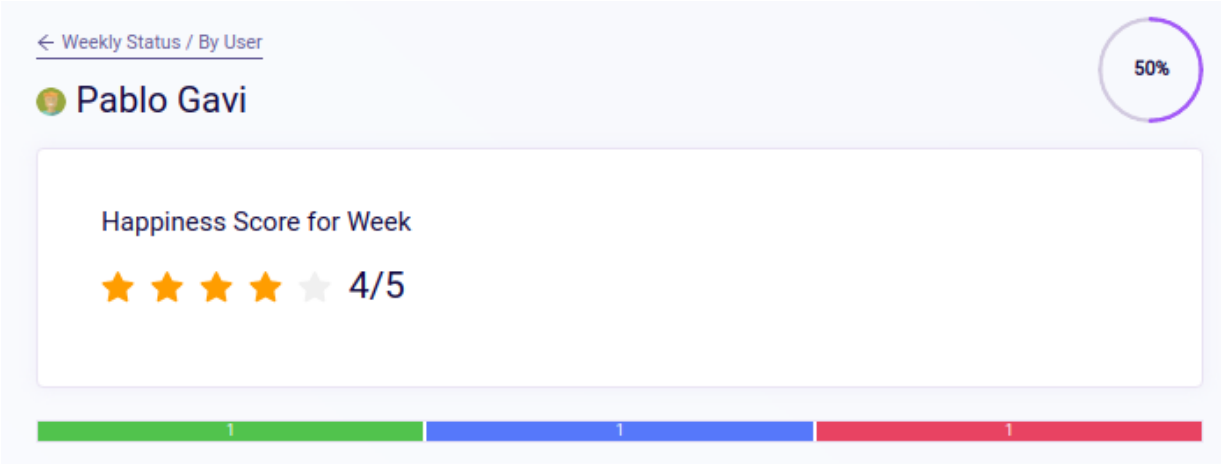
of these items, as they are used extensively throughout the system.

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.

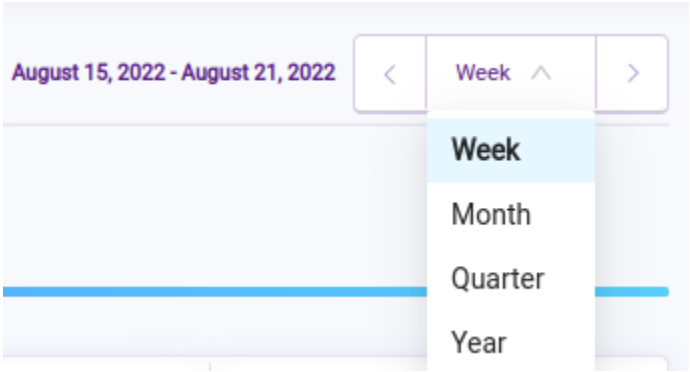


Dashboard

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.

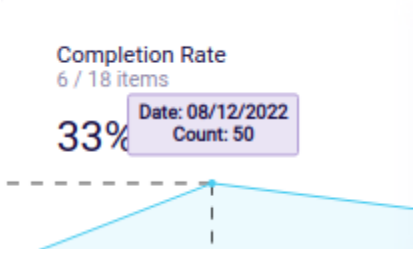
The Weekly Status **Dashboard** shows the progress of **Goals** and their statuses. The Progression rate shows how much your goals have progressed during the ongoing week or period of time selected.

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

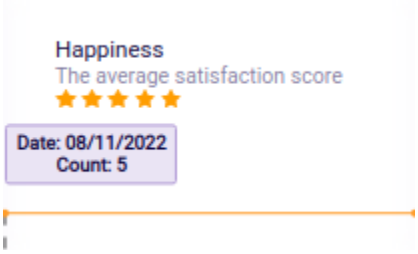


The **Dashboard** has also mini charts, which represent an overview of the organization's weekly data. When the user hovers their cursor over the charts, they can see the count of items recorded on specific dates.

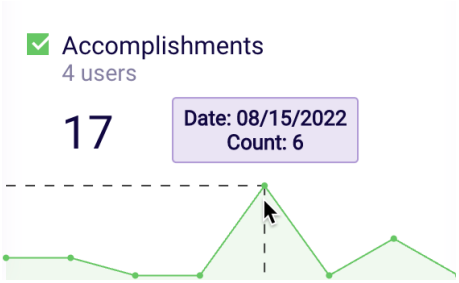
The Completion Rate chart shows the overall completion rate of the organization's weekly items. If you're interested in the formula used, it is **Accomplishments/Plan + Accomplishments**.



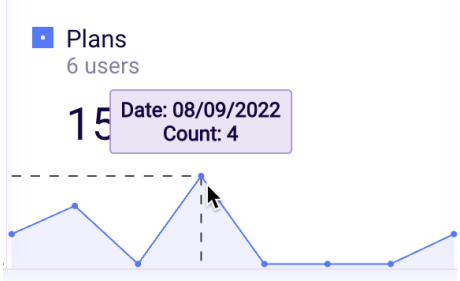
The **Happiness score** chart shows the progression of 'happiness' across your whole organization over a time period. Keep an eye on Happiness!



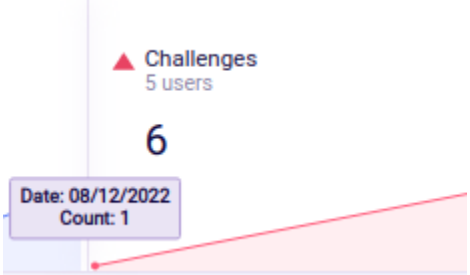
The **Accomplishment** chart shows how many **Accomplishments** were recorded on specific dates and what trends we are seeing.



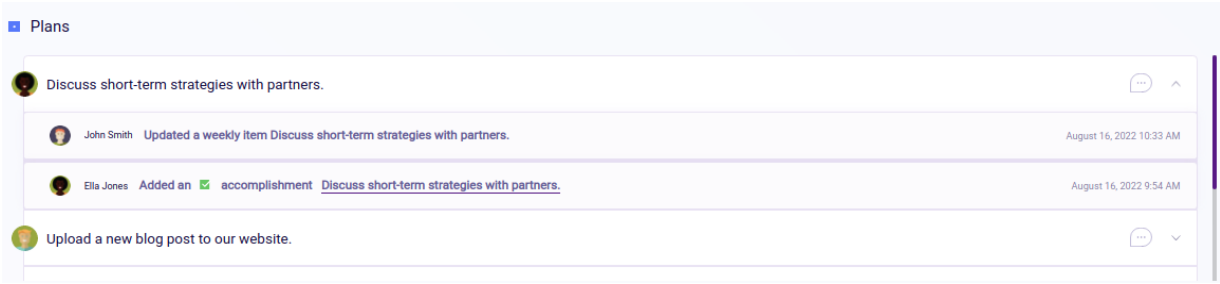
The **Plans** chart shows how many **Plans** have been recorded on specific dates and what trends we are seeing.



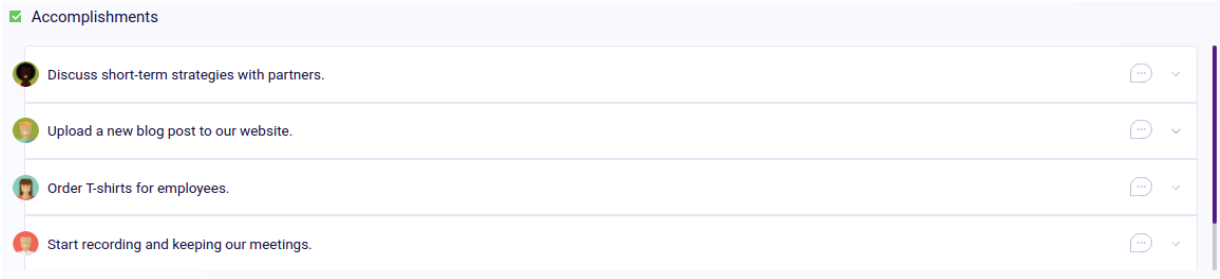
The **Challenges** chart shows how many **Challenges** have been recorded on specific dates and of course, the trends we are witnessing.

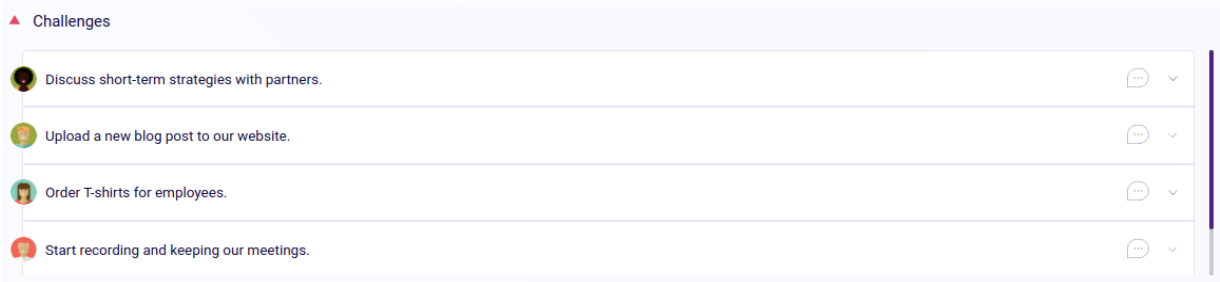


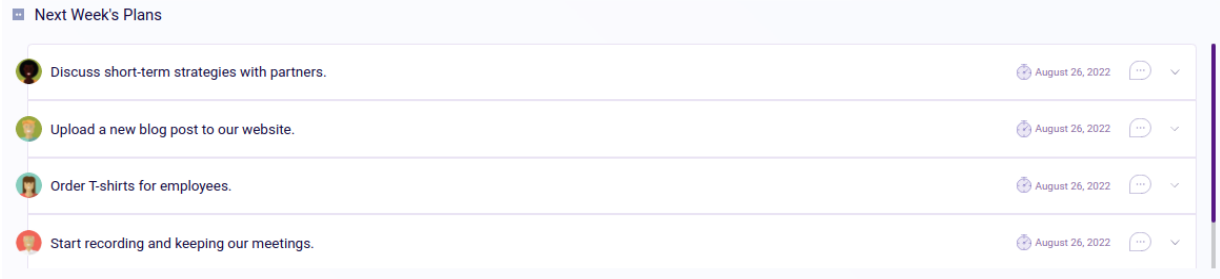
Since the organization already has data in Weekly **Plans,** we display an overview of all the plans as illustrated in the list below. Unlike the **Mine** and **By User** sections, the **Plans** have a dropdown arrow on the right side of the page. This dropdown opens an activity list, which shows log 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 **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.







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	● views all items	● for themselves ● Senior Managers ● Managers ● Members	● for themselves ● Senior Managers ● Managers ● Members
Senior Manager	● items assigned to themselves ● items assigned to a user who has a team	● for themselves ● Managers ● Members	● for themselves ● Managers ● Members
Manager	● items assigned to themselves ● items assigned to a user who is in the same team	● for themselves ● Members	● for themselves ● Members
Member	● view items that are assigned to themselves.	● for themselves	● for themselves

Weekly Items Comments, Timeline, Attachments

	View comments, timeline, attachments	Add comments and attachments
Administrator	● views all items	● for their weekly items ● Senior Manager's weekly items ● Manager's weekly items ● Member's weekly items
Senior Manager	● items assigned to themselves ● items assigned to a user who has a team	● for their weekly items ● Manager's weekly items ● Member's weekly items
Manager	● items assigned to themselves	● for their weekly items ● Managed Member's weekly

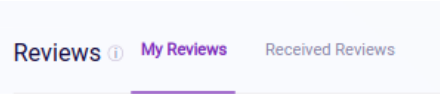
	● items assigned to a user who is in the same team	items
Member	● view items that are assigned to themselves.	● for their weekly items

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

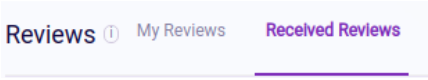
Reviews

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.

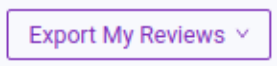
The **My Reviews** tab includes reviews that the user has given to others depending on user role permissions.



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



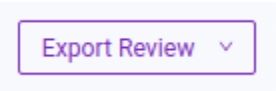
Export all given reviews in .PDF format by clicking the **Export My Reviews** dropdown. The system will export all reviews the user has given to other users.
Note: The Export feature is available only for **Administrators** and **Senior managers.**



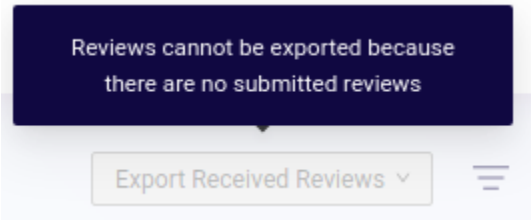
Export all received reviews in .PDF format by clicking **Export Received Reviews** dropdown. The system will export all reviews that the user has received from other users.
Note: Export feature is available only for **Administrators** and **Senior**

managers.

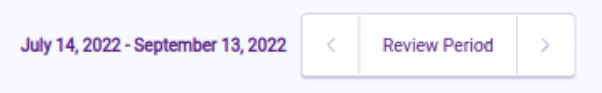
Administrators and Senior managers can export individual user reviews. This button appears when we click the individual review card of the user from the **My Reviews** section. **Note:** The Export feature is available only for **Administrators** and **Senior managers.**



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



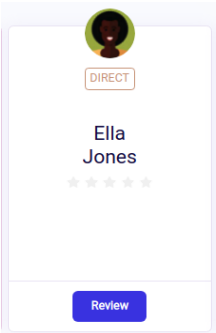
Users can switch between review periods and check reviews recorded in previous periods. The review period start and end dates are also displayed.



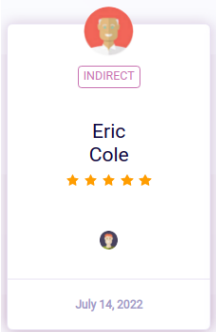
In the **My Reviews** section, we have several types of designs that the users will encounter.

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:

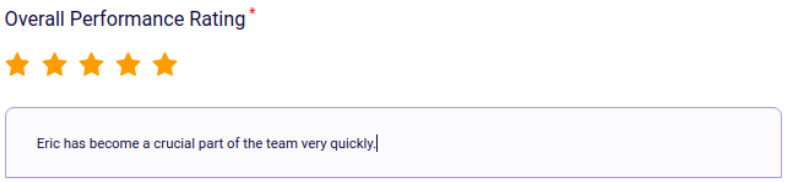
Users of equal user roles or statuses see this label on the review card. For example, if we're logged in as a **Member,** we'll see the **"Peer"** label on the review cards of other **Members.**

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.

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.

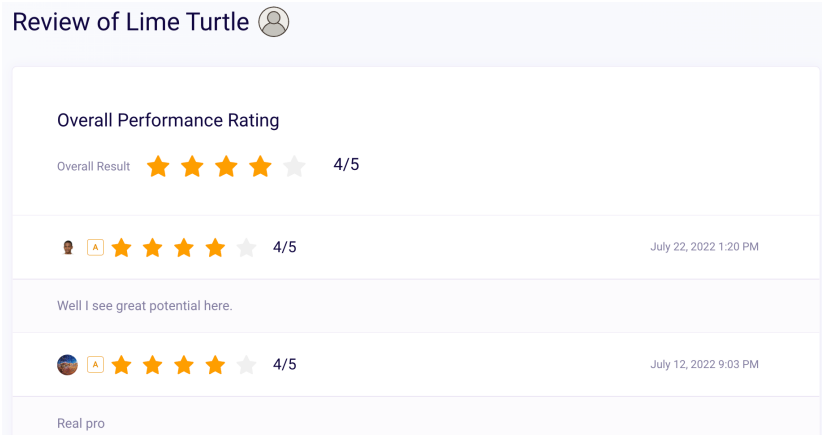
Now, let's move on to the actual reviewing process. As we already mentioned, the **Reviews** section is closely linked to the **Form Templates**, which is why **Surveys** and **Reviews** are similar in structure. Once you click the Review button on one of the user cards, you will be presented with the 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.



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.

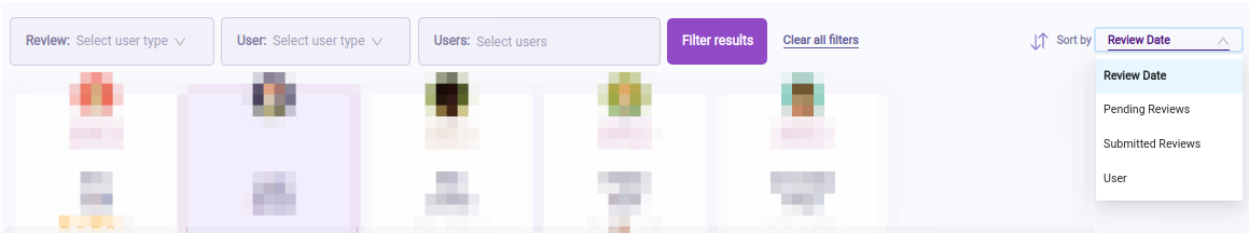
At the top of the review page, we see the average Overall Performance Rating of the user based on the individual reviews provided. Below that section, the system lists the individual responses with user avatars, roles, and the dates of review submissions. In this case, we can see that **Lime Turtle**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



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**.

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	● views all users	● perform reviews on all users
Senior Manager	● themselves ● all users who have a team	● on themselves ● on all users who have a team
Manager	● themselves ● all users who are in their teams	● on themselves ● on all users who are in their teams
Member	● themselves ● all users who are in their teams	● on themselves ● on all users who are in their teams

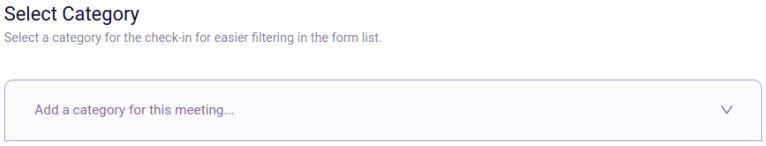
Check-ins

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.

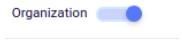
Start by adding a name for the **Check-in.** Users can name the meetings however they want. The system has a 64-character limit for the Check-in name.
You can also add a description for the Check-in.

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.

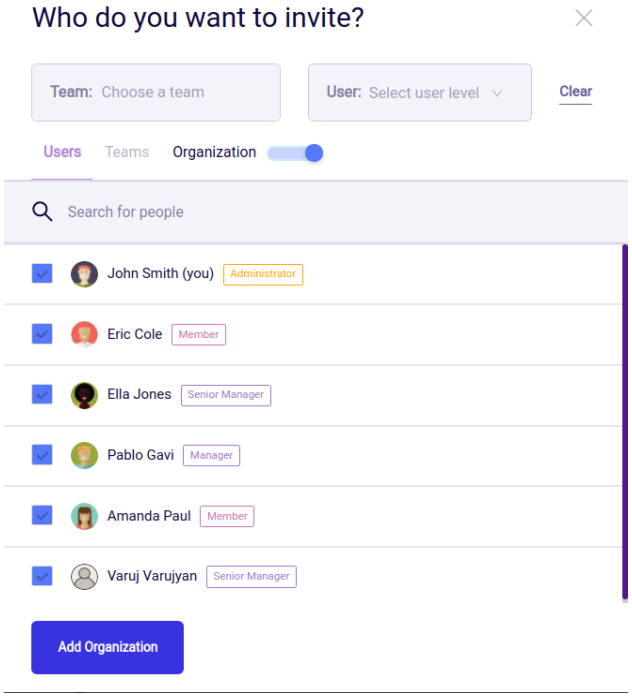


Next, add team members to the Check-in. All added members will be able to access the information in the check-in meeting. They will be notified when they are assigned to the check-in or the check-in details are modified. Inviting users to a Check-in is dependent on user roles.

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

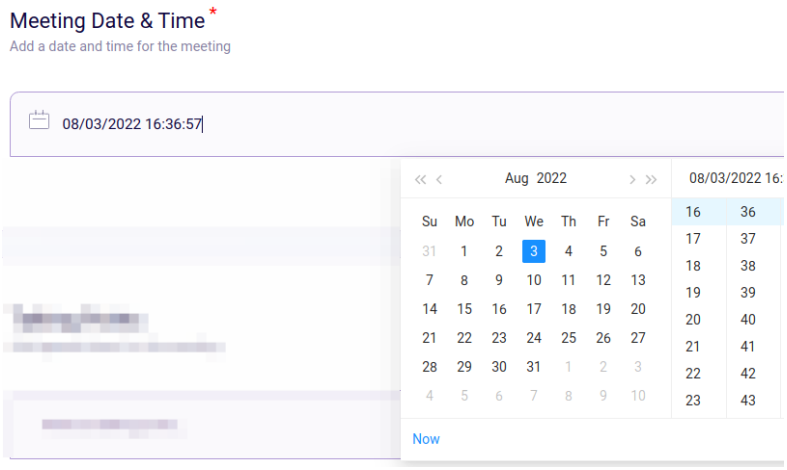


button, the check-in is assigned to every user in the Organization. Until the switcher is on, user and team checkboxes are disabled for edit. The **Organization** option is available to Admin users only.

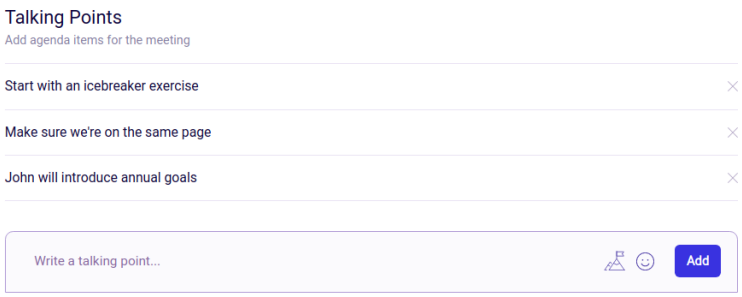


To quickly find users on teams in the list, use our filters, which work just like any other filter on our platform.

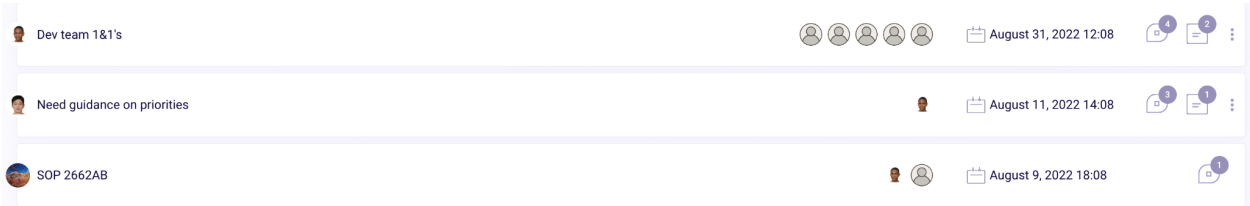
Select the **date & time** for the check-in. Both past and future dates can be selected. Users can select past dates to record and document previous meetings and store past meeting data.



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.



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:

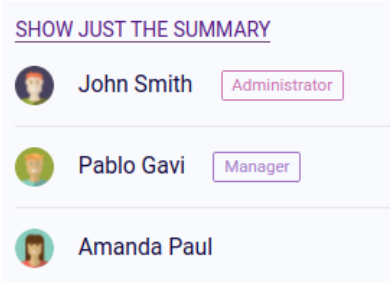


When the check-in meeting begins, the assignees can enter the check-in card and start their interaction with the check-in in the meeting area. The check-in details description is presented below:

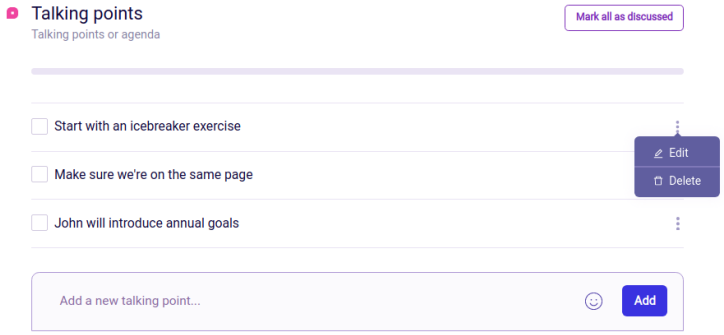
At the top of the **Check-in details** page, there's general information about the check-in as well as a description, if available. All Check-in data can be exported in .PDF format using the **Export Check-in** button. We indicate both the Check-in creation

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.

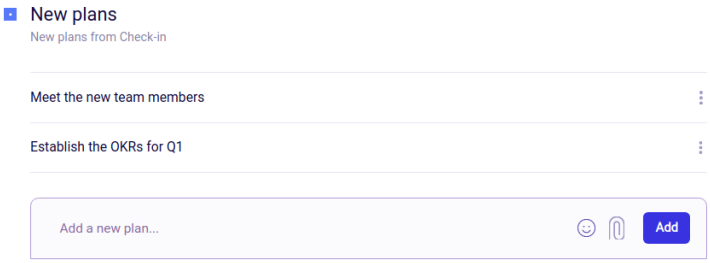
The invited member's section displays details on the assignees to the check-in. This is general information regarding these users and their user roles.



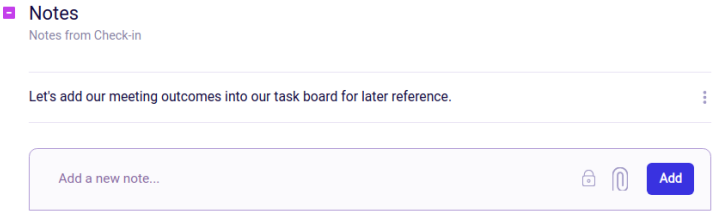
Talking points refer to an agenda or outline of what is to be discussed in the Check-in meeting. You add/edit or delete Talking points as the Check-in creator. Assignees can mark the **Talking points** as discussed. This action can be performed either by individually clicking on the checkboxes near the 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.



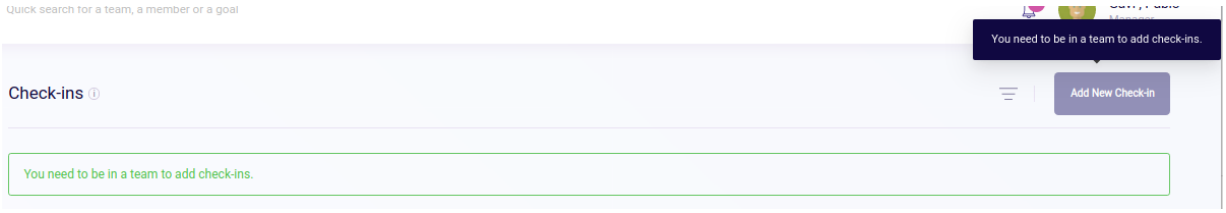
The **New Plans** section of the system is designed to provide next steps planning opportunities. Based on the outcome of the Check-ins, you can add New Plans to be undertaken. Users can also attach files to **New Plans.**



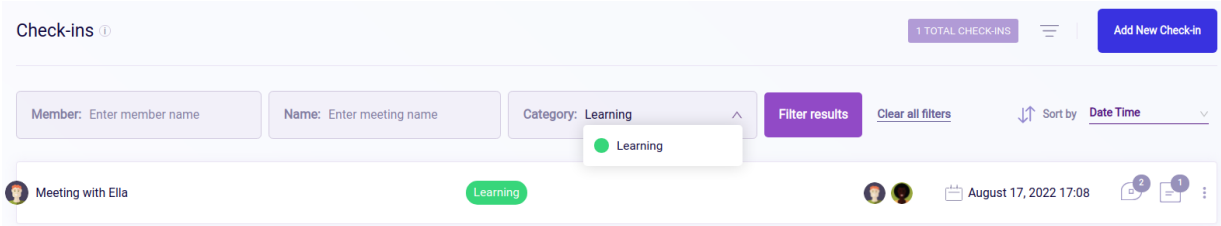
Notes can help the users document any information that can later be used for reference purposes. Notes can be made private using the button. Private notes can only be seen by the creator of the note. You can also attach files to Notes.



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.

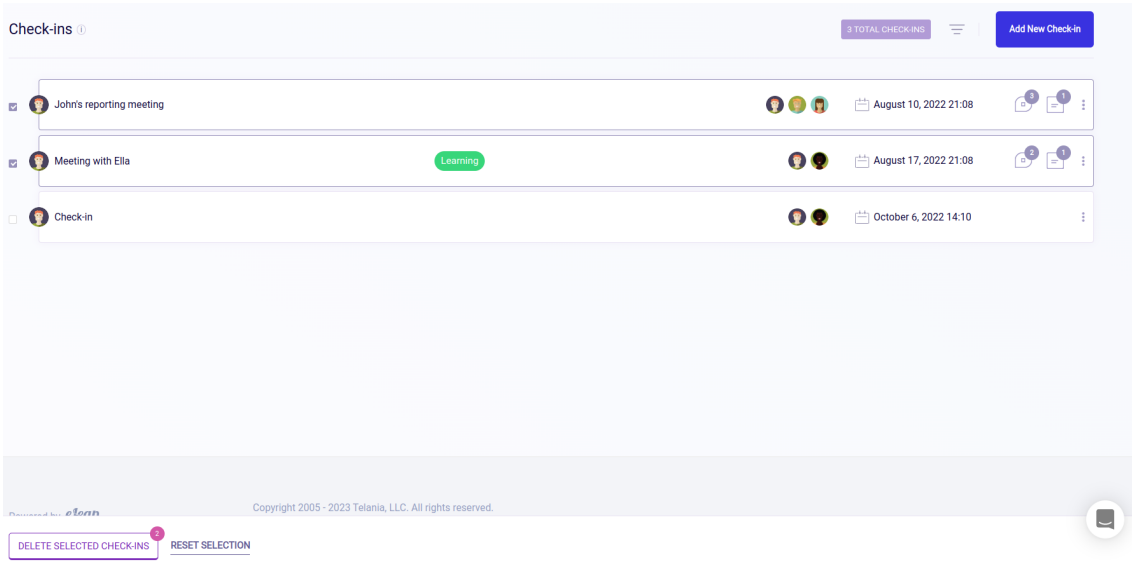


Check-ins can be filtered by **Member name** and **Check-in name** and sorted by **Check-in date and time**, and **Name** in alphabetical order, both in ascending and descending. For filtering by **category**, select a category from the list. Only one category can be selected.



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.



Check-ins - Permissions

	View	Add	Edit/Delete
Administrator	● all check-ins	● for all users	● all check-ins
Senior Manager	● check-ins created by themselves ● check-ins of every user who has a team	● for all team members (if the user has a team)	● check-ins created by themselves ● created by Managers ● check-ins created by Members
Manager	● check-ins created by themselves ● check-ins of manager's team members ● check-ins assigned to the Member	● for all manager's team members (if the user has a team)	● check-ins created by themselves
Member	● check-ins created by themselves ● check-ins assigned to the Member	● for all team members (if the user has a team)	● check-ins created by themselves

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

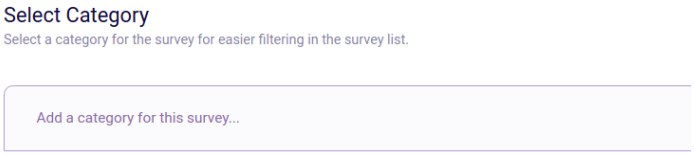
Surveys

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.

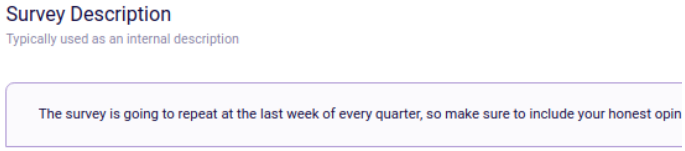
To get started with the process of creating a survey, we first need to go to the **Form Templates** section. Click the Add New Survey button to start creating your first survey.

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

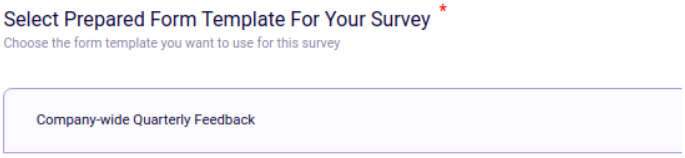
Select a **category** from the list of available categories for easier filtering. The categories created by Admins are available in the list. When the user picks a category, a category label is assigned to the Survey.



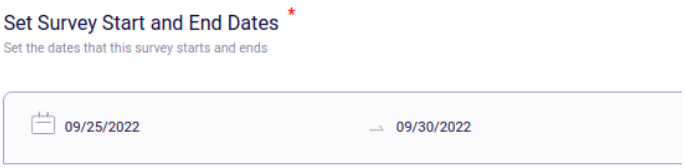
Next, add a **Survey description** for more context on what the survey is about. The field is optional, but it can help survey assignees understand its purpose.



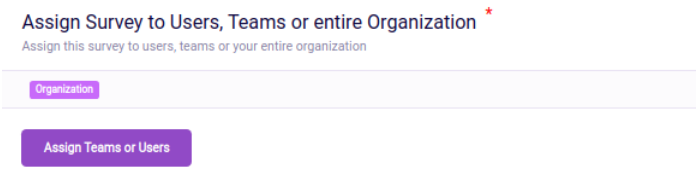
After creating your survey name and optional description, select the **Form Template** that will be used in the survey. This is one of the most important steps in the survey creation process because the form template selected decides the structure of the survey. The **Form Templates** must be prepared 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.



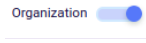
Set your **Start and End dates** for the survey. Adding the start and end dates add urgency to the survey respondents and help increase completions. Being able to set the Start and End dates also enables account executives to pre-schedule their survey deployment. Survey assignees are notified of new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



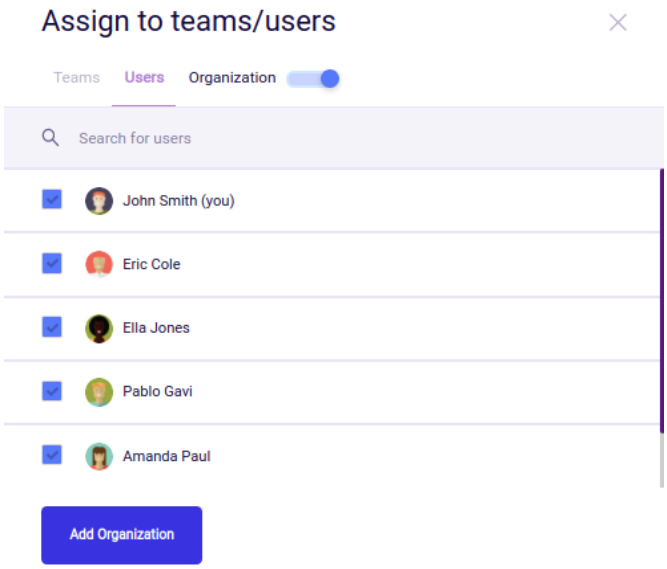
Assign users, teams, or organization to the survey. As surveys may be organization-wide events, creators can add teams, individual users, or entire organizations to surveys. See the next illustration on how to add users to surveys.



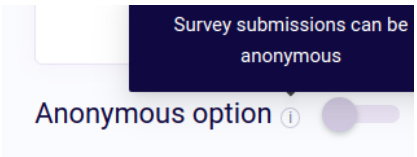
Assigning users and teams to surveys is pretty simple. Just click on the checkboxes near the user or team names and click the "Add" button below. With the



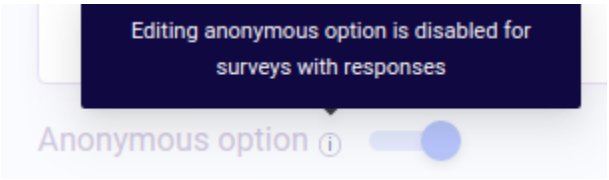
button, the survey is assigned to every user in the Organization. Until the switcher is on, user and team checkboxes are disabled for edit. The **Organization** option is available to Admin users only.



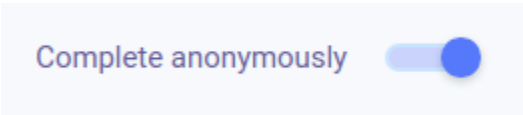
Survey creators can add an option for respondents to submit the survey anonymously. If the switcher is on, respondents will have a similar switcher when they enter the survey and submit the form.



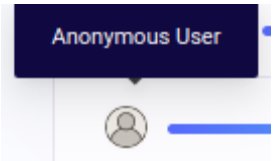
If the users want to edit an existing survey to have an anonymous option, they can only do that if the survey does not have submitted responses yet.



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.



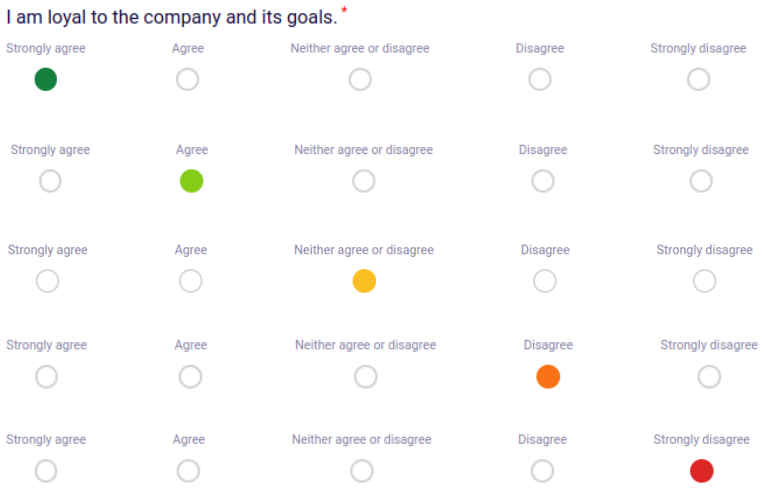
After clicking 

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

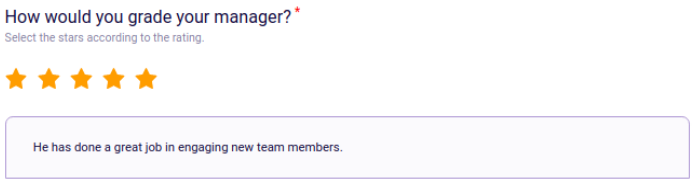
Notice that the card has 

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.

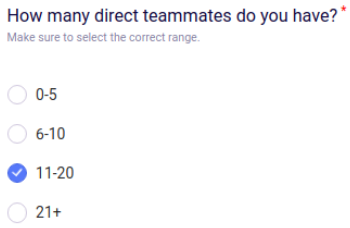


This is a **Grading** type field. We've previously added an explanation of this field. In this Grading field, however, we're also required to provide an explanation under the star rating. We've given a 5-star rating as an illustration.

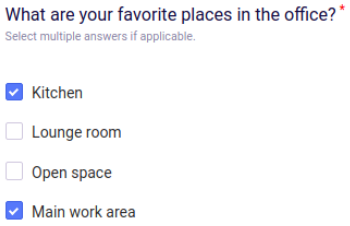


This is a **Range** type field. As an answer to this question, the assignees must drag the circle to make their selection on the scale.

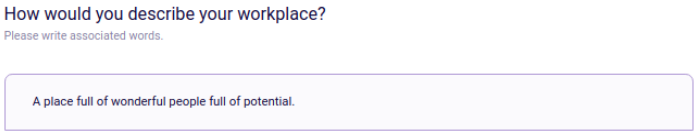
This is a **Multiple-choice option** type field. The assignee should select one of the answers.



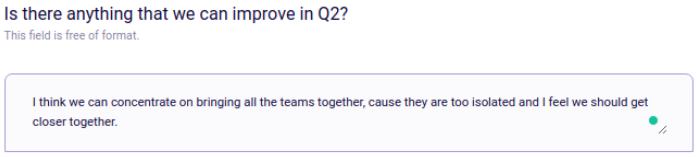
This is a **Multiple selection option** type field. The assignees can select multiple answers, which are recorded.



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.



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.

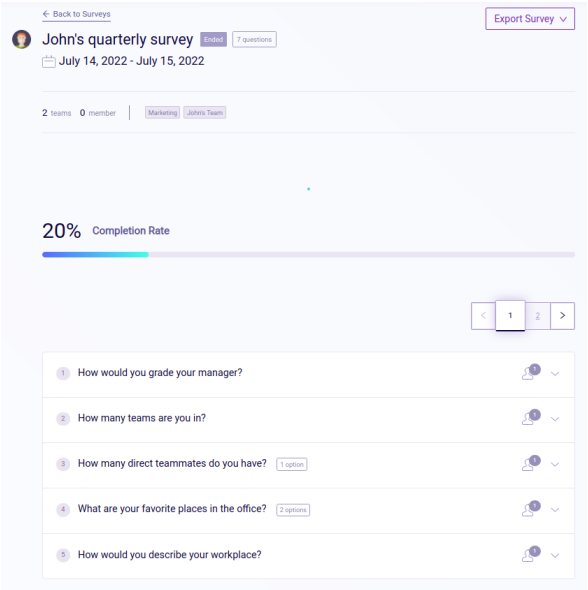


The **Overview** button is for the creator of the survey so that they can overview the survey at any point.

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 Export Survey 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.

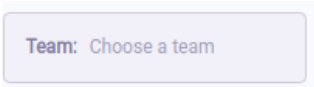


The results recorded from previous types of questions are pretty self-explanatory, but the results of the **Rating** type field might need some explanation. As you can see, we've recorded different answers in this field. Each answer has its color and number, which are used here to calculate an average 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.

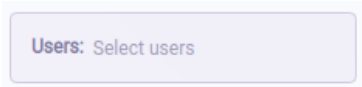
The **Surveys** section has filters as well. The table below describes each field of the filter.

Simply search for a survey by name.

Filter surveys based on the teams assigned.

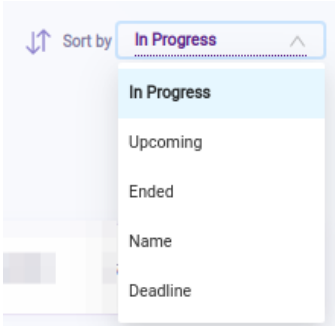


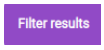
Filter surveys based on the users assigned.

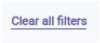


Filter surveys based on the deadline. The user selects a date and the system brings up the surveys with deadlines up to the selected date.

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.

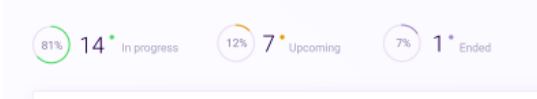


Click 

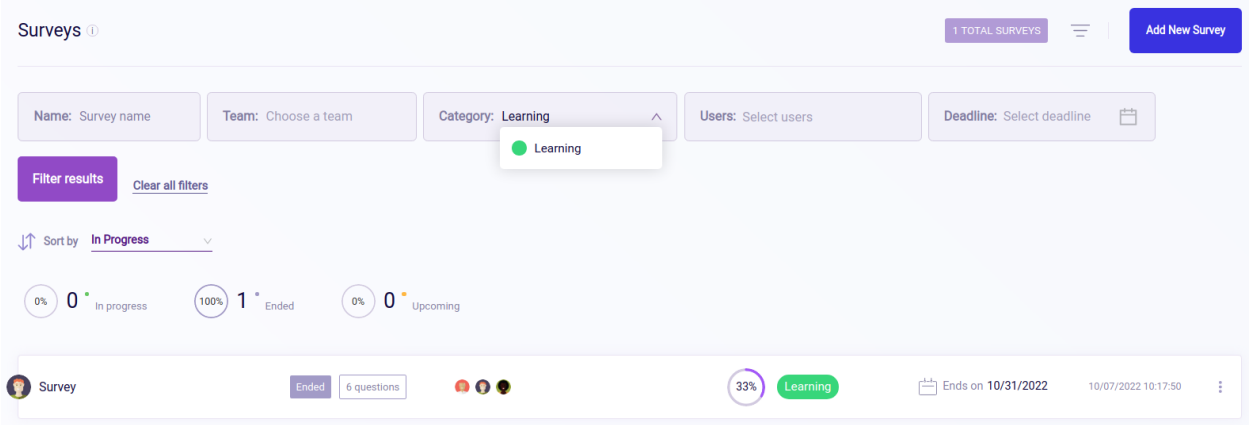
to get the filtered results and 

to clear the results of the filter.

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

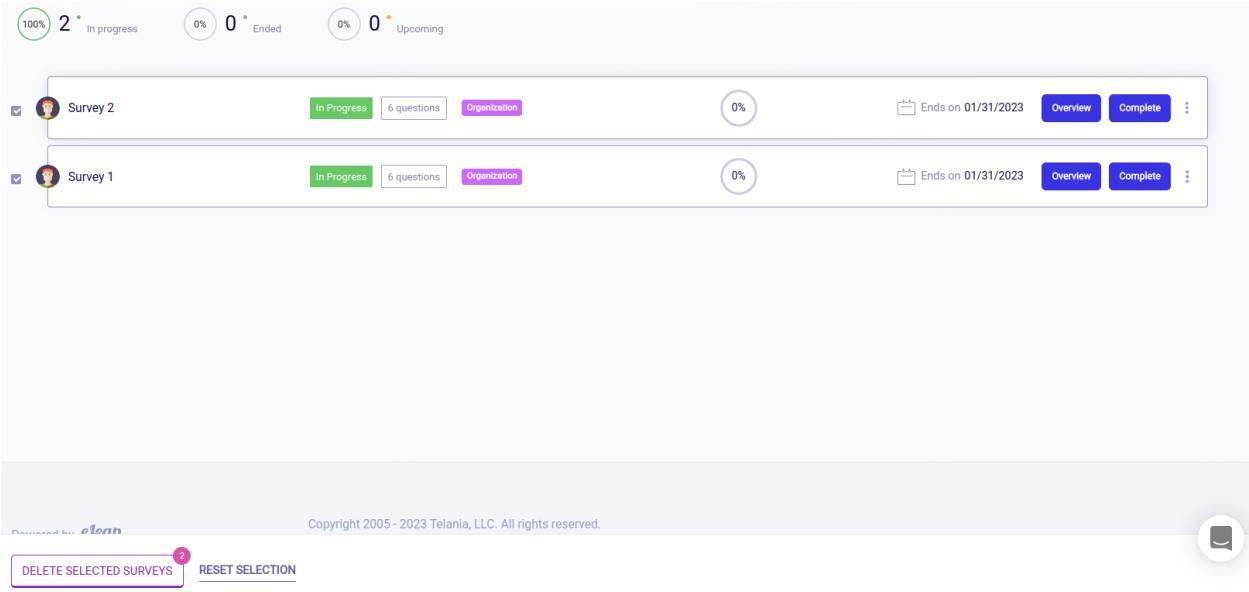


For filtering by **category**, select a category from the list. Only one category can be selected.



Checkbox selection

For bulk-deleting Surveys, just tick the checkboxes near the Survey cards. Once they are selected, click the DELETE SELECTED SURVEYS button to delete the selected surveys. Click the RESET SELECTION button to uncheck all selected checkboxes.



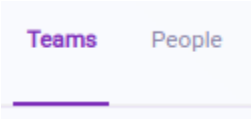
Surveys - Permissions

	View	Add	Edit/Delete
Administrator	● all surveys	● for all users	● all surveys
Senior Manager	● surveys created by themselves ● surveys assigned to them ● surveys created by Managers ● surveys created by Members	● for all users who have a team	● surveys created by themselves ● created by Managers ● check-ins created by Members
Manager	● surveys created by themselves ● surveys assigned to them	● for all users who are in the same team	● surveys created by themselves

Member	● surveys assigned to them	● No Permission	● No Permission

Teams & People

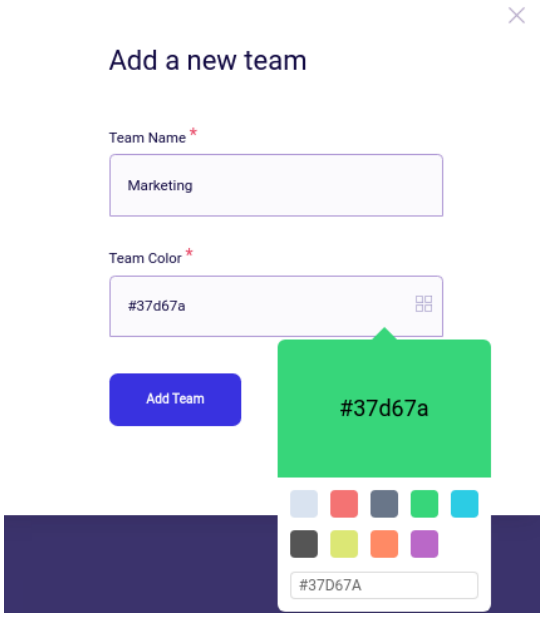
The **Teams & People** section enables organizations to create profiles for their team members in the system and also to have quick access to their information. The section is divided into two subsections: **Teams** and **People.** We'll discuss the process of creating **Teams** and **People** and their 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.

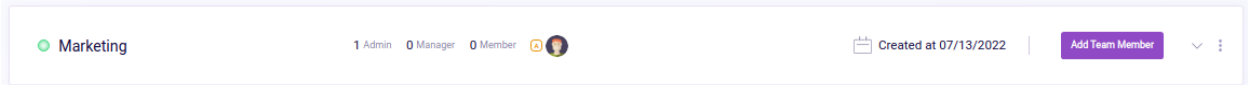


Teams

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.**





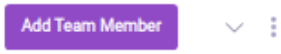
The team gets created instantly and automatically assigns the creator to the team. In our example, John has created the team. The team card features brief, useful information about the team.

The name and the color of the team

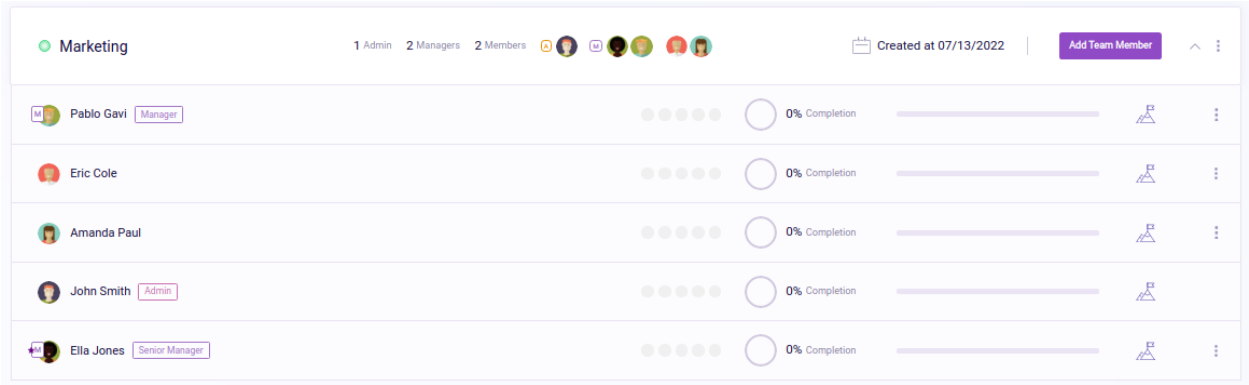
The number of users in every user role category (**Managers** and **Senior Managers** are grouped into Managers on the team card).

The date on which the team was created.

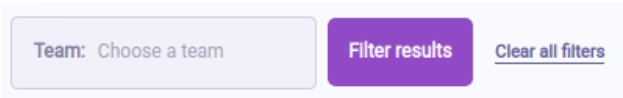
Some quick actions with the team like **Add Team Member,** a drop-down menu that opens the data on individual team members, and an ⋮ for edit and delete functionality.



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



You can always search for a team from the filters that exist on every page. Click Filter results to get the filter results and Clear all filters 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 Add New User 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.

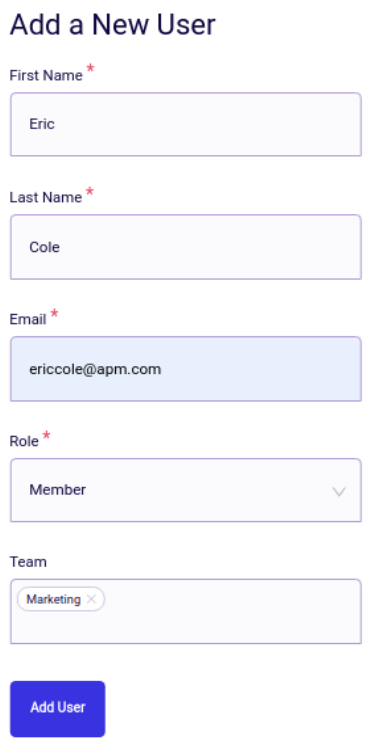
Add **the Last Name** of the new user. The field is required.

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.

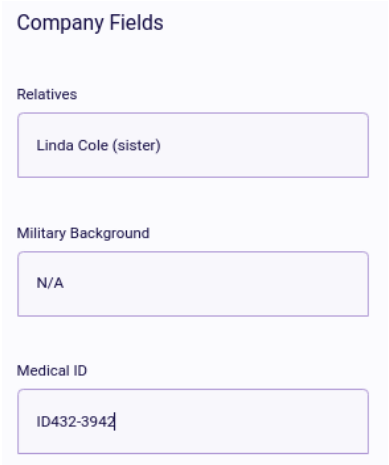
Add the **Role** of the new user. This will decide the permissions of the user that you're adding. The field is required.

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.



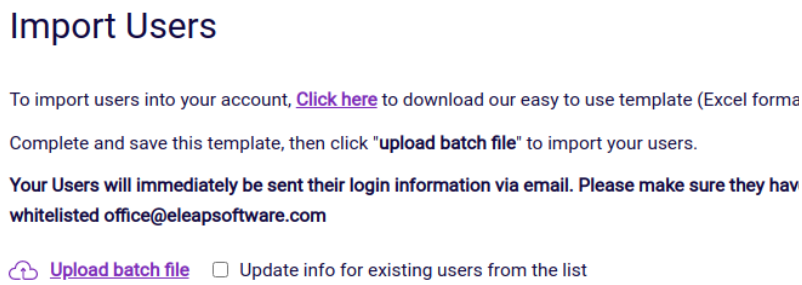
On the right side of the window, we see the **Custom fields** that we added previously from the Settings section. These fields accept any info, which can help the organizations store more data on their users.



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 

the button in **People** opens a window that instructs the users on how to proceed.

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

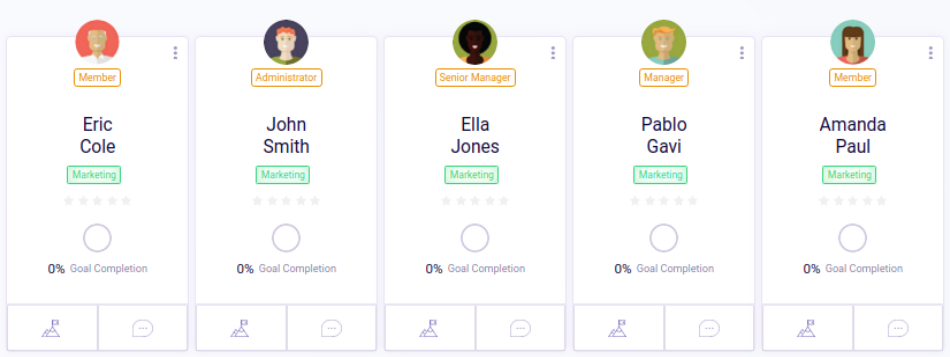


The fields in the file are pretty simple. Administrators can just input all the information and import all users to the system at once. The "**Is Administrator"** field determines whether the user you want to add is an Admin or not. If you put 1, the user on that row will be created as an Admin. All 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	

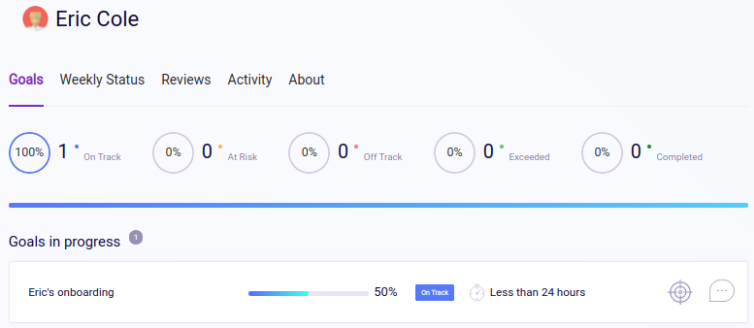
After all the information is in the file, save your changes and upload the same file by clicking on the **Upload batch file** button. If you want to update some information regarding the same users, check the checkbox on the right, and the users who have matching emails in the system and in the file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

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

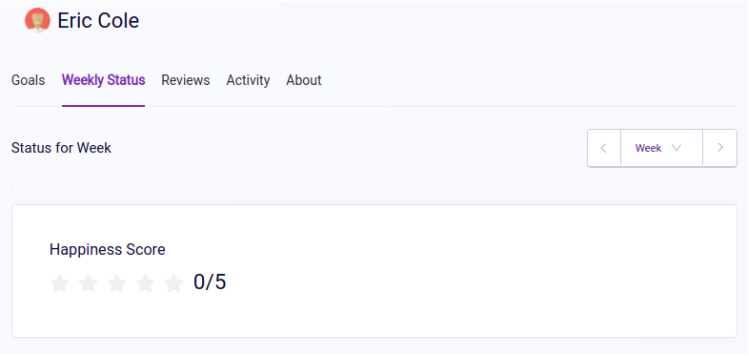


Users have their own profile section, which contains all their activity and associated data in one convenient and easy-to-access area. The sub-tabs include Goals, Weekly Status, Reviews, Activity, and About. The table below includes a detailed description of each sub-tab in the user profile section.

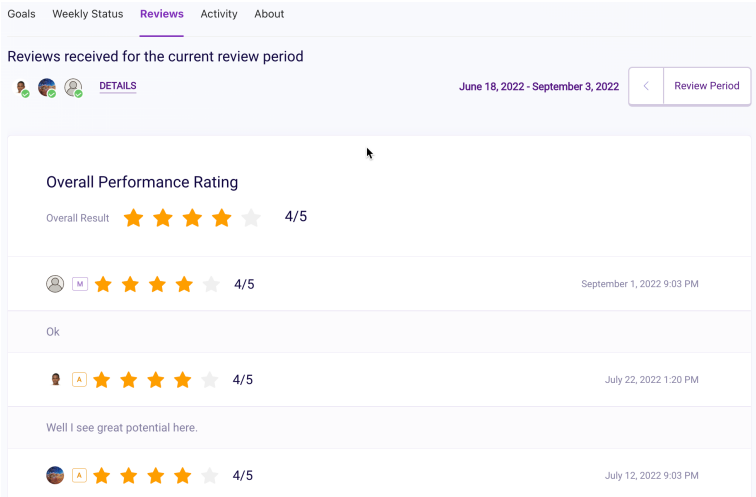
The **Goals** sub-tab provides insight into the progress of the Goals that Eric is assigned. If available, individual **Goals** can easily be accessed by clicking on the goals in this tab. You can refer to the Goals section in this document for more details.



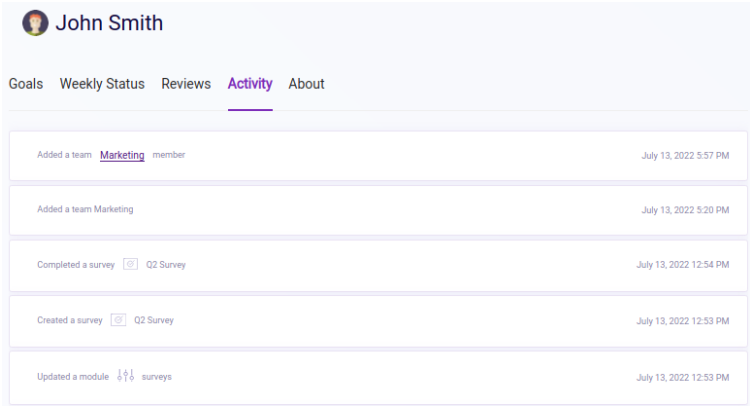
The **Weekly Status** tab includes the weekly status items of the user. **Administrators** and **Senior Managers** can add weekly items for the user directly from this section. The main [Weekly Status]() section description has more details on its functionality.



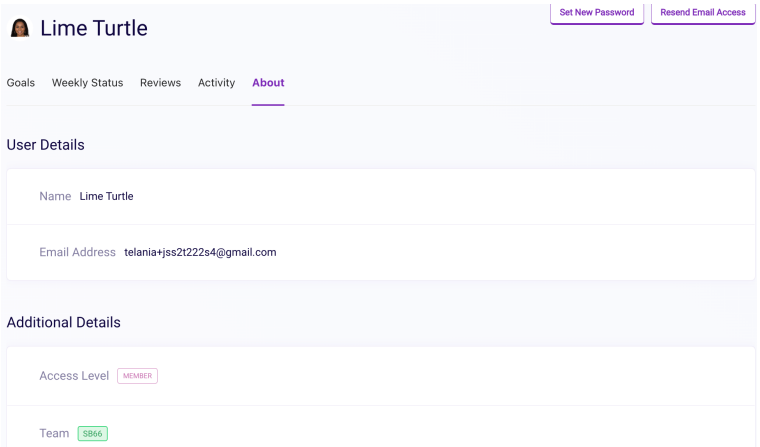
The **Reviews** tab displays reviews that have been given to the owner of the profile. In our example, Lime Turtle received reviews from 3 users. The main **Reviews** section of this document has more details.



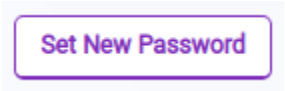
The **Activity** tab describes the individual activity of the user. Any action performed by the user is recorded here in the profile. The main **Audit Trail** section also provides data on user activity and more.



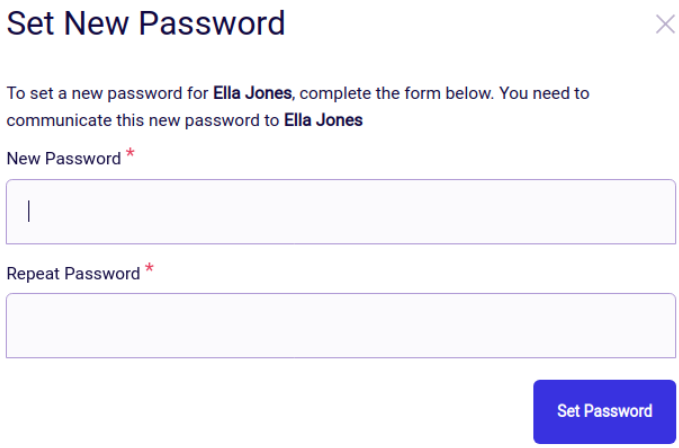
The **About** tab includes general information on the user, including any associated teams and access level.



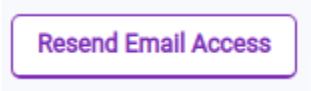
The **Set password** button enables setting a new password for users in case they have some issues with their older password.



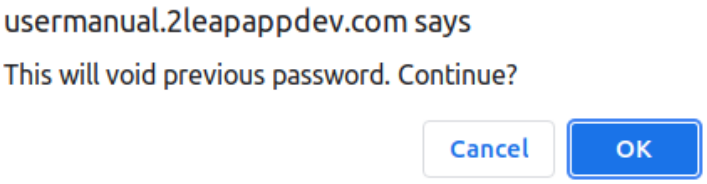
Clicking the **Set password** button opens a window for setting a new password. Create a new password for the selected user, type the same password in **Repeat Password** field, and the password will automatically update. Next time the user logs in, they have to use the new password. Communicating the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



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

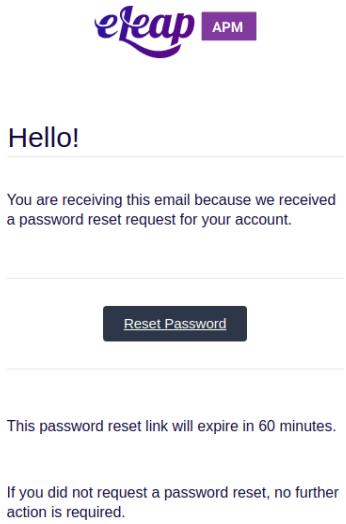


The previous password of the user will be reset after this action. That is why Admins will receive a warning inside the browser with the content on the right.

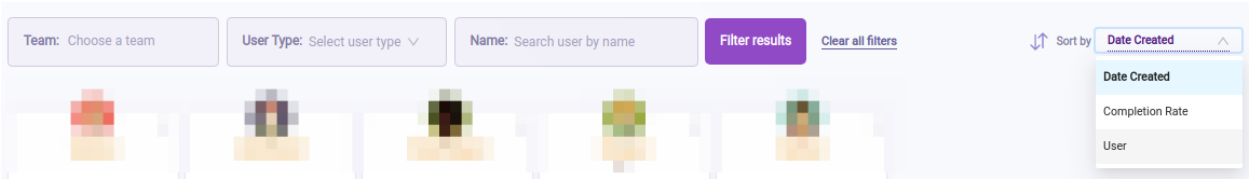


Important: Set new Password and Resend email access features are only available to the Administrator role.

After Administrators click **Resend Email Access**, users receive an email that redirects them to a page for resetting the password.



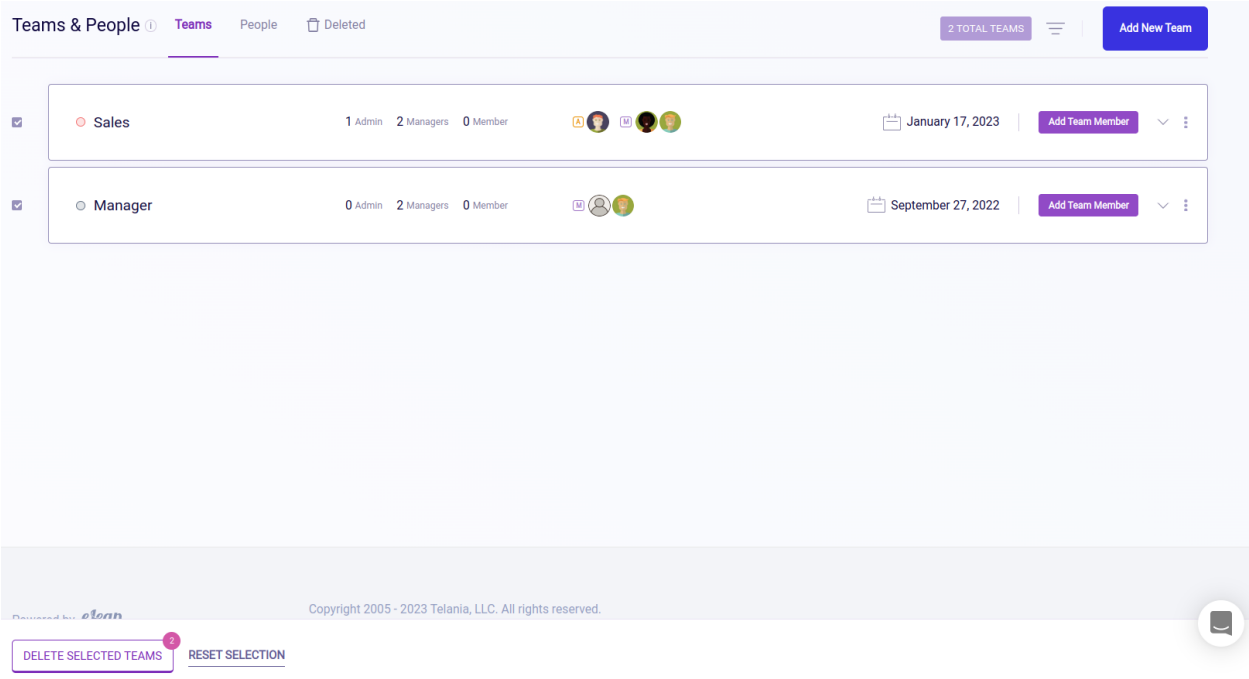
The users can be filtered according to **Team**, **User Role**, **Name,** or **Active/Inactive** status. Users can also be sorted according to **Date Created**, **Completion Rate (Goal), User Name** (alphabetical order both ascending and descending), and **Active** or **Inactive** status. Click Filter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



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.

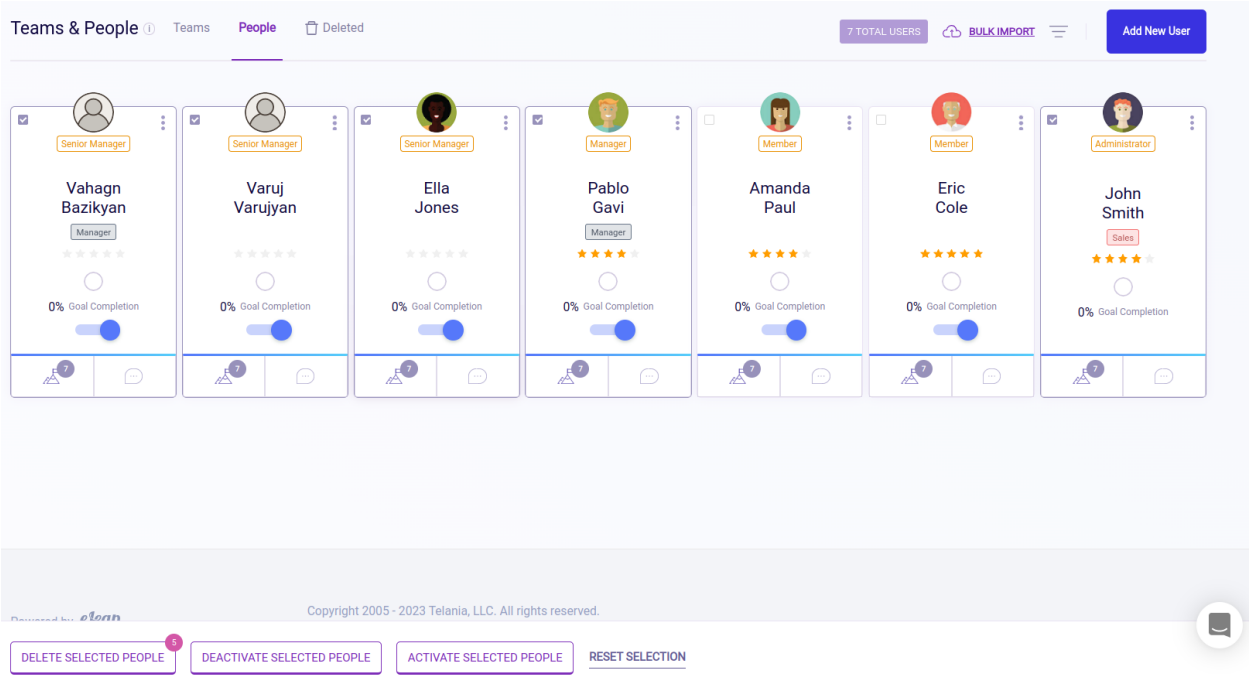


People section

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 (5)	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.



Teams & People - Permissions

Teams creation permissions

	View	Add	Edit/Delete
Administrator	● all teams	All roles can add teams	● teams created by themselves ● teams created by Senior Managers ● teams created by Managers
Senior Manager	● all 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

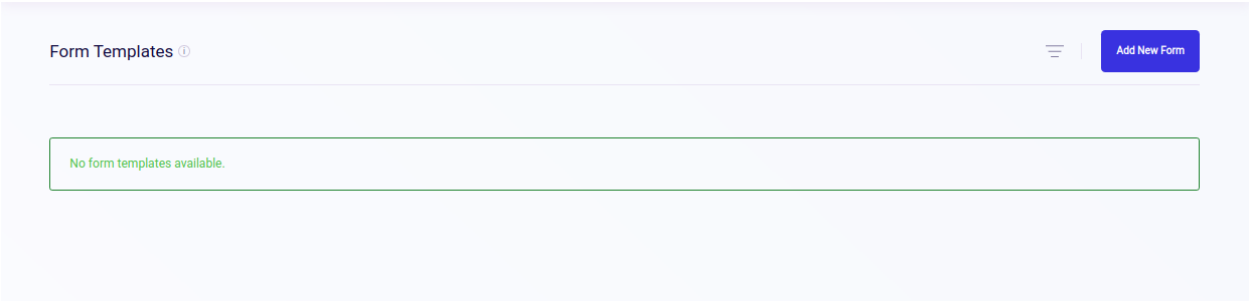
		Managers ● can add Managers ● can add Members	● can edit/delete Managers ● can edit/delete Members
Senior Manager	● all users	● can add Managers ● can add Members	● can edit/delete Managers ● can edit/delete Members
Manager	● their users	● can add Members	● can edit/delete Members
Member	● No Permission	● No permission	● No permission

People Activity permissions

	View
Administrator	● activity of themselves/Admins ● activity of Senior Managers ● activity of Managers ● activity of Members
Senior Manager	● activity of themselves ● activity of Managers ● activity of Members
Manager	● activity of themselves ● activity of Members
Member	● No Permission

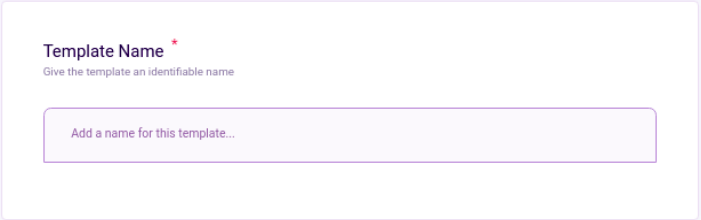
Form Templates

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:

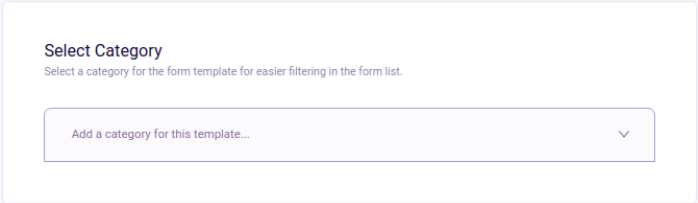


Clicking the Add New Form button opens a separate page where the form details and fields are created. Here's the template creation process in a step-by-step format.

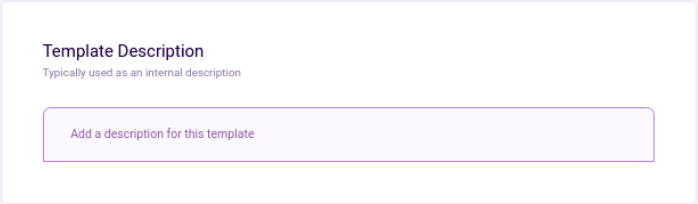
The process of adding a new form starts with the **template name**. Choose an appropriate and memorable name because the template will be easier to find later when the template list gets larger. You can use the filtering options to easily find your form templates.



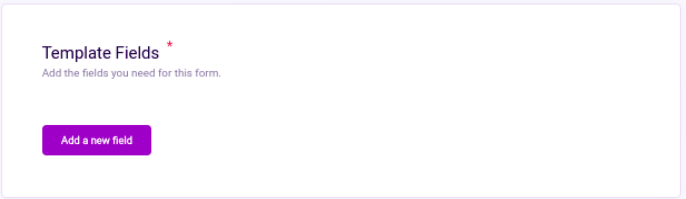
Select a **category** from the list of available categories for easier filtering. The categories created by Admins are available in the list. When the user picks a category, a category label is assigned to the Form Template. Only one category can be assigned to a form.

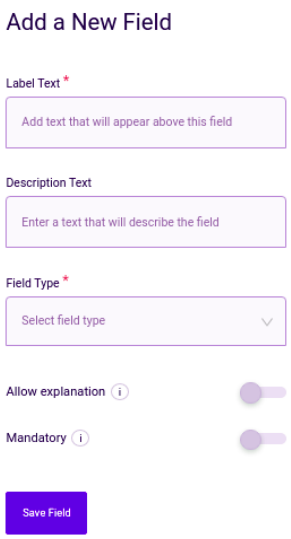


The template **description** provides important additional information to users as to what the template is about. This is an optional field that provides the opportunity to add extra info if needed.



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





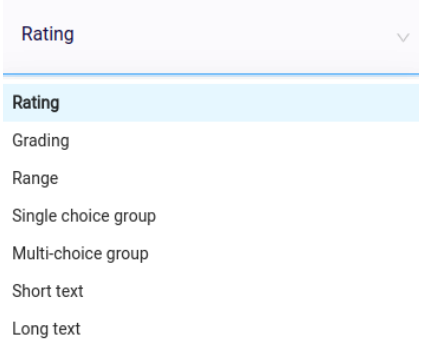
Label Text is the question field

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.

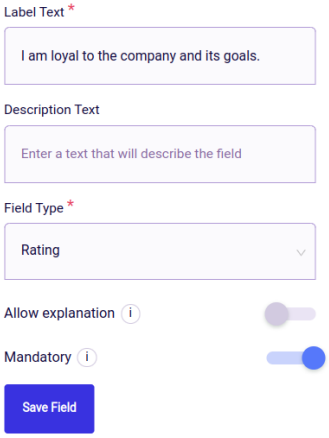
Mandatory field enables you to make the field required.



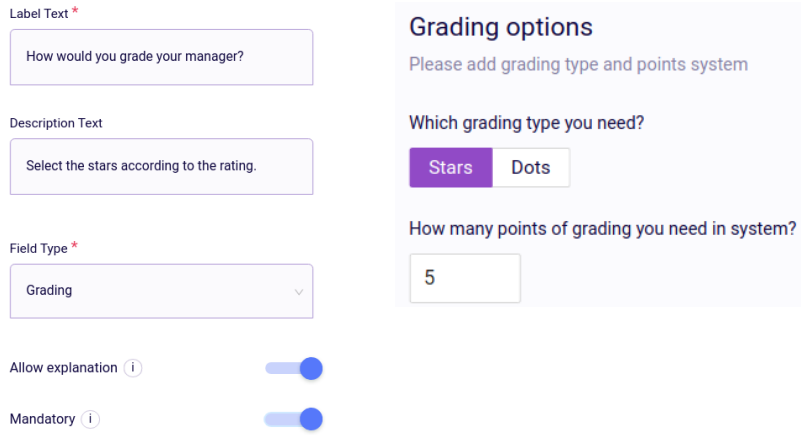
Clicking the **Field Type** dropdown opens a selection of options to choose from. The table below describes how each field type functions and what input they might require.

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.

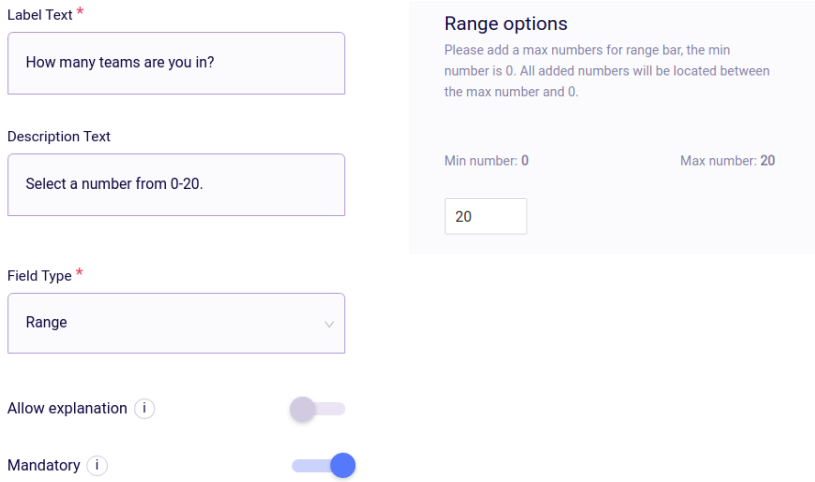
The **Rating** type field is Likert scale type field, which allows users to mark down their level of agreement with the statement described in the **Label text.** The numbers corresponding to every degree are later used to calculate average scores for questions.



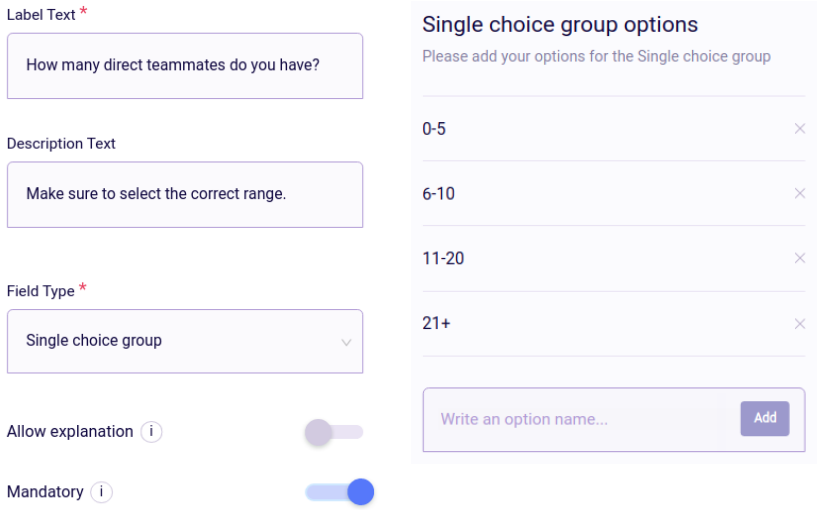
The **Grading** field type creates a question that asks the users to input a grade. The users can choose between Star and Dot formats. Grade points can be customized.



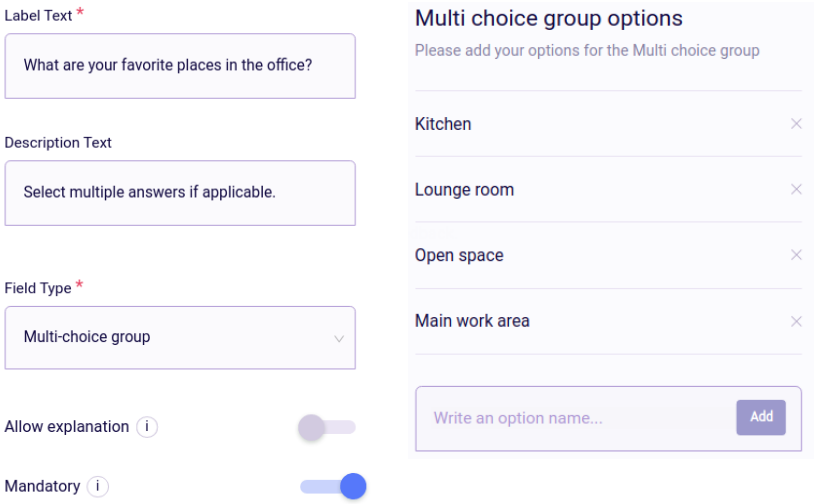
The **Range** field provides an option for users to fill in a number, ranging from 0 to the max number set.



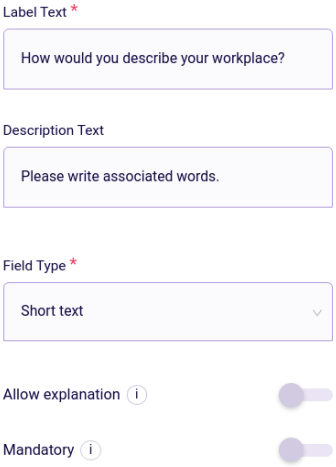
The **Single choice group** field type accepts a single answer from the answer options provided.



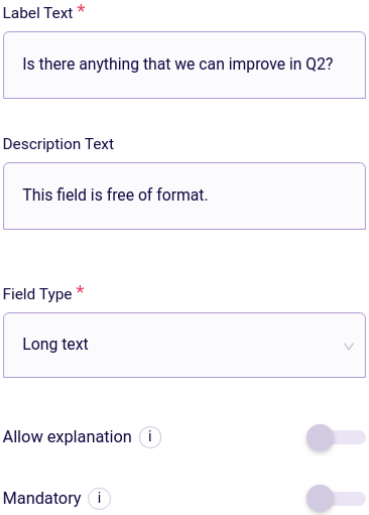
The **Multi-choice group** field type accepts the selection of multiple answers if necessary. This is also known as the checkbox question type.



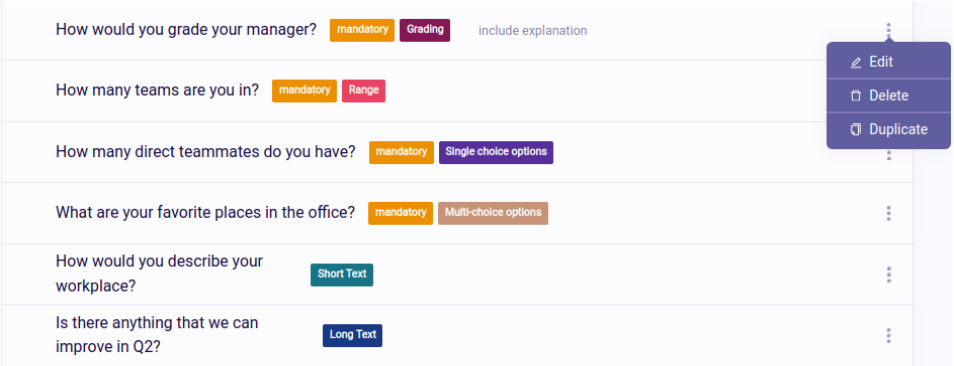
The **Short text** accepts short text in the field as the answer. There are no extra settings for this field as the answer is in free format. Also known as a single textbox type field.



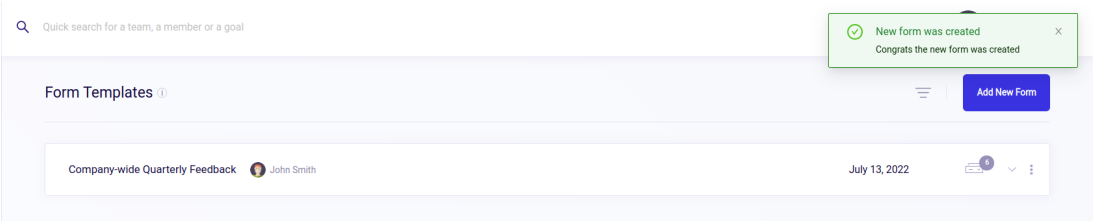
Long text accepts longer text in the field as the answer. There are no extra settings for this field as the answer is free of format. Also known as a comment box-type field.



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.

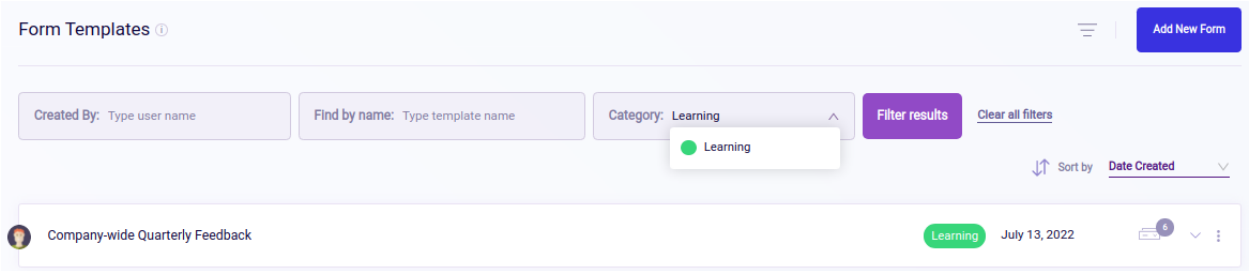


That's it! We've successfully created our Form Template. Note that the created Form Templates can be used in the **Surveys** and **Reviews** sections.



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. OBJ OBJ OBJ 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

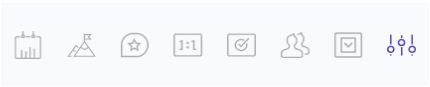
Administrators, Senior Managers, and Managers can all duplicate the form templates that they see in the section.

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.



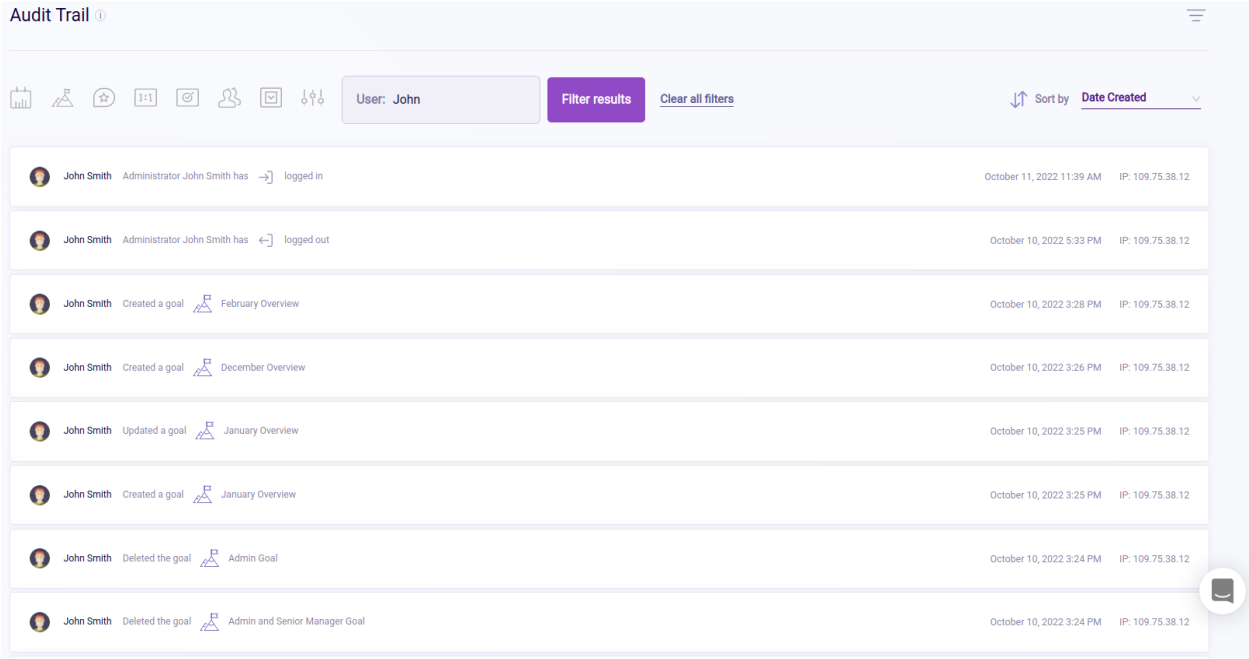
Note: The icons on the side menu can be used for reference until you get used to the icon-section relation.

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

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.

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.

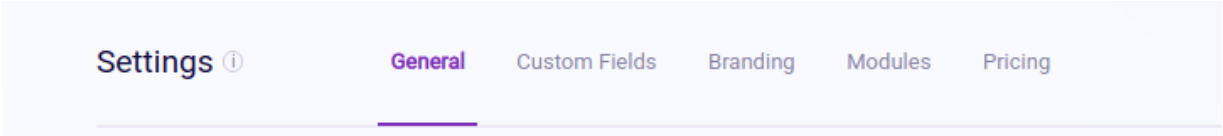


Audit Trail - Permissions

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

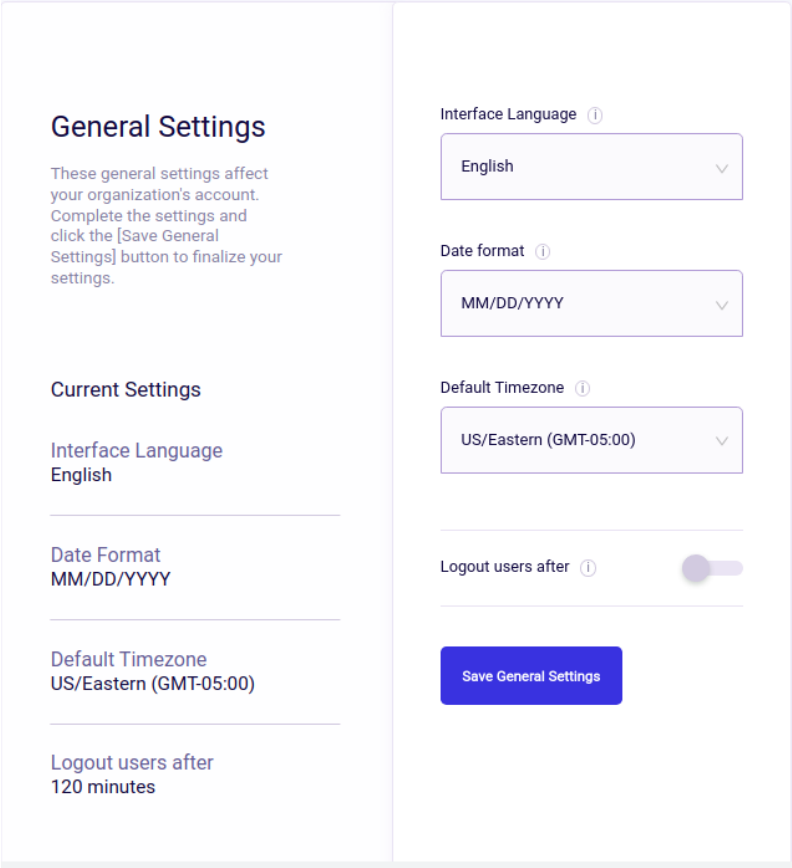
The **Pricing** subsection enables Administrators to upgrade/downgrade the eLeaP PSP package. Note that the selected package plan determines what modules are available to the users.

Pricing

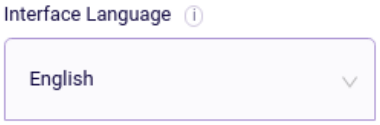
Next, we'll go into the details of each sub-section.

General

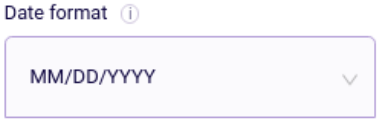
The **General Settings** area contains account-wide settings. The left side of the illustration below lists the current settings.



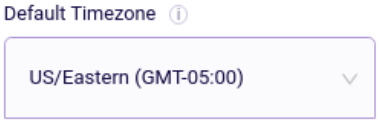
Changes the **Interface Language.** Additional languages will be deployed soon. The current language is English.



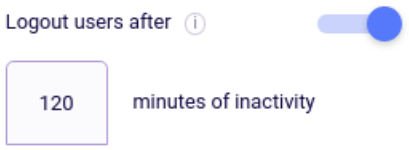
Changing the **Date Format** will impact your entire account. Dates written in text form will remain as is. However, dates in number format will update accordingly. Click the drop-down to select your account date format.



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.



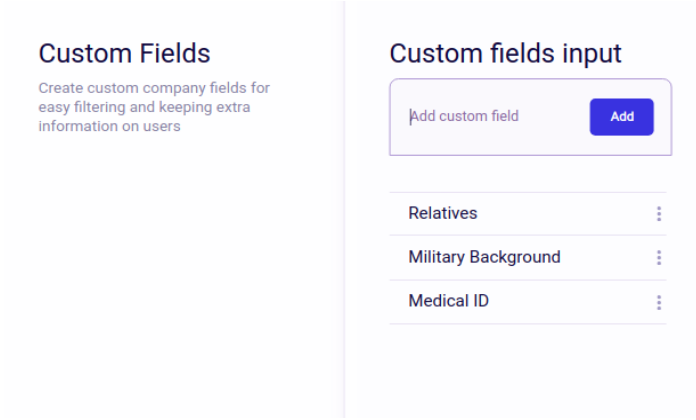
The auto log-out feature is a safety tool to prevent users from staying logged in ad infinitum. Administrators can enter a time limit, and the users will be logged out after the selected minutes of inactivity. The feature can be toggled on and off.

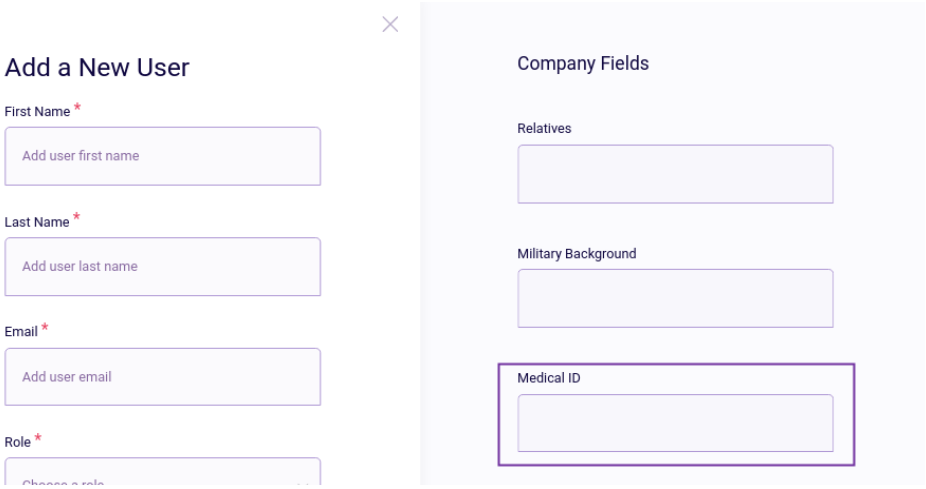


Custom Fields

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.

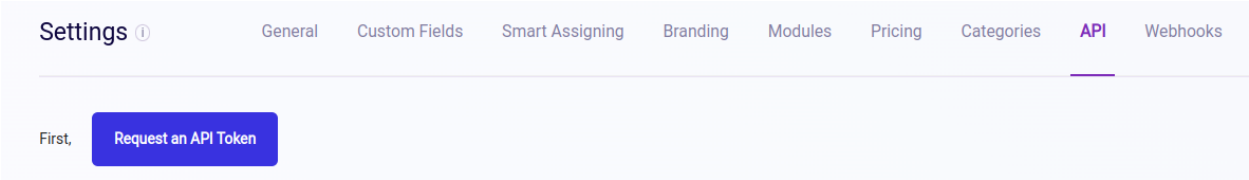




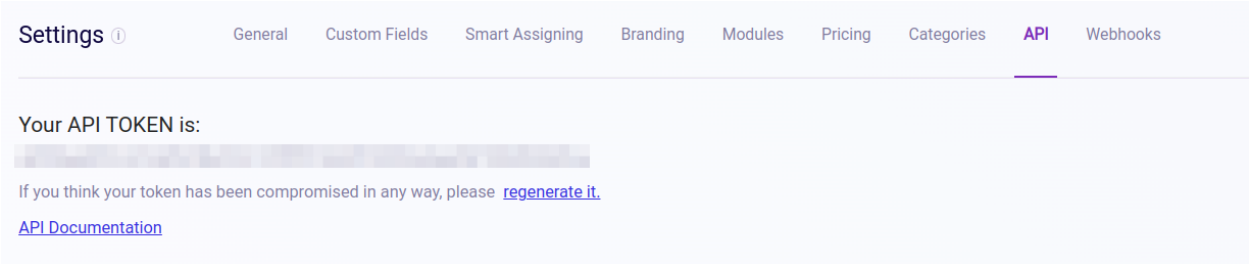
Open API

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.

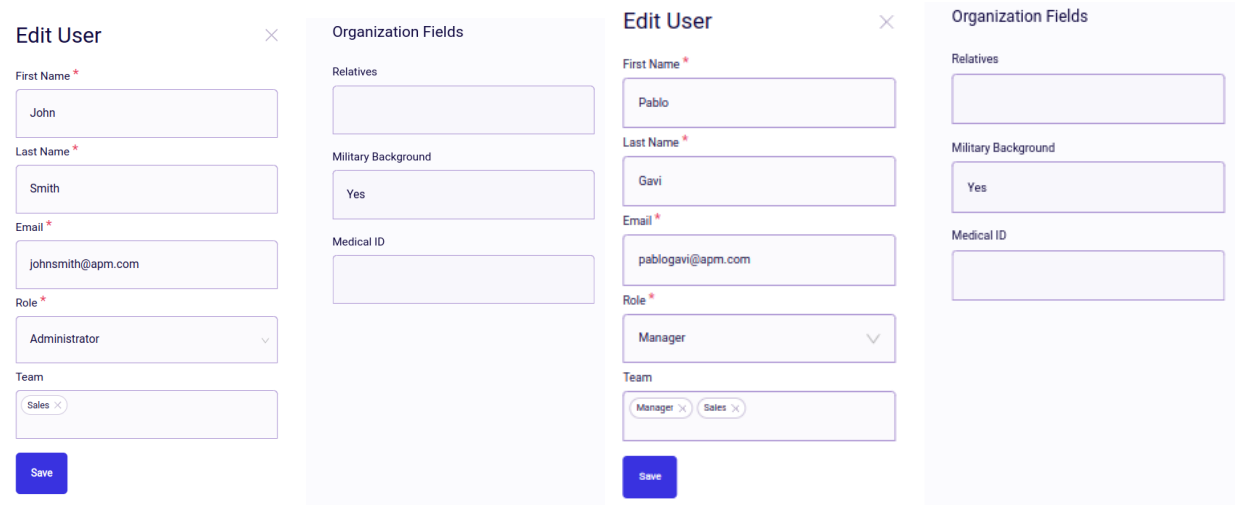


Detailed instructions on how to use the API service are described in the **API Documentation** link.

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.



Branding

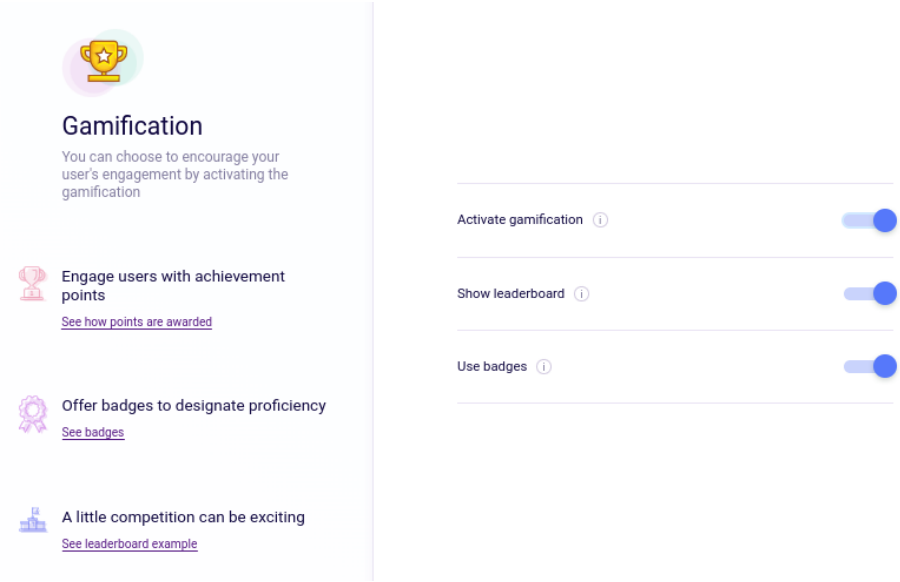
The Branding sub-tab enables organizations to upload their own logo to customize their PSP instance. Please note that the logo uploaded here will appear on your login page and in the application (top left menu) area. In addition, we provide an option to select your logo background color scheme. Light-colored 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

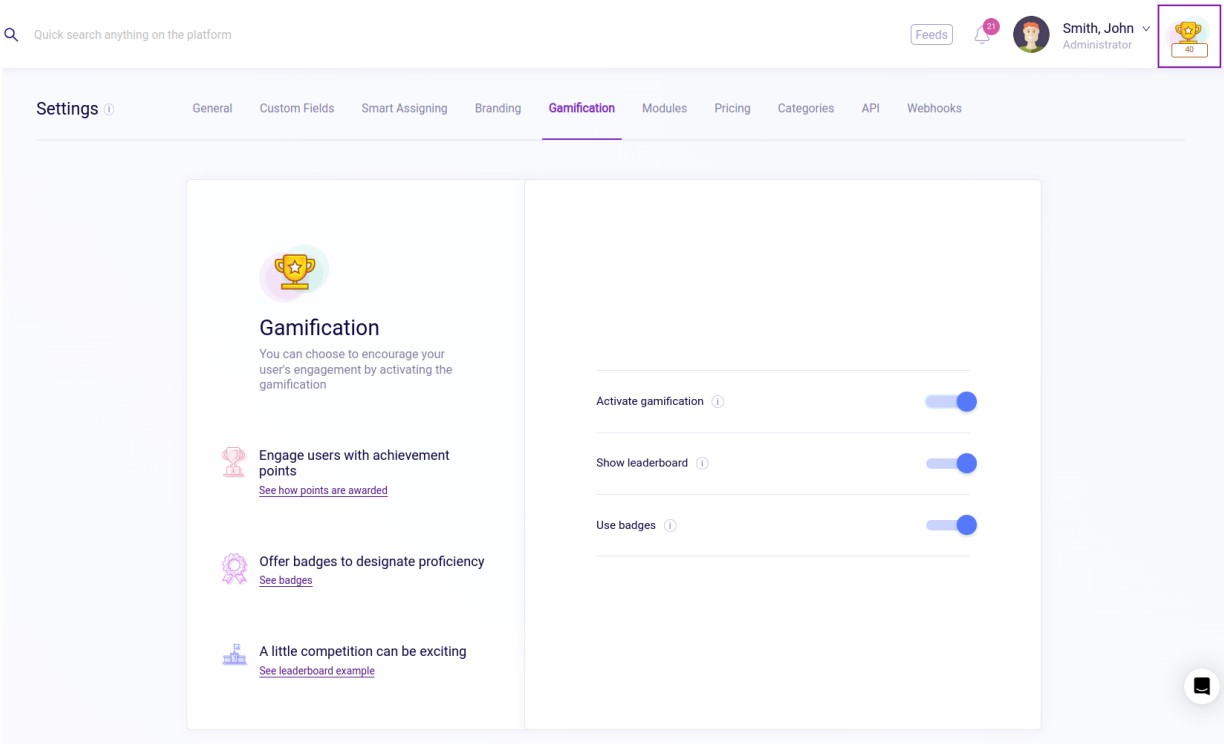
Want to add a little fun to the platform usage? Gamification adds a game component and a bit of a friendly "competition" inside the organization. As users perform certain activities inside the system, they get rewarded with Gamification points, which can help determine the most active users. Let's go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

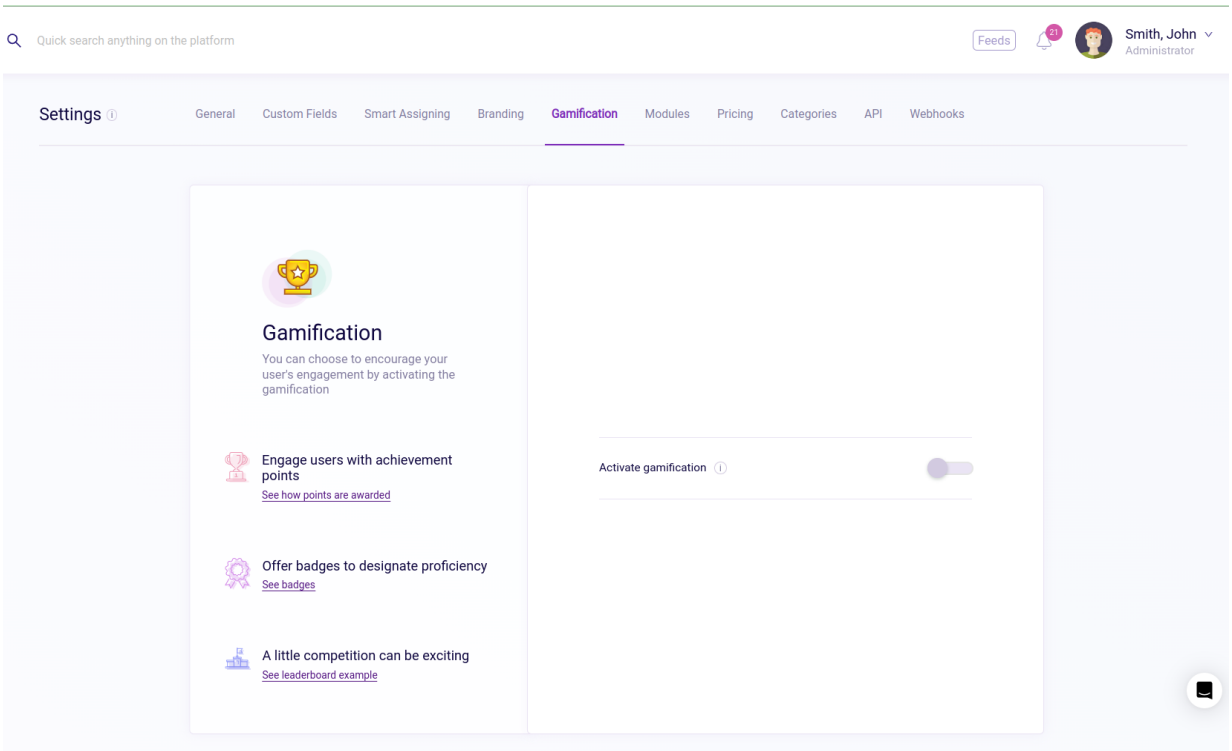
Each organization has its own Gamifications settings, and it can be fully customized to meet the company's needs.

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.



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.**



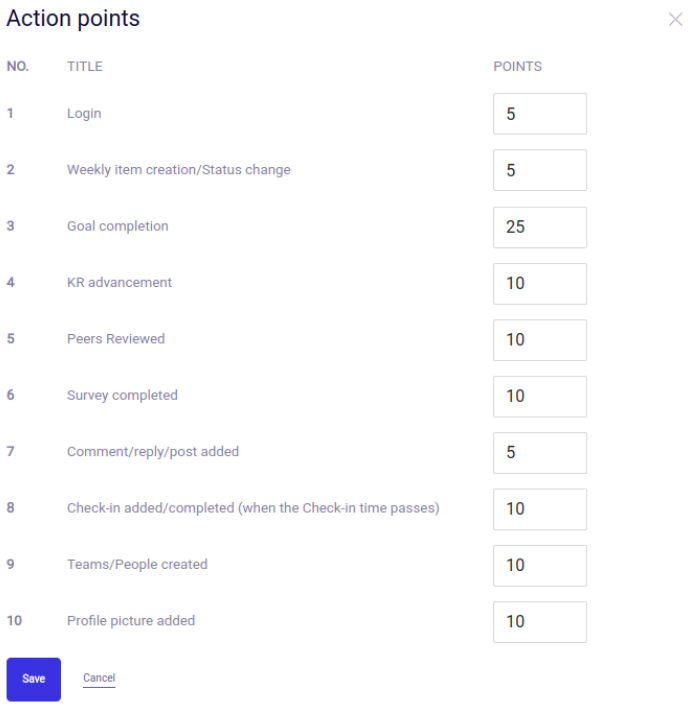


The **Show Leaderboard** and **Use Badges** switches will automatically disappear when we turn off the Gamification feature as they become irrelevant.

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.



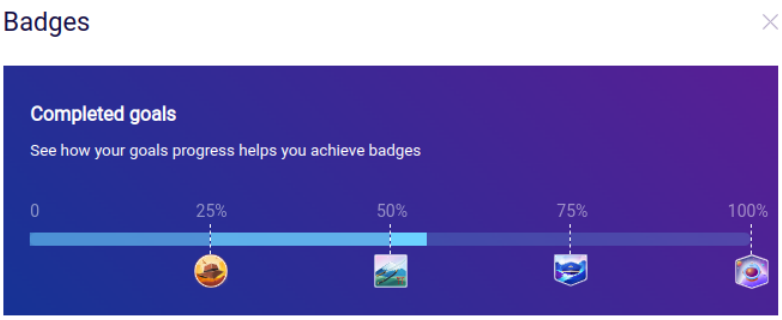
Action points

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 total The badge awarding works like this:

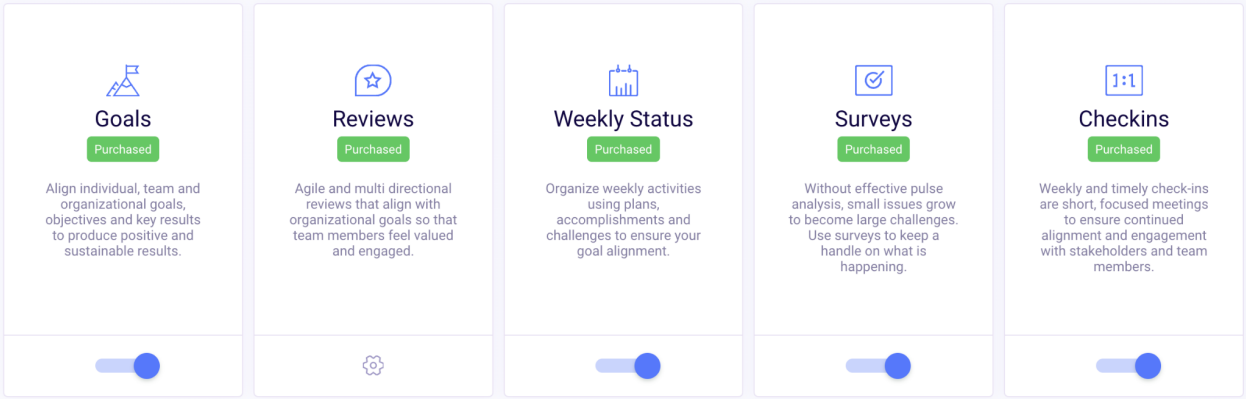
up to 25% - no badge
25% - 50% - Pioneer
50% - 75% - Ninja
75% - 99% - Trailblazer
100% - Elite



Modules

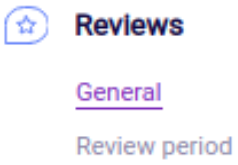
Administrators can turn on/off the modules from the **Modules** section with switcher. In the illustration below, all sections are included in the current Pricing package, which is why they all have the Purchased label. Note that each module card has a brief description of its functionality.

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.

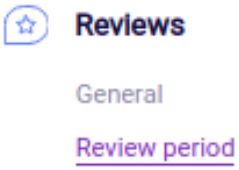


Each organization can customize their **Reviews** settings. You can refer to the **Reviews** section description in this user guide for more details.

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



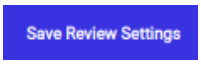
Review period subsection is for customizing the settings of the review period. Each organization can set their reviews period and cadence.



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 

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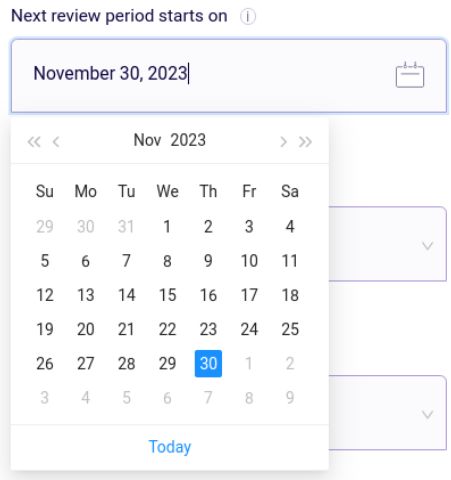
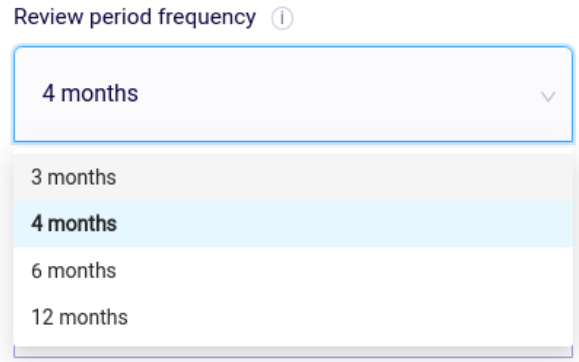
The **Review Period** settings which control the review period are contained in a separate subsection.

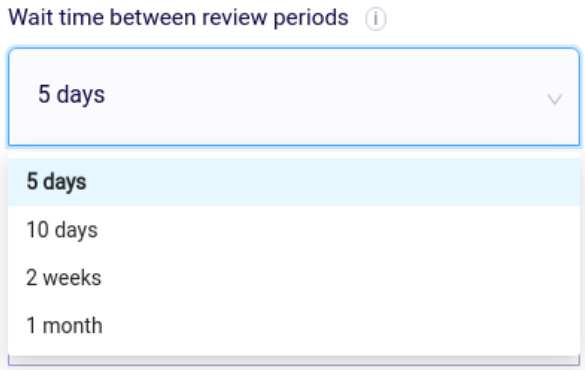
The organization Administrator selects the date for the **next review period**. Once set, the admin can also set the review frequency, which automates the cycle and cadence of your reviews.



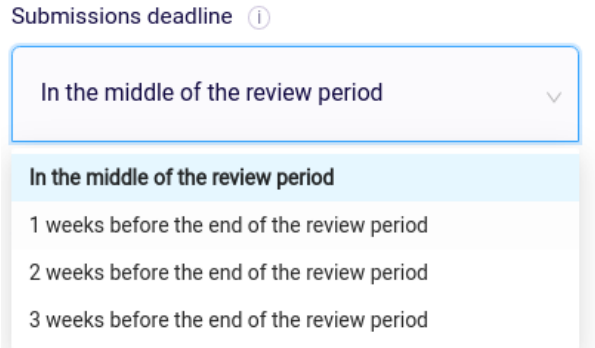
In this step, the admin selects the **frequency** of review periods. The system has four review period frequencies to select from, as illustrated here.



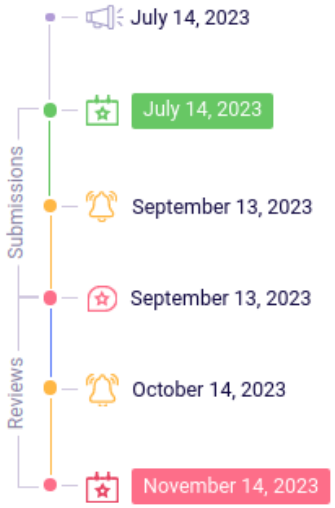
Organizations might want to add a small buffer between review periods. Use this option to set the **wait time** between review periods. Simply select one of the available options so the next review period begins a little later.

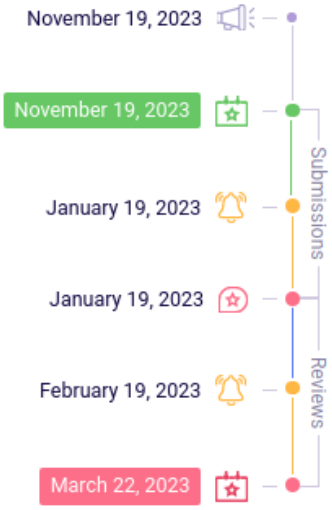


In eLeaP, review periods are divided into two subperiods: **Review Submission period** and **Review Analysis period.** Every review period starts with the submissions of reviews. After the submission deadline passes, users can only view the submitted reviews and can no longer give new reviews. In this 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.



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.

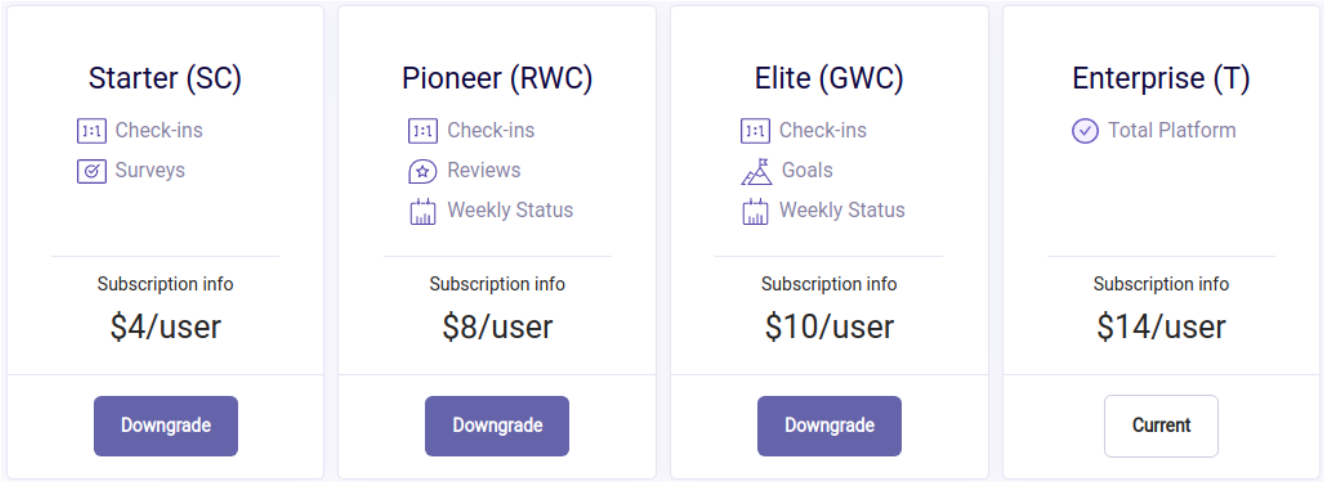




After adjusting all the Review period settings, click the Save Review Period Settings button to save the changes.

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.

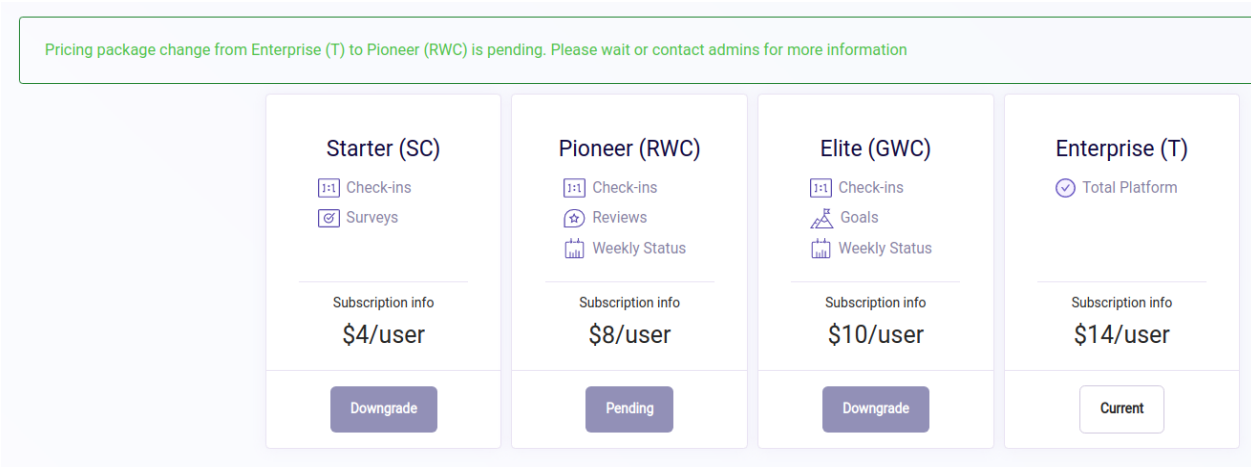


Administrators can change their pricing package at any time. The table below lists the labels/buttons that you will encounter in this section:

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"**.



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.

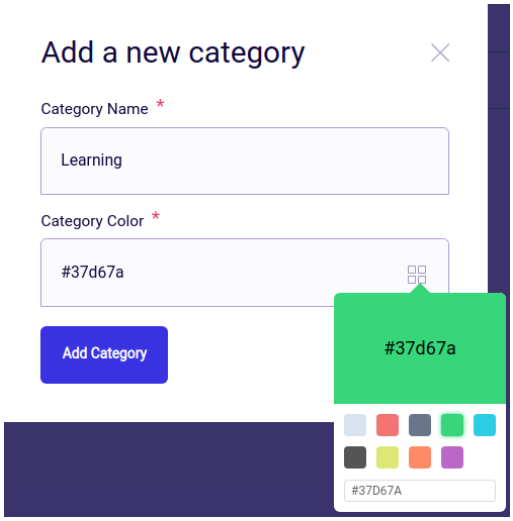
Let's get started by creating new categories. Click 

to create your first category.

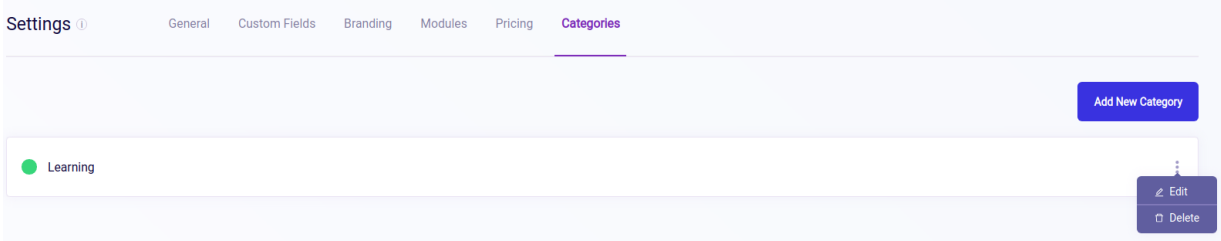
Add a name for the category in the **Category name** field. Try to keep them short and descriptive, as categories are going to be displayed on some items. The field is limited to 64 characters.

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.

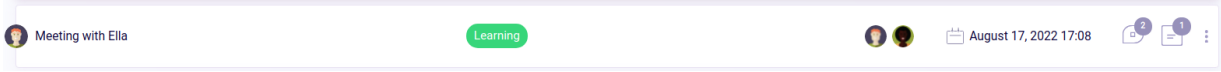


The added category in **Settings -> Categories** looks like this. The color indicates the background of the label that the users are going to see on platform items. Edit/delete the categories from the ⋮ menu.

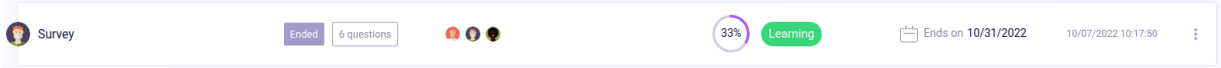


Below are examples of how the **"Learning"** category looks like on Check-ins, Survey, and Form Templates.

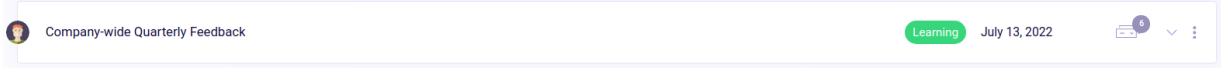
Check-in



Survey



Form templates



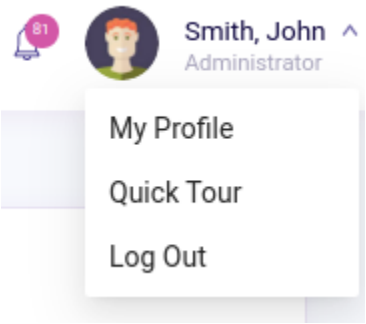
The process of assigning a label to an item is described in detail in [Check-ins](), [Survey](), and [Form Templates]() sections, respectively.

Settings - Permissions

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

My Profile

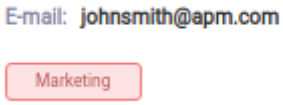
On the top right of the application, you can access My Profile, Quick Your, and Log Out. The **Quick Tour** starts a guide through the system by presenting an easy-to-follow overview of information on the system. We recommend you view the Quick Tour at least once. It's a great way to orient yourself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

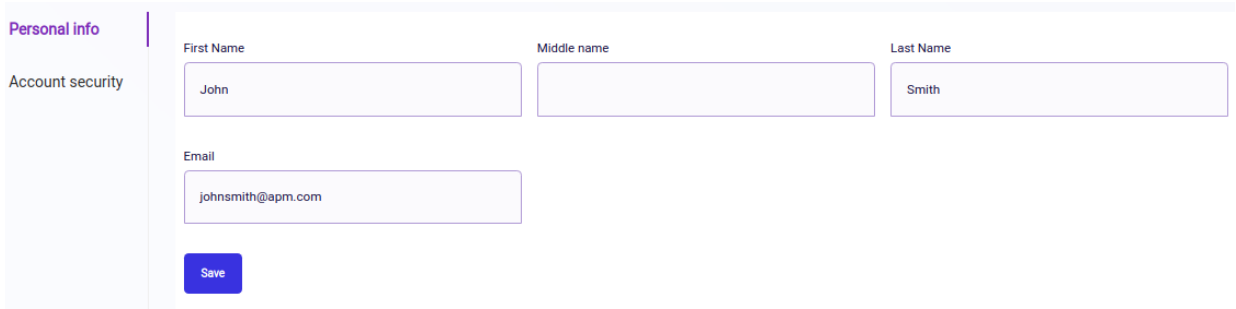
On the right side of the avatar, we display the **email address** of the user that is used for logging into the system.



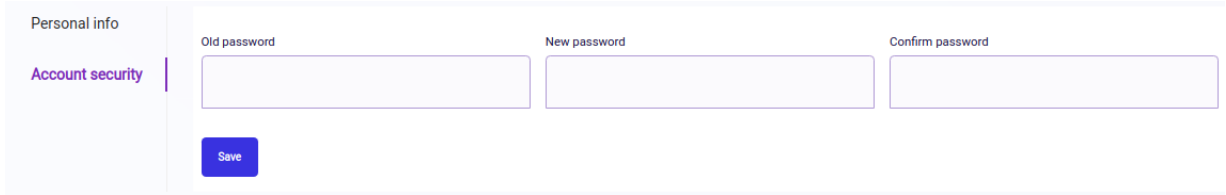
Below the email address, we have the **team badges**. The user can be a member of as many teams as needed. Team badges are listed next to each other.

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.



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.



My Profile - Permissions

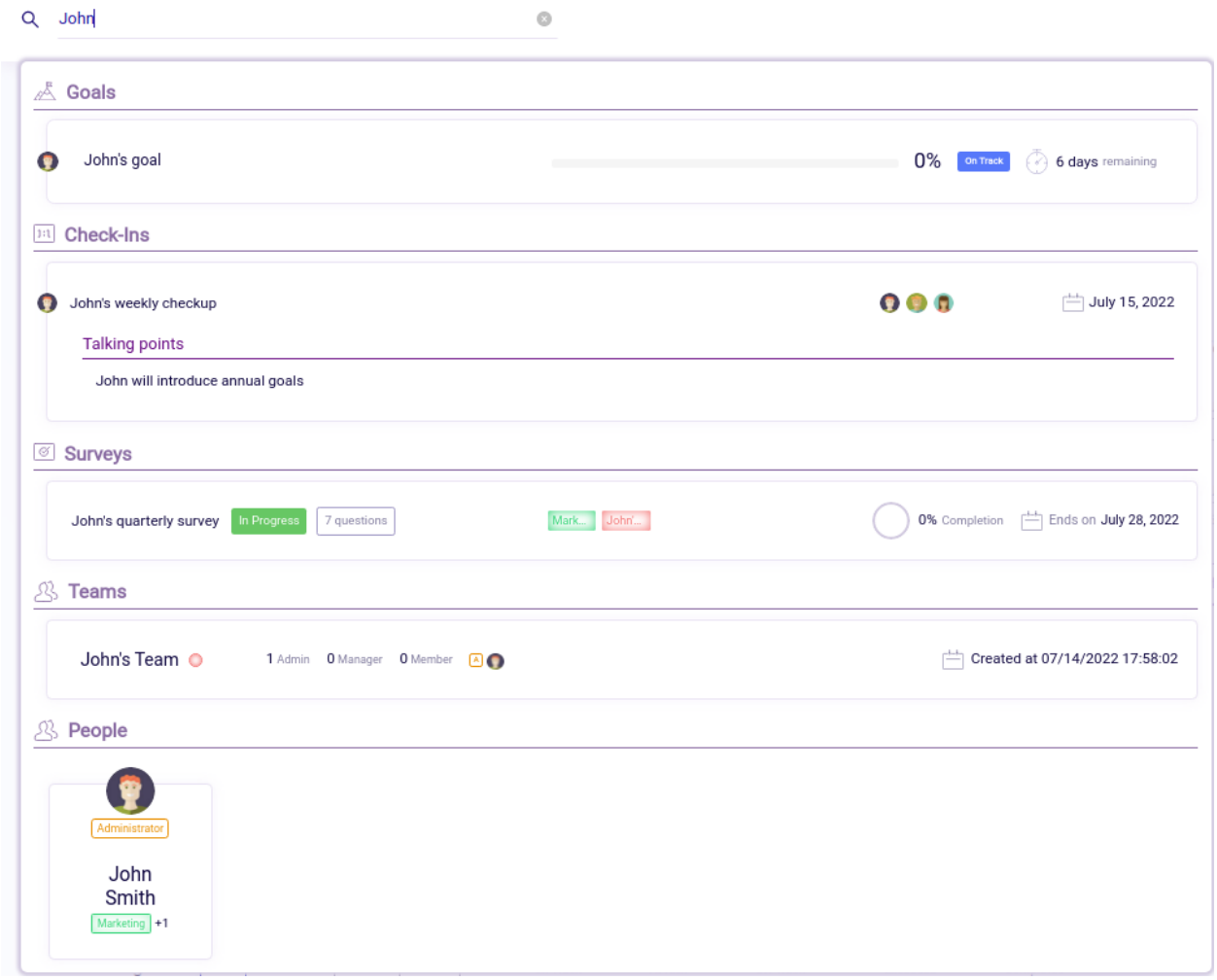
All users can edit their personal My Profile page.

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.


John
Goals
John's goal
0%
On Track
6 days remaining
Check-Ins
John's weekly checkup
July 15, 2022
Talking points
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.