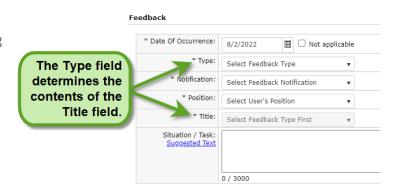Quick Start Guide

Managing Feedback Lists

The updated Feedback feature in symplr Performance offers a redesigned interface and additional functionality for users. In addition, the administrative tools for managing the feature have been updated as well.

Overview

Updates to the Feedback feature include splitting the original **Title** field into three separate lists based on the type of feedback being created (Commendation, Coaching, or Corrective). Each type now has a separate list of titles, which are automatically pulled into the **Title** field when a **Type** is selected.

These three new lists are found on the *Custom Lists* page under the **Admin** area. The *Feedback Lists* item now contains **Commendation Title**, **Coaching Title**, and **Corrective Title** lists, each of which can be customized with titles that correspond to their types.

The original **Title** list now populates the **Title** field when adding *Notes* to an employee record. Edits made to the **Title** list do not affect any values in the new **Commendation**, **Coaching**, or **Corrective Title** lists.

Values in New Lists

In order to ensure users are able to locate the desired **Title** for feedback after the update has been released, the original **Title** list used by clients before the update has been copied into all three of the new lists.

In order to properly customize these lists, it is necessary to review each list and remove the items that do not correspond to the list type.

Example: *The original pre-update **Title** list for a client contains the value Policy Violation. Though this value is copied to the **Commendation Title** list, it doesn't really apply – it only belongs in the **Coaching** or **Corrective Title** list. Therefore, the Policy Violation value should be removed from the **Commendation Title** list.*

Adding Values to Lists

When adding new values to any of the Feedback lists, the **Value** and **Description** fields must match. While unmatching values still appear in the **Title** drop-down list, they do not properly record in the system database when selected.