Performance Update Cheat Sheet

OnStrategy

1 Update from the Homepage

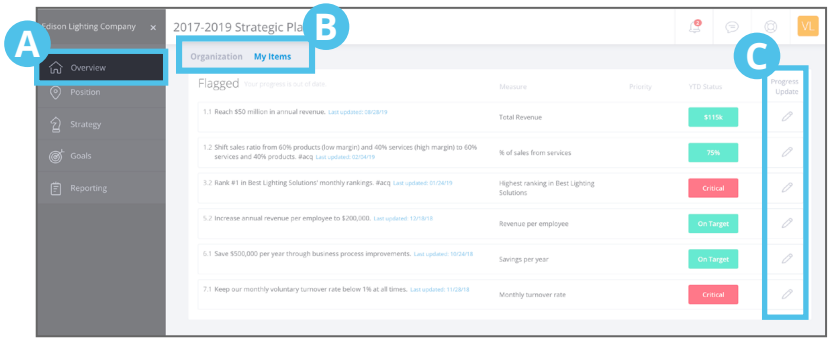
A) Navigate to the **Overview** page in the left-hand navigation.

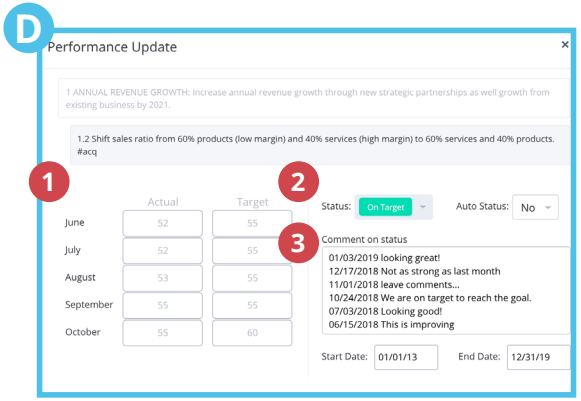
B) Click on the **My Items** toggle.

C) In the **Flagged** section, click on the **Edit** icon to update an item. Items in the Flagged section need an update.

D) In the **Performance Update** modal, complete the following:

1. Update the **Actuals** and, if needed, the **Target** for the previous periods.
2. Select a **Status**. If Auto Status is on, skip this step.
3. **Add a Comment**. Consider including a date before your comment.





2 Update from the Goal Cascade Page

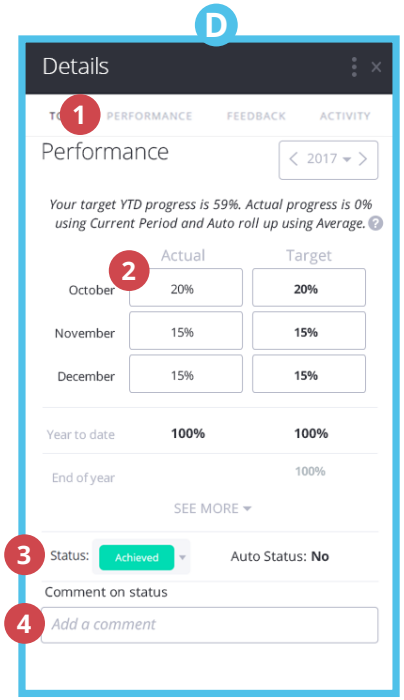
A) Navigate to the **Goal Cascade** page in the Goals section of the left-hand navigation.

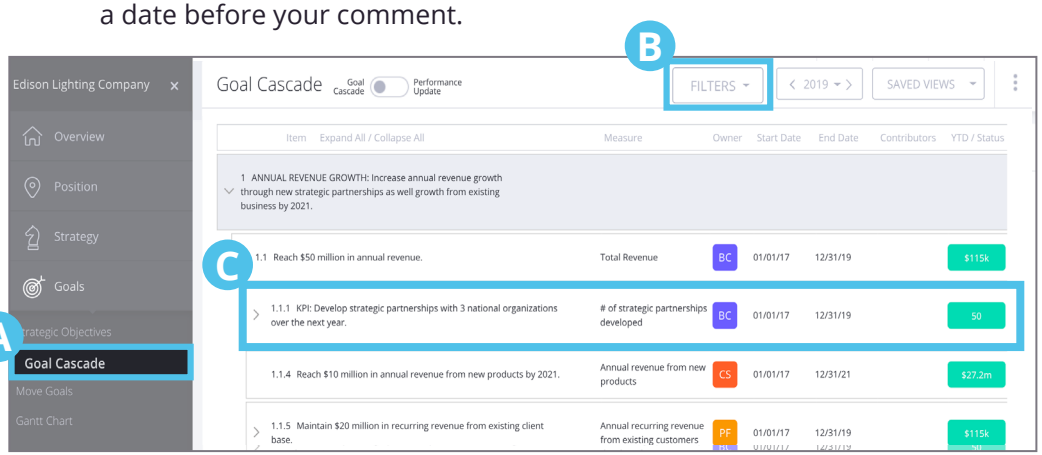
B) Use the **Filters** to filter the page to show goals that are assigned to you.

C) Click on the goal you wish to update. Clicking the goal will open the **Details Tray.**

D) Provide an update in the **Details Tray:**

1. Click the **Performance** tab in the details navigation OR scroll down to the performance section.
2. Enter the **Actual** (and if needed, Targets) for the previous period.
3. Select a **Status**. If Auto Status is on, skip this step.
4. Add a **Comment**. Consider including a date before your comment.





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3 Update from Mobile

A) **Download OnStrategy Mobile** from the App Store or Google Play Store. You can find this by searching OnStrategy Mobile.

Download on the App Store

GET IT ON Google Play

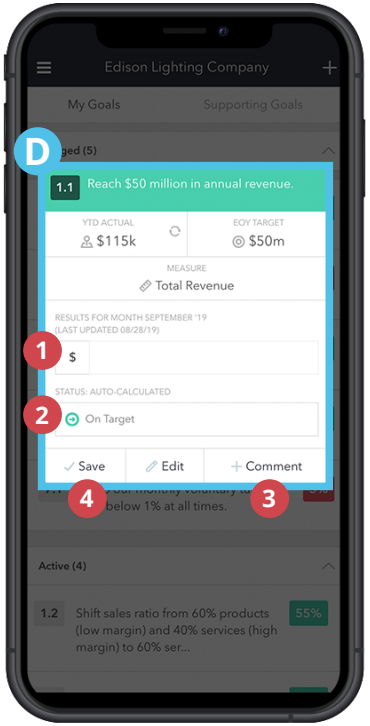
B) **Login** using your username and password.

C) Click on any goal in the **Flagged** section. Items in the Flagged section need an update.

D) In the modal, provide a **Performance Update**:

1. Update the **Actual Performance.**
2. Confirm or choose **Status**. If Auto Status is on, you may skip this step.
3. Add a **Date-Stamped Comment**.
4. Hit **Save.**

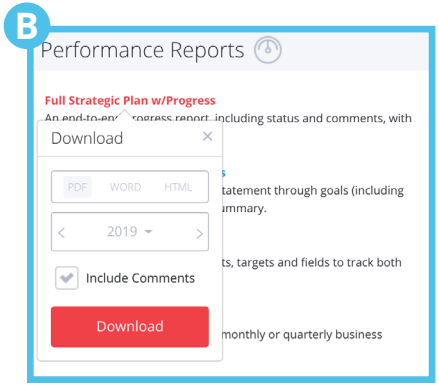
E) Repeat this until all goals in the Flagged section have been updated.



4 Review & Communicate Progress

A) Navigate to the **Organization Reports or Team Member Reports** page in the Goals navigation.

B) Click on the report title to show the **Download modal.** You can download reports as a PDF, Word Document, or HTML. You can also select if you'd like to include comments.



C) Navigate to the **Dashboard** page in the Goals navigation.

D) **Click on a Chip** to expand its view. In the expanded view, you can see a goals:

1. **Description and Label.**
2. **Actual Performance.**
3. **Comments**. Hovering on the Comment bubble will show recent comments.
4. **Goal Details**. This includes the target, calculation, owner, status, and start- and end-dates.
5. **Performance Graph.** You can toggle to show quarterly, monthly, annual, or YTD views.
6. **Status of Supporting Goals.** See the status and performance of the supporting children