betterworks

Admin Settings for Conversations
User Manual
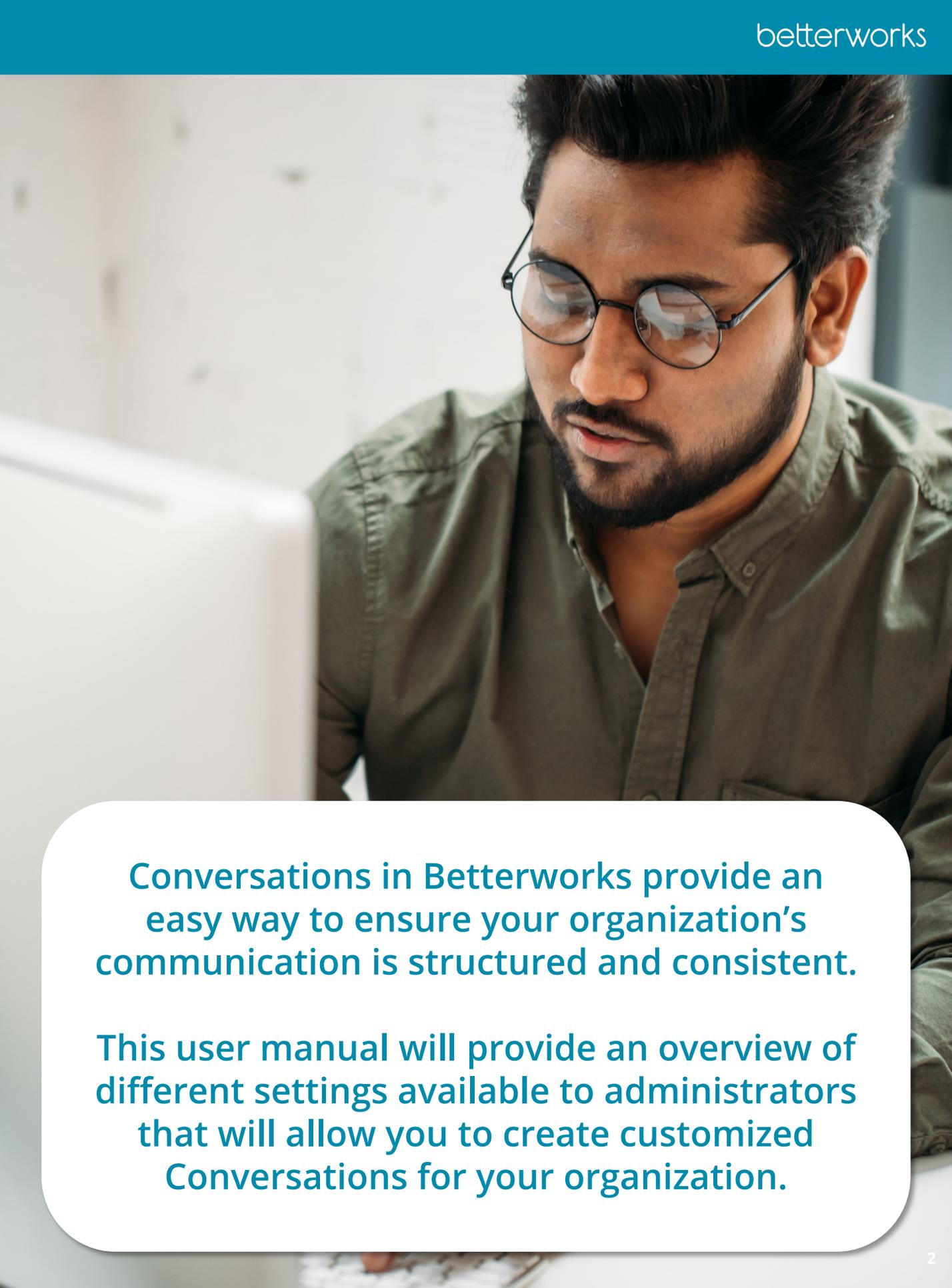
Conversations in Betterworks provide an easy way to ensure your organization's communication is structured and consistent.

This user manual will provide an overview of different settings available to administrators that will allow you to create customized Conversations for your organization.

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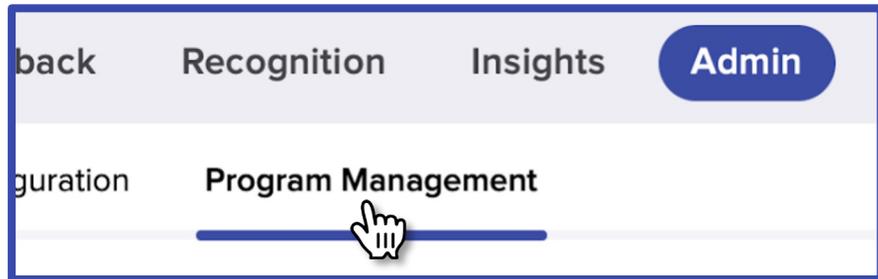# Getting Started

Step 1

Click on "Admin" in the navigation bar at the top of the screen.

Step 2

Click on "Program Management" just below that.

Step 3

Click on "Settings" below the "Conversations" heading in the left-hand sidebar.

Step 4

From here, you can start a new Anytime or Scheduled Conversation, or you can select from an available template.

Anytime Conversations

Step 1: Name This Conversation

This step allows you to create or edit your Conversation's name and optional description. This section may be updated after the Conversation has launched.

Update your conversation name or description and save the changes.

Title Character Limit: 64

Description Character Limit: None

Edit a conversation

Step 1: Enter a conversation name

This is visible to everyone.

Conversation name *

> Strategic one-on-one

Description (optional)

Describe the purpose of this conversation to provide guidance to the participants

| H1 | H2 | H3 | H4 | **B** | *I* | % |

> Purpose: generate creative approaches and big ideas
> This conversation gives you the opportunity to think outside of the day-to-day and brainstorm ideas.

Optional

- ☑ Require employees to confirm they met ?
- ☑ Enable employees to create goals from inside this conversation
- ☐ Only Managers can initiate this template

After you meet with Deborah, please confirm meeting here: **CONFIRM MEETING**

Shared on 04/18/2023

End User View

| Goals | Feedback |

| **Sara** | Debo... | Current ▼

Create a best-in-class onboarding process by the end of Q2 2023.   0%

CREATE GOAL

End User View

- If your Conversation is intended to supplement a meeting between the Manager and the Direct Report, you can enable the Confirm Meeting button. This will allow employees to document that the meeting took place.

- The second checkbox in this step will enable your end users to create goals from within their Conversation.

- You can check the third box in this step if you only want to allow Managers to be able to initiate this Anytime Conversation.

Step 2: Decide on a Format

This step allows you to determine who will be answering the questions. The responses to these questions will be viewable to both the manager and the direct report.

Step 2: Decide on a format

Specify who will be answering questions in this conversation.

○ Direct report to answer

○ Manager to answer

● Direct report and manager to answer

Step 3: Permissions

This step allows you to determine the level and type of access different roles will have to the Conversation. You can set View or Edit permission, or you can limit access entirely.

Note: "Skip-Level Manager" refers to leaders with multiple layers of direct reports. Skip-Level Managers with view/edit access will see an additional tab in the Conversation module when this option is enabled.

Step 3: Permissions

Allow viewing and collaborating in this conversation.

Super admins	Can view ▾
HR admins	Can view ▾
Skip level managers ⊘	No access ▾

My Conversations **Skip Level Conversations**

▾ Choose a manager to view their conversations

CONVERSATION WITH ⬍	CONVERSATION ⬍	END DATE ▲	CONTRIBUTORS
John Haynes-Rivera Project Manager	Performance Assessment - NetWork+ Scheduled	04/11/2023	
Tisha Pirani Project Manager	Performance Assessment - NetWork+ Scheduled	04/11/2023	

Skip-Level View

Step 4: Notifications

This step allows you to send out a notification to end users when your new Anytime Conversation has been created.

Step 4: Notifications

Choose which notifications will be sent to participants. View emails

☑ Conversation create

Steps 5 & 6: Direct Report & Manager Questions

These steps allow you to create questions for Direct Reports and Managers respectively to answer in their Conversations. You can select amongst different question types, set word limits, and also determine whether a response is mandatory. Responses will be visible to both parties once shared.

Step 5: Enter questions for the **direct report** to answer *

1. What are some ways our team might help achieve the company's strategic objectives?

2. What are the potential risks and rewards?

3. What are some creative team objectives we might set to help achieve the company's strategic

+ ADD ANOTHER QUESTION

COPY & PASTE FROM ABOVE

Step 6: Enter questions for **manager** to answer *

1. Here are some ways I see our team helping to achieve the company's strategic objectives

2. Here are some specific skills you have that I think might help us achieve the company's strategic

+ ADD ANOTHER QUESTION

Step 7: Deploy Conversation

If you select the Deployment option, your Anytime Conversation will go live. Once someone starts the Conversation, they will have to complete it within the number of days you specify here.

Important: Once a conversation has launched, un-deploying the conversation will remove any previously shared responses.

Step 7: Deploy conversation

Set the number of days users will have to complete

28

Only enabled conversations will be made available to participants

Deployment: ✔

Scheduled Conversations

Step 1: Name This Conversation

This step allows you to create or edit your Conversation's name and optional description. This section may be updated after the Conversation has launched.

Update your conversation name or description and save the changes.

Title Character Limit: 64

Description Character Limit: None

Step 1: Name this conversation

This is visible to everyone.

Conversation name *

Performance Assessment - NetWork

Description (optional)

Describe the purpose of this conversation to provide guidance to the participants

| H1 | H2 | H3 | H4 | B | I | % |

Purpose: align on work expectations
Take some time to focus on growth, opportunities, and insights.

This check box will enable your end users to create goals from within their Conversation.

Optional

☑ Enable employees to create goals from inside this conversation

Step 2: Select Participants

This step allows you to specify to whom your Conversation will be disseminated. This can include all employees, specific departments or groups, or the option to upload a custom CSV file containing a list of specific participants.

Note: Leverage Groups/Custom Participant lists. If a new participant is added to a Group or Conversation participant list during an active cycle, the Conversation will launch to the employee and their manager at the top of the hour. Similarly, if all employees are selected, a newly provisioned user will receive a conversation at the top of the hour.

Step 2: Select participants

Specify whether all or only some of your direct reports will participate in the conversation. If specific direct reports are participating, upload a CSV file with their information.

Note: Any change you make will not affect users who are already participating in active conversation cycles. Those users will keep all conversations they are currently working on.

◯ Include all employees (recommended)

◉ Include employees from specific departments or groups Learn more.

    NetWork

◯ Custom participant list via CSV upload

Step 2: Select Participants (Cont'd)

This check box allows Managers to invite additional contributors to the Conversation. After checking this box, you can set the contributors' visibility to other participants' responses.

The direct report cannot view contributor responses.

Managers cannot add contributors after their conversation responses have been shared.

Managers cannot add contributors during the grace period (after the conversation due date).

If "allow contributors to view others responses" is selected, contributors will also have access to view the manager's responses once shared.

☑ Allow Managers to invite additional contributors

Managers can add up to three additional people to a conversation. **Direct reports** will not see the additional contributors' responses.

☑ Allow contributors to view other contributors responses

☑ Allow contributors to view Direct Reports responses

Step 3: Decide on a Format

This step allows you to determine who will be answering the questions. The responses to these questions will be viewable to both the manager and the direct report.

Additionally, you can enable confidential questions and determine who will answer those and when. The responses to these questions are only visible to the person who wrote them and the program Admin.

Step 3: Decide on a format

Specify who will be answering questions in this conversation **before** the meeting happens.

○ Direct report to answer

○ Manager to answer

◉ Direct report and manager to answer

☑ Enable confidential questions

Choose which participant(s) will answer confidential questions. These answers will not be visible to other participant once shared.

○ Direct report to answer

○ Manager to answer

◉ Direct report and manager to answer

Choose when participant(s) will answer confidential questions.

◉ During the conversation

○ After the conversation

Step 4: Permissions

This step allows you to determine the level and type of access different roles will have to the Conversation. You can set View or Edit permission, or you can limit access entirely.

Note: "Skip-Level Manager" refers to leaders with multiple layers of direct reports. Skip-Level view/edit access will see an additional tab in the Conversations module when this option is enabled.

Step 4: Permissions

Choose which additional roles will be able to view and edit this conversation.

Super admins	Can view ▾
HR admins	Can view ▾
Skip level managers ⓘ	Can view ▾

Select the depth skip level managers can access:

○ One level down
● Two levels down
○ Everyone below them

Steps 5 & 6: Direct Report & Manager Questions

These steps allow you to create questions for Direct Reports and Managers respectively to answer in their Conversations. You can select amongst different question types, set word limits, and also determine whether a response is mandatory.

Note:

- Answer types include Paragraph, Scale (25 options), Multi-select (25 options), and a 5-star rating.

- The question character limit is 512.

Step 5: Direct Report Questions *

Answers will be visible to the manager

1. What are some recent examples of times you were highly effective?

2. What are some recent examples of times you could have been more effective?

3. What would you need to be more effective?

+ ADD ANOTHER QUESTION

Step 6: Manager Questions *

Answers will be visible to the direct report

1. What are some recent examples of times they were highly effective?

2. What are some recent examples of times they could have been more effective?

3. How can you help increase their effectiveness?

Step 7: Notifications

This step allows you to send notifications to your end users at various points in the Conversation cycle to help drive participation.

Step 7: Notifications

Choose which notifications will be sent to participants. View emails

☑ Conversation start
☐ Mid-cycle reminder
☐ Conversation due
☐ Overdue reminder ⓘ

Step 8: Schedule Conversation Cycles

This step allows you to set Start and End dates for your Conversation cycle. You may extend the cycle end date as long as the date has not passed.

If your Conversation is intended to supplement a meeting between the Manager and the Direct Report, you can enable the Confirm Meeting button and set the date on which it becomes visible to the end user. This will allow employees to document that the meeting took place.

Within this step, you can also set a grace period during which unlocked questions can be edited after the cycle end date. You may extend the grace period as long as the grace period due date has not passed. Employees will not see the grace period due date. The grace period is not visible on the Conversation, but the Conversation will remain open for the set number of days configured.

Within the Additional Lock Options drop-down, you can set all or some questions to lock once employees have shared them. If the question is not locked, the employee can edit their answers after they've shared them up until the end date. The lock option will prevent them from changing responses. If a question is locked and a user wants to make updates, the user must "request to edit."

Step 8: Schedule conversation cycles

Set the start and end dates for your conversation cycles. For each cycle, you can update answer locking and admin review period options.

1 Remaining conversation cycles scheduled

Cycle | Duration: 4 days

Start date 06/06/2023   End date 06/09/2023

☑ Require employees to confirm they met after responses were shared

06/06/2023 date on which the Confirm Meeting button is active

Set the number of days unlocked questions will remain editable

___ days after the cycle end date

Additional lock options

Choose if questions should lock prior to the end of the cycle.

☑ All answers lock when shared
☐ Some questions lock on an earlier date

Step 8: Schedule Conversation Cycles (Cont'd)

Admin Review prevents a party from sharing their answers before a specified date (review deadline). You can also set a submit deadline for users to submit their responses to Admins for review.

Within this drop-down, you can set a timeframe for end users to submit their answers to Admins before sharing their answers more broadly. End users will see the deadline to submit their responses to Admins, but Admin review deadlines must be shared by the Admin/HR team; these will not be communicated within Betterworks.

Once the Admin review deadline has passed, end users will need to return to the Conversation and click the "Share" button in order to disseminate their responses.

Additional admin review period options ⌄

Include a timeframe for participants to submit answers to admins prior to sharing. Admins can pull reports on these submitted answers.

Direct Reports (optional)

Submit deadline ❓   Review Deadline ❓

06/08/2023 📅   06/09/2023 📅

Managers (optional)

Submit deadline   Review Deadline

Select date ❓   Select date ❓

Here's how admin review works:

Write responses   Admin review   Share responses

Cycle start   Submit deadline   Review deadline   Cycle end

+ ADD ANOTHER CYCLE

Step 9: Deploy Conversation

When you select the Deployment option, your Conversation will be set to go live on the dates you specified within Step 8.

If the same template and questions will be used for future Conversations, you may schedule additional cycle deployments on the date of your choosing by selecting "+ Add Another Cycle" in Step 8.

Step 9: Conversation deployment

Only enabled conversations will be made available to participants on the above dates.

Deployment: ✓○