

# New Insight Navigation

That long list of stuff on the left side of the 'Insight' home page? Gone! On December 13th you're going to feel just a little bit lost. Change can be painful, but we have so many new things coming up that organizing and improving the Insight navigation became a 'must have'. This document will help lessen the pain.

## What's New?

The new functions in Insights include:

- Improved navigation
- New Key Insights in each major area of insight
- A favorites menu
- A recents menu
- Reports and dashboards that are up to 10X faster

Whew! With that in mind, let's take a look at the changes.

### Improved Navigation

The reports and dashboards are now organized as follows. The codes for roles are like this: **+** - Limited to self downward, **\*** - Limited to self or owned by self, **a** - admin, **da** - data access, **fa** - finance admin, **l** - leader, **ap** - approver, **m** - manager, **sm** - store\_manager, **bm** - badge\_manager, **u** - user

Recognition				
License	Type	Name	Description	Roles
Recognition	Dashboard	Engagement	See participation rates for appreciation	a,da,l,m+
Insight	Dashboard	Appreciation Trends	See an overview of appreciation rates over time	a,da,m

Recognition				
Recognition	Dashboard	Recognition and Praise	See appreciation by company value, by day, and by department	a,da,l,m+
Insight	Dashboard	Appreciation Flow	See how departments are interacting	a,da,l,m+
Recognition	Dashboard	Top Givers and Receivers	See the most active givers and receivers in the company	u
Insight	Dashboard	Manager Appreciation	See how regularly managers are appreciating their direct reports	a,da,l,m+
Recognition	Report	Appreciation Details	Report of all appreciations	a,da,fa,u*
Recognition	Report	Appreciation Summary	Report summarizing appreciations by person	a,da,fa,u*
Recognition	Report	Reciprocal Giving	Report of people that are potentially trading appreciations	a,da

Feedback				
License	Type	Name	Description	Roles
Feedback	Dashboard	Feedback Overview	See feedback scores for the organization	da,m+
Feedback	Dashboard	Feedback Trends	See trends in feedback participation	da,l
Feedback	Dashboard	Feedback Participation	See how regularly managers are giving feedback	da,l,m+
Feedback	Report	Feedback Details	Report of feedback by manager or user	da

Community and Team				
License	Type	Name	Description	Roles
Recognition	Dashboard	Org Chart	Visually navigate your company	u
Recognition	Dashboard	Org Chart Builder	Build an org chart what-if scenario	m
Recognition	Dashboard	Personality Map	See a heat map of personality types	u
Recognition	Dashboard	Interest Map	See a graphic of company interests	u
Recognition	Report	Deleted Users	Report of recently deleted users	a
Recognition	Report	Highlights	Report of highlights	da,u+
Recognition	Report	User Management	Manage current user data	a
Recognition	Report	Appreciation Summary	Report summarizing appreciations by person	a,da,fa,u*

### Community and Team

Recognition	Report	Reciprocal Giving	Report of people that are potentially trading appreciations	a,da
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### eNPS & Satisfaction

License	Type	Name	Description	Roles
Insight	Dashboard	Employee Satisfaction	See a summary of employee satisfaction data	da,l,m+
Insight	Dashboard	eNPS Heatmap	See a heatmap of eNPS scores for your organization	da,l,m+
Insight	Dashboard	eNPS Trends	See an overview of company eNPS over time	da,l
Insight	Report	Satisfaction Surveys	Report summarizing satisfaction scores by department	da,l,m+

### Surveys

License	Type	Name	Description	Roles
Insight	Builder	Create a Survey	Create a new survey	a,m*
Insight	Dashboard	Survey Overview	See a dashboard of all survey activity	a,da,l,m*
Insight	Report	Surveys	Report of all current and historical surveys	a,da,m*

### Money

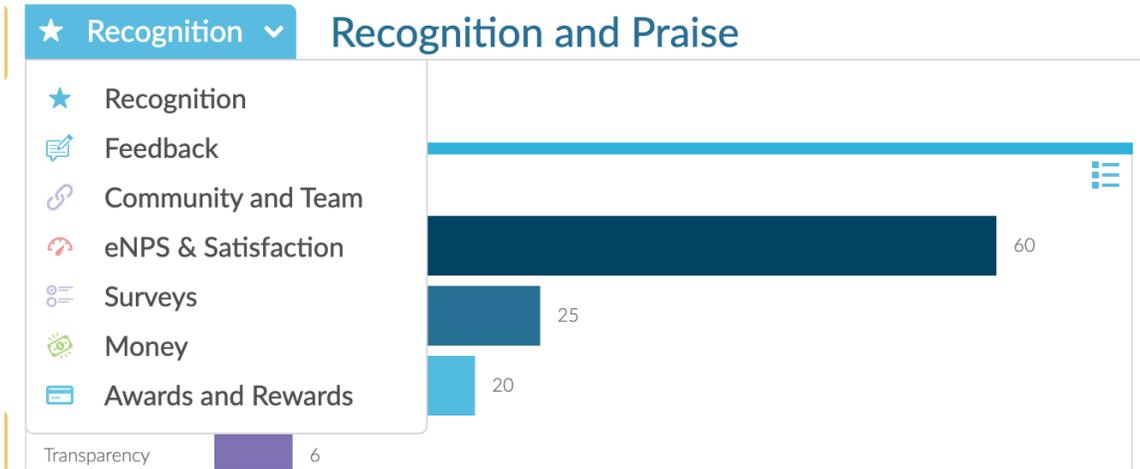
License	Type	Name	Description	Roles
Recognition	Dashboard	Giving and Receiving	See an overview of cash related to giving and receiving	a,da,fa
Recognition	Report	Cash History	Report of all cash in and cash out	a,da,fa
Recognition	Report	External Thanks	Report of appreciations given outside the organization	a,da,fa,ap
Recognition	Report	Giving Summary	Report summarizing cash giving by user	a,da,fa
Recognition	Report	Individual Balance	Report of each user's giving and spending balance	a,da,fa
Recognition	Report	Receiving by Department	Report summarizing all cash received by department	a,da,fa
Recognition	Report	Receiving Details	Report of all cash associated with appreciations	a,da,fa

Money				
Recognition	Report	Receiving Summary	Report summarizing cash cash received by source	a,da,fa
Recognition	Report	Tax Summary	Report summarizing individual cash redemptions by tax category	a,da,fa

Awards and Rewards				
License	Type	Name	Description	Roles
Recognition	Dashboard	Rewards	See popular store items and redemption	a,da,fa
Recognition	Report	Award Details	Report of milestones, awards, and badges received	a,da,bm*
Recognition	Report	Award Summary	Report summarizing activity for each award	a,da,bm*
Recognition	Report	Nominations	Report of nominations for awards	a,da,bm*
Recognition	Report	Orders	Report of individual orders for store items	a,da,fa,sm*
Recognition	Report	Store Performance	Report summarizing order activity for each store item	a,da,fa,sm*

Ok... we know you aren't going to memorize this, but there you have it.

## Moving Around the Insights Section



Clicking the  icon will expand the tab and allow you to see the other sections. Clicking on the name in the tab (i.e. 'Recognition') will take you back to the main view of that section.

## Favorites

At the top of each dashboard or report, there are two new icons. The heart-shaped icon is for favorites. When you click on the heart, this dashboard or report will be added to the 'Favorites' list on the left-hand side of the Insights section.



Showing content for **Last 90 days**

When you click on the filter icon, you have all of your available filter controls for this report.

## Recents and Favorites Pane

On the left hand side of the insights section you will see two panes: one for Favorites and one for Recently Viewed.

In this list, the  icon means the item is a report. The  icon means the item is a dashboard.

If you click the  icon next to a report or dashboard in Recently Viewed, that item is added to Favorites. Clicking the  icon removes an item from favorites.

**Favorites** 

-  **Satisfaction Surveys**   
*Report summarizing satisfaction scores by department*
-  **Recognition and Praise**   
*Break down company values and participation by department*

**Recently viewed** 

-  **Giving Summary**   
*Report summarizing cash giving by user*
-  **eNPS Heatmap**   
*See a heatmap of eNPS scores for your organization*
-  **Engagement**   
*See participation rates for appreciation*

# Happy reporting!