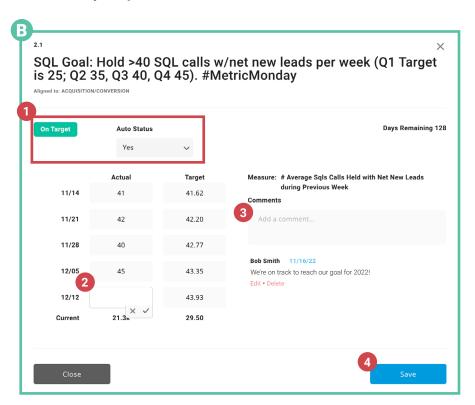# Check-In Cheat Sheet

OnStrategy

1 OnStrategy Web App

A If you have items that need a results update, the **Check-in** icon will appear in the top right-hand corner. To update your items, click the **Check-in** icon.
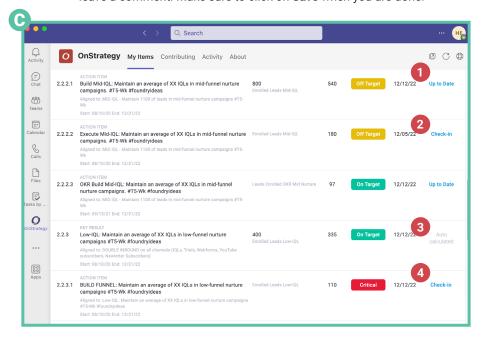
B In the **Check-in** modal, complete the following:

1. **If auto-status is off, select a status.** You may also turn auto-status on or off.

2. **Update** your actual.

3. **Add a comment** in the comment box.

3. **Save your update** and move on to the next item.

2.1

SQL Goal: Hold >40 SQL calls w/net new leads per week (Q1 Target is 25; Q2 35, Q3 40, Q4 45). #MetricMonday

Aligned to: ACQUISITION/CONVERSION

1 On Target | Auto Status | Yes | Days Remaining 128

	Actual	Target
11/14	41	41.62
11/21	42	42.20
11/28	40	42.77
12/05	45	43.35
12/12	**2**	43.93
Current	21.3	29.50

Measure: # Average Sqls Calls Held with Net New Leads during Previous Week

Comments

3 Add a comment...

Bob Smith 11/16/22
We're on track to reach our goal for 2022!
Edit • Delete

Close | **4** Save

2 OnStrategy for Teams

A) [Follow the instructions here](#) to **add OnStrategy for Teams** into your daily working environment.

B) **Login** to the application using your OnStrategy account information.

C Once logged in, navigate to the **My Items** tab to see all goals you own.

1. Goals that don't need an update will say **Up To Date.**

2. Any goal that needs an update will say **Check-in.**

3. Any goal that is using **Auto Roll Up** will not appear as needing a check-in, although you may want to leave a comment. To do so, click on **Up to Date** in your goals list to leave a comment.

4. Clicking on **Check-in** will launch the check-in modal where you can enter updates for the current and previous time periods, the status and leave a comment. Make sure to click on **Save** when you are done.
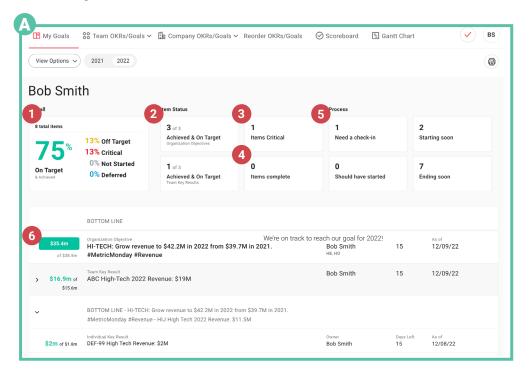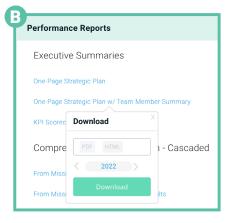
3 Connect to Your Progress

A Navigate to the **My Goals** page in the goals section. This is your home-base when you login to OnStrategy. At the top of the **My Goals** page, connect to the performance of your goals and actions. This includes:

1. An **Overview** of your performance.

2. How many of your items are **Achieved & On Target.**

3. How many of your items are **Critical**.

4. How many of your items are **Complete**.

5. Which items are due for a **Check-in, Starting soon, Should have started, and are Ending soon.**

6. Dig into all of your **Goals**, their performance, and how they support your organization's direction.

4 Prepare for a Monthly/Quarterly Review

A) Navigate to the **Reports** tab in the left-hand navigation.

B Click on the report title to show the **Download** modal. You can download reports as a PDF, Word Document, or HTML. You can also select if you'd like to include comments.

C) Click on the **Reviews** tab in the left-hand navigation to open the **Dashboard**.

D **Click on a Chip** to expand its view. In the expanded view, you can see:

1. **Description** and **Label**.

2. **Actual performance.**

3. **Comments**. Hovering on the Comment bubble will show recent comments.

4. **Goal details.** This includes the target, calculation, owner, status, and start- and end-dates.

5. **Performance graph.** You can toggle to show quarterly, monthly, annual, or YTD views.

6. **Status of supporting goals**. See the status and performance of the supporting items.