Home Page Overview

1. **Navigation:** Click the next to **Home** to view your menu options. Click a menu option to navigate to that area of the system.

2. **Search Field:** Locate Team Members within the system by entering their first or last name in the People search bar. **Note:** You can also search for tasks by typing a key word, for example “goals” or “performance.”

3. **Options:** Click the next to your name to log out or access options that allow you to set notifications or change accessibility settings.

4. **To Do:** Lists the tasks that have been assigned to you. Click on an item and a window will open or pop up to view the tasks. Select a task to begin working. **Note:** The **To Do** tile is organized by due date. Click on each section to view the assigned tasks.

5. **My Goals:** Displays your current goals. By clicking on a goal name, you will be directed to your goal plan.

6. **Welcome:** Company announcements will be posted here.

7. **Links:** Allows you to add links to areas of the system that you use regularly. Click **Edit** to customize your quick links.

8. **Tile Browser:** Allows you to add or remove home page tiles that customize the look of your home page. Click **Add/remove tiles** to customize.

9. **My Team:** Provides Leaders with quick access to Team Member information. To view additional detail, click on the Team Member. **Note:** Some tiles can be expanded or shrunk. Hover over the upper right corner of a tile to reveal the options.

**Note:** The tiles and links that are visible or available to be added to your Home Page are dependent on your role and permissions.

**Note:** Tiles on the Home Page can be rearranged. Click on the title bar of a tile and when a appears you can click and drag a tile to a new location.
**Access the Org Chart:** From the Home Page menu drop down click **Organization Chart** to access.

**Directory:** Select **Directory** to access the Team Member directory and search in a list view format. **Note:** Click on Resources or Help & Tutorials for reference material.

**Search the Org Chart:** Start typing in a name to search the org chart for an individual.

**View Adjustment:** Click ⬠ or ⬡ to adjust the size of the tiles.

**Display Options:** Click ☰ to change the reporting type from All Reports to Direct Reports Only or Matrix Direct Reports only.

**Export Options:** Click ☰ to save the team’s org chart as a pdf or image/jpg.

**Expand Screen:** Click ☰ to hide top navigation and increase viewing area.

**Navigation:** Click the number of Team Members listed at the bottom of an org chart node to navigate down the team or click on **Up One Level** (if visible) to view additional levels.

**Team Member Details:** Click on the Team Member’s name or picture to see detailed information (e.g. Title, Department, Location, Contact Info), available actions (Take Action), and links (Go To) to other areas of the system.