


Check-In, edit, delete, archive, restore

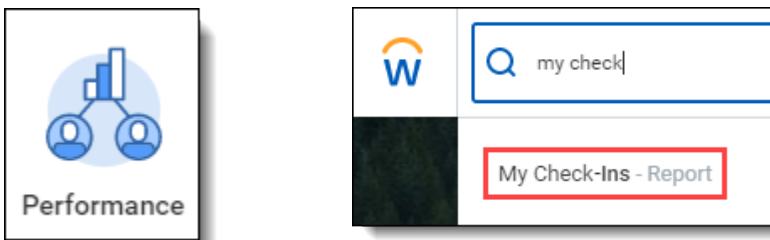
This job aid provides step by step instructions on how to edit, delete, archive and restore Topics and Check-Ins.



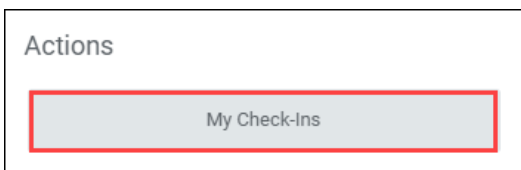
Add the optional Performance worklet to your Homepage if you don't already have it, using the gear icon.  The Homepage displays a maximum of 20 worklets, starting with required worklets.

Edit Check-Ins:

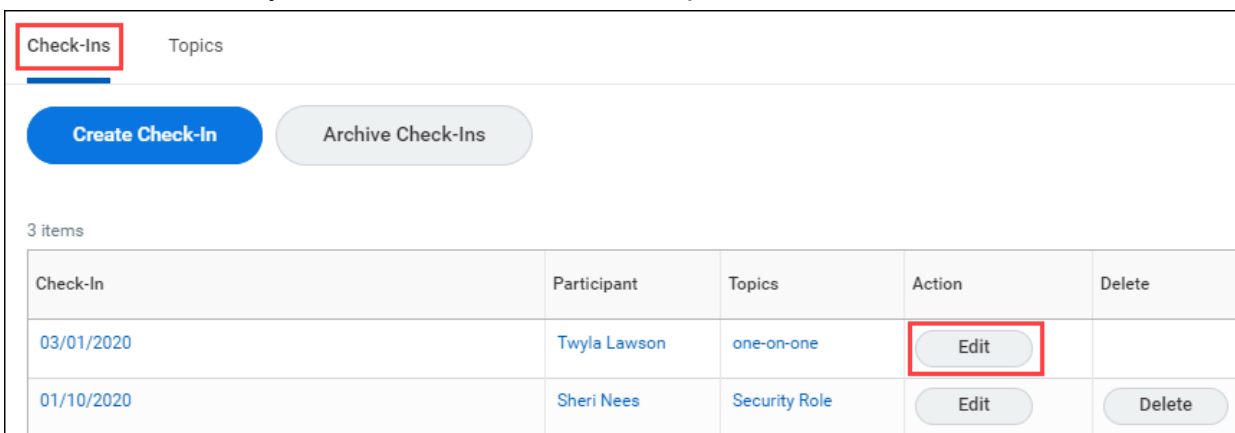
Step 1: Click on the **Performance** worklet on your *Homepage* and proceed to Step 2, or type **My Check-Ins** in the search bar, select it from the search results and proceed to Step 3.



Step 2: Click on **My Check-Ins**.



Step 3: From here, you can *Delete* a Check-in if you created it, or you can *Edit and Archive* Check-Ins that were created by someone else. For this example, we will select **Edit** for the Check-In we want to edit.



Step 4: Check the **Notify Participant** box if you want the Check-In participant to be notified that edits were made (1). Update the fields of the current topic, or click the plus icon (**+ Add**) to add a new topic to the Check-In (2). Note: See Edit a Topic to rename a Check-In. Click **OK**.

Edit Check-In

Participant Twyla Lawson

Notify Participant **1**

Planned for * 03 / 01 / 2020

Description

Format **B** *I* U **A**

This is time for us to check-in and make sure we are both on the same page. I have created an initial set of items for discussion. Feel free to add additional ones as you see fit. This is a living document and will improve/evolve over time to help us work even better together.

Attachments

Manage Topics

+ Add **2**

one-on-one

Changes to this topic apply across all Check-Ins.

Select Existing Topic

Topic Name * one-on-one

Notes

Shared Notes

Normal **B** *I* U **A**

Feedback & communication (How are things? ...)

Plan for the the week/month/quarter (What's on your plate?... now and soon?)

Ideas/requests for change/improvement (What can be better in your workplace? with our partnership, etc?)

Notable accomplishments/milestones (Kudos? Wins? You know you have them, let's make sure we talk about them!)

Training/learning/career development (How are you developing yourself? How can I help you grow & be challenged?)

Notes from Twyla:

My Notes

Format **B** *I* U **A**

To rename a Check-In Topic, see the **Edit a Topic** section in this job aid. Changing or removing the Existing Topic name will delete the Notes.

Delete Check-Ins:

Follow Steps 1 – 3 on page 1.

Step 4: Click **Delete** for the Check-In you want to delete. Note: You can only delete Check-Ins you have created.

Check-In	Participant	Topics	Action	Delete
03/01/2020	Twyla Lawson	Follow up to one-on-one one-on-one	Edit	
01/10/2020	Sheri Nees	Security Role	Edit	Delete

Step 5: Click on the open prompt (>) to review *Topics*, Shared Notes and My Notes (1). Click the **Notify Participant** box if you want the participant to receive a notification that the Check-In has been deleted (2). Click **OK**.

Delete Check-In
01/10/2020 Actions

Are you sure you want to delete this check-in? Any topics associated with this check-in will not be deleted.

Notify Participant 2

Check-In: 01/10/2020
 Created by: Margo Hammonds
 Participant: Sheri Nees
 Description: 1:30 Security Role questions
 Created On: 01/06/2020
 Last Updated: 07/29/2020

1 > **Topics**

Topics

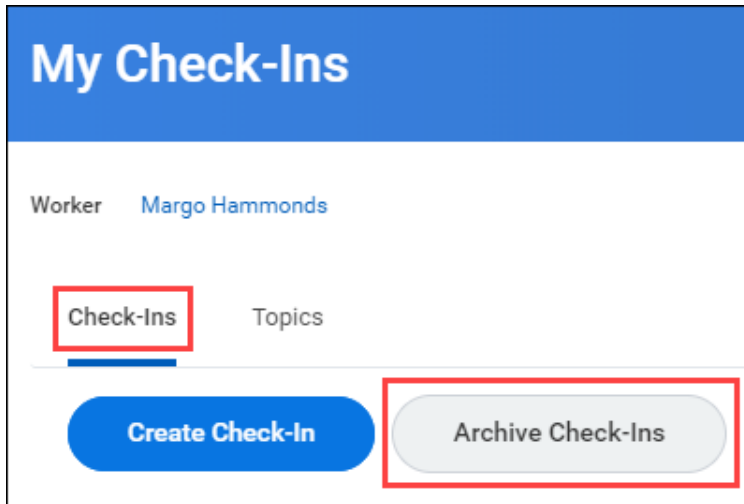
Topics 1 item

Topic Name	Shared Notes	My Notes
Security Role	Discuss Security Role questions. What do security partners need to know? Plan for our next forum.	Use discussion to create a QRG

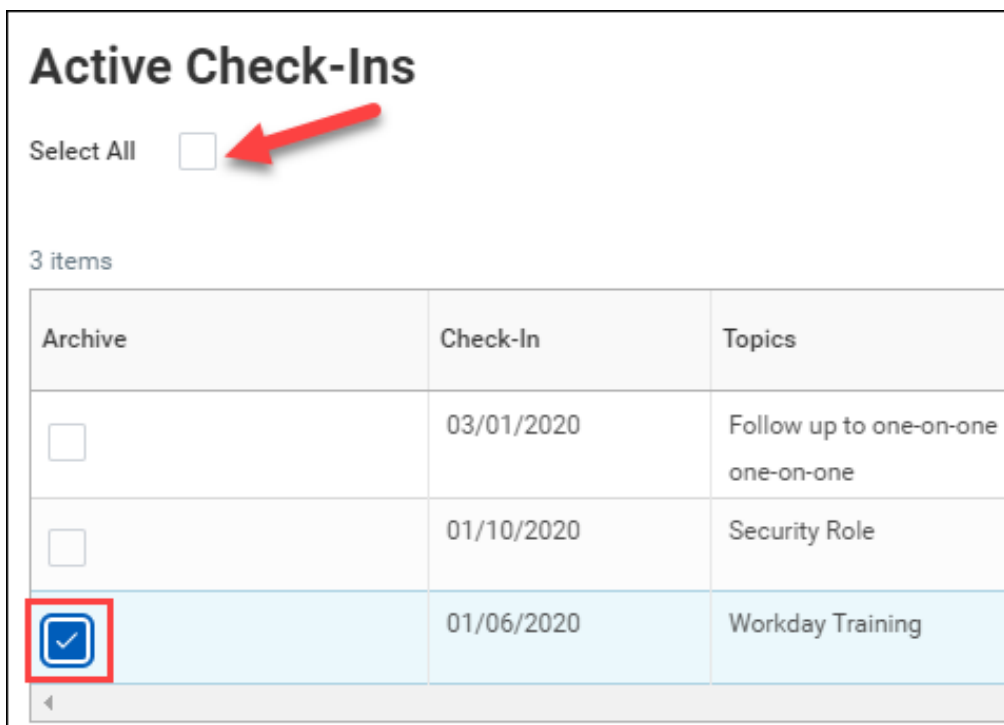
Archive Check-Ins:

Follow Steps 1 – 3 on page 1.

Step 4: Click on **Archive Check-Ins**.



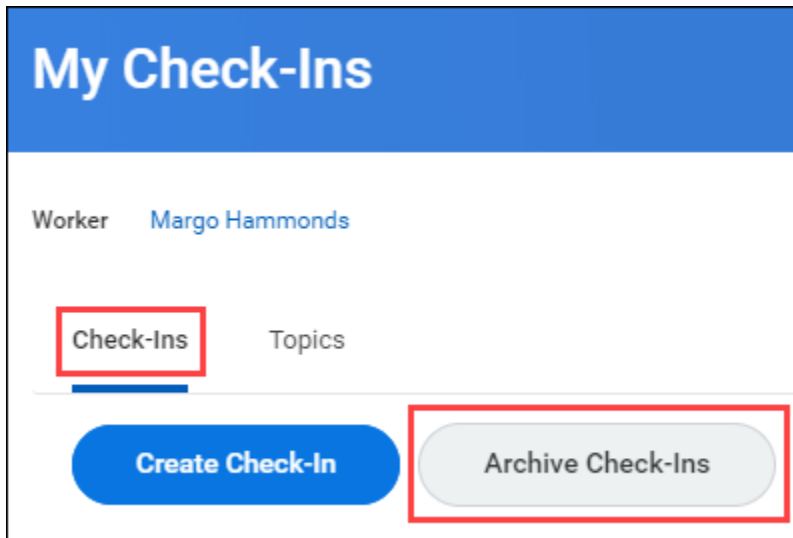
Step 5: Check the **Archive** box in front of the *Active Check-In* you want to archive, and click **OK**.
Note: You can check *Select All* to archive all your Check-Ins at once.



Restore Archived Check-Ins:

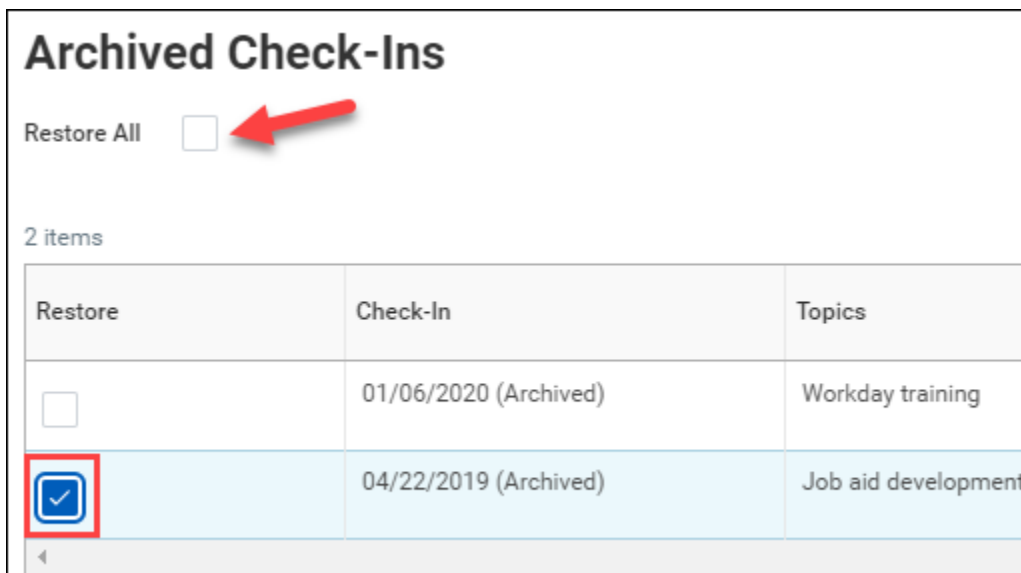
Follow Steps 1 – 3 on page 1.

Step 4: Click on **Archive Check-Ins**.



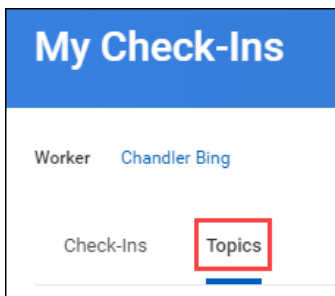
Step 5: Check the **Restore** box in front of the *Archived Check-In* you want to restore, and click **OK**.

Note: You can check *Restore All* to restore all your Check-Ins at once.



Edit Topics:

Follow Steps 1 – 2 on page 1.



Step 3: Click on **Topics**.

Step 4: Click **Edit** for the *Topic* you want to edit.

Topic	Participant	Associated Check-Ins	Action	Delete
One on one	Gunther Smith	07/31/2020	Edit	Delete

Step 5: Check the **Notify Participant** box if you want the participant to be notified that edits were made. Update the **Topic Name** here or other fields and click **OK**.

Participant: Gunther Smith

Notify Participant:

Topic Name: * 2020 Q3 - Performance Feedback Meet

Shared Notes: [Rich text editor with Format, Bold, Italic, Underline, Color, List, Link, and Undo/Redo icons]

My Notes: [Rich text editor with Format, Bold, Italic, Underline, Color, List, Link, and Undo/Redo icons]

Associated Check-Ins: x 07/31/2020 ...

Individual Topics can also be *Edited*, *Deleted*, *Archived*, and *Restored* when there are multiple topics for one Check-In.

Check-In	Participant	Topics	Action	Delete
08/31/2020	Gunther Smith	Touch base	Edit	Delete
07/27/2020	Gunther Smith	New Hire Information Working Remotely	Edit	Delete

Click on the **Topics** tab to manage individual topics for Check-Ins with more than one topics.

Topic	Participant	Associated Check-Ins	Action	Delete
Touch base	Gunther Smith	08/31/2020	Edit	Delete
Working Remotely	Gunther Smith	07/27/2020	Edit	Delete
New Hire Information	Gunther Smith	07/27/2020	Edit	Delete