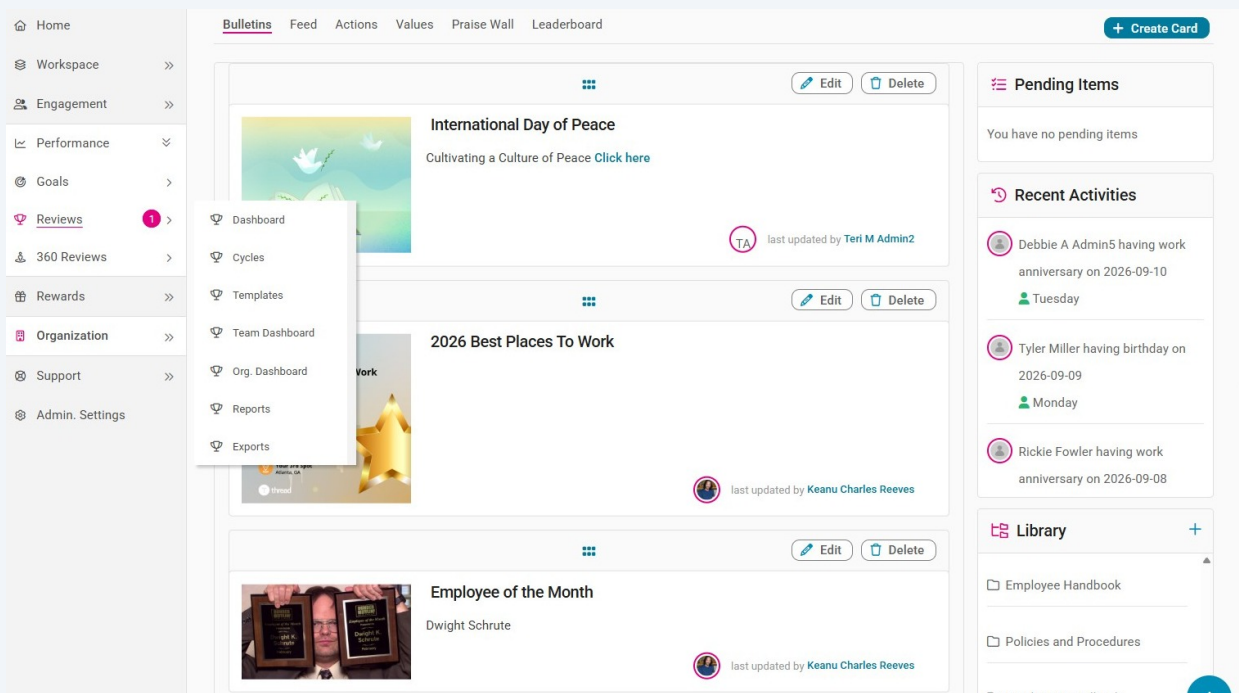


Org Dashboard -Share & Perform



Learn how to efficiently manage performance review cycles by assigning participants, adjusting settings, and overseeing review statuses. This guide provides a clear walkthrough for administrators to organize and process employee evaluations within the platform.

1 Once you're in Share and Perform, click Reviews on the left side



2 Click Reviews

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance **Goals** **Reviews** 360 Reviews Rewards Organization Support Admin. Settings

Bulletins Feed Actions Values Praise Wall Leaderboard [+ Create Card](#)

International Day of Peace
Cultivating a Culture of Peace [Click here](#)
last updated by Teri M Admin2

2026 Best Places To Work
last updated by Keanu Charles Reeves

Employee of the Month
Dwight Schrute

Pending Items
You have no pending items

Recent Activities
Debbie A Admin5 having work anniversary on 2026-09-10 Tuesday
Tyler Miller having birthday on 2026-09-09 Monday
Rickie Fowler having work anniversary on 2026-09-08

Library
Employee Handbook
Policies and Procedures

Dashboard Cycles Templates Team Dashboard Org. Dashboard Reports Exports

3 Click Org. Dashboard

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance **Goals** **Reviews** 360 Reviews Rewards Organization Support Admin. Settings

Dashboard Cycles Templates Team Dashboard **Org. Dashboard** Reports Exports

Pending Actions 1 - 1 of 1 [View](#)

HR review for Ben Button IV is pending (Cycle- 90 Day Review)

My Reviews Active

No reviews

4 Click Change Cycle if you need to select a different cycle

You are logged in as a partner user. [Exit](#)

Dashboard Cycles Templates Team Dashboard Org. Dashboard Reports Exports

Performance Review with Goals 👤 Add Users 🔄 Change Cycle 📄 Export

Review Period: Jan 01, 2024 - Dec 31, 2024

My Org. ▼ Select Department ▼

Total Active Employees: **94**
Active Participants: **0**
Blocked Participants: **27**
Active Participants vs Active Employees: **0%**

0% Template Assigned 0% Template Shared 0% LP Assignment 0% Self Review 0% Supervisor Review 0% Additional R

List View Hierarchy View Select an option

	Employee ⚙️	Job Title	Template	Status	LP	Employee	Supervisor	Additio
☐	Select 🔍	Filter	Actions	Actions	Actions	Actions	Actions	Review

 You can select and add users from your organization one at a time or add all employees in one go by using the 'Add users to this cycle' button on th

5 Choose the Cycle

You are logged in as a partner user. [Exit](#)

Dashboard Cycles Templates Team Dashboard Org. Dashboard Reports Exports

Review Period: Jan 01, 2024 - Dec 31, 2024

Performance Review with Goals Cancel

My Org. ▼ Select Department ▼

Total Active Employees: **94**
Active Participants: **0**
Blocked Participants: **27**
Active Participants vs Active Employees: **0%**

0% Template Assigned 0% Template Shared 0% LP Assignment 0% Self Review 0% Supervisor Review 0% Additional

List View Hierarchy View Select an option

	Employee ⚙️	Job Title	Template	Status	LP	Employee	Supervisor	Additio
☐	Select 🔍	Filter	Actions	Actions	Actions	Actions	Actions	Review

 You can select and add users from your organization one at a time or add all employees in one go by using the 'Add users to this cycle' button on th

You are logged in as a partner user. Exit

Dashboard Cycles Templates Team Dashboard **Org. Dashboard** Reports Exports

Review Period: Jan 01, 2024 - Dec 31, 2024

Performance Review with Goals Cancel

2026 Annual Performance Review
Quarterly Cycle
New Cycle
January DYNAMIC TEST
Performance Review with Goals
Blocked Participants: 27
Active Participants vs Active Employees: 0%

0% 0% 0% 0% 0% 0%

Template Assigned Template Shared LP Assignment Self Review Supervisor Review Additional

List View Hierarchy View Select an option

☐ Employee ⚙️ ⬆️ Job Title ⬆️ Template ⬆️ Status ⬆️ LP ⬆️ Employee ⬆️ Supervisor ⬆️ Additio
Select Filter Actions Actions Actions Actions Actions Actions Review

! You can select and add users from your organization one at a time or add all employees in one go by using the 'Add users to this cycle' button on t

6

Choose Add Users and here you can either Add All Employees, or Search & Add to select individuals. You can always remove employees here if you add any by accident.

You are logged in as a partner user. Exit

Dashboard Cycles Templates Team Dashboard **Org. Dashboard** Reports Exports

Performance Review with Goals ⚙️ + Add Users 🔄 Change Cycle 📄 Export ⌵

Review Period: Jan 01, 2024 - Dec 31, 2024

My Org. ⌵ Select Department ⌵

Add all employees
Search & Add employees

Total Active Employees: 94
Active Participants: 0
Blocked Participants: 27
Active Participants vs Active Employees: 0%

0% 0% 0% 0% 0% 0%

Template Assigned Template Shared LP Assignment Self Review Supervisor Review Additional F

List View Hierarchy View Select an option

☐ Employee ⚙️ ⬆️ Job Title ⬆️ Template ⬆️ Status ⬆️ LP ⬆️ Employee ⬆️ Supervisor ⬆️ Additio
Select Filter Actions Actions Actions Actions Actions Actions Review

! You can select and add users from your organization one at a time or add all employees in one go by using the 'Add users to this cycle' button on th

7

If we're going by individual, select the employees you'd like to add

Add Users to Cycle (Performance Review with Goals)

Employees

1 - 30 of 65

Add >>

☐	Employees 30	Job Title	Hire Date
	Search	Select	Select
☐	AE Abigail A Employee3	Implenetation Specialist	May 03,2016
☐	AT Amber Demo Test	Hugger	Nov 15,2023
☐	AS Andy Stanley	Pastor	Sep 21,2020
☐	AM Angela L Martin	Training Manager	May 08,2017
☐	AE Aria S Employee3	Implenetation Specialist	Oct 20,1978
☐	AE Audrey M Employee10	Trainer	May 18,2004
☐	BI Ben Button IV	Groomer	Jan 26,1999
☐	BI Benjamin Button IV	Server	Jul 25,2018

Selected Employees

Select To Remove

<< Remove

☐	Employees 0	Job Title	Hire Date
--------------------------	---------------	-----------	-----------

8

Click Add

Add Users to Cycle (Performance Review with Goals)

Employees

1 - 30 of 65

Add >>

☒	Employees 30	Job Title	Hire Date
	Search	Select	Select
☒	AE Abigail A Employee3	Implenetation Specialist	May 03,2016
☒	AT Amber Demo Test	Hugger	Nov 15,2023
☒	AS Andy Stanley	Pastor	Sep 21,2020
☒	AM Angela L Martin	Training Manager	May 08,2017
☒	AE Aria S Employee3	Implenetation Specialist	Oct 20,1978
☒	AE Audrey M Employee10	Trainer	May 18,2004
☒	BI Ben Button IV	Groomer	Jan 26,1999
☒	BI Benjamin Button IV	Server	Jul 25,2018

Selected Employees

Select To Remove

<< Remove

☐	Employees 0	Job Title	Hire Date
--------------------------	---------------	-----------	-----------

9 Click Save

Employees

1 - 30 of 65

Add >>

☐	Employees 30	Job Title	Hire Date
	Search	Select	Select
☐	AE Abigail A Employee3	Implenetation Specialist	May 03,2016
☐	AT Amber Demo Test	Hugger	Nov 15,2023
☐	AS Andy Stanley	Pastor	Sep 21,2020
☐	AM Angela L Martin	Training Manager	May 08,2017
☐	AE Aria S Employee3	Implenetation Specialist	Oct 20,1978
☐	AE Audrey M Employee10	Trainer	May 18,2004
☐	BI Ben Button IV	Groomer	Jan 26,1999
☐	BI Benjamin Button IV	Server	Jul 25,2018
☐	BI Benjamin Button IV	Server	Jul 25,2018

Selected Employees

Select To Remove

<< Remove

☐	Employees 30	Job Title	Hire Date
☐	AE Abigail A Employee3	Implenetation Specialist	May 03,2016
☐	AT Amber Demo Test	Hugger	Nov 15,2023
☐	AS Andy Stanley	Pastor	Sep 21,2020
☐	AM Angela L Martin	Training Manager	May 08,2017
☐	AE Aria S Employee3	Implenetation Specialist	Oct 20,1978
☐	AE Audrey M Employee10	Trainer	May 18,2004
☐	BI Ben Button IV	Groomer	Jan 26,1999
☐	BI Benjamin Button IV	Server	Jul 25,2018
☐	BI Benjamin Button IV	Server	Jul 25,2018

Cancel

Save

+

10

Once you do that, you'll see all employees that you've added listed here. This dashboard is where you can assign, remove and track the progress of these reviews.

You are logged in as a partner user. Exit

My Org.

Select Department

Total Active Employees: 94

Active Participants: 30

Blocked Participants: 27

Active Participants vs Active Employees: 32%

0%

0%

100%

0%

0%

0%

Template Assigned

Template Shared

LP Assignment

Self Review

Supervisor Review

Additional Review

List View

Hierarchy View

1 - 30

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additio
Select	Filter	Actions	Actions	Actions	Actions	Actions	Review
☐	Abigail A Employee...	Implenetation Spec...	Assign	-	-	-	+0
☐	Amber Demo Test	Hugger	Assign	-	-	-	+0
☐	Andy Stanley	Pastor	Assign	-	-	-	+0
☐	Angela L Martin	Training Manager	Assign	-	-	-	+0
☐	Aria S Employee3	Implenetation Spec...	Assign	-	-	-	+0
☐	Audrey M Employo...	Trainer	Assign	-	-	-	+0
☐	Ben Button IV	Groomer	Assign	-	-	-	+0
☐	Benjamin Button IV	Server	Assign	-	-	-	+0
☐	Brandon Holliday	-	Assign	-	-	-	+0
☐	Bridget Kelly	Office Manager	Assign	-	-	-	+0

11

All of these items have 'Actions' from the drop downs. You can use this to do certain functions in mass, or you can do it by each individual employee. By clicking the button in their row.

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance Goals Reviews 360 Reviews Rewards Organization Support Admin. Settings

My Org. Select Department

Total Active Employees: 94
Active Participants: 30
Blocked Participants: 27
Active Participants vs Active Employees: 32%

Template Assigned 0% Template Shared 0% LP Assignment 100% Self Review 0% Supervisor Review 0% Additional Review 0%

List View Hierarchy View 1 - 30

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Review
☐ Abigail A Employee...	Implenetation Spec...	Actions Assign > Recall	-	-	-	-	+0
☐ Amber Demo Test	Hugger	-	-	-	-	-	+0
☐ Andy Stanley	Pastor	Assign	-	-	-	-	+0
☐ Angela L Martin	Training Manager	Assign	-	-	-	-	+0
☐ Aria S Employee3	Implenetation Spec...	Assign	-	-	-	-	+0
☐ Audrey M Employ...	Trainer	Assign	-	-	-	-	+0
☐ Ben Button IV	Groomer	Assign	-	-	-	-	+0
☐ Benjamin Button IV	Server	Assign	-	-	-	-	+0
☐ Brandon Holliday	-	Assign	-	-	-	-	+0
☐ Bridget Kelly	Office Manager	Assign	-	-	-	-	+0

12

Check the boxes, or click the checkbox up top to select all.

You are logged in as a partner user. [Exit](#)

Home Workspace Engagement Performance Goals Reviews 360 Reviews Rewards Organization Support Admin. Settings

My Org. Select Department

Total Active Employees: 94
Active Participants: 30
Blocked Participants: 27
Active Participants vs Active Employees: 32%

Template Assigned 0% Template Shared 0% LP Assignment 100% Self Review 0% Supervisor Review 0% Additional Review 0%

List View Hierarchy View 1 - 30

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Review
☐ Abigail A Employee...	Implenetation Spec...	Assign >	-	-	-	-	+0
☐ Amber Demo Test	Hugger	Assign	-	-	-	-	+0
☐ Andy Stanley	Pastor	Assign	-	-	-	-	+0
☐ Angela L Martin	Training Manager	Assign	-	-	-	-	+0
☐ Aria S Employee3	Implenetation Spec...	Assign	-	-	-	-	+0
☐ Audrey M Employ...	Trainer	Assign	-	-	-	-	+0
☐ Ben Button IV	Groomer	Assign	-	-	-	-	+0
☐ Benjamin Button IV	Server	Assign	-	-	-	-	+0
☐ Brandon Holliday	-	Assign	-	-	-	-	+0
☐ Bridget Kelly	Office Manager	Assign	-	-	-	-	+0

13 Click Assign

You are logged in as a partner user. Exit

Home Workspace Engagement Performance Goals Reviews 360 Reviews Rewards Organization Support Admin. Settings

Select Department

Active Employees: 94
Participants: 30
Participants vs Active Employees: 32%

Template Assigned 0% Template Shared 0% LP Assignment 100% Self Review 0% Supervisor Review 0% Additional Reviews 0%

Assign Template Selected Employee: 2 **Assign** Cancel

Hierarchy View 1 - 30 of 30

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Reviewers	Actions
Abigal A Employee...	Implenetation Spec...	Assign	-	-	-	-	+0	
Amber Demo Test	Hugger	Assign	-	-	-	-	+0	
Andy Stanley	Pastor	Assign	-	-	-	-	+0	
Angela L. Martin	Training Manager	Assign	-	-	-	-	+0	
Aria S Employee3	Implenetation Spec...	Assign	-	-	-	-	+0	
Audrey M Employ...	Trainer	Assign	-	-	-	-	+0	
Ben Button IV	Groomer	Assign	-	-	-	-	+0	
Benjamin Button IV	Server	Assign	-	-	-	-	+0	

14 When Assigning, it will also ask you to select a template you'd like to assign.

Home My Org. Select Department

Total Active Employees: 94
Active Participants: 30
Blocked Participants: 27
Active Participants vs Active Employees: 32%

Assign Template

List View Hierarchy View

Employee Select

Assign Template For Selected Employees

Select Cycle
Performance Review with Goals

Search & Select Template

Full Time Annual Review Select
Goals Review Select
RYANTEST Select
Review with Goals Select
test Select
Annual Service Review Select
Service and Implementation Management Team Select
Service and Implementation Select

Cancel Submit

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Reviewers	Actions
Abigal A Employee...	Implenetation Spec...	Assign	-	-	-	-	+0	
Amber Demo Test	Hugger	Assign	-	-	-	-	+0	
Andy Stanley	Pastor	Assign	-	-	-	-	+0	
Angela L. Martin	Training Manager	Assign	-	-	-	-	+0	
Aria S Employee3	Implenetation Spec...	Assign	-	-	-	-	+0	
Audrey M Employ...	Trainer	Assign	-	-	-	-	+0	
Ben Button IV	Groomer	Assign	-	-	-	-	+0	
Benjamin Button IV	Server	Assign	-	-	-	-	+0	

15 Click Submit

The screenshot shows the 'Assign Template' modal in a performance review system. The modal is titled 'Select Cycle' and shows a list of templates. The 'Review with Goals' template is selected. The 'Submit' button is circled in orange.

Modal Content:

- Select Cycle:** Performance Review with Goals
- Search & Select Template:** Full Time Annual Review, Goals Review, RYANTEST, Review with Goals (selected), test, Annual Service Review, Service and Implementation Management Team, Service and Implementation
- Buttons:** Cancel, Submit (circled in orange)

Background Content:

- Left Sidebar:** Workspace, Engagement, Performance, Goals, Reviews (1), 360 Reviews, Rewards, Organization, Support, Admin. Settings
- Top Bar:** Total Active Employees: 94, Active Participants: 30, Blocked Participants: 27, Active Participants vs Active Employees: 32%
- Table:**

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Review
Abigail A Employee...	Implenetation Spec...	Assign	-	-	-	-	+0
Amber Demo Test	Trainer	Assign	-	-	-	-	+0
Andy Stanley	Groomer	Assign	-	-	-	-	+0
Angela L Martin	Server	Assign	-	-	-	-	+0
Aria S Employee3	Implenetation Spec...	Assign	-	-	-	-	+0
Audrey M Employ...	Trainer	Assign	-	-	-	-	+0
Ben Button IV	Groomer	Assign	-	-	-	-	+0
Benjamin Button IV	Server	Assign	-	-	-	-	+0
Brandon Holliday	-	Assign	-	-	-	-	+0
Bridget Kelly	Office Manager	Assign	-	-	-	-	+0

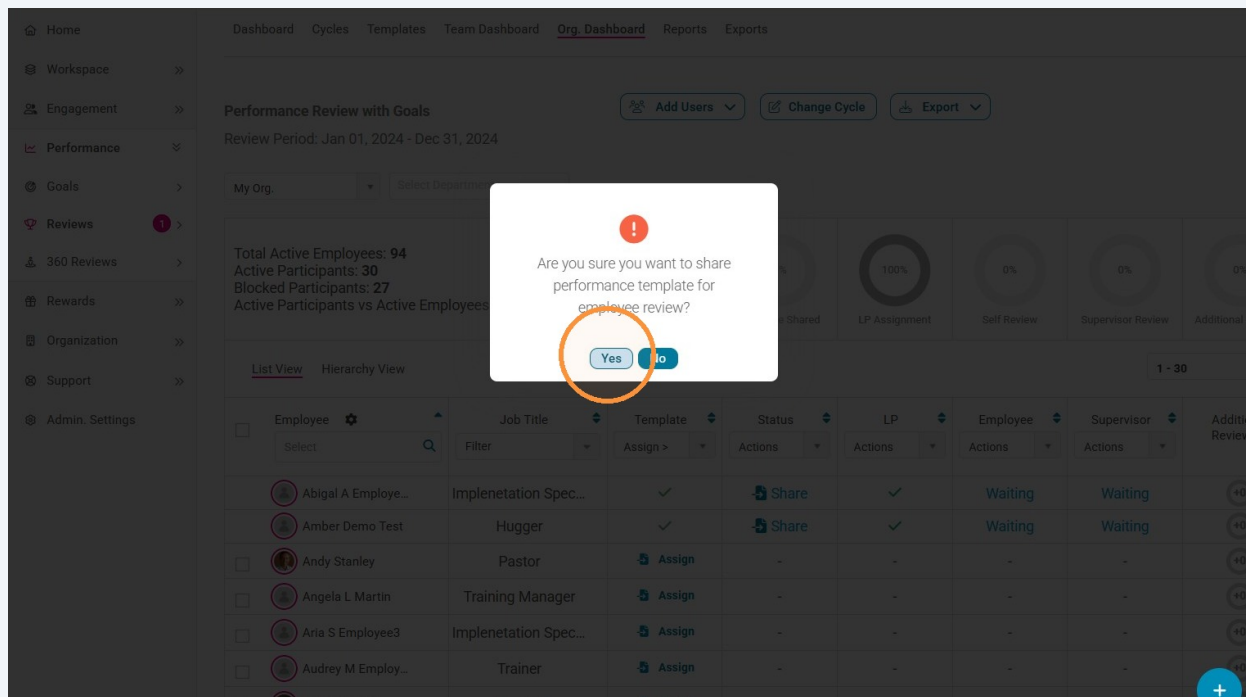
16 Unless you have it set to Automatically share the review once it's assigned, you'll need to click Share next and can also do this by individual, or in bulk with the Actions drop down.

The screenshot shows the 'Performance Review with Goals' page. The 'Share' button is circled in orange.

Page Content:

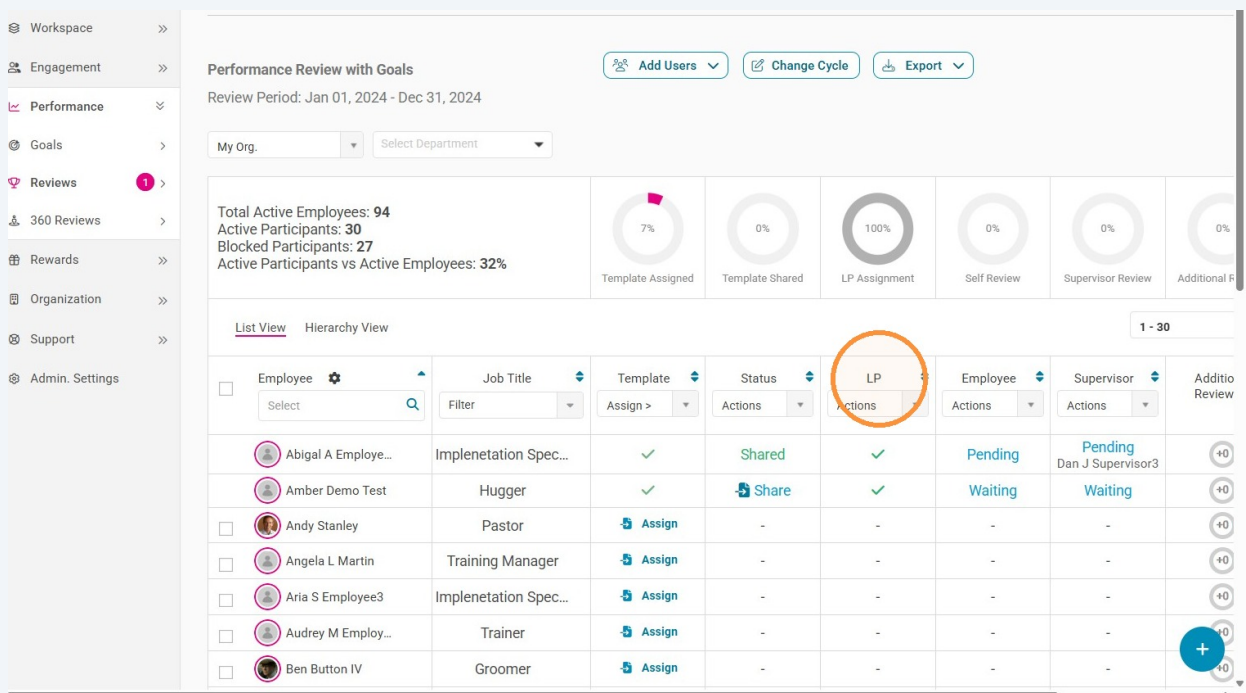
- Top Bar:** Performance Review with Goals, Add Users, Change Cycle, Export
- Review Period:** Jan 01, 2024 - Dec 31, 2024
- Filters:** My Org., Select Department
- Summary:**
 - Total Active Employees: 94
 - Active Participants: 30
 - Blocked Participants: 27
 - Active Participants vs Active Employees: 32%
- Progress Indicators:**
 - Template Assigned: 7%
 - Template Shared: 0%
 - LP Assignment: 100%
 - Self Review: 0%
 - Supervisor Review: 0%
 - Additional Review: 0%
- Table:**

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Review
Abigail A Employee...	Implenetation Spec...	Assign	Share	Waiting	Waiting	+0	
Amber Demo Test	Hugger	Assign	Share	Waiting	Waiting	+0	
Andy Stanley	Pastor	Assign	-	-	-	+0	
Angela L Martin	Training Manager	Assign	-	-	-	+0	
Aria S Employee3	Implenetation Spec...	Assign	-	-	-	+0	
Audrey M Employ...	Trainer	Assign	-	-	-	+0	
Ben Button IV	Groomer	Assign	-	-	-	+0	



17

LP will be Leadership Potential. If this is turned on, you'll see this showing here after a review and their Leadership Potential is completed.



18

If you click any of these you can go into the review and see the progress. If it says Pending, they haven't started. If it shows a rating, you'll know that the employee or supervisor has submitted their review.

Workspace >> Engagement >> Performance >> Goals >> Reviews **1** >> 360 Reviews >> Rewards >> Organization >> Support >> Admin. Settings >>

Goals: 24 - Dec 31, 2024

Select Department

94

Active Employees: 32%

Template Assigned: 7% | Template Shared: 0% | LP Assignment: 100% | Self Review: 0% | Supervisor Review: 0% | Additional Reviews: 0% | HR Review: 0%

1 - 30 of 30

Job Title	Template	Status	LP	Employee	Supervisor	Additional Reviewers	HR
Implenetation Spec...	✓	Shared	✓	Pending	Pending Dan J Supervisor3	+0	Pending
Hugger	✓	Share	✓	Waiting	Waiting	+0	Pending
Pastor	Assign	-	-	-	-	+0	-
Training Manager	Assign	-	-	-	-	+0	-
Implenetation Spec...	Assign	-	-	-	-	+0	-
Trainer	Assign	-	-	-	-	+0	-
Groomer	Assign	-	-	-	-	+0	-

19

If you need to undo any of these reviews, you can back track. Open the Template actions menu and click Recall, to recall a review. This will remove all progress the reviewers have made on this review.

Workspace >> Engagement >> Performance >> Rewards >> Organization >> Support >> Admin. Settings >>

Performance Review with Goals

Review Period: Jan 01, 2024 - Dec 31, 2024

My Org. Select Department

Total Active Employees: 94
Active Participants: 30
Blocked Participants: 27
Active Participants vs Active Employees: 32%

Template Assigned: 7% | Template Shared: 3% | LP Assignment: 100% | Self Review: 0% | Supervisor Review: 0% | Additional Review: 0%

List View Hierarchy View

1 - 30

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additio
Abigal A Employee...	Implenetation Spec...	Assign >	Shared	✓	Pending	Pending Dan J Supervisor3	+0
Amber Demo Test	Hugger	< Recall	Share	✓	Waiting	Waiting	+0
Andy Stanley	Pastor	Assign	-	-	-	-	+0
Angela L Martin	Training Manager	Assign	-	-	-	-	+0
Aria S Employee3	Implenetation Spec...	Assign	-	-	-	-	+0
Audrey M Employ...	Trainer	Assign	-	-	-	-	+0
Ben Button IV	Groomer	Assign	-	-	-	-	+0

20

Click Remove from cycle if you need to remove an employee all together.

Workspace »

Engagement »

Performance »

Rewards »

Organization »

Support »

Admin. Settings

Performance Review with Goals

Review Period: Jan 01, 2024 - Dec 31, 2024

My Org. Select Department

Add Users Change Cycle Export

Total Active Employees: 94
Active Participants: 30
Blocked Participants: 27
Active Participants vs Active Employees: 32%

7% Template Assigned 3% Template Shared 100% LP Assignment 0% Self Review 0% Supervisor Review 0% Additional

List View Hierarchy View 1 - 30

Employee	Job Title	Template	Status	LP	Employee	Supervisor	Additional Review
Select	Filter	< Recall	Actions	Actions	Actions	Actions	
☐	Abigal A Employe...	Implenetation Spec...	✓	Shared	✓	Pending	Pending Dan J Supervisor3 +0
☐	Amber Demo Test	Hugger	✓	Share	✓	Waiting	Waiting +0
☐	Andy Stanley	Pastor	Assign	-	-	-	- +0
☐	Angela L Martin	Training Manager	Assign	-	-	-	- +0
☐	Aria S Employee3	Implenetation Spec...	Assign	-	-	-	- +0
☐	Audrey M Employ...	Trainer	Assign	-	-	-	- +0
☐	Ben Button IV	Groomer	Assign	-	-	-	- +0