Introduction to Microsoft Viva Glint

Article • 09/29/2023

This article helps you to understand how Microsoft Viva Glint makes people in your organization happier and more successful at work.

First, watch this 4:30 video for an easy-to-understand introduction of Viva Glint and its people success methodology: https://www.microsoft.com/en-us/videoplayer/embed/RW17jMY?postJsllMsg=true

Get started with Viva Glint

Viva Glint is a people-driven platform that provides visibility into the health of your organization and guides effective action. The world's leading brands use our programs to increase employee engagement, develop their people, and improve business results.

Great teams build great cultures, and great cultures fuel great companies.

How does Viva Glint improve the overall health of your organization?

With Viva Glint you can:

- Increase employee engagement resulting in overall business improvement.
- Receive faster and more focused people insights in your organization.
- Collaborate within teams and throughout your organization with continuous conversations.
- Predict opportunities and risk to business outcomes.
- Review data driven feedback to study employee success drivers.
- Translate insights into action and track the feedback progress.

Four stages of Viva Glint programs

Article • 07/13/2023

The article walks you through the four stages of Microsoft Viva Glint program to help you launch the right feedback program to the right people in your organization.

You can create a strong feedback program by incorporating these four phases:

1. **Goals** - Ask questions of your organization to determine how you use feedback to support goals.
2. **Launch** - Design your program, set up your survey, set your program live.
3. **INsight** - Gather and analyze feedback using reporting results.
4. **Transform**- Implement small, meaningful changes across your company.

Questions to consider for Viva Glint program

The following set of questions in each phase ensure that you're prepared to launch the right survey, to the right people, and that your resulting action-taking is insightful and sustainable. You may connect with your leaders for the most effective insights.

Goals phase

Answer these questions:

- What is the current focus area for your business?
- What engagement areas have you been focusing on? How do you plan to check in on these areas?
- If this survey isn't your first, then:
  - Have there been any changes or shifts in your business since the last survey?
  - Have the goals of your program changed?
  - Are there survey items that you want to rotate in or out?

Launch phase

Answer these questions:

- When are you going to launch your next survey? What is your planned cadence?
- Are there other feedback programs running simultaneously that may impact this survey?
- Do other surveys impact the timing for this launch?

- If this isn't your first survey, how did your communications approach work for the first survey? Does anything need to be modified?
- How can we lean on champions to help support our survey efforts?

INsight phase

Answer these questions:

- How did you decide what to focus on? Did you use the ACT conversation model? Team Conversations?
- How are results, next steps, and expectations communicated to leaders and managers?
- Can you become more agile with your rollout and platform access strategy?
- How can you continue to bring insights into other key strategic initiatives?
- How did you onboard leaders and managers to Viva Glint? Employees? HR team members?

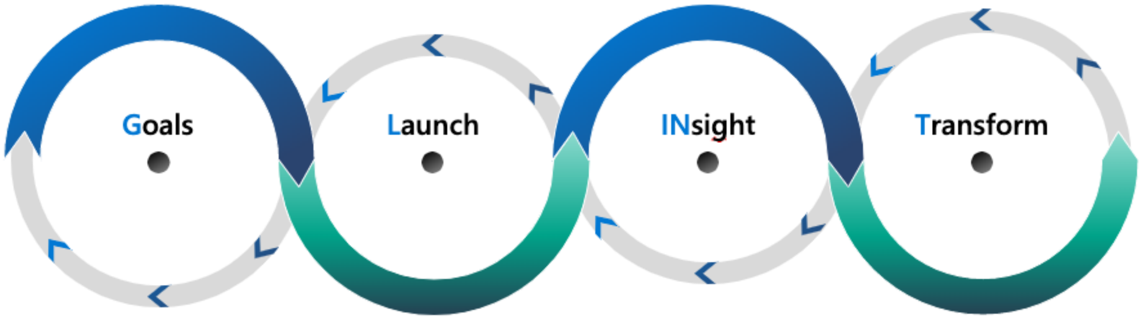
Transform phase

Answer these questions:

- How are you keeping up momentum?
- Which parts of the organization have been successful in taking action? How can everyone learn from that group?
- Are leaders transparent about results and committed to action?
- Are managers owning their data?
- Do employees feel empowered to participate and influence change?
- Do HR employees coach leaders and managers to enable change?

The following image shows the four phases of the Viva Glint program:

The four stages of a Glint program



Viva Glint program types and associated templates

Article • 07/13/2023

Viva Glint believes that ongoing, frequent communications to solicit and collect employee feedback is crucial to an organization's success. Viva Glint offers engagement programs as a way for customers to send short, targeted surveys to their employees which will deliver rich insights that translate into actionable opportunities to improve business.

Engagement is the degree to which employees invest their cognitive, emotional, and behavioral energies toward positive organizational outcomes. Engagement correlates with job satisfaction, commitment, involvement, motivation, and attrition.

In addition to **Engagement survey programs** , Viva Glint customers can opt into **Employee Lifecycle survey programs, and 360 Feedback programs.**

Our People Science team continually updates survey items and develops templates that will provide meaningful insights into the current world of work.

Two categories of surveys to consider

Within our survey programs, there are two overarching types to consider:

- Organizational surveys – Often administered by a global HR (Human Resources) team and sent to all employees on a recurring cadence
- Business unit survey – Often administered by a core business team, HR team, or a local business leader with the goal of obtaining more specific information for a particular business unit

Survey frequency to consider when choosing a Viva Glint program

Viva Glint programs available for different cadences and can run simultaneously, when appropriate.

Recurring surveys

Viva Glint offers recurring Engagement and special topic-type survey templates, in addition to a blank template from which you can create your own survey. Surveys should be *recurring* so that data can be compared from between cycles and *trend* can be established. Recurring surveys are set to go live at a scheduled cadence.

Ad Hoc surveys

Viva Glint uses Ad Hoc surveys to measure something out of the ordinary at an impactful time. A blank template is available if you choose to create your own Ad Hoc survey.

Always-On feedback

Use Always-On feedback to provide feedback and suggestions anytime it feels relevant. A blank survey can be created for Always-On feedback, as well.

Survey types

Leverage Viva Glint programs to create feedback habits and support continuous employee and organizational development. Viva Glint offers prescribed templates and a blank template option for each type of program.

Engagement survey template

- **Purpose** - - Engagement surveys measures key drivers of engagement from Glint's research-based People Success Elements, which are critical for employees being happy and successful at work.
- **Recommended frequency** - Recurring: Recommended quarterly as this includes all core engagement items, creating a solid engagement baseline for your organization. This program is recommended as a first introduction to Viva Glint programs within your organization and can be set to a customized cadence.
- **Target groups for results** - Managers and teams
- **Feedback providers** - All eligible employees

Special topic survey templates

Culture survey

- **Purpose** - Provides a deep understanding of the strengths and opportunities of an organization's culture based upon Viva Glint's research-based culture mode
- **Recommended frequency** - Recommended as a recurring survey launching every few years or so depending on how quickly the organization is changing
- **Target groups for results** - Senior leadership and above
- **Feedback providers** - All eligible employees

Diversity, Inclusion, & Belonging

- **Purpose** - Provides an understanding of employee sentiment related to various elements necessary for building a powerful sense of belonging among employees
- **Recommended frequency** - Recurring
- **Target groups for results** - Managers and teams
- **Feedback providers** - All eligible employees

Patient Safety

- **Purpose** - Assesses the culture of patient safety in a valid, reliable, concise, and straightforward way. Leapfrog-approved.
- **Recommended frequency** - Recurring
- **Target groups for results** - Healthcare managers and teams
- **Feedback providers** - All eligible employees

Manager Effectiveness

- **Purpose** - Assesses employee perceptions of how their direct managers demonstrate key behaviors related to their effectiveness
- **Recommended frequency** - Recurring
- **Target groups for results** - Managers and teams
- **Feedback providers** - All eligible employees

Team Effectiveness

- **Purpose** - Identifies a team's unique dynamics and opportunities for improvement
- **Recommended frequency** - Recurring
- **Target groups for results** - Managers and teams
- **Feedback providers** - All eligible employees

Change Management

- **Purpose** - Assesses employee sentiment related to a specific large-scale change within the organization (e.g., M&A, major technology implementation, organizational restructuring)
- **Recommended frequency** - Recurring or Ad Hoc
- **Target groups for results** - Leaders of change and change management team
- **Feedback providers** - All eligible employees

Employee Lifecycle survey templates

Onboarding

- **Purpose** - Provides an opportunity to check in with newcomers and understand what is going well and any challenges with their onboarding experience
- **Recommended frequency** - Automatically triggered at a key moment

  > **Tip**
  >
  > Recommend having at least two onboarding surveys at specific points in time (e.g. - 45 days, 60 days or 30 days, 60 days, and 90 days)

- **Target groups for results** - Human Resource leaders and managers
- **Feedback providers** - New hires

Exit

- **Purpose** - Provides data for why people leave and their perceptions of the organization as they transition from the organization
- **Recommended frequency** - Automatically triggered at a key moment
- **Target groups for results** - Human Resource leaders and managers
- **Feedback providers** - Departing employees

Manager 360 Feedback template

- **Purpose** - Supports the development of managers by allowing them to get feedback from their leaders, peers, and direct reports on key behaviors related to their effectiveness
- **Recommended frequency** - Ad Hoc: Recommend timing be relevant to the person receiving the feedback (e.g. - send 360 when manager is new to role, or participating in a development program)
- **Target groups for results** - Managers (Subjects)

- **Feedback providers** - Departing employees

How People Science works with Viva Glint

Article • 07/13/2023

The Microsoft Viva People Science team integrates traditional social sciences like behavioral and organizational psychology with advances in data science, product management, and design to reimagine how Viva apps, such as Viva Glint, can deliver exceptional and impactful experiences in the workplace.

We bring unique points of view based on science-backed research, people-centric perspective, and deep understanding of customer needs to help organizations craft meaningful employee experiences. Our deep knowledge and extensive experience help us to create a product that will drive employee engagement and business results.

Our work is focused on enabling people to bring their best selves to work – in order to do their best work. Years of research tell us that there are six core elements that organizations can use to build effective cultures, people-centric leaders, and engaged employees. We refer to these six core elements as the People Success Elements. They include:

- **Wellbeing**: You feel physically and psychologically safe at work. You feel uniquely valued, and are treated with dignity, fairness, and equity.
- **Connection**: You feel a sense of belonging as a trusted, integral member of a diverse community of people you like and respect. You have high-quality relationships with your colleagues.
- **Clarity**: You know what success looks like and what to prioritize. You know when you are on track, and you get feedback that helps you change course as needed.
- **Empowerment**: You have access to the information, people, tools, and resources you need to work effectively. You're trusted with freedom and flexibility to own your work and make decisions about how to best direct your talent and effort.
- **Growth**: You're maximizing your strengths, learning new skills, diversifying your experience, and making progress.
- **Purpose**: You see how you're part of something bigger than yourself—how the work you do serves others and has a meaningful impact.

The six People Success Elements are embedded throughout the Viva research and development process and within Microsoft Viva's guidance, resources, and materials.

Specifically for Viva Glint, the People Science team has led the way with foundational research on how to define a measurement strategy in the modern world of work, ways to effectively design a survey that best drive business results, and ways to propel action taking through conversations.

Viva Glint Learning Paths and modules

Article • 09/11/2023

Discover the power of Microsoft Viva Glint with step-by-step guidance. Recommended trainings for admins and managers using Viva Glint are hosted within Microsoft Learn, on the Training tab.

Viva Glint learning paths and the modules contained within them have been carefully created by our Subject Matter Experts to provide a thorough self-paced and self-teachable learning experience. Learning paths are comprised of building blocks, referred to as modules. All trainings are recommended prior to setting up and launching your first Viva Glint program.

As an HR and/or an IT professional, you may find both the admin and manager trainings useful in using Viva Glint.

Recommended for admins

These learning paths and modules deep dive into Viva Glint methodology and how to configure surveys.

Title	Type of training	Summary	Modules within path
Introduction to Microsoft Viva Glint	Module	Gives an overview of Viva Glint, who should use it, and why an organization should use it	N/A
Apply Viva Glint's modern approach to engagement for better results	Learning path	Introduces the methodology of People Success, describe how to use it, and details the Viva Glint methodology	• Getting to know Viva Glint's approach to modern engagement • Designing a People-Centric Measurement Strategy • Empowering Action for Better Results
Design and set up your Viva Glint program	Learning path	Provides high level information about setting up your dashboard, recurring surveys, and sharing feedback results	• Learn how to set up Viva Glint • Learn about Viva Glint program design • Understand Viva Glint survey configuration

Title	Type of training	Summary	Modules within path
			and launch • Prepare for a successful Viva Glint results rollout

Optional for admins

Title	Type of training	Summary	Modules within path
Set a Vision and Strategy for your Viva Glint program	Module	Provides the framework for how meetings can be designed to align stakeholders on the core challenges within your organization and be solved with a Microsoft Viva Glint survey program	N/A
Deliver results with your Executive Consultation	Module	Provides the knowledge to help you move from data to insights and facilitate a successful Executive Consultation (EC) with leadership teams	N/A
Learn about a Viva Glint 360 Feedback program	Learning path	Designed to help understand how to configure, launch, and share a 360 survey and results	• Understand Viva Glint's approach to 360 Feedback • Configure and manage a Viva Glint 360 Feedback program • Set a Vision and Strategy for your Viva Glint program

Recommended for managers

These modules define how specific features will assist a manager to interpret reports and results on their Viva Glint dashboard.

Title	Type of training	Summary	Modules within path
Introduction to Microsoft Viva Glint	Module	Gives an overview of Viva Glint, who should use it, and why an organization should use it	N/A
Navigate and share your Viva Glint results	Module	Guides the learner through the various dashboards and reports available on the Viva Glint app and introduces best practices around sharing results with teams: • Confidentiality and how to navigate the Viva Glint app • Team Summary Dashboard • Executive Summary Report • Heat Map Report • Driver Impact Report • Comments Report • Navigate Focus Areas • Use the Team Conversations feature and ACT framework	N/A

Microsoft Viva Glint privacy

Article • 07/18/2023

Microsoft Viva provides privacy-protected, data-driven insights and recommendations to help improve productivity and wellbeing. Microsoft Viva Glint adheres to all Microsoft Viva privacy safeguards .

For information specific to Viva Glint:

Learn about privacy policies in Microsoft Viva glint. .

Read Viva Glint's advanced privacy guide for data usage and survey item creation.

Lean how Viva Glint helps you protect your privacy

Learn about access to Viva Glint raw survey responses.

Privacy policies in Microsoft Viva Glint

Article • 07/13/2023

Every Microsoft Viva Glint survey includes links to a privacy policy that users can access. Privacy policies within Viva Glint are accessible from:

- Email footers
- Survey login screens
- Survey introduction (welcome) pages
- Behind the question mark symbol in top navigation menu of each survey and the Viva Glint's reporting dashboard

The privacy policy can be either:

- Your organization's privacy policy if you choose to add it to Viva Glint
- The Microsoft Privacy Statement if you don't add your organization's privacy policy.

The Microsoft Privacy Statement explains the personal data Microsoft processes, how Microsoft processes it, and for what purposes. It includes a section specifically addressing personal data processing in commercial products, like Viva Glint, that users can access through an employer or other organization. Before deciding to rely solely on the Microsoft Privacy Statement, you should review it carefully and determine, in coordination with your legal, privacy, and HR teams, whether it meets your organization's needs.

Viva Glint allows your organization to present its own privacy policy to Viva Glint users. By adding your own privacy policy, you can provide more specific information to employees about how your organization handles their personal data, which may be necessary to meet your organization's compliance needs. Again, you should consult your legal, privacy, and HR teams to determine what privacy policy to include in Viva Glint.

Use your organization's privacy policy in Viva Glint programs

The setup for the privacy policy is self-serve from within the admin dashboard.

To add your organization's privacy policy

Follow this procedure:

1. From the admin dashboard, navigate to **General Settings** and then **Company Information**.
2. Add the link to your company's privacy policy URL in the bar in the **Company Privacy Policy** section.

Your company's privacy policy link will now be embedded on Viva Glint's top navigation menu bar, survey header, and survey introduction page. If you haven't provided a correct link, an error message directs you to enter a valid URL.

User access to your organization's privacy policy

If your organization chose to add its privacy policy to Viva Glint, users can access it in these places:

1. Survey page: Survey takers can access it from the **privacy policy** link on survey introduction pages or by selecting the question mark symbol on the surveys' top navigation bar and then **Privacy** from the dropdown menu.
2. Viva Glint reporting dashboard: From the top navigation menu of the Viva Glint application, select the question mark symbol and then **Privacy** from the dropdown menu.

To use the Microsoft Privacy Statement

If your organization doesn't add its privacy statement to Viva Glint, a link to the Microsoft Privacy Statement will automatically be presented in Viva Glint's top navigation menu bar, survey headers, and survey introduction pages.

> **Note**
>
> The Microsoft Privacy Statement will display in all Viva Glint email footers and login screens.

Advanced privacy guide for data usage and survey item creation

Article • 07/13/2023

Microsoft Viva Glint helps organizations measure employee engagement and experiences so they can take action to improve them. Grounded in our approach to employee engagement, Viva Glint offers a flexible surveying approach that enables organizations to gain a greater understanding of key experiences that shape an employee's journey, how those experiences impact engagement, and the resulting impact on individual and business outcomes.

With Viva Glint, organizations capture invaluable employee feedback and transform those insights into actions. Feedback and action-taking are brought directly into the flow of work, empowering managers and their teams to take joint ownership and drive meaningful actions and habits that support happiness, success, and wellbeing at work.

This resource explains how Viva Glint provides the customer admin with controls to manage personal data and implements protections within Viva Glint to maintain employee privacy. These controls and protections support customer compliance with regulations such as the European Union General Data Protection Regulation (GDPR).

This document is specific to Viva Glint and provides a technical overview of how data and privacy are protected.

Understand the fundamentals of Viva Glint privacy

This section discusses concepts that provide a framework for understanding how Viva Glint approaches data protection.

Data entity

Contemporary privacy regulations, such as the GDPR, outline roles and responsibilities in thinking about data protection and privacy. These concepts help illustrate the respective responsibilities of the customer, Microsoft, and employees when it comes to processing and managing sensitive data.

The concepts of data controller, data processor, and data subject originate in European privacy law. Regardless of where your organization is located or whether any personal data of European Union citizens is involved, these concepts provide a useful framework for thinking about data protection when using Viva Glint.

The following illustration shows the central position of the data controller (your organization) between the data subject (left) and the data processor, Microsoft (on the right):

Data controller

The data controller is a party that determines the purposes and means of processing a data subject's personal data.

When using Viva Glint, your organization is the data controller because your organization determines if, how, and why Viva Glint processes any personal data.

As the data controller, your organization:

- Determined the scope of data to analyze and the purpose and objectives of the analysis.
- Works with your organization's legal, privacy, and human resources teams for the following tasks:
  - Determining whether you should obtain consent from users in your organization.
  - Determining what information is provided to users about how your organization processes their personal data in Viva Glint.
  - Accounting for local considerations (for example, obtaining approval from local works councils, if applicable).
- Uses Viva Glint privacy controls to direct what data will be analyzed, how data will appear in results, and who will have access to both raw data and the results of analysis.
- Reviews and is familiar with this document and other Viva Glint privacy documentation provided by Microsoft.

Data processor

The data processor is a party that processes personal data on behalf of the data controller. When your organization uses Viva Glint, Microsoft is the data processor.

As a data processor, Microsoft will:

- Process personal data in accordance with your organization's instructions as directed through your settings configuration within Viva Glint
- Through your use of Viva Glint, process all data provided to Microsoft (including personal data) according to the same general privacy and security terms in the Product Terms
- As part of Microsoft's commitments under Product Terms and Microsoft Products and Services Data Protection Addendum (DPA), abide by the Standard Contractual Clauses and remain certified under the EU-U.S. and Swiss-U.S. Privacy Shield Frameworks and the commitments that these frameworks entail legitimizing transfers of personal data from the EU and Switzerland to the U.S, though Microsoft doesn't rely on the EU-U.S. Privacy Shield Framework as a legal basis for transfers of personal data in light of the judgment of the Court of Justice of the EU in Case C-311/18
- Contractually commit to abide by applicable provisions of applicable regulations such as the GDPR or California Privacy Rights Act (CPRA).
- Provide Viva Glint features that help organizations meet their data controller obligations and honor data subject rights under the GDPR, including the rights of exclusion from processing, access, erasure, and transparency regarding methods of processing
- Implement technical and organizational security measures to protect the confidentiality of your organization's (and employees') data in Viva Glint

In addition, Microsoft doesn't use customer data or personal data for advertising, nor does it volunteer to provide such data to law enforcement.

Data subject

A data subject is a person who can be identified through personal data. In the context of Viva Glint, the data subject is an employee or other user in your organization whose personal information is being processed. Personal data is any information that directly or indirectly identifies a person (the data subject).

> **Note**
>
> In most cases in the Viva Glint product and documentation, we refer to a Data Subject simply as a "user," a "person," an "individual," or an "employee."

Understand which data gets processed

Viva Glint provides the customer with tools to manage the data Viva Glint processes and who has access to that data. Viva Glint also gives customers the ability to receive and respond to Data Subject Rights requests from employees. Customers control what employee personal data they import to Viva Glint. Viva Glint can then combine this customer-imported data with survey responses to provide extra insights. GDPR "sensitive data" has specific considerations that customers should assess in coordination with their HR, privacy, and legal teams.

> **Tip**
>
> Customers should upload the minimum and least sensitive data necessary to achieve their goals. It is the customer's responsibility to assess their privacy and compliance obligations and to determine whether Viva Glint is suitable.

Manage who has access to survey feedback

The customer admin can assign user roles with varying levels of access to view survey feedback results. The admin also controls who can see the data and at what level of detail.

Viva Glint reporting, like other products that work with sensitive data (for example, HR systems), isn't meant for the general workforce. Rather, its users are expected to have training in how to handle sensitive information. Topics might include your organization's HR policies, your organization's employee privacy policy and how to handle and store sensitive data.

Viva Glint Customer Admins may create the following types of user roles within their organization:

- Managers: These users may need to see the rollup for their teams and perhaps, one attribute. They often don't have the team size to see results by demographic analysis and lack the authority to act on them.
- Senior managers: Due to their organizations' size, they may need to see data for various cohorts. They may need to see organizational demographics such as location, tenure, and job family as those are areas within their authority to act. Special category data, such as ethnicity, is often not provided to these users.

- Human Resources Business Partners (HRBPs) with the ability to see divisions or even organization-wide, and the internal ability to see employee-level data. These users may need access to all attributes.

Read about why Viva Glint collects employee attributes and how they're used in reporting.

Privacy and legal subject matter experts may be required

Some countries require employers to consult with employee representatives or seek approval from a works council before deploying certain information technology services in the workplace.

Additional resources

- Privacy policy requirement of every Microsoft Viva Glint program
- How Viva Glint helps protect confidentiality and privacy
- Raw data requests and handling
- Why surveys are confidential rather than anonymous

Why Viva Glint surveys are confidential but not anonymous

Article • 10/03/2023

“Confidential” and “anonymous” are sometimes used interchangeably, but in the realm of employee engagement, their meanings are not the same, and understanding the difference is important for effective communication to your organization and other stakeholders, such as Works Councils.

- When used with surveys, the word “confidential” means that survey results are aggregated, and, in general, the identity of the survey respondent is not disclosed.
- “Anonymous” surveys indicate there is no way to definitively link data back to a specific individual. Anonymous survey responses have no personal data associated with it, other than specific demographic questions that may be asked during the survey itself.

Why aren’t Viva Glint surveys anonymous?

Viva Glint surveys are not anonymous so that accurate demographic analysis can be provided. Survey results can also be aggregated across multiple surveys and programs to provide organizations with cross-program insights, accurately tracking trends. If the survey results were anonymous, analytical capability would be severely limited.

> **Note**
>
> Not all Microsoft Viva Glint surveys are confidential. Some are identifiable, meaning that survey responses are directly attributed to survey takers in Viva Glint reporting. **Read more about how Viva Glint help you protect your privacy.**

How Viva Glint helps you protect your privacy

Article • 11/07/2023

Data privacy and trust are key priorities for Microsoft Viva Glint. Not only is individual privacy a core Viva Glint value, when survey respondents feel confident that their privacy will be protected, they're more likely to participate in surveys and provide honest and constructive feedback, allowing our customers to get the most out of Viva Glint.

Choose the survey type that meets your needs

Viva Glint uses several methods to inform you about what level of privacy users can expect when responding, starting with the survey types. Viva Glint offers two types of surveys: confidential and identifiable.

Confidential surveys

For confidential surveys, Viva Glint aggregates (group averages) responses before reporting results. Because it's easier to guess a survey taker's identity when there are few responses, confidential survey responses are only reported when a survey item (question) receives a minimum number of responses. This number is set by your organization and might differ for rating/multiple choice questions versus comments. For a survey to be confidential, this minimum number of responses can't be set below three (3).

> **Note**
>
> Viva Glint surveys might contain three types of items/questions:
>
> - Ratings: Survey takers choose a score on a numerical scale.
> - Multiple choice: Survey takers choose from pre-populated options
> - Comments: Survey takers write in freeform comments.

Identifiable surveys

In Identifiable surveys, survey takers' identities might be directly or indirectly available within reporting. The minimum response threshold for these surveys is below three. An example of an identifiable survey could be a company's exit survey, where viewing responses for each departing employee is desired.

Use your organization's statement about privacy

At the beginning of each Viva Glint survey, survey takers are presented with a statement configured by your organization.

How does a statement about privacy help?

This statement provides information about who can see survey takers' identifiable responses and under what circumstances. It specifies whether the survey is confidential or identifiable, and the minimum response threshold set by your organization. It also notifies survey takers of any potential admin access to identifiable survey responses (see more on this below) and provides links to more Microsoft privacy documentation. Your organization can also choose to include a link to its employee privacy policy or other documentation about how it handles survey data.

A statement about privacy advises access and data handling of survey responses

Even for confidential surveys, your organization's customer admin might be able to access identifiable survey responses. This access might be necessary for an organization to meet its legal obligations, such as Data Subject Rights under GDPR. However, your organization can choose to opt out of this on a survey-by-survey basis using Viva Glint admin controls.

> ⓘ **Important**
>
> A statement is automatically selected based on your progam setup configurations.

Confidential surveys which do not support raw survey responses export

If your organization chooses to restrict the export of raw survey responses for confidential surveys, the following statement will be applied to surveys. Even in these cases, your organization will have access to identifiable survey responses if it determines that such access is necessitated by "extreme circumstances," such as suspected illegal activity, fraud, threats of physical harm, or legal obligation. This confidentiality-based statement will make this clear to survey takers, stating “[our organization's name] might access your identifiable survey responses if it determines that extreme circumstances exist." In addition, logs will be generated and available to your organization when survey responses are accessed in this way.

Example:

Your responses are confidential and reported to Contoso in aggregate groups of 5 or more respondents. Write-in comments are reported verbatim if at least 10 people respond to a question. Take care not to identify yourself in the comments. Microsoft Viva Glint Reporting and Confidentiality Rules describe other ways your data might be accessed and your organization's Privacy Policy also has more information.

Confidential surveys which do support raw survey responses export

If your organization has approved making raw survey responses available for a particular survey, survey takers will be informed in this statement/

Example:

Your responses are confidential and reported to Contoso in aggregate groups of 5 or more respondents. Write-in comments are reported verbatim if at least 10 people respond to a question. Take care not to identify yourself in the comments. A limited number of people at Contoso will have access to your identifiable survey responses. Microsoft Viva Glint Reporting and Confidentiality Rules describe other ways your data might be accessed and your organization's Privacy Policy also has more information.

Identifiable surveys

If your organization opts to create an identifiable survey, this statement will be applied.

Note that this is an identifiable survey, which means Contoso will be able to see that your survey responses came from you. See your organization's Privacy Policy for more information. Learn how Viva Glint handles survey responses in [Microsoft Viva Glint Reporting and Confidentiality Rules[(https://go.microsoft.com/fwlink/?linkid=2230922).

ⓘ Note

The Confidentiality and Comments Threshold set for the survey program will automatically become the default statement for your programs.

How is privacy protected within survey results reporting?

Survey takers' privacy is protected by setting and communicating a minimum number of responses used in reporting, as well as management of roles and permissions. Your organization configures who has access to survey data and establishes the minimum response thresholds for each survey program.

A minimum response threshold is the minimum number of responses a survey item must receive for its results to be reported. The higher the level of aggregation, the less likely it is that users reviewing a survey report will be able to infer the identity of an individual survey taker.

By default, the minimum response threshold for rating or multiple-choice items is set at five, while for open-ended comments, it's set at 10. Your organization can adjust the thresholds, either higher or lower, for each survey program, and these thresholds are noted to survey takers.

ⓘ **Note**

To be classified as a confidential survey, the minimum number of responses must be three (3) or higher. If the threshold is below three (3), the survey is identifiable.

At the beginning of each survey, the privacy statement will inform survey takers whether the survey is confidential or identifiable and specify its minimum response thresholds, if any. Once a survey program has been launched, its minimum response thresholds can't be changed. Changing or altering a minimum response threshold requires a new survey program. The previous program with the original confidentiality could, however, be drawn into reports for comparison against new results with the new threshold.

Privacy is protected by managing reporting roles and permissions

Your organization can configure who might view and configure survey reports at various levels. For instance, your organization might use the following reporting hierarchy for its marketing organization and assign permissions accordingly:

1. Marketing program managers (PMs) can only view survey results from the team they manage.
2. Marketing directors (to whom marketing PMs report) can view survey results for all the teams reporting up through them.
3. The Chief Marketing Officer (to whom the marketing director reports) can view survey data for the entire marketing organization.

Each of these reporting groups feeds into the hierarchy level above, or roll up, giving users in your organization visibility commensurate with their scope and authority.

If the minimum response threshold isn't met at for a user's team, their responses won't be reported at that level; instead, they'll be aggregated with extra responses and rolled up to the next level.

For example, consider a survey of the marketing organization described above with the minimum reporting threshold set to five (5). A marketing PM would be able to see aggregated survey responses for any question to which at least five (5) of their team members responded. But if only four (4) responded to a specific question, the responses for that question wouldn't be shown to the marketing PM. Instead, the responses would be combined with those of other employees reporting up through the marketing director and rolled up the next reporting level - the marketing director's report. The PM wouldn't be able to see survey data for that question because the minimum response threshold wasn't met. However, because the threshold was met at the reporting level above, the survey data would be included in the director's report.

Why does the comments threshold differ from the survey items threshold?

As stated above, the default minimum response thresholds for ratings and multiple-choice questions are five (5) but for the comments the default threshold is 10. The reason for the higher threshold is due to comments being easier for the user to infer which survey respondent provided the feedback. As comments are reported as written (verbatim), the report user might notice a writing or grammatical style that is unique to a specific person. The smaller the group, the larger the potential to deduce the survey respondent.

Example: If a manager receives seven (7) responses from their team, they'll see an aggregated score but not the comments. On the other hand, if a manager receives 20 responses, they'll see both the calculated score and the comments provided, regardless of the number of comments received.

Suppression thresholds add further protection

In some cases, even when the minimum response threshold is met, the ability to filter reporting by survey responder attributes (like title or location) and then compares those filtered results to nonfiltered results might allow a survey responder's identify to be inferred. In these cases, responses are "suppressed"—meaning, not reported even if the minimum response threshold was met. The suppression threshold requires more than two responses that separate the smallest attribute group from the smallest group that meets the minimum response threshold.

Consider a marketing PM from the example above, given the following:

- Five (5) of the six (6) team members are in North America; one (1) is in Europe.
- The organization has configured Viva Glint to allow filtering of responses by survey taker region.
- The survey's minimum response threshold is set to five (5).
- All six (6) team members respond to a question that asks them to rate their manager's communication skills from 'Very Good' to 'Very Poor.'
- The North America team members all provided a rating of 'Very Good;' the European team member provided a rating of 'Very Poor.'

In this case, the marketing PM can't see the European score because, with only one (1) response from European employees, the minimum response threshold isn't met. But the PM can view the teamwide score (based on six responses) and North American-only score (based on five responses)—right? **No!** Those results are **suppressed**.

Why? Because, by comparing the teamwide score to the North American score, the marketing PM might be mathematically able to determine the score received from just the single European team member. When the PM sees that the North American score is 'Very Good' but the teamwide score isn't, the user might correctly infer that the European team member brought the average down. With a little math, the marketing PM might be able to calculate the exact score the European team member provided. For the North American score to be displayed, there needs to be more than two responses within the overall team score that aren't within the North American group. So, if the overall team earned eight responses where five were from North America and three were from Europe, the marketing PM sees both the overall team score and the North American score, having exceeded the suppression threshold.

Access to Viva Glint raw survey responses

Article • 07/13/2023

What are raw survey responses?

In Microsoft Viva Glint, "raw survey responses" refers to unaggregated survey responses that are directly tied to the survey taker. By default, customers have access to raw survey responses and can export that data using admin controls. Customers can also use program setup features to respond to users' Data Subject Rights (DSR) requests.

Enabling raw survey response export doesn't necessarily mean that survey takers will be identifiable in Viva Glint survey reporting; reporting will still be aggregated for surveys with a minimum response threshold of three or more. Export of raw survey responses will only be available to your organization through admin controls. Customers should consult with their privacy, HR, and legal teams to determine how to configure raw survey response export in Viva Glint.

Your organization may not want access to raw survey responses for every survey. This could be because of the data's sensitivity, employee privacy concerns, regulatory or contractual obligations (such as works council agreements), or other reasons. To meet this customer need, Viva Glint provides admin controls through which customers can opt out of the raw survey response export functionality on a survey-by-survey basis.

To ensure customers can meet their DSR obligations, Viva Glint provides an alternative solution that allows customers to fulfill DSR requests without accessing the requestors raw survey responses (discussed in more detail below).

Even when a customer has opted out of raw survey response export, the customer can still access this data if they determine certain extreme circumstances exist. Read more about "extreme circumstances."

Access raw survey responses at the company level

The following section outlines how to enable, disable and export company-level raw data.

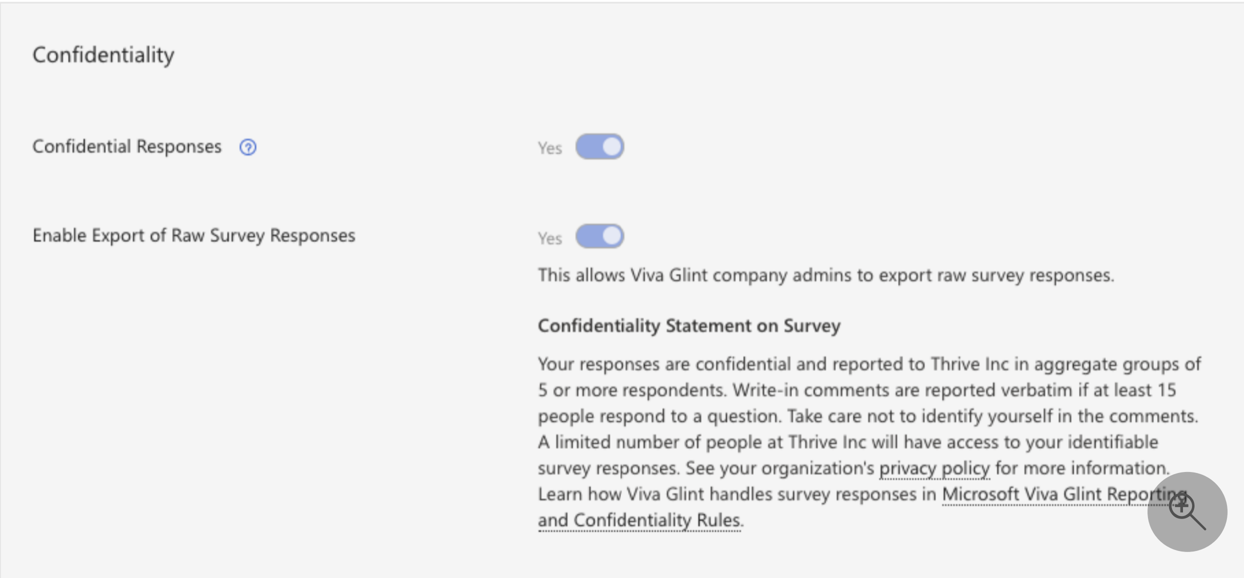
Enable or disable access to company-level raw survey responses

When setting up each Viva Glint survey, the customer decides whether raw survey response export will be available for the survey.

By default, raw survey responses are available for each new survey program. Admins can choose to opt out of raw survey response export from the **Confidentiality** section of **Program Setup**. **Program Summary** is accessible from the configuration page of the admin dashboard. A program can't be in **Approved** status to enable this feature. As necessary, toggle **Approved** to **NO**.

1. Select **Pulse Programs** in the **Pulses** section.
2. Select the survey and then **Program Setup** on the **Program Summary** page.

The default setting for **Enable Export of Raw Survey Responses** is **YES**. Toggle to **NO** to opt out of raw survey response export. More information on the confidentiality statement is available here .



> ⓘ **Note**
>
> Once a survey is live, the availability raw survey response export cannot be changed for that survey.

Export company-level raw data

For surveys, which have a closed cycle where raw survey responses were enabled, customer admins can export raw survey responses from Viva Glint. Company admins can navigate to the Completed cycles tab of the survey program. On the row with the appropriate cycle, select the vertical ellipses (three dots) on the far right. Select **Export raw survey responses**.

For surveys that are always live, such as onboarding surveys, admins can navigate to **Settings** , then **Pulse Programs**. Next choose **Live** status and select a **Lifecycle or Always-On survey program**. In the **Actions** dropdown menu, select **Export raw survey responses**. Select the **Survey Send Date** range desired.

> ⓘ **Note**
>
> For both survey types:
>
> - This export option will only be available to admins.
> - This export option will only be enabled for a survey cycle if the raw survey response export was enabled for the selected survey program before the survey went live.

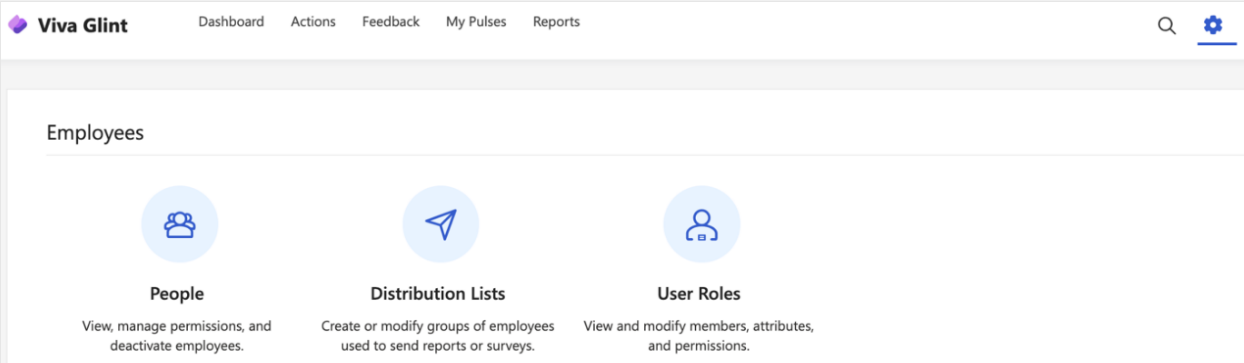
Supporting requests for raw survey responses from data subjects (DSRs)

The customer, as data controller, is responsible for responding to DSR requests from the organization's Viva Glint users. Read more about DSRs and the role of data controllers in Advanced privacy guide for data usage and survey item creation . Microsoft, as data processor, provides controls in Viva Glint that allow customers to respond to meet their DSR obligations.

> ⓘ **Note**
>
> Raw survey response export does not need to be enabled to fulfill these requests. Admins can send raw survey responses directly to the user without gaining access and viewing this data.

Send user data to employees

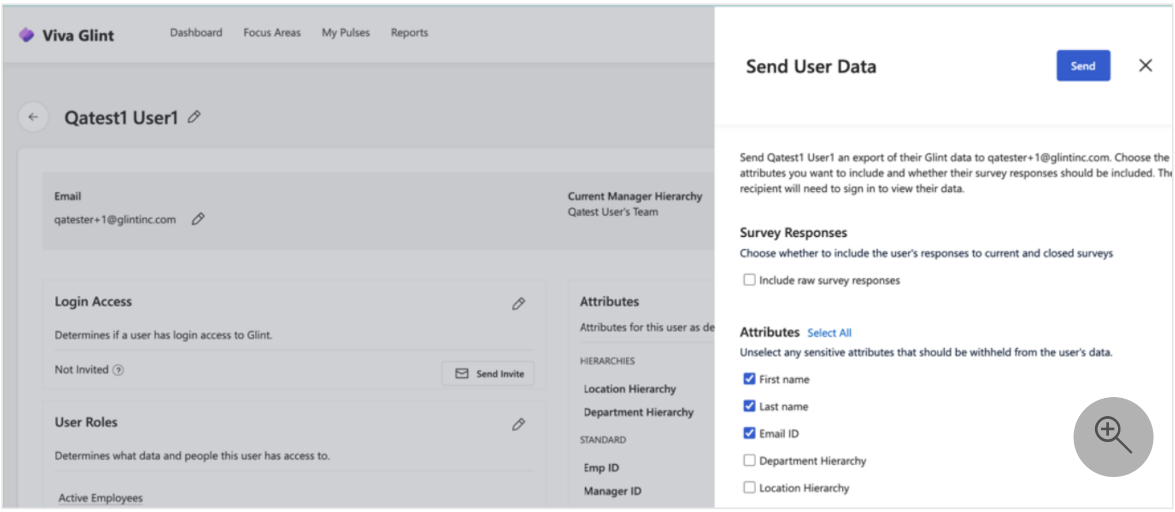
An admin can export user attributes and raw survey responses from an individual's profile screen in the **People** feature within the **Employee** section on the admin configuration section of the Viva Glint dashboard. Attributes are populated from the data sent to Viva Glint in your HRIS (Human Resources Information System) file. From the Viva Glint admin dashboard, customer admins can export a survey taker's user attributes and raw survey responses and send this data, without viewing it, directly to the survey taker.



Export user attributes and raw responses to data Subject

An admin can follow this procedure to export user data:

1. Search for the user in the *Search People* label.
2. On the user page, select **Send User Data** from the Actions dropdown menu.
3. In the **Send User Data** slider, all attributes from your HRIS file are preselected.
   a. Select **Clear All** and then select the attributes you want to export,** or
   b. Individual attributes may be excluded from the export by deselecting them.
4. Along with user attributes, in the slider window, there's the option to **Include raw survey responses**. Enable this feature to include the user's responses to current and closed surveys.



5. Select **Send.** This information will be sent to the employee email address on file. Check that this is correct before selecting **Send**.

6. A banner will appear indicating that your export has been sent successfully.
7. The employee will receive an email with their Glint data attached in a .csv file.

Tip

For more information on how to support a request to delete data, visit **Delete user data from Viva Glint**.

Set up a Microsoft Viva Glint tenant

Article • 10/26/2023

To deploy apps that use the Microsoft platform for identity and access management, you first need access to a Microsoft Entra ID *tenant*. In the Microsoft Entra tenant, you'll register and manage your Viva Glint apps, configure their access to data and other web APIs, and enable features like Conditional Access.

A tenant represents an organization. It's a dedicated instance of the Microsoft Entra tenant that an organization or app developer receives at the beginning of a relationship with Microsoft.

Each Microsoft Entra tenant is distinct and separate from other Microsoft Entra tenants. It has its own representation of work and school identities, consumer identities (if it's an Azure AD B2C tenant), and app registrations. An app registration inside your tenant can allow authentications only from accounts within your tenant or all tenants.

When a new customer purchases Viva Glint, they're entitled to the Viva Glint product, and tenant provisioning should occur within days of the purchase. Customer instances can be hosted on Viva Glint’s US or EU server.

Customers entitled for Viva Glint provisioning

- Net new Viva Glint standalone customers
- Viva Suite customers
- LinkedIn Glint standalone customers
- Existing Viva suite and LinkedIn Glint customer

> **Note**
>
> - A Viva Glint tenant is not available for GCC/GCC H entities as it is intended for commercial services only.
> - A minimum number of 100 active user licenses are required for tenant provisioning. Licenses requested below 100 will prompt a screen message and email to inform you to contact your Microsoft Account Manager or adjust the number of licenses purchased in the Microsoft Admin Center, if you purchased via our self-serve checkout flow.

Begin your Viva Glint provisioning experience

Choose either the US or EU URL for Azure login to begin:

- US - http://app.us1.glint.cloud.microsoft
- EU - http://app.eu1.glint.cloud.microsoft

> **Tip**
>
> If you are unsure which URL to choose, begin with the US URL.

Complete the Welcome to Viva Glint page

After logging into your preferred URL, the Welcome to Viva Glint page displays. Check the box for notification to be sent if you would like to receive email notification once your tenant provisioning is complete. Select **Continue** to begin tenant provisioning.

> **Note**
>
> Tenant provisioning can only be initiated by the Tenant Global Administrator.

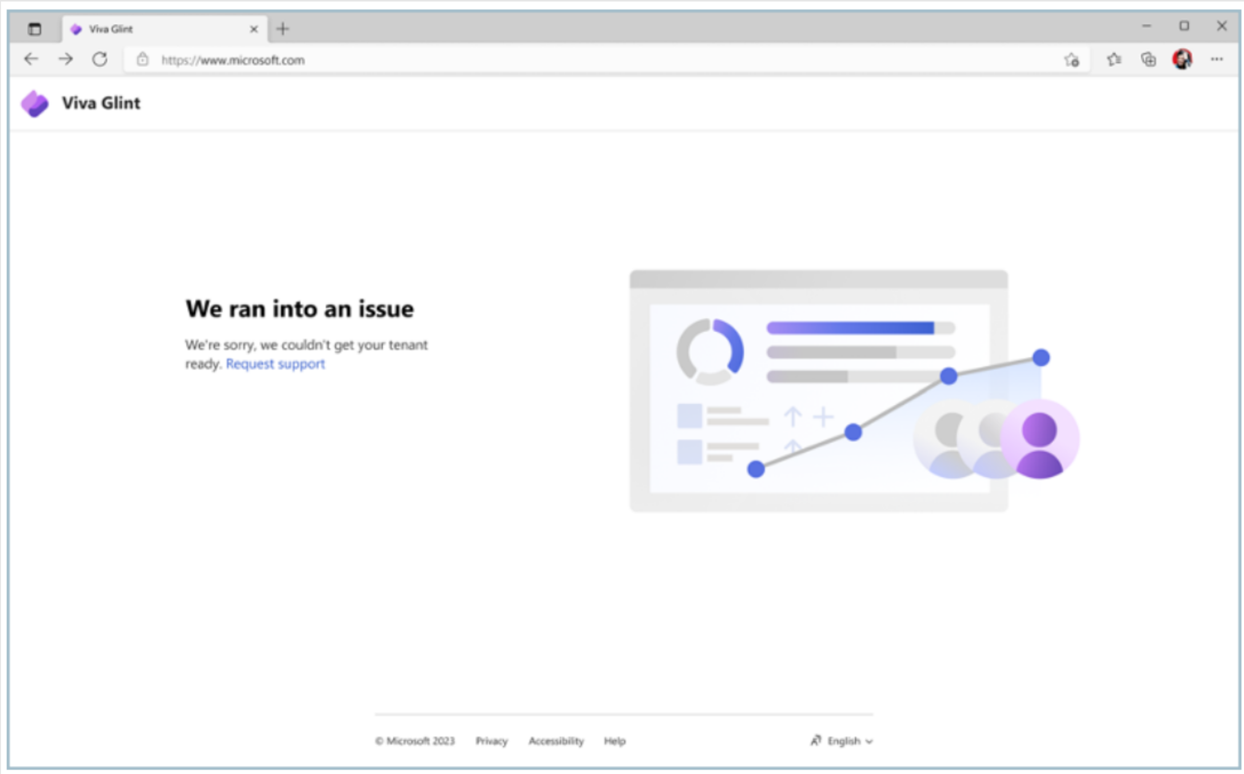
Dependent upon whether you have chosen to receive notification, one of the following screens will open:

- With notification requested, these messages display:
  - We'll notify you when it's ready.
  - We'll add tenant global administrators as your default Viva Glint service administrators. You can update this or add more Viva Glint service administrators within the product anytime.
  - Select **Learn more** to be taken to post-provisioning next steps while your tenant is getting provisioned.

- Without notification requested, these messages display:
  - Check here later to see if it's ready. Allow a couple of days for this step.
  - We'll add tenant global administrators as your default Viva Glint service administrators. You can update this or add more Viva Glint service administrators within the product anytime.
  - Select **Learn more** to be taken to post-provisioning next steps while your tenant is getting provisioned.

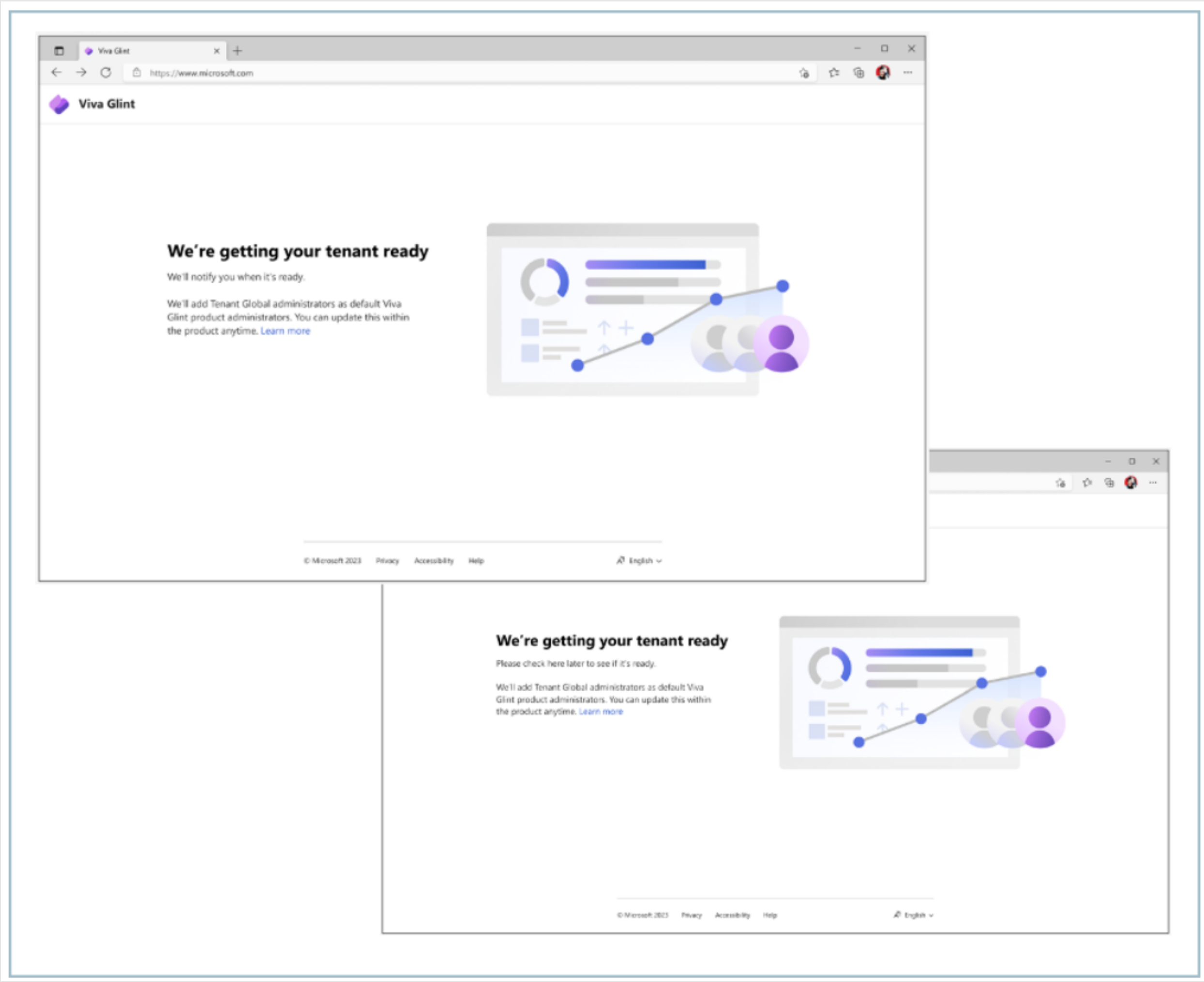
What if I run into an error?

If your tenant can't be provided, you'll receive this message. Select **Request support** and a tab will open for Microsoft 365 support.



Your view as your tenant is being readied

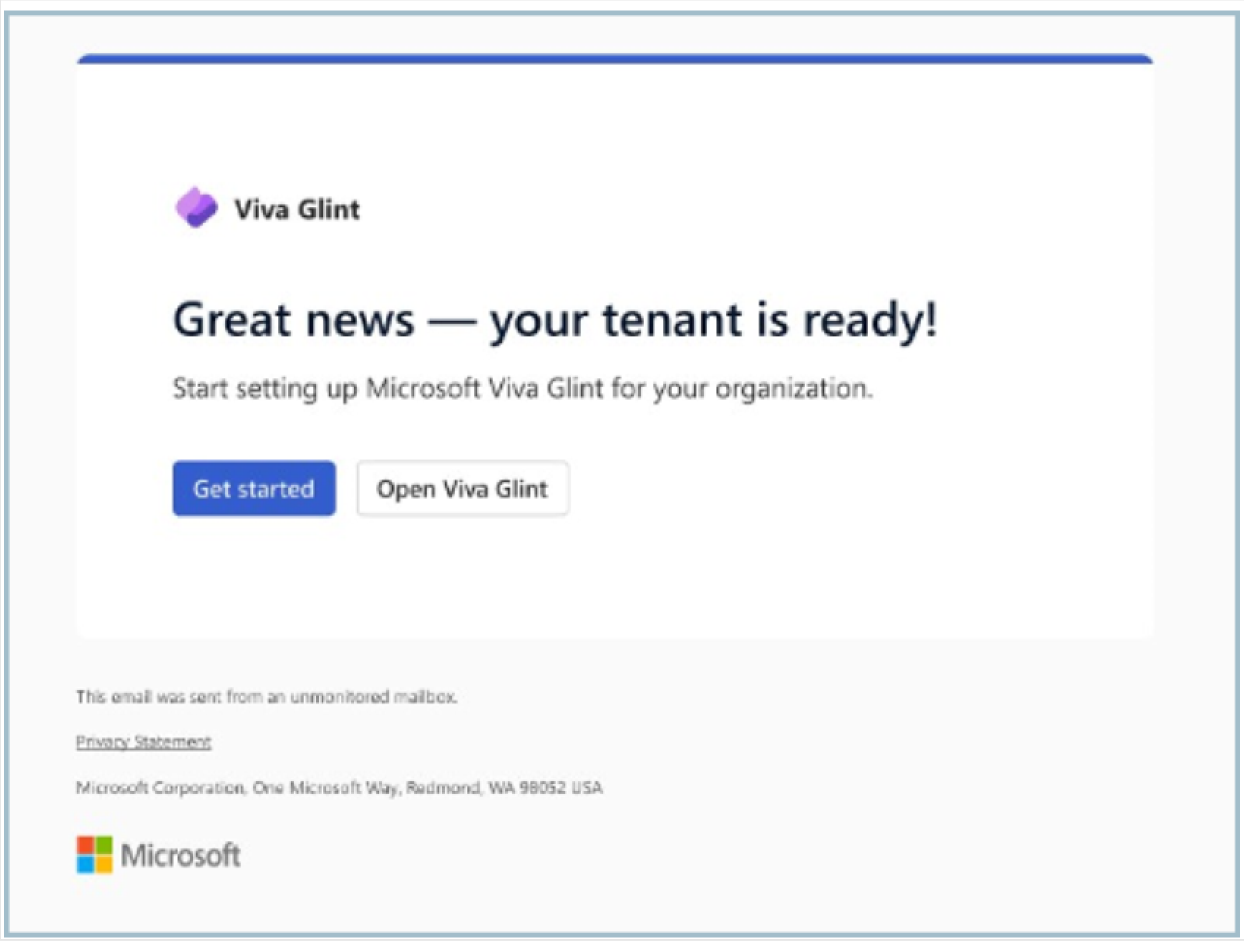
Dependent upon whether you've requested notification to be sent, you'll receive one of the following messages:



Proceed to post-provisioning once your tenant is ready

Once you receive the email notification below (if you requested notification in the earlier step), select **Get Started**. You'll automatically be taken to the Viva Glint Learn page for post-provisioning, where you'll proceed with setting up your Viva Glint program.

You can also choose to **Open Viva Glint** from this page:



Use Microsoft FastTrack for more support

Microsoft FastTrack can provide help with Microsoft Viva foundational products and capabilities - at no extra cost for the life of your eligible subscription.

If you've already registered for FastTrack and need support, use this link.

To register for Microsoft FastTrack, use this link.

Set up admins in your Viva Glint instance

Article • 11/14/2023

Welcome to Microsoft Viva Glint! If you have landed on this page, you should already have your tenant provisioned.

- If you haven't already completed tenant provisioning, set up a Microsoft Viva tenant.
- If you have completed tenant provisioning, follow these next steps to continue Viva Glint deployment.

Add administrators to your Viva Glint instance

As the tenant Global Admin, you're the default Microsoft Viva Glint Service Admin. This means you have ultimate control over the subscriptions in your Viva Glint product and you can access all data. Additionally - and importantly - you can assign Viva Glint Service admin roles to other users.

> **Note**
>
> Administrators for Viva Glint are assigned within the Viva Glint product only, not through the Microsoft Administrator Center (MAC).

> **Tip**
>
> Viva Glint recommends no more than five (5) administrators for your Viva Glint instance.

Collect administrator information

Compile a file of administrators to upload to Viva Glint with the following columns and user information. Save as **.csv with UTF-8 encoding and a comma separator**.

- **Email:** Work email address
- **Employee ID:** ID value exactly as it appears in your HRIS
- **First Name:** User first name
- **Last Name:** User last name

- **Status:** ACTIVE, in all caps

ⓘ **Important**

To prevent duplication errors with future file uploads, ensure that the Employee ID values for these users match the Employee ID from the HR Information System (HRIS) that will be used to transfer data to Viva Glint.

Upload administrators to Viva Glint

Upload your administrators to Viva Glint Advanced Configuration:

1. From the admin dashboard, select the **Configure** symbol, then in **Service Configuration**, choose **Advanced Configuration**.
2. In the **Advanced Configuration** menu, select **Uploads**.
3. In the **Choose job type** dropdown list, select **USERS_UPLOAD**.
4. Switch the **Incremental** toggle on.
5. Drag and drop your .csv file or browse to choose it in the **Drag and drop to upload** section and select **Upload**.
6. In the **Upload Job Details** page that appears, confirm that **Upload Lines Summary** shows the correct number of users to ADD in the **Lines** column.
7. Select **Apply Upload to Database** to upload new users and select **Yes**.
8. Go to the **Uploads** menu and confirm that the file **State** is SUCCESS and that the **Total Lines** and **Processed Lines** match the number of users in the uploaded file.

Add administrators to the Company Admin User Role

When users are successfully uploaded, add them to the Company Admin User Role and grant Advanced Configuration access:

1. Select the **Configure** symbol, then in the **Employees** section, choose **People**.
2. Select each user, and on their profile under **User Roles**, select the pencil symbol to edit.
3. In the **Customize User Role** dialog, select the checkbox for **Company Admin** and then choose **Save**.
4. In the **Confirm Role** dialog, select **Grant All Access**.
5. On the user profile, in the **Company Admin: Advanced Configuration Access** section, select the pencil symbol to edit.
6. In the **Advanced Configuration Access** dialog, switch the toggle on to **Enable access** and select **Save**.

Steps to set up your Viva Glint program instance

As a Viva Glint admin, use the following guidance to complete platform setup and prepare to launch your first Viva Glint survey: Learn more.

What do I do if I need help?

Get support from Microsoft 365

Learning and community resources

Viva Glint is a "voice of the employee" solution helping organizations understand and improve employee engagement. Use the following Microsoft sites to help your business get the most from Viva Glint. Seamlessly visit one page to the next to find just what you're looking for, right when you need it.

Build skills that open doors. See all that you can do with documentation, hands-on training, and certifications to help you get the most from Microsoft products.

Within Viva Glint Learn, you'll be busy in these two areas, accessible from the top navigation me

- Documentation- See all you can do with resources and solutions.
- Training - Browse the full catalog of Learning Paths and Modules

Learn before you leap

Within Microsoft Learn, admins are recommended to invest time in learning about Viva Glint before introducing these listening programs to their teams:

- **Introduction to Microsoft Viva Glint:** Designed to give an overview of what Viva Glint is, who should use it, and how your organization will benefit from using this app.
- **Viva Glint's Modern Approach to Measuring Engagement:** Designed to introduce the methodology of People Success, describe how we use it, and detail how Viva Glint methodology can be embedded into your daily flow of work.
- **Viva Glint Program Design and Setup:** Designed to give high level information about dashboard settings, setting up a first recurring survey, and sharing results.

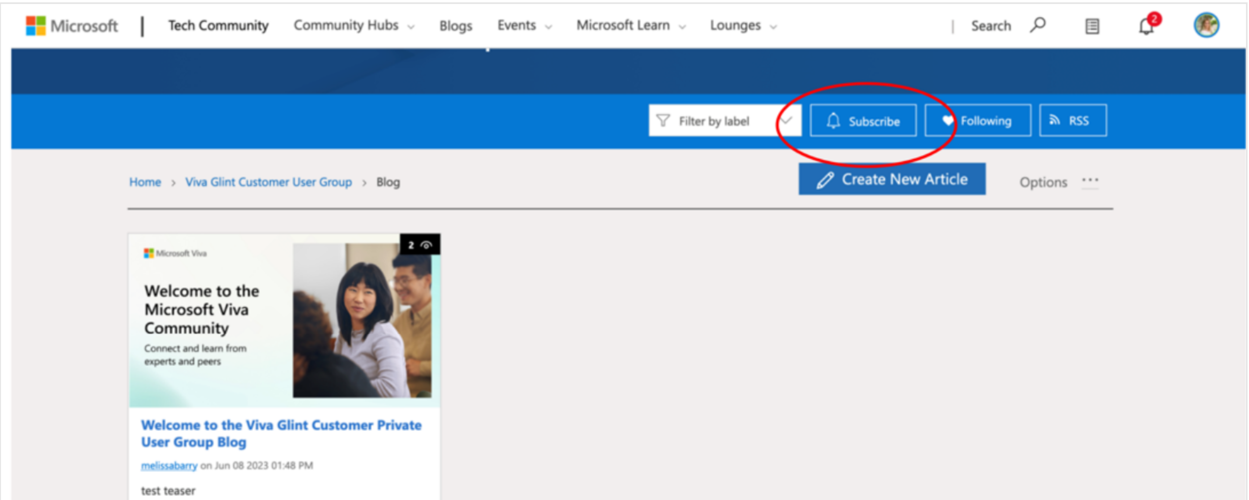
Microsoft Viva Community

Explore the Viva Community that you'll be part of. The Viva Community is public facing for all the Viva apps and Viva Glint has its own community, as well.

- **Register for the Viva Community** to be part of private user groups, post in forums, and to receive invitations to special events. Select **Sign In** to create an account.

Get started with the Viva Glint community

1. Sign up for the Viva Glint Customer Private User group. In this group you'll find customer-only content and a gated space to chat with your peers. Our team will review member requests and accept customers regularly.
2. Subscribe for updates to the Viva Glint Customer Private User Group blog. Once you're a member of the private user group, subscribe to the blog to receive customer-only updates about product news, thought leadership content, upcoming events, and more.



Microsoft Viva Adoption

Find resources to go from inspiration to execution. Adoption resources will give you the tools you need to implement Viva Glint. Our papers will guide you through some of the most pressing issues in the employee experience space. Find resources to support your Viva Glint adoption here.

Microsoft Viva Support

Resources and guides for survey participants to help answer questions and provide background on Viva Glint methodology. How to take a Viva Glint survey

Viva Glint Licensing

Article • 07/13/2023

Subscription plans of Viva suite or Viva Glint are required for using Microsoft Viva Glint. The total number of active licenses in your subscriptions should be greater than or equal to the number of active users in the app.

Notifications for exceeding licenses

If the number of active users in Viva Glint exceeds the subscription purchase, you'll be notified via email, and you'll have a 45-day grace period to take one of the following actions:

- Purchase extra Microsoft Viva suite or Viva Glint licenses according to the product terms;
- Remove excess active users from the Viva Glint instance by marking them "INACTIVE."

If the grace period expires and you haven't taken any of the actions described above, some of Viva Glint app's key functionalities won't work as expected. An admin can perform either of the actions to re-enable all features of Viva Glint.

Third-Party Notices – Viva Glint

Article • 09/20/2023

NOTICES AND INFORMATION

Do Not Translate or Localize

HTML5 Shiv

Ansible-st2

Google Visualization Data Source Library

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ChromeDriver

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Azure Identity client library for Python

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build-url

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Nrwl Extensions for Angular (Nx)

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pyspark-scripts

argcomplete

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Airbnb JavaScript Style Guide

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Animate.css

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es5-shim

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progress

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html5lib-python

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operations-deploy

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operations-python-package

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pep517

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pkg_resources

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dockerpty

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importlib-metadata

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charset-normalizer

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dotty-dict

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httplib2

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identify

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influxdb

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jmespath

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knack

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more-itertools

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msal

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msal-extensions

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msrest

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msrestazure

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no-manylinux1

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pem

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pip

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pkginfo

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platformdirs

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pre-commit

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PyJWT

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pyparsin

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pyrsistent

pytz

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PyYAML

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rich

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ruamel.yaml

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ruamel.yaml.clib

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setuptools

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setuptools-scm

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six

SQLAlchemy

tabulate

texttable

toml

tomli

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urllib3

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virtualenv

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wcwidth

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wheel

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xmltodict

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zipp

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protobuf.js

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angular-table

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angular-translate

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angular-ui-codemirror

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angular-ui-tree

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localStorage Service for angular.js

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moment.js

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moment-timezone.js

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oi.select

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ui-sortable

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angularjs-naturalsort

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Renderjson

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angular-local-storage

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jQuery UI

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messageformat

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lodash

Set up your platform as a Viva Glint admin

Article • 12/07/2023

Viva Glint is a people-driven platform that provides visibility into the health of your organization and guides effective action. The world's leading brands use our programs to increase employee engagement, develop their people, and improve business results.

Great teams build great cultures, and great cultures fuel great companies.

Ready to get started?

Spend short of 10 minutes watching this video about all the goodness that Viva Glint offers.

https://www.microsoft.com/en-us/videoplayer/embed/RW1fyCz?postJsllMsg=true

1. Begin Viva Glint platform setup

- Access Viva Glint with Microsoft Entra ID
- Manage Allowed Lists
- Generate an SSH key pair for SFTP access

2. Prepare your data

- Learn about Viva Glint employee attribute fundamentals
- Learn about Viva Glint organizational hierarchy fundamentals
- Create your Employee Attribute template
- Set up Employee Attributes in Viva Glint
- Set up Secure File Transfer Protocol (SFTP)
- Upload your employee attributes to Viva Glint

3. Manage features and settings

- Admin management of the General Settings feature in Viva Glint
- Use Viva Glint benchmarks
- Manage language translations
- Use Viva Glint's People page to view employee information
- Set up Viva Glint User Roles

- Set up and use Distribution Lists in Viva Glint
- Use the Viva Glint Question Library
- Communicate with Nudges

4. Set up your Engagement or Employee Lifecycle survey

- Viva Glint program types and associated templates
- Set up Program summary pages for a Viva Glint Engagement-type survey
- Set up Program summary pages for a Viva Glint Employee Lifecycle programs

Prepare your Viva Glint communications plan

The following templates are examples you can use to communicate to your organization about an upcoming Viva Glint program and steps users can take to gain the most from the experience. The templates are for all roles within your business.

- Introduce Viva Glint survey taking
- Communicate prelaunch and live program information
- Communicate results rollout plan

What do I do if I need help?

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Provide product feedback

Manage your Allowed List for Viva Glint

Article • 11/07/2023

What is an Allowed List?

An Allowed List is a list of pre-approved URL or email addresses that receive guaranteed access to your server. An Allowed List is a security feature to reduce unapproved access by allowing only trusted files, applications, and processes to be run.

Manage your Allowed List for Viva Glint

Viva Glint operates in two distinct geographical regions: the United States and in the European Union. Add approved domains, IP addresses, and ports, which can be different depending on your account's region, to your organization's allowed list. Viva Glint recommends that you add **full domains,** and not the specific addresses. For example, to ensure users receive invites from no-reply@glint.microsoft.com, add **glint.microsoft.com** to your allowed list.

Add email sender domains

Viva Glint emails will come from one of the domains listed below. Add the following domains to your allowed list:

United States (US) and European Union (EU):

- glint.microsoft.com - Survey Notifications
- microsoft.com - Microsoft Email Communications
- mktomail.com - Newsletter and Product Updates

Glint survey and system emails originate from:

- US and EU: **no-reply@glint.microsoft.com**

Take additional steps to ensure email delivery

Confirm that your email service permits Viva Glint emails to display images for **logos** to render. Some third-party email applications have security restrictions in place that block the download of images into an email. Ensure that fd-glint-glintus1.azurefd.net (US) or fd-glint-glinteu1.azurefd.net (EU) are added as a trusted sender and that automatic image downloads from external senders are allowed.

If there are any **Spam gateways** on your exchange server, ensure that they're configured to successfully receive survey emails in bulk from Viva Glint without causing throttling, delays, or bounce backs.

Some email providers have **special inboxes that automatically filter** mail of a certain type. Review your application or exchange server settings to ensure email from Viva Glint arrives in the primary inbox for employees.

Allow application hosts and ports

If your organization requires domains or URLs to be opened to access Viva Glint's application, the following hosts and ports will need to be allowed, depending on which region your account resides in.

United States:

Host	TCP port	Description
sftp.us1.glint.cloud.microsoft	1122	Secure File Transfer Protocol
www.microsoft.com	443	Viva Glint Website (US and EU)
techcommunity.microsoft.com	443	Viva Glint Community
fd-glint-glintus1.azurefd.net	443	Viva Glint CDN
app.us1.glint.cloud.microsoft	443	Viva Glint website and Unified Login
api.us1.glint.cloud.microsoft	443	Viva Glint unified login
feedback.us1.glint.cloud.microsoft	443	Viva Glint survey landing page

European Union:

Host	TCP port	Description
sftp.eu1.glint.cloud.microsoft	1122	Secure File Transfer Protocol
www.microsoft.com	443	Viva Glint Website (US and EU)
techcommunity.microsoft.com	443	Viva Glint Community

Host	TCP port	Description
fd-glint-glinteu1.azurefd.net	443	Viva Glint CDN
app.eu1.glint.cloud.microsoft	443	Viva Glint website and Unified Login
api.eu1.glint.cloud.microsoft	443	Viva Glint unified login
feedback.eu1.glint.cloud.microsoft	443	Viva Glint survey landing page

Explore additional allowed list information

Some Viva Glint applications require the use of **third-party cookies**, such as hosted learning content. Should you receive an error saying that your browser is missing an authentication cookie, take appropriate steps to allow this third-party cookie.

If your organization requires the addition of an **IP exception** for Viva Glint's SFTP server, the US address is 172.174.87.0, and the EU address is 20.238.98.162.

Access Viva Glint with Microsoft Entra ID

Article • 10/24/2023

To access the Microsoft Viva Glint application, a Global administrator must register Viva Glint in a Microsoft Entra tenant. A service administrator must also import users to Viva Glint. Users must exist in both Microsoft Entra ID and Viva Glint with the same email address to successfully access the application.

> **Note**
>
> To add a Support or Partner user to Viva Glint, follow this guidance: **Add an external user to Viva Glint.**

Set up and manage a Viva Glint Microsoft Entra tenant

For information on tenant creation, user and group creation, bulk user maintenance, authentication options, and how to enable single sign-on with Microsoft Entra ID, see the following articles:

- Set up a Microsoft Viva Glint tenant
- Create users and groups in Microsoft Entra ID
- Perform bulk user maintenance in Microsoft Entra ID
- What authentication and verification methods are available in Microsoft Entra ID?
- Enable single sign-on for an enterprise application

> **Tip**
>
> Add all users in Microsoft Entra ID to minimize friction for ongoing role and data access changes for Viva Glint users. Control Viva Glint User Role membership and permissions in the Viva Glint application.

Import users to Viva Glint

The Global administrator adds service administrators to Microsoft Entra ID and Viva Glint for initial access. As the service administrator, see information below to add other users (HR, leadership, managers, individual contributors) to Viva Glint.

> Note
>
> Email addresses for users in Viva Glint must match email addresses tied to users in Microsoft Entra ID. Coordinate with the Global administrator for your Viva Glint Microsoft Entra tenant to ensure that these email addresses match.

Understand prerequisites for importing users

To import users to Viva Glint, first follow critical data preparation steps:

- Finalize file layout
- Set up attributes in Viva Glint

Import users

After employee data preparation and attribute setup:

- Upload employee data to Viva Glint

Create an SSH key pair

Article • 10/30/2023

To access your Microsoft Viva Glint SFTP account, create an SSH key pair, which includes a public and private key.

Understand SSH key pair requirements

To connect to your Viva Glint SFTP account, ensure that the SSH key pair:

- Has a key length of as least 2048, ideally 4096 bits.
- Is type RSA in OpenSSH format.

> **Tip**
>
> Passphrases are optional for key files. To omit, leave blank when prompted.

Create an SSH key pair on Microsoft Windows

To create a key pair on Microsoft Windows operating systems:

1. Download PuTTy Key Generator PuTTygen.exe file and run it.
2. In the **Key** menu, select **SSH-2 RSA Key**.
3. In **Parameters**, select the **RSA** option.
4. In **Number of bits in generated key field**, enter at least 2048, ideally 4096.
5. In **Actions**, select **Generate**.
6. A progress bar will appear. In the blank area under the bar, move your pointer in a random pattern to complete key pair generation.
7. When generation completes, copy the contents of the **Public key for pasting into OpenSSH authorized_keys file** field and past into a text editor application (like Notepad).
8. Save your file as **vivaglint-yyyymmdd.pub**.
9. **Key passphrase** and **Confirm passphrase** fields aren't required, leave blank for no passphrase.
10. Select **Save private key** to save the private key file. This is the key you use to connect to SFTP in a dedicated FTP application.

Create an SSH key pair on Macintosh or Linux

To create a key pair on Macintosh or Linux operating systems:

1. Open a **Terminal** window. in Macintosh operating systems, find **Terminal** in the **Dock** or in the **Utilities** folder.
2. Enter the following command: ssh-keygen -b 2048 -t rsa -C "your_username" -f filename
   a. The length, determined by -b, should be at least 2048, ideally 4096.
   b. Update **your_username** and **filename** values.
   c. Example: ssh-keygen -b 2048 -t rsa -C "**jsmith**" -f **vivaglint-yyyymmdd**
3. Select **enter** and follow prompts.
4. A passphrase isn't required. Supply a passphrase or leave blank and select **enter** to continue.
5. When successfully generated, you see these messages:
   a. Your identification has been saved in **filename**.
   b. Your public key has been saved in **filename.pub**.
6. Search for the public and private key files in **Finder**.
   a. The 2 key files are named based on what was specified in the Terminal command
      i. Example: **vivaglint-yyyymmdd** and **vivaglint-yyyymmdd.pub**
   b. With no specified file name, the key files appear as: **id_rsa** and **id_rsa.pub**.

Prepare and upload your employee data to Viva Glint

Article • 10/18/2023

Your organizational data can appear in the Microsoft Viva Glint app through a .csv or .xlsx file that you as an admin upload.

Viva Glint refers to this data as "attributes." Attributes are data about the people in your organization, which are then used to convert feedback into insightful and action-oriented intelligence to improve employee engagement and achieve business goals.

Learn what we collect, why, how you deliver it to us, and how we use it to help you improve your business:

Viva Glint employee attribute fundamentals

Viva Glint's organizational hierarchy fundamentals

Creating your Employee Attribute Template

Set up your attributes

Understand Viva Glint SFTP and data automation

Upload your attributes to Viva Glint

Understand upload errors and warnings

Viva Glint employee attribute fundamentals

Article • 08/21/2023

Understand and set up attribute types

Attributes are data about the people in your organization. Attributes are used to convert feedback into insightful and action-oriented intelligence to improve employee engagement and achieve business goals.

Attribute column headers (name labels) may be customized. For example, you might choose "Employee ID," while another company chooses "Work ID." For this reason, know that the labels in our guidance are for purposes of example only. Choose name labels that make sense to your organization as these labels appear on your reports.

Standard attribute types

- **Required attributes**: When building your Employee Attribute Template, this is the data that is required to be part of your Employee Data File.
- **Recommended attributes**: Data that can be converted into derivative groups (or buckets). Derivative groups keep attributes from being used to specifically identify an employee.

ⓘ **Note**

Recommended attributes are not required, but if sent initially in your Employee Attribute Template, then they are required for all future uploads.

Attributes by item and survey type

Attribute	Description/Notes	Required for Engagement surveys	Required for Employee Lifecycle surveys
Status – ACTIVE or INACTIVE	Must always be fully capitalized. An employee on temporary leave should have their status updated to INACTIVE and then returned to ACTIVE upon return.	Yes	Yes

Attribute	Description/Notes	Required for Engagement surveys	Required for Employee Lifecycle surveys
First name	Appears in email invites and reminders (can be the legal first name, preferred first name, or whichever is in your HRIS).	Yes	Yes
Last name	Employee's legal last name field from your HRIS.	Yes	Yes
Employee ID	Each employee has a unique ID. Don't use blanks or spaces.	Yes	Yes
Email address	Each employee should have a unique email address. Don't include extra spaces. If an employee doesn't have an email address, copy the employee's unique ID into the email field.	Yes	Yes
Time zone	See Time zones	No	No
Language	See Language	No	No
Manager ID	Providing the employee ID of the manager for each employee allows automatic build-out of a managerial hierarchy.	Highly recommended	Highly recommended
Hire date	Used to derive tenure buckets. Viva Glint standard values: 0-1 year, 1-2 years, 2-3 years, 3-4 years, 4-5 years, 5-7 years, 7+ years.	No	Yes, for Employee Lifecycle *Onboarding* surveys
Birth year	Used to derive age group buckets. Viva Glint standard values: <25, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, 65-69, and 70+	No	No
End date	Employee's termination date, off-boarding date, last day, and so on.	No	Yes, for Employee Lifecycle Exit surveys

Custom attributes

By selecting more than required attributes only, you can see what groups of employees are more engaged than others and use this information to develop action plans to improve engagement.

Your template may include up to 100 custom, flat attributes. *A flat attribute is a descriptor that can't be further broken down, such as gender, work location, or department.*

Add custom attributes to the header row on your template, named the way that seems most sensible to you. Choose attributes that can boost the way you do business.

Best practices:

- The more attributes you provide, the more ways data can be sliced and diced to provide richer insights and alerts.
- Attributes that are too specific won't meet the minimum confidentiality threshold of five to appear in reporting, so avoid them.

General Data protection Regulation (GDPR) compliance for attributes

Confidentiality around employee data is of the highest priority for Microsoft Viva Glint. Using EU General Data Protection Regulation (GDPR) guidelines, we apply these privacy protection standards globally to ensure that every person's data is handled with the utmost confidentiality and integrity.

Functional attributes

Functional attributes are values that indicate how and when communications are sent to an employee, such as time zone and language.

> **Note**
>
> Time zone and language values are case sensitive and must be sent exactly as they appear. Employee records with blank or invalid time zone or language values will receive communications in the organization's default time zone and language.

Time zones

Global companies often include a time zone attribute column in their Employee Attribute Template to trigger survey emails in employees' time zones. Use the Time Zone tab of the Employee Attribute Template to find valid time zone values. Before a survey launches, ensure that all employees have a valid value attached to their records.

> **Tip**

For global companies, consider adding time zones and languages meaning to reach employees in their appropriate timezones and their preferred language.

Languages

Use the Language Codes tab of the Employee Attribute Template to find language values that trigger survey emails in an employee's preferred language. Ensure that you include a Language column in your Employee Attribute File. Before a survey launches, ensure that all employees have a valid value attached to their records.

If you also supply language values to indicate users' dashboard languages (for those who view reports), include a separate column (example: Dashboard Language).

Tip

For global companies, consider adding time zones and languages meaning to reach employees in their appropriate timezones and their preferred language.

Note

Dashboards do not support languages that are read from right to left.

Communicate with Viva Glint users based on time zone

Article • 12/08/2023

Microsoft Viva Glint offers the ability to send survey invites, reminders, and other notifications in users' preferred time zones.

> ⓘ **Note**
>
> This feature sends emails on a time zone-based schedule but doesn't include activation/deactivation of each user's survey by time zone.

Set up a time zone attribute

In order to ensure employees receive survey communications in their unique time zones, your time zone attribute must be appropriately configured.

- You'll first need to get support from Microsoft 365 during attribute setup.
- Once configured, you'll be able to include this time zone attribute in your employee data to trigger survey emails in employees' time zones.

Use the Time Zone tab of the Employee Attribute Template to find valid time zone values. Before a survey launches, ensure that all employees have a valid value attached to their records.

> ⓘ **Note**
>
> When a user has a blank or invalid time zone value in employee data, notifications send in the default time zone selected in General Settings.

Manage time zone options in General Settings

As a Viva Glint admin, select a default time zone and enable sending in users' time zones in General Settings.

Set a default time zone

Set the default time zone in the **Company Information** section of **General Settings**, found on the admin dashboard from the configuration page, in the **Service Configuration** section. Use the dropdown menu to find your organization's default time zone and then select **Save Changes**.

> ⓘ Note
>
> Employee Lifecycle survey invitations are triggered by events. These events send platform notifications at your Viva Glint default time zone.

Enable notification in user time zone

Set notifications to **send in users' time zones** in the **Communication section** of **General Settings**, found on the admin dashboard from the configuration page, in the **Service Configuration** section. Toggle to **YES** to activate and then select **Save Changes**.

This setting applies to all survey programs and can't be disabled or enabled at the survey program level. When enabled, a 24-hour buffer is added to survey start and end times to allow for users to access and submit surveys across the globe.

> For example: Contoso, with a default time zone/headquarters in New York, wants to ensure that their Sydney, Australia employees receive and access their surveys at the same time in their day as the rest of their employee population. For survey invites to send to Sydney employees at 9:00 AM on March 28 in Australia/Sydney time, the survey will need to be active no later than 12:00 AM, March 27, New York time because New York is 14 hours behind Sydney.

> Enabling sending in user time zone allows for invites to send to users at the appropriate time and to submit their surveys until midnight on April 12 by adding a 24-hour cushion before launch and after survey close.

> Expand table
>
> | Survey activation | Survey launch | Survey close | Survey deactivation |
> | --- | --- | --- | --- |
> | March 27, 12:00 AM | March 28, 9:00 AM | April 11, 12:00 AM | April 12, 12:00 AM |

> ⓘ Note

Users in any time zone can access a survey before receiving an email invite after the Survey Activation time if they have access to My Surveys in Viva Glint or with attribute-based survey access. Any results submitted appear in the dashboard at 12:00 AM on the survey launch day.

ⓘ **Important**

If this feature is activated or deactivated during a live survey, the update won't apply to emails and reminders that are already scheduled, and it won't affect the activation date/deactivation dates on existing surveys.

Feedback

Was this page helpful? Yes No

Provide product feedback

Viva Glint organizational hierarchy fundamentals

Article • 10/31/2023

Understand and set up hierarchies

A hierarchy filters down an employee's attributes into levels from highest to lowest, or largest to smallest, to provide precise insights into a survey. There are three main hierarchies within the Employee Attribute Template:

- Managerial
- Locational
- Departmental

Establish your managerial hierarchy

Managerial hierarchy is typically used as the primary hierarchy ranking. Managerial hierarchy is the only hierarchical level that Microsoft Viva Glint processes automatically. Every employee in your organization should have a manager. The only person on your Employee Data File who won't have a manager associated with them is your organization's CEO or top-level person.

> ⓘ **Important**
>
> The Viva Glint label for your managerial hierarchy is "Manager." Ensure that no attributes in your employee data are also labeled "Manager." This will result in file upload issues.

Example of setting up managerial hierarchy

- In this scenario:
  - Harper reports to Tate
  - Tate reports to Gabriel
  - Gabriel reports to Dana
- In the Employee Attribute File:
  - Harper's row would list Tate's Manager ID or email in the Manager ID column
  - Tate's row would list Gabriel's Manager ID

- Gabriel's row would list Dana's Manager ID
- The hierarchy ends with Dana, as Dana is the CEO, who doesn't report to anyone

The Viva Glint system automatically configures Harper's hierarchy level within their company as:

- Level 1 – Dana
- Level 2 – Gabriel
- Level 3 – Tate
- Level 4 - Harper

Establish your locational hierarchy

The size and proximity of your organization will determine if you choose to use locational hierarchies within your custom attributes.

Example of setting up locational hierarchy

North America > United States > California > Sunnyvale

In this example, four columns are needed on the Employee Attribute Template

- Locational Level 1 – Continent
- Locational Level 2 – Country
- Locational Level 3 – State
- Locational Level 4 - City

You can customize the locational hierarchies for your organization. This example was four levels, but your organization may only have two of the maximum 10 levels.

Establish your departmental hierarchies

Like locational hierarchy, the size of your organization will determine if you choose to use departmental levels within your custom attributes.

Example of setting up departmental hierarchies

Company name > Department > Function > Subfunction

Four columns are needed to enter this departmental hierarchy on the Employee Attribute File:

- Departmental Level 1 – Company (ex: Thrive)
- Departmental Level 2 – Department (ex: IT)
- Departmental Level 3 – Function (ex: Operations)
- Departmental Level 4 – Subfunction (ex: User Support)

Create your Viva Glint Employee Attribute Template

Article • 09/28/2023

The Employee Attribute Template is a guide and planning tool used to document your organization's file format and attribute selections, before uploading your employee data to the Microsoft Viva Glint system. This essential step helps our team to know which attributes to expect so your data can be structured and surfaced correctly in reporting and role reporting.

> **Note**
>
> Use our **template as guidance** to ensure that data is uploaded in the correct format, incorporating our recommendations and requirements.

Ensure that attribute labels that you set up initially stay consistent over time in the Employee Data Files transferred to Viva Glint. For example, if an attribute is set up as "*Employee ID*," it can't later be recognized as the same column renamed as "Employee Number."

Why is creating an employee data template important?

Every report, recommendation, and action plan that is built for your organization relies on the foundation of employee data that you provide. The collection of detailed information about the people in your organization is essential, so we can use cuts of that data to highlight meaningful insights from survey results. In doing that, Viva Glint helps you to determine what you are doing right and where your opportunities lie.

A successful process means that you first need to:

- Understand the definitions and why we ask for attributes and hierarchies
- Use the Employee Attribute Template to format and create your data file
- Understand how to set up and upload your data to Viva Glint

Use your IT department for support

Many companies rely on their IT department to stage and maintain the backend processes that power Viva Glint programs. Your IT department may be the best internal expert when it comes to certain data preparation tasks.

Create the template

The following extensions are supported for files exported by your HRIS system:

- .csv for files with a comma delimiter and UTF-8 encoding
- .xlsx for files in Microsoft Excel format with a single tab of data

The first page of the template contains instructions for building your own template. Follow the guidance on the instruction page, the following tabs, and in the following table to set up your template.

> **Tip**
>
> Your template is only the column headers. No employee data is needed at this point.

Definitions for Employee Attribute Template

Term	Definition
Employee Attribute Template	XLSX guidance for creating your organization's file format and data selections, before setting up attributes in our platform.
Attribute	Demographic details about employees. They're also referred to as filters in the platform.
Attribute Header Row	The blueprint of the Employee Attribute Template. It dictates the columns of information and the name labels for the columns.
Required Attribute	Information about each employee in your organization that Viva Glint requires to be part of your Employee Attribute Template: • Status: ACTIVE or INACTIVE • First name • Last name • Email address • Employee ID
Custom Attribute	Any employee information collected in addition to the required attributes. Up to 100 custom attributes can be collected. Examples: birth year, hire date, gender, work location, department.

Term	Definition
	Viva Glint is GDPR compliant and prohibits the processing of any employee information classified as sensitive. No attributes classified as sensitive can be incorporated into an Employee Attribute Template.
Flat Attribute	A category that can't be broken down further, such as age group or gender.
Functional Attribute	A value that indicates how and when communications are sent to an employee, such as language and time zone.
Hierarchy	Filtering down of an employee attribute into levels from highest to lowest, largest to smallest, etc. to provide more precise insights into engagement. Example: Region > Country > State > City
Derivation	Other fields configured based on employee attributes. Examples: Age groups can be derived from birth year or tenure can be derived from hire date.
Schema	The framework in our platform's backend, which stores a mapping of your organization's attributes.

Next steps with your Employee Attribute Template

After finalizing your attribute selections, reporting hierarchies, file and date attribute format, use the guidance here to set up attributes: Setup attributes in Viva Glint.

Set up attributes in Viva Glint

Article • 09/28/2023

Before using the guidance on this page, you should have created your Employee Attribute Template. All required and custom attributes, and hierarchies, should appear as you would like them to appear on all reports going forward. This first row is your file blueprint.

> **Tip**
>
> Ensure that attribute labels stay consistent over time in your Employee Data File. For example, if an attribute is set up as "Employee ID," it will not later be recognized as the same column renamed as "Employee Number".

Use the following guidance to set up attributes in Viva Glint based on selections you made when putting together your Employee Attribute Template. This is your guide for setting up Viva Glint to accept data that you import to the platform long-term.

Attribute setup in Viva Glint

To set up your attributes in Viva Glint, your uploaded file must contain a finalized attribute header row and at least one row of employee data. Use the in-platform, four-step attribute setup process to prepare the system to import employee data.

> **Important**
>
> Reporting hierarchies, derivations, file format, and date attribute formats can't be edited after initial setup is complete. Before beginning, confirm that the attribute selections in your Employee Attribute Template are **final**.

1. From the admin dashboard, select the **Configure** symbol.
2. In **Employees,** select **People**.
3. Choose **Get Started** to begin the four-step process.

Follow the onscreen guidance for the following actions.

Upload dataset

Upload finalized attributes in the format you have chosen. This file format will determine the format for all future uploads. Select **Continue.**

Preview employee data fields

Check that the attribute names and values appear as expected.

1. Verify that:

    - All attributes are present in the preview.
    - Attribute values shown for preview employee records display in the correct column.
    - The total count of "data fields found" displayed above the preview matches the number of attributes in the file.

2. If dates are included in your file, select the **There are date fields** checkbox and then the appropriate **date format** from the dropdown menu.

    > ⓘ **Note**
    >
    > All attributes that include dates must follow the same format. Viva Glint will transform incoming dates to Viva Glint's preferred format, yyyy/mm/dd, upon upload.

3. After previewing, select **Continue**.

Set up attributes

Map your uploaded and confirmed attributes to Viva Glint fields. This setup is divided into three sections:

Required attributes

Select your attribute from the dropdown for each required attribute:

- First Name
- Last Name
- Email
- Employee ID
- Status

Hierarchy groups

Select your attributes from the dropdown menu for each hierarchy group.

- To add more levels to a hierarchy, select **+ Add Level**.
- To add a new hierarchy group, select **+ Add Hierarchy Group**.
- To rename the hierarchy label, select the **pencil** symbol.
- To delete a group or level, select the **trash can** symbol.

Derived attributes

Viva Glint calculates attributes based on data sent in your employee attribute file. Most organizations choose to include a managerial hierarchy. Select your option and the attribute that should be used to create it. Decide whether to include tenure groups based on hire date or age groups based on birth year.

1. Select the section with the desired attribute.
2. Select the desired attribute from the dropdown menu for each derived attribute.
3. Select **Continue**.

Review uploaded attributes

1. Review your attribute selections, choosing between the following two options:

   - Option 1 - Save attributes and import employee data – Recommended if the employee data in your file is complete and finalized (doesn't contain test or partial data).

   > **Caution**
   >
   > Employee data can't be deleted. This option performs a full employee upload, which applies any changes in the file and marks anyone not in the file as an inactive employee.

   - Option 2 - Save attributes and discard employee data – Recommended to configure attributes based on your header row and then import finalized employee data later.

   > **Tip**

Viva Glint recommends the **Save attributes and discard employee data** option for initial setup. This allows you to set up and map your attributes in the system and complete your first data import as a separate task.

2. Select **Save**.

Add new attributes to Viva Glint

After initial setup, you may find that new attributes need to be added to your employee data file. New attributes and their values will apply to future survey results only.

Procedure for adding new attributes

From the admin dashboard:

1. Select the **Configure** symbol and then under the **Employees** section, choose **People**.
2. Select **Actions** and then **New User Attributes**.
3. Upload your dataset with all existing attributes and the new attribute(s).

> ⓘ **Note**
>
> Your uploaded file must contain the Attribute Header Row and at least one row of employee data that aligns with the current format.

4. Select **Continue**.
5. If dates are included in your file, select **There are date fields** and then the appropriate date format from the dropdown menu.

> ⓘ **Note**
>
> This selection should be your existing date format, which is consistently used for employee data.

6. Preview your data and confirm that you see the new attributes.
7. Select **Continue**.

8. The Attributes Setup page shows current required attributes and hierarchy groups and can't be edited. Select **Continue**.

9. Choose to **Save attributes and import employee data** or to **Save attributes and discard employee data**.

   > **Tip**
   >
   > When adding new attributes, choose the Save attributes and discard employee data option to save your setup in preparation for future imports.

10. Select **Save**.

Edit attribute names

Use the following guidance to rename attributes before updating your data files so that they continue to import seamlessly.

From the admin dashboard:

1. Select the **Configure** symbol and then in the **Employees** section, choose **People**.
2. Select **Actions** and then select **Edit User Attributes**.
3. Select the corresponding vertical ellipses to the far right of the attribute in the Active Attributes row.
4. Select **Rename Attribute**.
5. Enter the new name in the Attribute Name field and select **Rename**.
6. On the top right of your dashboard, select **Save Changes**.

> **Caution**
>
> Use this method if the underlying data remains the same, but the field name has changed in your system. Don't repurpose attribute name labels, as this can create issues in reporting. Instead, create a new attributes. For example, if Department changes to Team and the values in that column change too, add a new Team attribute and don't rename Department to Team.

Understand Viva Glint SFTP and data automation

Article • 11/07/2023

Use Microsoft Viva Glint Secure File Transfer Protocol (SFTP) to establish regular imports of employee data. An automated data feed enables you to keep your HRIS data in sync with Viva Glint and allows your organization to:

- Send surveys and results to the right participants at any time.
- Automatically trigger surveys for employees at specific points in the employee lifecycle.
- Always have the most up-to-date employee information.

Prepare data for import

Before transferring data to Viva Glint with SFTP, ensure that you review information on Viva Glint attribute fundamentals and complete your attribute setup. Learn more.

> **Caution**
>
> Ensure that all Company Admin users are included in your first file upload, with Employee IDs that match the IDs in Viva Glint. If not, Company Admin users will be deactivated and lose access to the platform.

Manage SFTP settings

In Viva Glint general settings, manage Public SSH keys, add public IP addresses, specify notification users, manage encryption settings, and view SFTP credentials. Learn more.

Understand automated data import

Viva Glint SFTP allows for full and incremental data files, regularly checks for and automatically imports new files, uses derivation to create calculated attributes during import, and works best with recommended file formats.

SFTP directories

In your SFTP account, there are 2 directories that Viva Glint monitors for files to automatically import:

- **/files/user_full:** Use for FULL file uploads - existing employee records in the platform that are not included in your file become INACTIVE.
- **/files/user_delta:** Use for INCREMENTAL file uploads - only the employee records in the file will be updated in the platform, all others will be unchanged.

> ⓘ **Note**
>
> Files are automatically deleted from SFTP after 48 hours.

Transfer methods

Depending on how frequently your organization imports data to Viva Glint, consider which SFTP data transfer method best meets your needs.

- **Automated HRIS data feed:** Work with your employee data team to establish an automated export that is transmitted from your HRIS to SFTP directly.
- **Manual SFTP file transfer:** Connect with an FTP application to manually place a full or incremental file on SFTP.

Derived attributes

While your employee data uploads to Viva Glint, derived attributes and values are calculated based on selections made during your attribute setup:

Derived Field	Based On	Derived Values
Age Grouping	Birth Year	<25, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, 65-69, 70+
Tenure	Hire Date	0-1 Year, 1-2 Years, 2-3 Years, 3-4 Years, 4-5 Years, 5-7 Years, 7+ Years
Manager Hierarchy	Employee ID and Manager ID data relationship	Up to 25 manager levels, starting with the CEO/top-level leader

> ⓘ **Note**
>
> Don’t include derived attributes in your employee data file, Viva Glint creates these fields.

File best practices

Select a file transfer frequency, format, layout, and naming convention based on your company's needs and HRIS capabilities.

Frequency:

Update your employee data at least weekly or at a regular cadence that aligns with your company's survey schedule.

If you have fewer than 10,000 employees, a daily feed of the full file should be a good frequency, and incremental files can be uploaded for one-off updates. If you have a large employee base with several attributes (50+), sending full files 1-2 times per month with daily incremental files may make more sense for your company's needs. Discuss with your HRIS team to find out data file transfer possibilities.

Format and layout:

Consistent file format and layout over time ensure successful file imports. Maintain the same attribute labels in your file's header row and select one file format from Viva Glint's options:

- **.csv** with a comma separator and UTF-8 encoding. When values contain commas, enclose in double quotation marks.
- **.xlsx** with a single tab and no password or formulas.

Naming convention:

Viva Glint recommends the following file naming conventions, where "companyid" is your unique ID within Viva Glint. Ensure that whichever name you select is 64 characters or fewer, including the file extension.

- Companyid_user_full_yyyymmdd.csv
- Companyid_user_delta_yyyymmdd.csv

For example: contoso_user_delta_20230101.csv

> ⓘ **Important**
>
> File extensions must reflect PGP encryption, if used. For example, an encrypted .csv file should appear as: contoso_user_full_20230101**.csv.pgp**

Set up Secure File Transfer Protocol (SFTP)

Article • 10/30/2023

Use Microsoft Viva Glint Secure File Transfer Protocol (SFTP) to establish regular, automated imports of employee data. In Viva Glint General Settings, import SSH Public Keys and specify public IP addresses to connect, specify users that should be notified about data uploads and warnings, opt-in to PGP encryption, and view your credentials to access your SFTP account. Your IT team may need to add an IP exception or add hosts and ports to an allow list to connect to SFTP. Learn more.

Manage SFTP in General Settings

Manage SFTP settings to connect to your Viva Glint SFTP account:

1. From the admin dashboard, select the **Configure** symbol, then in **Service Configuration**, choose **General Settings**.
2. In the **Technical Configuration** section, go to **SFTP Setup** and select **Manage**.
3. In the SFTP pane that appears, review each field and enter information as needed:
    a. **SSH Public Key:** Enter your public SSH key in this field. **DO NOT** share your private key with Viva Glint. To generate a key pair: Learn more.
    b. **SFTP IP Addresses:** Any account that connects to SFTP must have valid public IP addresses added here. Contact your IT team or use online tools to determine your public IP address(es).
    c. **Notify People:** Search for and add users that should receive file upload notification emails.
    d. **PGP Encryption:** This setting is optional. Switch toggle to **On** to enable file encryption and reveal Glint's public PGP encryption key to encrypt your employee data files.
    e. **SFTP Credentials:** Use the credentials shown here to connect to SFTP with a dedicated FTP application and your private SSH key file. Allow at least 1 hour after entering public SSH keys and IP addresses before testing your connection.

> ⓘ **Important**
>
> Private IP ranges aren't internet routable and don't allow SFTP connection. Don't include private IP addresses, which fall in these ranges:
>
> - **10.0.0.0/8 IP addresses:** 10.0.0.0 – 10.255.255.255

- **172.16.0.0/12 IP addresses:** 172.16.0.0 – 172.31.255.255
- **192.168.0.0/16 IP addresses:** 192.168.0.0 – 192.168.255.255

ⓘ **Note**

Once a tenant is deprovisioned or considered in a "LockedOut" state, the public SSH key is deleted and SFTP will no longer work.

Viva Glint program features and settings

Article • 07/13/2023

Microsoft Viva Glint offers multiple program types, reporting features, and guidance opportunities for acting on feedback. To make the most of this application designed to meet your business goals, use the following guidance while setting up your programs:

Admin management of the General Settings feature in Viva Glint

Set up Viva Glint User Roles

Use Viva Glint's People page to view employee information

Set up Distribution Lists

Customize Action Plans

Use the Viva Glint Question Library

Use Viva Glint benchmarks

Share post-learning survey experiences with your people

Understand Advanced Configuration options

Admin management of the General Settings feature in Viva Glint

Article • 12/08/2023

Details defining your Viva Glint programs are set up and viewed by selecting the **configuration** symbol on your Microsoft Viva Glint admin dashboard and then **General Settings** in the *Service Configuration* section.

Once your General Settings are designated, they're valid for all your Viva Glint programs until you edit them.

Standard procedures for General Settings section setup

For each setting option, you'll see a short description so you can feel confident about the choices you make. There are seven sections which require input:

- Company information
- Communications
- Reporting
- Engage Survey Details
- Features
- Technical Configuration
- Localization

> ⓘ **Note**
>
> Any changes you make in the General Settings apply to all survey programs created in Viva Glint.

Set up the Company Information section

This section provides high-level information about your company. Also, set up what your employees see when they open an email sharing information about a Viva Glint program.

Expand table

Field	Definition and notes
Client UUID	How Viva Glint identifies your company in our system
Client Name	*Or Doing Business As (DBA) name*
Client Time Zone	Survey and reminder emails are sent out in this time zone unless **Send surveys in users' time zones is checked**.
Top-Level Manager	This employee is used to build managerial hierarchy and is the only person in your organization that doesn't report to anyone at a higher level.
Company Privacy Policy	Add a link to your organization's privacy policy to replace the Microsoft Privacy Statement. The privacy policy is displayed at the beginning of Viva Glint surveys and in the Viva Glint navigation bar.
Company Message to Survey Participants	Enter guidance specific to your organization that will be displayed at the beginning of Viva Glint surveys and applied to new programs and scheduled surveys.

ⓘ **Important**

Avoid potential conflicts between your organization's message and Viva Glint's privacy statements. The application of one of the three privacy statements to the survey is dependent upon its configuration. Learn more. The company message displayed alongside standard privacy statements should refrain from stating anything that conflicts with the privacy statement applied to the survey. Microsoft reserves the right to delete company messages if such conflicts comes to our attention.

Set up the Communications section

Provide or edit the following fields:

Expand table

Field	Definition and notes
Enable Email Notifications for Focus Area Comments	Enable for comments and user tagging
Hide Focus Area/Comment Text in	Managers may receive an email notification when someone comments on their Focus Area (goal) or a new one is cascaded to

Field	Definition and notes
Focus Area Emails	them. Enable to hide these details from these emails. Disable to allow goal title and comment text to display.
Send Survey in Users' Time Zones	Send invitations in user's time zones on the survey start date

Set up the Reporting section

Choose attributes and hierarchies to show in reporting and select benchmark comparisons. You will also indicate permissions and thresholds for viewing feedback.

> ⓘ **Note**
>
> This section is not applicable to 360 Feedback programs.

Provide or edit the following:

Expand table

Field	Definition and notes
Attributes for Alerts	Narrow down alerts, if desired. If left empty, all attributes are incorporated (other than nonreportable fields and emails)
Default Comparison	Your preferred default comparison statistic. If left empty, it defaults to Benchmark.
Internal Benchmarks	Viva Glint's three internal default benchmarks that cannot be removed. Up to ten more may be added
Comments Privacy: Minimum # of Responders for Search Results	Minimum number of responses to a survey before comments are viewable and searchable
Comments Privacy: Minimum # of Responders for Facet/Grouping	Minimum number of responses to a survey before comments are available for specific groupings
Confidentiality Threshold	Numerical scores can't be displayed for respondent groups smaller than this number of respondents. The default number is five (5).
Exclude Negative Strengths and Positive Weaknesses	Remove items that how negative scoring as strengths and positive scoring as weaknesses

Field	Definition and notes
Insight Minimum Group Size	Minimum number of responses before insights and alerts can be shown
Insight Minimum Score Difference	Minimum number of responses before showing differences in insights and alerts
Minimum Sample Survey Stats	Response rate won't be displayed for groups smaller than this set number. This is based on group size, not on number of responses and it must match the confidentiality threshold.
PowerPoint Template	Customer chosen default template. If unset, it defaults to the Viva Glint default template.
Broader Team Insights PowerPoint Template	Customer chosen default Broader Team Insights template. If unset, it defaults to the Viva Glint default template.
Primary Hierarchy	The hierarchy your company identified as the first level for reporting, typically Manager
Secondary Hierarchy	The hierarchy your company identified as its second level for reporting, typically Location
Rating Questions Scale	The defaults survey rating questions use. Viva Glint's best practice is to use a 5-point scale
Suppression Threshold	Suppression occurs if there aren't enough respondents to meet confidentiality requirements. The Viva Glint Suppression Threshold default is two (2) but depends upon the confidentiality threshold.
Cross-Program Filtering	Turns on cross-program filtering within reports. Enables user roles to compare employee groups across different survey programs and cycles

Set up the Engage Survey Details section

Choose your survey access method. Learn more.

Expand table

Field	Definition and notes
Require Microsoft Entra ID for links in survey emails	Turn this on to authenticate participants for future surveys with Microsoft Entra ID (recommended). If you turn this off, a personalized survey link will be sent to participants.

Field	Definition and notes
Attribute-based Survey Access	Participants will be able to retrieve survey links by entering attributes. This will not authenticate participants and is less secure than surveys requiring Microsoft Entra authentication.

Set up the Features section

In this section:

- Enable or disable program templates and Focus Area visibility and privacy settings.
- Set limits for the number of survey cycles that will show on a dashboard.

Edit the following:

Expand table

Field	Definition and notes
Available Survey Questions and Program Templates	Deselect any program types that you won't be using to delete their items from your platform. You can edit this at any time.
Team Conversation Enabled	Enables Team Conversations for recurring surveys
Default Focus Area Privacy	Choose the visibility/privacy setting for users creating a new Focus Area
Maximum Number of Survey Cycles for Trend	Default is five (5) cycles. Applies only to recurring and ad-hoc surveys. This controls the number of cycles that will show on the dashboard and in reporting.

Set up the Technical Configuration section

In this section, make selections for your Viva Glint technical setup:

- Username and password for SSO users
- Employee ID

Expand table

Field	Definition and notes
Attribute for SSO Authentication	Configure the unique Employee ID. The email has been set as the default employee ID.

Set up the Localization section

English is the default language for all programs, but surveys and emails may be sent to employees in their preferred language. Viva Glint has 70+ language translations for standard content that can be set during the initial configuration or added later, until the survey is live.

In this section:

- Set the list of languages to include for comment analysis.
- Enable or disable comment translation.
- Indicate the default language for surveys.
- Provide the additional languages you need supported within the survey.
- Indicate the default language for your dashboard.
- Provide the languages available for employee dashboards.

Expand table

Field	Definition and notes
Comment Analytics Language	The list of codes for languages to include for comment analysis. Empty value signifies English only.
Default Survey Language	Provides the default language for surveys. If a preference isn't populated per employee, this language is shown as a default.
Supported Survey Languages	Lists all languages chosen by the admin to support surveys within your organization. This is a global setting and can be tailored on a per-program level.
Default Dashboard Language	Provides the default language for dashboards. If a preference isn't supplied/selected per employee, this language is shown as a default.
Supported Dashboard Languages	These are the languages available for your dashboard. Your users can select any of these as their static, preferred view.

Feedback

Was this page helpful? Yes No

Provide product feedback

Set up attribute-based survey access in Viva Glint

Article • 08/15/2023

Microsoft Viva Glint's Attribute-based Survey Access allows users without a corporate email account to complete confidential surveys using attribute-based survey access, which is designed for mobile or public devices including desktops, laptops, tablets, or mobile phones. Users access surveys using key identifiers. These identifiers ensure a user's responses are tied to their survey and allow for full reporting on demographics in survey results.

Understand key identifiers

Viva Glint uses key identifiers to uniquely identify each user. Because these users may not have email addresses, attribute-based survey access requires the use of two attributes - the combination known only to the specific user. The system is flexible enough to support any two attributes that are a part of your employee data file:

- One of these attributes is always a unique identifier
- The other attribute should be something not commonly known, like the employee ID number or birth year.

Set up attribute-based survey access

Configure General Settings

1. From the admin dashboard, select the **Configure** symbol, then in *Client Settings*, choose **General Settings**.
2. In the *All Settings* menu, select **Engage Survey Details**.
3. Next to **Attribute-based Survey Access,** select **Set up**.
4. In the **Attribute-based Survey Access** pane, turn on the **Enable when ready** toggle.
5. If desired, edit the **Welcome text** or **Instruction text** fields by entering new text.
6. Select + **Add an attribute** and select attributes from the dropdown menu.

> ⓘ **Note**

Complete attribute setup and employee data upload prior to selection for attributes to be available.

7. Edit the **Placeholder text** that displays under each selected attribute.
8. Confirm your edits in the **Preview** at the bottom of the pane.

> **Note**
>
> Currently, while we are new to Microsoft Viva, emails are available only in English. This is a change from the LinkedIn Glint instance and remediation is in progress.

9. At the top of the pane, select **Save**.
10. Select the Configure symbol, then in Client Settings, choose **Advanced Configuration**.
11. In the *Details* section, select the Whether to allow the users to look up questionnaires without a kiosk checkbox.
12. Select **Save Changes** at the bottom of the Details page.

Obtain the attribute-based survey access URL

1. From the admin dashboard, select the **Configure** symbol, then in *Surveys*, choose **Survey Programs.**
2. Select the survey program that users will complete with attribute-based survey access.
3. At the top of the page, select **Copy survey link,** and then **Copy** in the dialog box.
4. Optionally, use online tools to convert this link into a QR code or shortened link for easy participation on mobile devices.

Use Viva Glint's People page to view employee information

Article • 08/17/2023

The People page functionality allows admins to view employee attributes, manage permissions and roles, and deactivate employees.

The **People** section is accessed from the **Employees** section on the admin dashboard and allows admins to:

- View individual employee data
- Manage positions by assigning User Roles
- Manage employment status
- Import an employee file
- Export a file of active employees

Use the filter feature

Employees are filtered by active/inactive status and User Role.

All People

A count of present and past employees, listed by:

- Active: Working within your organization presently
- Inactive: No longer work within your organization or are currently on leave
- Support Users: External users that have been added by your organization to provide assistance
- Advanced Configuration Access: Company Admin users with access to Advanced Configuration

User Roles

A count of company admins, managers, Human Resource Business Partners (HRBPs), and HR business partners listed by User Roles.

Find information on a specific person

Use one of the two following methods:

- Begin to type the name of the employee in the search bar. When the name appears, select the name.
- Scroll down the alphabetized list of names, but with hundreds or thousands of employees, that method won't be as efficient!

For each employee, the following information is visible:

- Employee Name: Editable by admin by selecting the pencil symbol.
- Email: Editable by admin by selecting the pencil symbol.
- Employee ID: Not editable.
- Manager Hierarchy: The organization's highest-ranking employee (generally the CEO) is listed first. The hierarchy progresses downward, following the organizational chart flow, ending with the employee's immediate manager. Not editable.
- User Role(s): Determines what data and people for whom this user has visibility. Editable by selecting the pencil symbol.
- Attributes and hierarchies (aside from the primary hierarchy, usually Manager): As defined in your organization's latest Employee Data File. The Attributes section of an individual's People page will always include required attributes (like Employee ID) and then customized attributes, as defined in your Employee Data File.

For employees with User Roles in addition to Active Employees, the following editable information will also appear:

- Focus Area Access: Defines which people's data this user will see in Focus Area reports. Editable by selecting the pencil symbol.
- Survey Access: Defines which people's data this user can see in selected survey programs. Editable by selecting the pencil symbol.

> ⊗ **Caution**
>
> Viewing and exporting raw data are governed by Microsoft rules protecting employee confidentiality. Review the guidance on **raw data exports** within our Security and Privacy documents.

Use the View As function

The View As functionality allows you to open your Viva Glint program as if you were another employee. This functionality allows you to view another user's dashboard based on their User Role and data access.

To view as another person:

1. Locate the person you want to view as and open their page by hovering over and selecting the name.
2. Select **View As**.
3. The dashboard indicates “You are seeing `<other person name>` Viva Glint experience."

To return to your own account, select **Return to your account**.

Use the Actions function

The Actions button dropdown menu allows you to send surveys, send user data, and delete users.

Send Survey

You can send a survey to one employee (manually) from the People page. Use the Actions button and then **Send Survey**.

- Enabled and live surveys are displayed. Select the survey to send.

> ⓘ **Note**
>
> A survey will not appear if it is not enabled or live. Go back into the program to re-enable or change the date of the survey, noting that it will take a few minutes for a survey to become live.

- Select **Send**.

Send User Data

Send a user's survey response and attributes directly to a user, without viewing data. Learn more .

Delete User

Delete a user from Viva Glint. Learn more .

Import your Employee Data File

Use the **Import** button on the People page to import a *.csv* (UTF-8 encoded) or an *xlsx* (single tab) file to update employee details.

Follow the on-screen guidance for uploading the file and then select **Import File**.

> **Note**
>
> If you upload a user file during a live survey, employee information will not be altered for that survey.

Export an Active Employees report

To make changes to an employee file, it's often easier to start with what's in the system first, so exporting from within the system, making changes, and then reimporting can occur beginning with the Export feature.

Select **Export** and then follow the on-screen guidance.

Delete user data from Viva Glint

Article • 12/08/2023

As your company's data controller, Microsoft Viva Glint admins can submit a user data deletion request to comply with a General Data Protection Regulation (GDPR) data subject request. The deletion requests will be processed right away.

> **Note**
>
> User data deletion in Viva Glint is an irreversible process.

User data can be deleted from the People section on the admin dashboard

> **Important**
>
> Deleting a user from Microsoft Entra ID does not delete the user and their information from Viva Glint. To delete user information from Viva Glint, you must complete the instructions provided below.

1. Select **People** from the Employees section.
2. Use the search box to select the employee whose data should be deleted. Open that employee's page.
3. From the Actions dropdown menu, choose **Delete User**.
4. A Delete User Confirmation box displays with this information:
   a. Data will be removed from Viva Glint except for essential account information associated with your organization's Microsoft subscription.
   b. To include later, the information must be reuploaded into your company's HRIS data.
   c. By deleting the user,
      i. Survey results from Viva Glint reports will be deleted, possibly impacting reports.
      ii. The user's data is removed from distribution list and future surveys.
      iii. The user's role definitions and their reporting permissions are removed.
   d. The display will indicate whether the user has direct reports and that the admin will have to reassign the reports later or in the next HRIS file import. Follow these steps to facilitate a retroactive user upload update.

5. Go back to the **People** page and verify that the username does not appear in the list of *All, Active or Inactive* employees.
6. Return to the admin dashboard and select **Activity Audit Log** in the Client Settings section. The action taken should be listed first in the Event column and its status should read "Success" and the Details column "deleted."
7. If the deleted user is a manager, verify that all reports they had been permissioned for no longer include their name. The report will now read, "Deleted User's Team."

> **Note**
>
> Should a deleted user be reinstated to your organization, their data will need to be uploaded as if they are a new employee. No previous data is stored once deleted.

Manage external users in Viva Glint

Article • 11/16/2023

Grant access to and remove Microsoft Viva Glint Support users to assist in deployment, advanced insights analysis, and complex Support tasks. The Support User role is designed to grant the right permissions to external users, like Microsoft Partners, and allow Viva Glint Admins to quickly audit how many Support users have access to their Viva Glint application.

> **Note**
>
> Support users must be added to your Microsoft Entra ID before you can add them in Viva Glint.

Add a Support or Partner user

To add a user:

1. From the admin dashboard, select the **Configure** symbol, then in **Employees**, choose **People**.

2. In the **Actions** dropdown menu, select **Add a Support User**.

3. Enter the First Name, Last Name, and Email on file in Microsoft Entra ID for this user.

    > **Important**
    >
    > Users must be added to Viva Glint and Entra ID with a company email address for your organization. For instructions on adding users in Entra ID: Learn more.

4. The **Company Admin User Role** will be selected by default and grants Support users the required level of access to assist in your Viva Glint account.

    > **Note**
    >
    > For Partner users, add the user to the Partner Employees User Role as well.

5. Switch the **External user** toggle to **Yes** to flag external users within your organization.

6. Switch the **Grant user advanced configuration access** setting to **Yes** to allow Support users access to **Advanced Configuration** features.

7. Select **Add support user.**

> ⊗ **Caution**
>
> Users with access to Advanced Configuration settings can make changes to potentially sensitive areas of your Viva Glint configuration. For an Advanced Configuration overview, see **Understand Advanced Configuration options in Viva Glint.**

Remove a Support or Partner user

When an external user no longer needs access to your Viva Glint account:

1. From the admin dashboard, select the **Configure** symbol, then in **Employees**, choose **People**.

2. In the **Search People** field, enter the first and last name or email address of the user.

3. In the search results, select the desired user.

4. On the user's profile, select **Actions** and then **Delete User**.

5. In the dialog, select **Delete User.**

   > ⓘ **Note**
   >
   > This cannot be undone.

Set up Viva Glint User Roles

Article • 07/13/2023

You can assign multiple roles with specific permissions - access to different segments of data and filter - within **User Roles** from the admin configuration dashboard. The User Roles and Access Template include prepopulated example roles and detailed instructions for two areas of setup. Use it to help plan your Microsoft Viva Glint programs.

You can use the template to indicate which attributes User Roles are allowed to view, according to three filter distinctions:

- Report filters: Attributes this role can view while searching results.
- Report sections: Which section a user can add to reports.
- Comment filters: Attributes this role must have to view the Comments report.

Tip

To protect confidentiality, give managers access to only one filterable attribute. Assigning more than one filterable attribute could increase the chance that a manager may be able to deduce the origin of individual responses.

Note

Not all User Roles and pre-populated attributes and permissions in the template may apply to your organization. Consult your Employee Attribute File for attributes specific to your organization and make changes, as necessary.

Download the template to use as a planning tool to define permissions for your User Roles.

Create User Roles

Program admins can specify the employee population and report filters their leaders can view on their dashboard based on manager, HRBP, and executive roles. Defining roles is important for data cuts, access permissions, and program integrity.

Procedure to create User Roles

1. Select the **Configure** symbol.
2. In the **Employees** section, select **User Roles**.
3. You'll see predefined user roles initially:
   a. Active Employees: Not intended to have data access
   b. Company Admin: Employees who are granted **ALL** permission; can't be edited
   c. Inactive employees: Not intended to have data access
   d. Manager: Commonly used and prepopulated; permissions and attributes can be edited
4. To add roles, select **+ New Role**.
5. Enter a User Role name by selecting the pencil symbol next to the title box.

Set up the Role Settings page

You can do the following from the Role Settings page:

- Permissions
- Report Attributes
- Add or remove users

Permissions setup

1. Select **Permissions** in the **Role Settings** section.
2. Choose all appropriate permissions and access capabilities you want for the new User Role.
3. Select **Save Changes**.

Report Attributes

1. Select **Report Attributes** in the **Role Settings** section.
2. Select all attributes and hierarchies that this role should be allowed to view for report filters, report sections, and comment filters.
3. Select **Save Changes**.

Tip

Since filtering through results across too many attributes can make identifying survey respondents within reports easier, we recommend giving access to only one attribute per manager role. For example, *Managers with Country Access* or *Managers with Comments*.

Add user to a role

1. Select **+ Search for an employee to add**.
2. Select their name.
3. The new user will now appear in the **All Members** section.

Remove a user from a User Role category

1. Hover over a user's name.
2. Select the **trash can** symbol.
3. Select **Yes, Remove**.

Import User Roles in bulk

When you need to assign many individuals to a specific User Role, you can mass assign them by using the bulk import feature.

Procedure to import User Roles in bulk

1. Select the **Configure** symbol.
2. In the **Employees** section, select **User Roles**. Select the User Role you need to update.
3. On the **Role Settings** page, select **Export.** Within the box that displays, make your selections and then again, select **Export**.
4. Open the downloaded .csv file and delete all columns except the column with email addresses.
5. Add or delete email addresses.

   > **Note**
   >
   > This can be a full replacement for the existing file, so you will not need to have an Add or Remove column.

6. Save your file.
7. Return to the **Role Settings** page and select **Import**.
8. Select the checkbox to indicate if you only added users.
9. Drag and drop your file, or browse to select your file, into the area indicated.
10. Select **Import File**.
11. Confirm your import and then select **Confirm Import**.

View and edit attribute rules for a User Role

This functionality works for roles, which already have filters and/or populations applied to them.

1. From the **User Roles** page, select a role to view or edit.
2. On the **Role Settings** page, the number of members of this group will display and the attribute rule applied. (Example: ***Includes: Gender: Female***)
3. To change, select **Edit Attribute Rules**.
4. In the new display window, choose from:

    - I want to include all active employees only, or
    - I want to filter all active employees by the following populations

5. Add new population(s) and filter(s) as desired.
6. Choose whether to include inactive employees or to exclude any employees.
7. Select **Save Changes**.

Create an attribute rule-based User Role

1. Select **User Roles** from the **Configure** section of your admin dashboard.
2. Choose any role - *excluding preconfigured roles*.
3. Select **Add/Edit Employees.**
4. In the new display window, choose either:

    - I want to include all active employees only, or
    - I want to filter all active employees by the following populations

5. To add users based on a filtered population, select **I want to filter all active employees by the following populations**.
6. Select + **New Population**.
7. Select + **Add Filter** to select the attribute you want to use to filter your employee list. Your attribute list is unique to your organization based on your Employee Attribute File.
8. Select **Done**.
9. To exclude someone, search their name and select **Exclude**.
10. To remove someone from the Excluded list, search their name and select **Remove**.
11. Confirm list for user role and select **Save Changes**.

Grant Custom access

Custom access is intended for users who need to have the default access overridden or are in a role that is so specific, it needs to be per user.

Create Custom Team Access for Programs

1. From your Glint dashboard, select **Configure** and then **People** and then **Select User.**
2. Review User Roles for accuracy.
3. Next to the survey name, select **Edit**.
4. Customize the survey access from the dialog box that opens and select **Save**. Customized data access for that program now displays on the user profile.

Import and export Viva Glint User Roles

Article • 07/13/2023

Admins can import and export lists of members associated with specific roles and attributes. This functionality is especially useful for large teams.

Import User Roles in bulk

When you need to assign many individuals to a specific User Role, you can mass assign them by using the bulk import feature.

Procedure to import User Roles in bulk

1. Select the **Configure** symbol.
2. In the **Employees** section, select **User Roles**. Select the User Role you need to update.
3. On the **Role Settings** page, select **Export.** Within the box that displays, make your selections and then again, select **Export**.
4. Open the downloaded .csv file and delete all columns except the column with email addresses.
5. Add or delete email addresses.

   > **Note**
   >
   > This can be a full replacement for the existing file, so you will not need to have an Add or Remove column.

6. Save your file.
7. Return to the **Role Settings** page and select **Import**.
8. Select the checkbox to indicate if you only added users.
9. Drag and drop your file, or browse to select your file, into the area indicated.
10. Select **Import File**.
11. Confirm your import and then select **Confirm Import**.

Manage exports

All exports generate a .csv download. Downloads may take a few minutes dependent upon list size.

Export roles

This export includes first and last names, email address, and employment status.

1. From your admin dashboard, select the **Configuration** symbol and then **User Roles.**
2. Select the role list you would like to export.
3. Select **Export** on the **Role Settings** page.
4. Choose whether to include all user attributes and User Roles.
5. Select **Export**.

Set up and use Distribution Lists in Viva Glint

Article • 09/14/2023

Distribution Lists define which employees within your organization should receive a survey. When creating a Distribution List, start with the list of all active employees and then refine this list using employee attributes. This creates a custom list of employees that can be chosen as recipients for any Microsoft Viva Glint program within your organization.

Distribution Lists are essential when a survey program isn't intended to be sent to all active employees.

Create, edit, or delete a Distribution List

In surveys, you can use existing Distribution Lists or edit or create new ones.

There are two ways to access Distribution Lists:

From the admin dashboard:

1. Select the **Configure** symbol.
2. Select **Distribution Lists** under the **Employees** section.

Or, from your survey program:

1. Select the **Configure** symbol at the top right of your Viva Glint dashboard.
2. Select **Survey Programs** in the **Survey** section.
3. Select the survey for which the Distribution List needs to be edited.
4. Select the **Distribution page** in **Program Summary**.
5. Select the pencil symbol to Modify Distribution Lists.

Create a new list

The first page that appears displays all Distribution Lists that exists for your organization and indicates the number of members in each list.

1. Select **+ New Distribution List**.

2. Enter a title for your list by selecting the pencil symbol next to the Untitled Distribution List box. For example, if you're creating a Distribution List for new employees, you could title your list *New Employees* or *New Hires*.
3. Select **Add/Edit Employees**.

Add attribute rules to create a new list

There are two options:

- All active employees
- Filter all active employees

All Active Employees

1. Select **I want to include all active employees only**.

2. For an Exit survey, consider enabling **Include Inactive Employees**, located below the selection box. To include inactive employees, contact them via their personal email; ensure you have a personal email when an employee leaves your organization, if possible.

3. If you need to exclude someone, search for their name and select **Exclude**.

4. Conversely, if you need to remove someone from the Excluded list, search their name and select **Remove**.

5. Confirm your list and select **Save Changes**.

Filter all Active Employees

1. Select **I want to filter all active employees by the following populations**.

2. Select **+ New Population**.

3. Select **+ Add Filter** to select the attribute you want to use to filter your employee list. Your attribute list is unique to your organization based on your Employee Attribute File.

4. Select **Done**.

5. For an Exit survey, consider enabling "Include Inactive Employees," located below the selection box. To include inactive employees, contact them via their personal email.

6. If you need to exclude someone, search for their name and select **Exclude**.

7. Conversely, if you need to remove someone from the Excluded list, search their name and select **Remove**.

8. Confirm list and select **Save Changes**.

> ⓘ **Note**
>
> The date range selected for an attribute should always be equal to or greater to the frequency at which you update your Employee Attribute File. For companies that integrate their Human Resources Information System (HRIS) files automatically, this will work well. For companies that manually update files, ensure that the window you've set is wide enough to include the frequency with which employee data is refreshed. For example, if a window is set to 15 days but employee files are only updated once every 30 days, the survey will likely miss people who should get the survey, since the date range is only set to look at people who started 30-45 days earlier. Instead, set the window for at least 30 days so you are sure to include everyone.

After selecting an attribute, you'll see a list of employees that match your criteria. From here, employees can be manually excluded by selecting that employees name in the Included box and then selecting **Exclude** when it appears.

> ⓘ **Note**
>
> You do not have the option to manually include employees.

Modify a Distribution List

Editing a Distribution List is a global change and will affect any program using that list. To modify:

1. Select the Distribution List you want to modify.

2. Select **Add/Edit Employees** or **Edit Attribute Rules** if there are filters available.

3. Make the necessary changes and select **Save Changes**.

After confirming you have the list you want, select **Save Changes**.

Understand why frequency of updating your Employee Attribute File matters

The date range selected for an attribute should always be equal or greater to the frequency at which you update your employee data files. For companies that integrate their HRIS files automatically, this works well. For companies that manually update employee files, make sure that the window set is wide enough to include the frequency with which employee data is refreshed. For example, if a window is set to 15 days but employee files are only updated once every 30 days, the survey will likely miss people who should get the survey, since the date range is only set to look at people who started 30-45 days earlier. Instead, set the window for at least 30 days so you're sure to include everyone.

> **Tip**
>
> Consider using the blended membership functionality, explained below.

Use the blended membership Distribution List functionality

Dynamic attributes automatically add and remove users to and from a distribution list. They can also include or exclude certain users from a list. Knowing how your distribution list has been populated helps you make decisions about how to add users.

View how a Distribution List was populated

From the Distribution Lists page, the far-right column entitled **Membership Type** defines if the list in that row has been populated manually, by attribute rules, or both.

> **Note**
>
> If a distribution list is populated by an Import, it will have the membership type "manual".

Use the dynamic Distribution Lists functionality

Your decision whether to use manual population or attribute rule population should be guided by these principles:

- If membership type is based on Attribute Rules and a user is manually added in the platform, employee data file imports (i.e. Rubicon) will automatically update the Distribution List.
- If the Distribution List began manually, adding attribute rules will change the list to include both Attribute Rules and Manual.
- If a manually added member is deleted and they match the filter criteria, they'll still appear in the Distribution List, but the Added by method will change from Manual to Attribute Rules.

ⓘ **Important**

Importing users to an Attribute Rules Distribution List removes existing rules.

- Activate the **Preserve the employees already in this distribution** list functionality to convert membership type to **Manual** for existing users.
- Uncheck to deactivate and remove the users based on the rules, and only include those in the import file.

Import members into a Viva Glint Distribution List

Article • 09/14/2023

Importing members to an existing Distribution List removes the current attribute rules from that list.

Imports can be into a .csv or .xlsx file

Follow this procedure:

1. From the **Distribution Lists** page, select the existing list you want to make additions to.
2. Select the **Add/Edit Employees** button.
3. From the **Choose a way to add employees** window, select **Import**.
4. Choose .csv or .xlsx file.
5. Drag and drop or browse to upload a file (maximum size 50 mb).
6. Select **Import File**.
7. The **Confirm your import** window displays. View the summary and if it's as expected, select **Confirm Import**.

> **Tip**
>
> Read this guidance for more information to set up and use Distribution Lists in Viva Glint

Optional - Use the blended membership Distribution List functionality

Dynamic attributes automatically add and remove users to and from a distribution list. They can also include or exclude certain users from a list. Knowing how your distribution list has been populated helps you make decisions about how to add users.

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Use the dynamic Distribution Lists functionality

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- If the Distribution List began manually, adding attribute rules will change the list to include both **Attribute Rules** and **Manual**.
- If a manually added member is deleted and they match the filter criteria, they'll still appear in the Distribution List, but the **Added by** method will change from **Manual** to **Attribute Rules**.

  > **Important**
  >
  > Importing users to an Attribute Rules Distribution List removes existing rules.
  > - Activate the **Preserve the employees already in this distribution list** functionality to convert membership type to **Manual** for existing users.
  > - Uncheck to deactivate and remove the users based on the rules, and only include those in the import file.

Export a Viva Glint Distribution List

Article • 11/14/2023

Admins can export Distribution Lists to quickly see the list of employees receiving a survey or the members of a group with specific permissions. This is especially useful for large teams.

> **Note**
>
> The option to export distribtuion lists is not available for Employee Lifecycle surveys.

Export survey recipient lists from Program Summary

This export includes first and last names, email addresses, and employment status.

1. From your Glint admin dashboard, select the **Configuration** symbol and then **Survey Programs**.
2. Select the survey for which you would like the recipient list.
3. On the **Program Summary** page, choose the **Distribution** page.
4. Select **Download Recipients**.
5. Choose whether to include all user attributes and User Roles.
6. Select **Export**.

Use the Viva Glint Question Library

Article • 07/13/2023

From the admin dashboard, in the **Survey** section, you'll find the **Question Library**. Microsoft Viva Glint's Question Library contains hundreds of questions and statements that can be included in your surveys. If you choose a template for a specific survey type, the questions and statements that best support the survey goal are prepopulated into the template. You can create and edit items from the Question Library, but Viva Glint suggests that you use our standard questions as most are mapped to benchmarks.

From the Question Library you can:

- Search items by type of question, key driver, benchmark, and whether translations are available
- Import and export questions – used for language translations
- Edit or create questions
- Sort by Viva Glint standard question or a custom question you have created or edited
- View the number of programs in which you have used this question or statement

> **Note**
>
> Changes made to the Question Library:
> - When a reporting label is changed, it will instantly propagate to all programs, past and present.
> - When question text is changed, it propagates to future programs only.

The implication of customizing Question Library items

Viva Glint has done extensive research to identify the most reliable and valid items linked to survey goals, and our benchmarks are created using the exact text from these items. Even a slight change to a question or statement can alter the meaning enough to invalidate a comparison to the benchmark.

> **Tip**

In cases where text is altered to sufficiently alter the item's meaning, we do not keep the benchmark and this item is considered customized. While losing a benchmark might seem like a disadvantage, using items that are most relevant to your organizational needs and measuring progress over time are more impactful.

We recommend that you do not customize standard survey items as customized items should not map to external benchmarks. If making a change to our standard survey items, we recommend duplicating the question and creating a customized version.

Custom questions interfere with question mapping

Once you have selected your questions that align to your organizational strategies, you may decide to compare trending data from previous surveys to your current survey. If you do decide to compare historical data to new items moving forward, it's vital that the previous and new questions are truly comparable. If historical data isn't aligned to new insights, a client risks misinterpreting the results, not having clear connections from historical to new insights or proceeding with misguided action steps. To ensure true comparisons between previous and new results, it's essential to match items accurately.

Mapping guidelines

To map, you must consider the wording, item intention and referents.

Item intention

If items have different wording, they can still be mapped, provided the intention of the historical item aligns with the intention of the item it's being mapped to – they must have the same aimed purpose and outcome:

	Glint Item	Historical Item
✅ Shares intent	My manager cares about me as a person	My manager shows sincere interest in me as a person.
✅ Shares intent	I can get the support I need from my manager.	I can get the help I need from my manager.
X Does not share intent	I feel satisfied with the recognition or praise I receive for my work.	I receive recognition when I do a good job.
X Does not share intent	Where I work, we have clear priorities.	Where I work, we set clear strategic goals.

Item referent

To gain specific insights, an item will always have a referent (for example, Company, senior leadership, direct manager, team, coworkers or even the employee themselves). If two items have similar intentions but are aimed at different referents, they can't be mapped.

	Glint Item	Historical Item
✅ Refers to the same audience	I have confidence in the leadership team.	I have confidence in the organization's executive leadership.
✅ Refers to the same audience	Teams at this company collaborate effectively to get things done.	We cooperate well across the company to get things done.
X Does not refer to the same audience	This organization does a good job communicating with employees.	This organization does a good job communicating with me.
X Does not refer to the same audience	My performance is evaluated fairly.	People are evaluated fairly at this organization.

Edit items from the Question Library

There may be cases where slight edits to wording can be accommodated without altering the meaning; in these cases, Viva Glint will be able to apply the item to benchmark data.

Any item can be edited by hovering over and selecting the row that the item appears on in the Question Library. An Edit Question panel displays. From this panel you can:

1. Edit the question, and

2. View associated programs

Procedure to edit a question:

1. Choose the language. Languages for which this item has been translated will be visible in the dropdown menu.
2. Change the item type, if applicable.
3. Edit the reporting label, if desired.
4. Edit the item text, if desired.
5. Add instruction text that helps the user understand the meaning of the item.
6. Add comment placeholder text, if desired.
7. Change the rating scale, if applicable.
8. Indicate whether the label explanation for ratings should be shown.
9. Enable or disable commenting.
10. Choose whether the item is optional or mandatory.
11. Map the item to a Suggested Action Template, if desired.
12. Select **Save Changes**.

Examples of edits that won't inactivate a benchmark

1. Example 1: Matching the language of the business

    - Standard: I would recommend my *manager* to others.
    - Modified: I would recommend my *supervisor* to others.
    - Recommendation: Modifying a term in the item to make it more specific to your organizational language is acceptable and doesn't affect the benchmark.

2. Example 2: Using synonyms

    - Standard: The recruitment process was *excellent*.
    - Modified: The recruitment process was *great*.
    - Recommendation: If the replacement word is likely to be interpreted similarly, the item change is acceptable.

Examples of edits that inactivate a benchmark

1. Example 1: Altering the subject

    - Standard: *I feel empowered* to make decisions regarding my work.
    - Modified: *My manager empowers me* to make decisions regarding my work.

- Recommendation: Altering the subject in an item changes the way people respond, and the benchmark will no longer be available.

2. Example 1: Altering the subject

- Standard: My manager *provides me with feedback that helps me improve my performance*.
- Modified: My manager and *I have regular conversations*.
- Recommendation: When the meaning of an item has been fundamentally altered, the change isn't recommended, and the benchmark is no longer available.

View associated programs

Use this tab to see if this item is associated with any existing program. To add it to a program, use the Questions page in Program Summary .

Add new items to the Question Library

Select the + **Create Question** button on **the Question Library** page. In the Create Question slider panel that opens, set up the same items that appear above in Procedure to edit a question. Follow that procedure to create a new item to add to your organization's Question Library. You'll now be able to see it in the Name column, sorted alphabetically by key driver.

Export, translate, and import items

English is the default language for all Viva Glint programs. You may choose to survey and send email communications to your employees in their preferred language rather than the default language. Glint provides its customers with more than 70 language translation offers for standard content. Language translations can be set during the initial survey configuration or added later as needed.

To support this, Viva Glint allows admins to export all program content - including questions and items from the Question Library - into .csv and .xlsx format. Exporting a file that includes English and all relevant translations allows users to review, add or edit translations in one place versus copying and pasting one language at a time into the platform.

There are four steps you use for translating Question Library items:

1. Export the items.

2. Employ a translator to make translations.
3. Use a translation reviewer to verify translations.
4. Import the items back into the platform.

Export your items for language translation

The first step for translating language translations is to export the list of items.

1. Select **Export Questions** from the **Actions** dropdown menu.

2. Choose the language(s) to include from the search box in the Choose Which Language to Export dialog box, which opens.

3. Select your export format from *.csv* or *.xlsx*.

4. Select **Export**. A dialog box lets you know that your file is being downloaded.

5. After the report is downloaded, select **Close Window**.

Translate the exported items

From this file that has been generated:

1. Use a translator to make exact changes to the items in column C for the approved English text in column B.
2. Further to the right, consider other items that might require translation: reporting labels, Multiple Choice questions, and ratings labels.
3. Use your translation reviewer to ensure that the translated items match exactly to the approved item from the Question Library.

For translators:

Do's:

- Keep the translated content in the same cell and columns.
- Ensure that there are no spaces added before/after the updated content. Ensure there is also consistent punctuation at the end of sentences (that is, all using a period or none using a period).
- Check for grammatical errors.

Don'ts:

- Do not edit, translate, or delete any bracketed text such as {user first name}, `<COMPANY_NAME>` or {{company name}}. It must stay the same for personalization

coding. There is no need to translate anything in brackets. If questions containing brackets are changed, ensure brackets around the text are balanced (that is, one bracket at the start and one at the end, or two at the start and end).
- Do not make visual, formatting, or other stylistic changes unless it improves clarity. Changes should never alter the meaning conveyed in the original English text.
- Do not add personal comments. `
- Do not add new or additional columns or remove columns.

For translation reviewers

Do's:

- Focus on copy-editing by fixing any typos or grammatical errors.
- Confirm that the original meaning of the question remains intact.
- Keep translated content in the same cell and columns.

Don'ts:

- Do not rewrite entire sentences.
- Do not move translated content to different cells or columns.
- Do not add personal comments.

Import your translated items

Back on the **Question Library** page, select **Import Questions** from the dropdown **Actions** menu.

1. Drag and drop or browse to find the translated file and place it in the box.

2. Select **Next**.

3. If everything looks as expected, select **Make Changes**.

Use Viva Glint benchmarks

Article • 07/13/2023

Microsoft Viva Glint believes that global benchmarks can provide useful level-setting comparisons during an initial survey, but they aren't as useful to the organization as internal and trend (historical) comparisons in subsequent surveys.

With 10 years of experience with benchmarking, Viva Glint now serves over 900 global customers from across every industry. Most of our customers use our standard survey questions, enabling us to offer global, high-performing, industry, and country benchmark suites using cross-customer data* exclusively. Viva Glint’s client-based benchmarks are among the best in the industry.

Viva Glint standards are robust and aspirational

We strongly urge our customers to use our standards - the overall global and high-performance benchmarks (top 10th & top 25th percentile). They're more powerful and aspirational than a custom norm (For example, industry-specific).

Download this People Science slide deck to view the following research:

- Customer-based benchmarks: Provide more value at lower cost
- Custom benchmarks: Not worth the time, cost, and effort
- The 2022 Global Benchmark Suite at-a-glance
- The new benchmark generation process
- Benchmark offerings:
  - Global benchmarks
  - Industry benchmarks
  - Country benchmarks
  - Nursing Excellence (Magnet) benchmarks

Viva Glint’s cadence for benchmark updates

Benchmarks represent a comprehensive and current set of norms that provide accurate and relevant comparisons for customers. Benchmarks are updated annually to reflect customer needs and emerging industry interests.

> ⓘ **Note**

It is unnecessary to update benchmarks more frequently as scores rarely change more than a point or two between updates.

Considerations for choosing a benchmark

Think about the following when choosing the list of benchmarks for your managers to use:

- Where does your company compete for talent? Within industry, or across industries?
- Engagement practices vary - companies in the same industry can have different strategies for success (for example, low-cost vs. premium service models).
- Companies aspire to be among the top 20% in specific areas that are important to them.

> **Tip**
>
> For large customers, we initially advise using a broad benchmark like our global benchmark, not one specific to an industry. Glint's global benchmark is applicable to all parts of a business and provides a solid baseline comparison. Often talent comes from or leaves to go to organizations in a different industry, so our global benchmark may be more helpful from a talent acquisition and retention perspective. Then, as customers continue to survey, comparisons of scores change over time (trend) and how groups compare within the organization may become more informative than benchmarks.

Considerations for updating benchmarks

Updated benchmarks provide additional comparisons by standard segments, such as country or industry, and by added items that may be part of a customer's survey feedback. Comparison trends provide valuable insights unavailable in Viva Glint benchmarks. For example, newly benchmarked diversity and inclusion items can help customers interpret the effectiveness of internal programs.

> **Note**
>
> Deploying new benchmarks will retroactively impact customer reports, action plans, etc. for past surveys. It is beneficial to adopt the latest benchmark suite available,

but a change in benchmark should be accompanied by a thorough internal communications approach.

Editing a survey item can disqualify it from a benchmark

Viva Glint has done extensive research to identify the most reliable and valid items linked to survey goals, and our benchmarks are created using the exact text from these items. Even a slight change to a question or statement can alter the meaning enough to invalidate a comparison to the benchmark.

Tip

Ensure alignment to the standard Viva Glint item text so benchmarks are truly an apples-to-apples comparison. There may be cases where slight edits to wording can be accommodated without altering the meaning; in these cases, Viva Glint will be able to apply the item to benchmark data. In cases where text is altered to sufficiently alter the item's meaning, we do not recommend keeping the benchmark. Instead, treat it as a custom item. While losing a benchmark might seem like a disadvantage, using items that are most relevant to your organizational needs and measuring progress over time are more impactful.

Examples of when to keep or discard the benchmark

1. Example 1: Matching the language of the business

   - Standard: I would recommend my manager to others.
   - Modified: I would recommend my supervisor to others.
   - Recommendation: Modifying a term in the item to make it more specific to your organizational language is acceptable.

2. Example 2: Using synonyms

   - Standard: The recruitment process was excellent.
   - Modified: The recruitment process was great.
   - Recommendation: If the replacement word is likely to be interpreted similarly, the item change is acceptable.

3. Example 3: Altering the subject

- Standard: I feel empowered to make decisions regarding my work.
- Modified: My manager empowers me to make decisions regarding my work.
- Recommendation: Altering the subject in an item changes the way people respond.

4. Example 4: Altering the meaning

- Standard: My manager provides me with feedback that helps me improve my performance.
- Modified: My manager and I have regular conversations.
- Recommendation: When the meaning of an item has been fundamentally altered, the change is not recommended.

Customize action plans in Viva Glint

Article • 07/13/2023

Suggested Action Templates contain content that Microsoft Viva Glint has included as suggested action items to help managers achieve Focus Areas with their teams. Action Plan templates live in Content Resources within Action Taking on the admin dashboard.

Understand terminology associated with action plans

The following terminology assists with understanding how Viva Glint determines action plan templates:

- **Driver**: A factor that affects employee engagement, such as growth or culture. Survey items are developed to surface engagement drivers.
- **Suggested Action Templates**: The overall template associated with a survey item. Managers choose a **Focus Area** via the **Take Action** command within survey results and are then directed to the Suggested Action Template associated with that chosen key driver.
- **Suggested Action Items**: The components of a Suggested Action Template.
- **Content Resources**: Articles, images, PDFs, and videos that make up Suggested Action Items.

Specifications for adding Content Resources

All content that exists in Content Resources is considered Viva Glint standard content. Content may exist as articles, images, PDF files, or videos. Content must first exist or be added in Content Resources before it can be attached to a Suggested Action Template.

Following is the character limit guidance for adding Content Resources:

Field	Character limit
Name	100, no spaces
Title	2048
Description	50 K+
Rich text	50 K+
Image file name	255, include file extension

Field	Character limit
PDF file name	255, include file extension
Video link URL	5048

Adding external links to Content Resources

1. From the Viva Glint admin dashboard, select **Configure** and then **Content Resources**.
2. Select + **New**.
3. Select **I Understand**, indicating that you understand that adding a new item adds it for all languages.
4. Add a title in the Untitled Resource section, select the **Resource Type** from the dropdown box, and add a description.
5. Follow the on-screen guidance for adding the resource.
6. Select **Save**.

How to clone customized standard content

Edited content must be renamed before it can be saved and published. This step is referred to as creating a clone so that original content is never altered. In the Shared column, the content indicated as **Shared** is Viva Glint standard content. In the **Last Modified** column, standard content is indicated by *Viva Glint Admin*. New or customized content will be classified as Custom in the **Shared** column and *Your Name* in the **Last Modified** column.

How to add LinkedIn Learning videos to Content Resources

Dozens of LinkedIn Learning videos are already linked to Viva Glint templates. If you're already a LinkedIn Learning customer and want to add different course content to your Viva Glint template, check out LinkedIn Learning Customer Success: Course Content Corner. To become a LinkedIn Learning customer, use this link.

Link a new survey item to a Suggested Action Template s

Most standard survey items are automatically linked to a Suggested Action Template by default. You can, however, edit an existing template by linking new items to it. This creates a new template (clone) that you'll rename.

Procedure

1. From the Viva Glint admin dashboard, select **Configure** and then **Suggested Action Templates**.

2. Choose the template you want to add an item to from the **Name** column. You see the item(s) already linked to the template. An item may appear twice if the item scale was different between surveys. Hover over the item to see where the item was used, and the point scale assigned to it.

3. Select the **pencil** symbol to edit.

4. Use the search bar dropdown menu to **find the new question**. Type in the key driver or a few words from the item to find it.

5. Select **Update**. The new item will now appear in the **Questions** section.

6. Select **Save**. The *Create new Suggested Action Template* name box displays. Remember, this is so the original template isn't altered.

7. Insert a name that resonates with you for ease of finding later.

8. Select **Done**. *The new Suggested Action Template will now appear as a Custom template*.

   > ⓘ **Note**
   >
   > Suggested Action Templates update in real time. Often standard survey items are shared across multiple survey programs. You may be updating a template currently in use. Be sure that the addition will be useful to any user who has chosen that template as a Focus Area.

Edit a suggested action item

Procedure

1. From the admin dashboard, select **Configure** and then **Suggested Action**.
2. Select the template from the **Name** column.

3. On the template page, under Suggested Action Items, tap the action to be edited and select the **pencil** symbol.
4. On the **Resource** page, edit the title, add to, or edit the description, add, or edit video link.

Move a suggested action item

Procedure

1. Tap the action item to be reordered.
2. Use the three horizontal lines to drag and place the item elsewhere in the list.

Delete a suggested action item

Procedure

1. Tap the action item to be deleted.
2. Select the **trash can** symbol.

Add default action items to a Suggested Action Template

Default Action Items will automatically appear anytime a new Focus Area is created for that item. For any Suggested Action Item that your company wants users to review, tap on the item and select **Move to Default**.

Resources

This PowerPoint deck explains how to initially set up a Suggested Action Template.

Manage language translations in Viva Glint programs

Article • 08/17/2023

English is the default language for all Microsoft Viva Glint programs, but surveys and email communications should be sent to employees in their preferred language. Viva Glint provides customers with more than 70 language translations for standard program content. Language translations are set during the initial survey configuration or added later as needed. Exporting a file that includes the default language and all relevant translations allows reviewing, adding, or editing translations to happen in one place.

Translations may be needed for email communications and survey content such as single-item questions, statements, multiple-choice questions, rating labels, and text snippets.

There are four steps for making language translations:

1. Export content from the Viva Glint program into a *.csv* or *.xlsx* file
2. Translate content
3. Review translations
4. Import content back into the Viva Glint program

Export survey and email text

Follow these steps:

1. Navigate to the appropriate survey program.
2. From the Actions dropdown menu and, select **Export Program Content**.
3. Choose if you'll export email content, survey content, or both.
4. Select the languages you would like to export from the Languages to include section. Default text will already be included in addition to whatever additional languages are chosen.
5. Select **Generate CSV**.
6. From the file generated, make translations to import back into Viva Glint.

ⓘ **Note**

The email content will be downloaded as its own separate Excel document. Survey content will download as a zip file with one file containing survey questions and text snippets.

Note

The Viva Glint system requires that one language document is initially exported and then later imported back into the program before the process can be repeated for other languages.

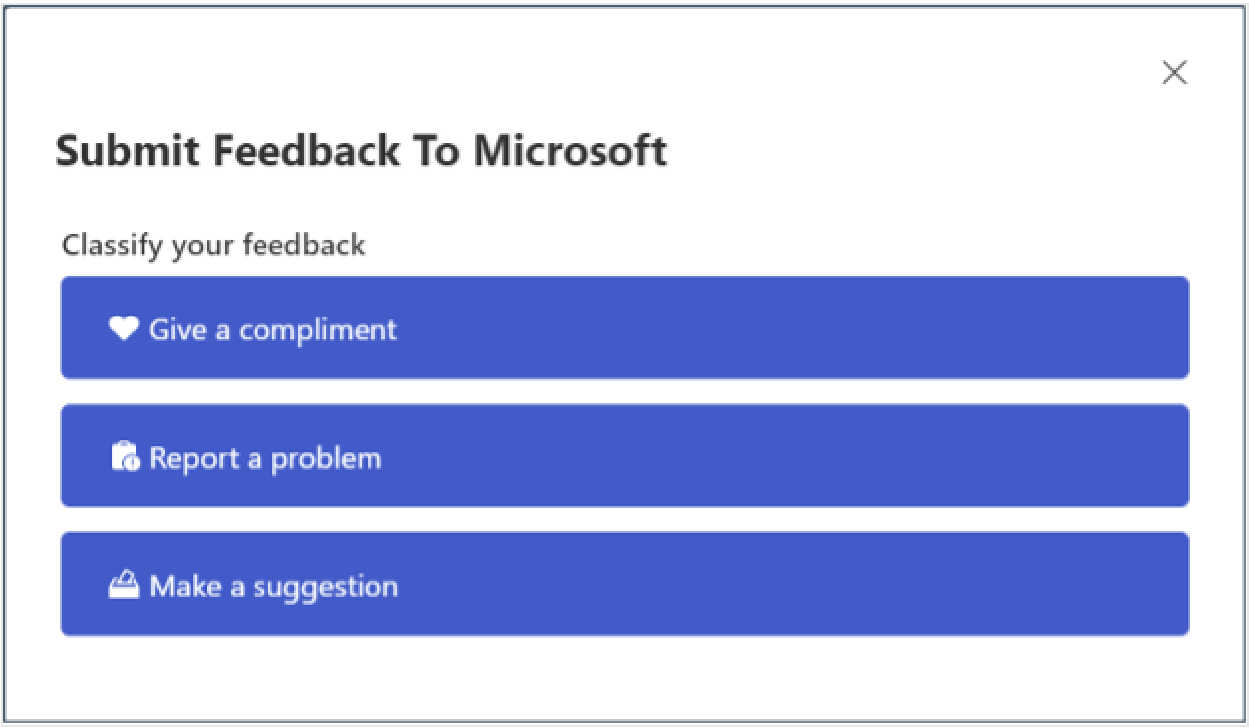
Submit product feedback to Viva Glint

Article • 10/30/2023

Microsoft Viva Glint provides an easy and consistent way for customers to provide in-app feedback. Submissions go directly to Viva Glint product and engineering teams so they can review suggestions to inform roadmap and strategic prioritization.

Three options to provide feedback

Select an option to open the corresponding feedback window.



Give a compliment

- Supply the details you'd like to share.
- You have the option to:
  - Include a screenshot
  - Include a screen recording
  - Upload files
- Indicate whether you can be contacted regarding your feedback.
- Select **Submit**.

Report a problem

- Provide the details about what went wrong.

- You have the option to:
  - Include a screenshot
  - Include a screen recording
  - Upload files
- Indicate whether you can be contacted regarding your feedback.
- Select **Submit**.

> ⓘ **Important**
>
> Need immediate help with an issue? **Get support from Microsoft 365**

Make a suggestion

- Tell us what we can do better.
- You have the option to:
  - Include a screenshot
  - Include a screen recording
  - Upload files
- Indicate whether you can be contacted regarding your feedback.
- Select **Submit**.

Follow up on feedback

A screen displays confirmation that your feedback has been received. Also included is a link to track your feedback and see how it's making a difference and a link to our general Feedback forum. Allow a few days for your feedback to appear.

×

Thank you!

We appreciate your feedback! Your comments will help us improve.

Want to get more engaged?

Visit our Feedback forum to create, view and vote on community feedback.

Feedback forum

Track your feedback and see how it is making a difference

Please allow some time for your latest feedback to show up.

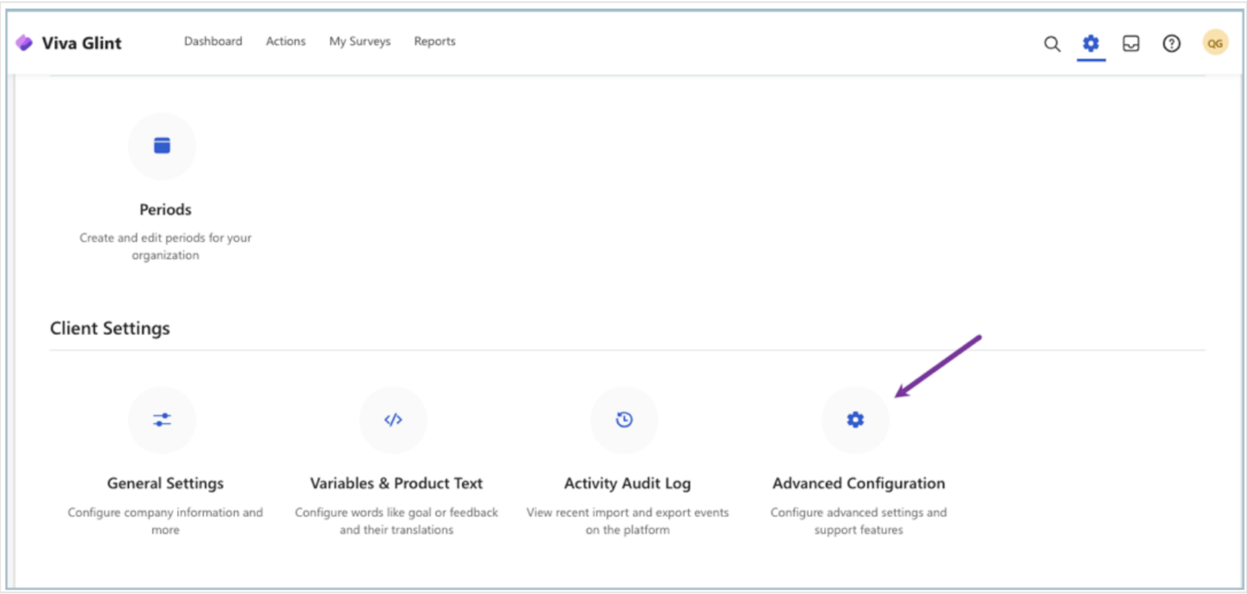
My Feedback

Done

Understand Advanced Configuration options in Viva Glint

Article • 09/12/2023

For highly trained users, Microsoft Viva Glint offers Advanced Configuration options, which allow users to view and modify advanced platform settings and perform complex data updates.



> ⊗ **Caution**
>
> Changing certain settings in Advanced Configuration may be irreversible. These options should only be modified by trained Viva Glint users.

Grant user access to Advanced Configuration

To access, a Global or Company admin must enable Advanced Configuration access on an admin user's profile in Viva Glint.

Grant access to an existing admin user

1. From the admin dashboard, select the **Configure** symbol, then in **Employees,** choose **People.**
2. In the **Search People** field, enter the user's first and last name or email address.
3. Select the user when they appear as a search result.

4. On the user's detail page, in **Company Admin: Advanced Configuration Access,** select the **pencil symbol** to edit.
5. In the dialog, **turn on Advanced Configuration access** and select **Save**.

After this enablement, when a user selects the **Configure** symbol, then goes to **Client Settings**, they'll see **Advanced Configuration.**

> ⓘ Note
>
> A user may need to refresh or sign into Viva Glint again to see Advanced Configuration once enabled.

Grant access to a Support user

To manage external users' access to Viva Glint and Advanced Configuration, follow the guidance in this article: Manage external users in Viva Glint .

Explore Advanced Configuration menu options

Menu option - Details

View specifics about how data display in Viva Glint reporting and which features are enabled.

Setting	Description
Auto Action Plans	Enable autogeneration of action plans for eligible users
Custom Surveys Enabled	Advanced survey customization, no action required.
Confidentiality threshold (minSampleSize)	Scores don't display for fewer responses than this threshold. Viva Glint standard: 5
Suppression threshold (minGroupSize)	To prevent guessing the scores of respondent groups with insufficient data, the next biggest group is suppressed until the total insufficient + suppressed = or exceeds this number. Viva Glint standard: 2
No suppression parent team size threshold (noSuppressionParentTeamSize)	Access results for teams that would have been suppressed for parent team respondents

Setting	Description
	greater than or equal to this threshold. Viva Glint standard: 400
Industry average eSat score	Industry average for eSat
Industry average response rate	Industry average for response rate
minSampleSizeSurveyStats	Response rates don't display for groups smaller than this value. Viva Glint standard: 5
Rating questions scale	Number of responses available on rating questions. Viva Glint standard: 5
insightMinGroupSize	In the Alerts report, minimum number of respondents for a group to be considered. Viva Glint standard: 20
insightMinScoreDifference	In the Alerts report, minimum difference from benchmark score for a group. Viva Glint standard: 8
insightsMax	In the Alerts report, the maximum number of alerts to display. Viva Glint standard: 2000
InsightsMaxAttributesPerGroup	In the Alerts report, the maximum number of attributes to combine for a group. Viva Glint standard: 2
InsightsMaxLevels	In the Alerts report, when hierarchies are selected, the maximum number of levels considered. Viva Glint standard: 3
insightsPValue	In the Alerts report, the statistical likelihood that results aren't by chance and are significant. Viva Glint standard: .05
Scores should represent favorability scores by default	Not recommended. Viva Glint recommends and displays average scores.
Comments privacy: minimum # of responders for search results	Comments don't display for fewer question responses than this threshold. Viva Glint standard: 10
Comments privacy: minimum # of responders for facet/grouping	Comments don't display by topics for fewer responses than this threshold. Viva Glint standard: 10
driverImpactMinDifferenceFromBaseline	In the Driver Impact report, the minimum difference from the item score for the entire company. Viva Glint standard: 5

Setting	Description
driverImpactMinSamples	In the Driver Impact report, the minimum number of respondents to display results. Viva Glint standard: 20
Exclude negative strengths and positive weaknesses?	Exclude negative strengths and positive weaknesses for Driver Impact calculation.
Whether to allow the users to look up questionnaires without a kiosk	Allow users to access attribute-based surveys without a registered kiosk. Learn more
Self-Serve Mode	EDIT_AND_CREATE allows admins to edit and create survey programs
Support Users for Pulse Notifications	No action needed, leave blank
Action Plans to Goals enabled?	No action needed, leave as true
Questionnaire Theme	Default theme selected. No action needed, leave blank
Enable Cross Program Filtering?	Filter results across multiple surveys programs. Viva Glint standard: true
Does the client have LinkedIn Learning LSEP license?	Employees have unlimited access to all LinkedIn Learning content
Percentage Probability of following up on marked question	To encourage open-ended comments, percentage of users that will be prompted with follow-up questions in surveys. Viva Glint standard: 15
Frequency of in-product feedback shown on non-MLE Dashboard	Percentage of users that will see in-product feedback questions in their dashboard. Viva Glint standard: 10
Enable Filter Suppression on Scores	Disable users' ability to filter to teams whose scores are suppressed

Menu option - Surveys

For a simpler view of existing survey programs, from the admin dashboard, select the **Configure** symbol, then in **Surveys** select **Survey Programs**. Use the **Advanced Configuration Surveys** option to view advanced technical details related to your survey programs including:

- Last modified by user
- Name

- Type
- State
- Program template name
- Start Date
- Frequency
- Recurrence Rule

Select a survey program to view more details and options:

Setting	Description
State	ACTIVE (ready to be enabled) or DRAFT (edit mode)
Domain	No action needed, leave blank
Survey Trigger Type	How surveys generate: Schedule, Event (example: Hire Date), User Initiated
Event Trigger Survey Questionnaire Shelf Life	Days to complete survey
Generate DISABLED survey cycle in Self Serve	True. Recurring/upcoming surveys don't enable until an admin enables them
Resubmit Submit Enabled	Allow users to resubmit their own surveys
Survey Type	Recurring, On demand, Employee Lifecycle (ELC), or Always-On
Event Trigger Survey Minimum Pulsing Interval (Days)	Minimum days before a user can be surveyed again
Icon Name (css class)	No action needed, leave blank
Contact Method	Company Email or Company and Personal Email
Minimum Sample Size	Blank. Refer to platform-level settings in Details
Minimum Group Size	Blank. Refer to platform-level settings in Details
No Suppression Parent Team Size	Blank. Refer to platform-level settings in Details
Minimum sample Size Survey Stats	Blank. Refer to platform-level settings in Details
Minimum Respondent size for Driver Impact Report	Blank. Refer to platform-level settings in Details
Minimum Respondent Size for Comments	Blank. Refer to platform-level settings in Details

Setting	Description
Minimum Group Size for Comments	Blank. Refer to platform-level settings in Details
Manager Report Default Question 1	Displays selection from Survey Programs: Survey: Reporting
Manager Report Default Question 2	Displays selection from Survey Programs: Survey: Reporting
Run action plans	True. Generate action plans for eligible users
Default survey locale	Displays selection from Survey Programs: Survey: Program Setup
Additional Survey Locales	Displays selection from Survey Programs: Survey: Program Setup
Enable Follow Up	Enable follow up questions that encourage more open-ended comments in surveys
Sensitive Comments	Enable sensitive comment flagging in the admin view of the Comments report for personally identifiable information (PII), sensitive topics, and profanity Learn more

Menu option - Users

To export Viva Glint users, go to the admin dashboard, select the **Configure** symbol, then in **Employees** choose **People** and then **Export** and follow on-screen guidance.

Menu option - External Import

Import external data from non-Viva Glint survey results to see trend for past items that will continue to be asked in Viva Glint survey programs. Learn more.

Menu option - Data Apps

Use Viva Glint Data Apps to export recipients or update attribute values for users in closed surveys. Learn more.

App UUID	Description
EXPORT_USERS_FROM_SURVEY_CYCLE	Export survey recipients, attributes, and hierarchies as they existed when a survey launched
RETROACTIVE_PULSE_UPDATE	Update employee attributes associated with a closed survey cycle

Menu option - Uploads

Use the Uploads option to:

- View file upload details.
- Update users' custom data access in bulk.
- Perform basic retroactive data updates to correct employee attributes in reporting.

Upload types:

- **MANAGERS_UPLOAD:** To upload custom results data access for dashboard users in bulk. Learn more .
- **USERS_UPLOAD:**
  - To upload employee data, follow the guidance in this article: Upload your employee attributes to Viva Glint .
  - Use the guidance in this article to perform a Retroactive USERS_UPLOAD: Use Advanced Configuration Uploads .
- **ROLE_UPLOAD:** To upload users to a Viva Glint User Role, follow the guidance in this article: Import and export Viva Glint User Roles .

Menu option - Running Jobs

Review details, statuses, and start times for Advanced Configuration tasks performed within the last 15 minutes to 48 hours, depending on the selected time-frame.

Import historical response data in Viva Glint

Article • 11/10/2023

For highly trained users, Microsoft Viva Glint Advanced Configuration offers the ability to import external, historical response data for items that trend with items that you select for your Viva Glint survey program.

Learn about the People Science perspective

It's common for an organization to spend years asking the same survey items that leaders are comfortable with. It may be time to revisit items to ensure they're aligned to your organization's current strategy. Before undertaking an import of historical, external data, consider these factors: Learn more .

Review prerequisites

Data from an external source must meet the prerequisites listed here to be eligible for import to Viva Glint. If your data don't meet these requirements, do not import via the Advanced Configuration External Import feature.

Survey program

- The confidentiality threshold for your Viva Glint survey program is equal to or greater than the source survey for the external data.
- Data are imported to a Recurring or Ad Hoc survey.

> **Important**
>
> External imports are not available for Always-on or Lifecycle surveys.

Survey items

- External data are tied to items that map to Viva Glint items. Learn more .
- The response scale for rated items is compatible with Viva Glint:
  - 5-point Likert scale: 1 = Strongly Disagree, 2 = Disagree, 3 = Neither, 4 = Agree, 5 = Strongly Agree.

- Reversed 5-point Likert scales require conversion before import to Viva Glint.

Respondent data

- Raw, respondent-level data, **NOT** aggregated data.
- All respondents are identified with their unique employee ID.
- External data attributes and values map to values in Viva Glint.
- The file layout aligns with Viva Glint requirements:
  - Horizontal layout with individual response data and attributes. See more details in the **Prepare data files** section.

Map historical survey items

Complete a mapping of historical and Viva Glint items to determine exactly where you'll see trend in reporting. Learn more .

> ⓘ **Important**
>
> As you map items from the Question Library to historical items, include the Glint question ID, which is available in Question Library exports. You will need these IDs to prepare your Raw Score File.

Set up a survey program

Set up your Viva Glint program, including items that trend with your external survey data. Learn more .

> **Tip**
>
> Before importing users for the external import, select a placeholder Distribution List to complete program setup, such as Company Admin.

> ⓘ **Note**
>
> Exclusion lists and question targeting configured in your survey will not apply to an historical import.

Prepare data files

External imports of historical data require three data files, each with their own requirements. Select the file name in the following table to see a sample of each file.

ⓘ **Important**

All files must be in .csv format with a comma separator and UTF-8 encoding. Enclose values that contain commas with double quotation marks. For example: "Manager, Customer Experience."

File	Description	Email address label	Import to
User File	All employees from a historical, external source formatted to align with your Viva Glint attribute setup	Match with your attribute setup	Viva Glint People page
Raw Score File	Respondent email address + question columns populated with numeric response values	Must be: User e-mail	Advanced Configuration: External Import
Respondent User File	Required fields for all respondents from historical, external source: email, first name, last name, ID, status	Must be: Email Address	Advanced Configuration: External Import

User File

To import historical data and generate reports, first add all historical employees to Viva Glint with an employee import. This file includes all employees from a historical, external source formatted to align with your Viva Glint attribute setup. See this sample User File.

Confirm that:

- Attribute setup is complete in Viva Glint. Learn more.
- Employee IDs and Email Addresses between current Viva Glint and historical users are aligned.
- You include accurate Employee ID and Manager ID relationships to calculate your manager hierarchy for historical data and reporting. Learn more.
- Attributes and values between current Viva Glint and historical users are aligned.
  - For example: Department = Human Resources will not trend with Department = HR.

Raw Score File

Your Raw Score File should be in a horizontal layout and contain an email address value to identify each user and columns of question and comment data. See this sample Raw Score File.

- **First column:**
  - Email which **must** be: User e-mail
- **Additional columns:**
  - **Question IDs:** Use IDs from the Question Mapping exercise that you conducted to assign Glint Question IDs to your historical response data.
    - **Key Outcome Items:** Ensure that these items are included in your Raw Score File (for example: eSat and Recommend). If Viva Glint Key Outcome items don't exist in historical data, include the Question IDs as blank columns in your Raw Score File.
    - **Rating Question Comments:** For open-ended feedback associated with rating questions, place a column to the right of the question column and add **_COMMENTS** to the question ID.
    - **Open-ended Questions:** Use the same column layout as for rating question comments but populate 0 where there's a comment and -1 where there's no comment.
    - **Multi-select Questions:** Separate numerical response values with a colon (:). If comments are attached to responses, use the same column layout as for rating question comments.

> ⓘ **Important**
>
> Comments that exceed 1024 characters will be truncated.

Respondent User File

Your Respondent User File needs to contain the following fields for the survey respondents associated with your historical data. See this sample Respondent User File.

- **Email Address:** must be labeled Email Address
- **First Name:** label must match your attribute setup
- **Last Name:** label must match your attribute setup
- **Employee ID:** label must match your attribute setup
- **Status:** label must match your attribute setup

Import users

Import your prepared User File to the Viva Glint People page to establish users and attributes for historical data.

> ⊗ **Caution**
>
> Avoid external, historical imports while Viva Glint surveys are live.

- Import employee data.
- Create a Distribution List with these historical employees. Learn more.
- Update the Distribution section of your survey program with your new Distribution List. Learn more.

Import external data

To complete your external, historical import, access Viva Glint's Advanced Configuration page. If you don't have access, confirm that:

- You are in the Company Admin User Role.
- The Advanced Configuration feature has been enabled for you as a user. Learn more.

> ⊗ **Caution**
>
> Your Glint survey program must be in an approved state while you import external, historical data and while reports generate. Ensure that your survey is approved before continuing.

To import historical users and their responses:

1. From your admin dashboard, select the **Configure** symbol, then in **Service Configuration** choose **Advanced Configuration**.

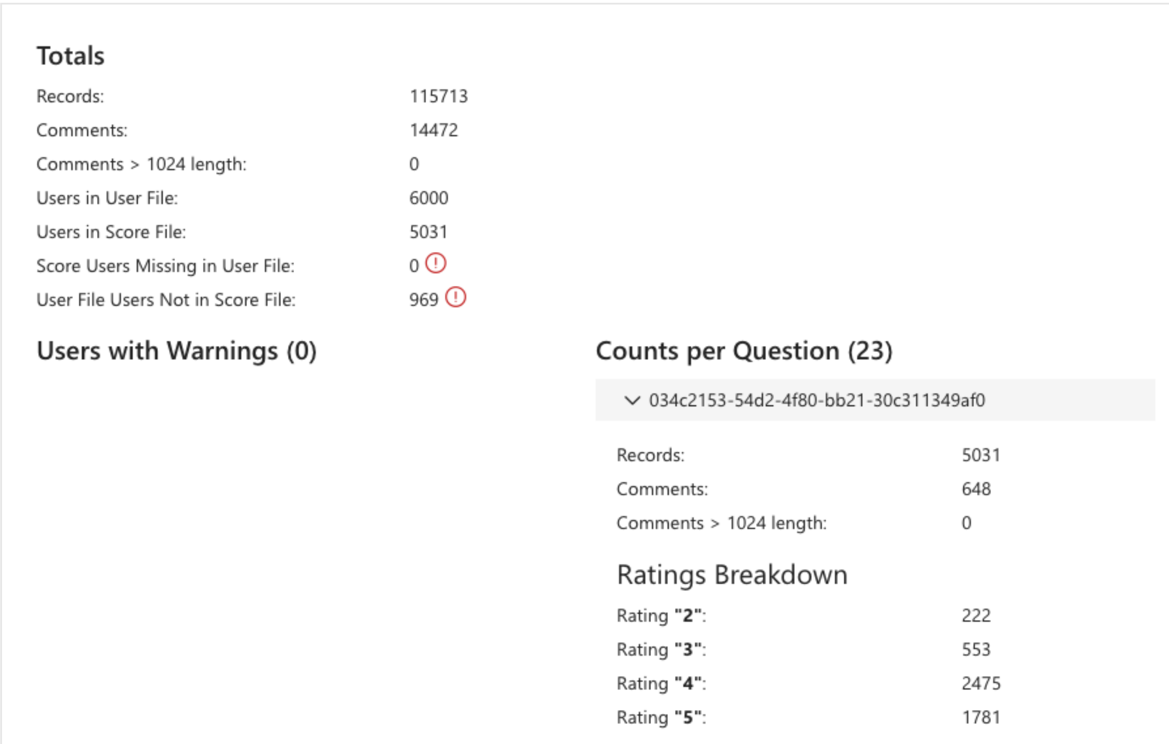
2. In the menu on the left, select **External Import**.

3. On the **External Import** page, make selections to import your data:
   a. **Manual Mode:** Leave this toggle switched to **Off**.
   b. **Survey Name:** Select your survey from the dropdown list.
   c. **Exception Date:** This field determines the start date displayed in reporting for this survey and must be **in the past** and **not overlap** with any scheduled surveys

in this program.

d. **Raw Score File:** Select **Choose File** and browse to select your **Raw Score File**.
e. **New Distribution List Name:** Enter a name for a Distribution List that is used for historical import only and does not appear in your **Distribution List** page. Recommended: External-import-yyyymmdd.
f. **User File:** Select **Choose File** and browse to select your **Respondent User File**.
g. **Are you looking to append data to a survey cycle?:** Leave this toggle switched to **Off**.
h. **Extra Options menu:** Leave collapsed, not applicable.

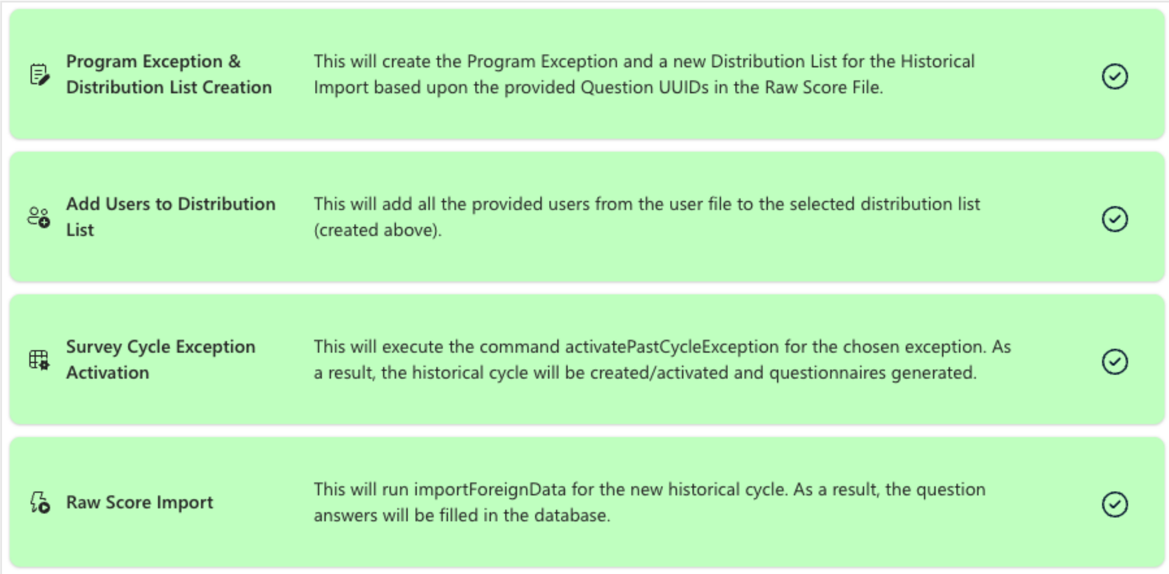
4. Select **Preview** and review the **Totals**, **Warnings**, and **Counts per Question** that appear.



5. Confirm that:
   a. **Users in User File** matches the number of users in your **Respondent User File**.
   b. **Users in Score File** matches the number of users in your **Raw Score File**.
   c. **Score Users Missing in User File** is 0.
   d. **User File Users Not in Score File** matches the number of people who were invited but didn't respond to the survey.
   e. **Counts per Question**, when expanded, match the expected counts for each comment and response value.

6. After confirming the **Preview**, select **Save**.

7. Each section at the bottom of the page turns yellow as it processes and all turn green when the import is complete.



Troubleshoot warnings and errors

If you encounter issues during your import, use this guidance to troubleshoot.

Error at line 2: missing required field...

Issue: The .csv files uploaded to External Import aren't UTF-8 encoded, and are likely UTF-8 with BOM encoding.

Resolution: Resave files with UTF-8 encoding and reupload.

User (email address) found in user file is NOT in client

Issue: The user email address for in your Respondent User File or Raw Score File doesn't match the email address for the user in the Viva Glint People page.

Resolution: Update the email address for the user(s) in Viva Glint to match the email address(es) in your files uploaded to Advanced Configuration External Import.

Confirm expected results in your dashboard

After your External Import processes successfully in Viva Glint, go to your Dashboard and Reports to confirm that scores and data display as expected. Confirm that:

- Reporting hierarchies display as expected.
- Question sores are accurate.
- Respondent counts are accurate.
- Questions that exist in historical data and Viva Glint data trend as expected.

- Attributes and values that exist in historical data and Viva Glint data trend as expected.
- If comments were included, review the Comments report to confirm that counts are accurate.

> **Note**
>
> Viva Glint's Narrative Intelligence may take time to process large amounts of open-ended feedback. Revisit the Comments report after 24 hours if data is not fully populated.

Consider People Science factors for historical imports

Article • 09/07/2023

For highly trained users, Microsoft Viva Glint Advanced Configuration offers the ability to import external, historical response data for items that trend with items that you select for your Viva Glint survey program. Trend data is important. It's essential to look at changes over time. However, there are several strategic factors to consider before you review the technical criteria of historical imports.

When did you conduct your last survey?

How recent is your data? To determine what “recent” means for your organization, consider: Has your business gone through significant change (strategy shift, external market or economic changes, organizational restructure, significant growth or reduction of your employee base)? If any of these changes have occurred, you may want to think twice about historical data as your comparisons may not be meaningful. Generally, it isn't advisable to import data that is more than one year old.

How does your previous response scale compare to Viva Glint’s?

Glint’s response scale is a 1 to 5 Likert scale ranging from strongly disagree to strongly agree. If your previous items don't use this exact scale, it’s difficult to map items to make meaningful comparisons.

Do your items map to Viva Glint items?

As you review the core items of the Glint taxonomy, do these items map to your previous items? It's important to consider intent of the question and the referent. If the items don't align to the Glint items, the comparisons aren't relevant.

Will external, historical data further your engagement strategy?

There are complexities when bringing over historical data. Between different vendors, there are intricacies between outcome measures, scales, and question wording. Bringing in previous items doesn't often lead to furthering a more modern approach to engagement, but rather cements a more traditional, less agile approach.

How to update reporting data in closed Viva Glint surveys

Article • 09/15/2023

For highly trained users, Microsoft Viva Glint Advanced Configuration Uploads and Data Apps allow you to perform retroactive updates to survey data. Use this guidance to determine which retroactive update option best meets your needs.

> ⊗ **Caution**
>
> Do not perform a retroactive update while a Viva Glint survey is live.

Attributes that don't require retroactive updates

Some attributes in Viva Glint always reference the most current information and don't require retroactive updates. These include:

- First Name
- Last Name
- Email Address
- Employee ID
- Time Zone
- Survey Language
- Dashboard Language
- Personal Email

Factor in Survey Program type

Recurring and Ad-Hoc survey programs represent a point in time for all respondents, and updates for multiple users for one time period can be applied in bulk with Viva Glint retroactive update options. Lifecycle and Always-On survey programs, however, are ongoing. Surveys generate for individual users at many points throughout the lifetime of these surveys, making it difficult to pinpoint users' data in the past and apply updates, especially for Manager Hierarchy data.

Uploads: Retroactive USERS_UPLOAD

Upload a file of all or some users in your closed survey to apply new values to past versions of data without touching current employee information. This option is the simplest and can be used for most retroactive updates, including non-managerial reporting hierarchy updates. Learn more.

> ⓘ **Important**
>
> To retroactively update a Manager Hierarchy, always use the RETROACTIVE_PULSE_UPDATE Data App and not the Retroactive USERS_UPLOAD option. **Learn more**.

Data Apps: RETROACTIVE_PULSE_UPDATE

Update Manager Hierarchy information for closed surveys by uploading corrected users to Viva Glint, running the RETROACTIVE_PULSE_UPDATE Data App, and reverting user data to current information after the update. Learn more.

Use Advanced Configuration Data Apps

Article • 09/15/2023

For highly trained users, Microsoft Viva Glint Advanced Configuration Data Apps allow you to perform complex data updates and export recipients for closed surveys. Use the following guidance to understand when and how to use Data Apps.

EXPORT_USERS_FROM_SURVEY_CYCLE

For one or multiple survey cycles, export a snapshot of employee data as they were when a survey launched.

Use this information to:

- Confirm manager reporting lines at a fixed point in the past.
- Confirm attribute values for employees when a survey launched.
- Prepare a file for a retroactive update.

To export users:

1. Select parameters:
   a. **surveyName:** Select **Load Values** and choose an option form the dropdown list.
   b. **cycleName:** Select **Load Values** and choose an option form the dropdown list.
   c. **includeAttributes:** Select **yes** to include all attributes. Select **no** to include required attributes only.
   d. **includeAllCycles:** Select **yes** to include all cycles. Select **no** to include the selected cycle only.
   e. **includePersonalEmail:** Select **yes** to include the personal email attribute (if applicable). Select **no** to exclude.
2. Select **Save as ZIP** to download.

> ⓘ **Note**
>
> To preserve special characters and formatting, always open files by **importing data from .csv** in Microsoft Excel.

RETROACTIVE_PULSE_UPDATE

When a survey has closed, Manager Hierarchy information that displays in reporting isn't updated by regular employee data uploads. To update data in reporting, use the Retroactive Pulse Update Data App to apply new values.

If your update doesn't involve Manager Hierarchy, use the Retroactive Upload feature instead.

> **Caution**
>
> Do not perform a retroactive update while a Viva Glint survey is live.

To perform a retroactive update to Manager Hierarchy:

Use these steps when manager reporting lines need to be corrected for a closed survey.

1. Export current employee data from the Glint People page to preserve employees and Manager IDs in their current state. When the retroactive update is complete, you'll reload this data to reset users to their current information.

2. Export survey cycle data with the EXPORT_USERS_FROM_SURVEY_CYCLE Data App for the survey(s) that will be updated.

3. Prepare an update file with the EXPORT_USERS_FROM_SURVEY_CYCLE file from Step 2.

   > **Important**
   >
   > Retain all users from the survey cycle in your update file. Even users who are not directly impacted by a Manager ID change can have a reporting line impact.

   a. To preserve special characters and formatting, always open files by importing data from .csv in Microsoft Excel.
   b. Delete all columns except for First Name, Last Name, Email, Employee ID, Status, and the Manager ID attribute.
   c. Correct values for users that should have their Manager ID updated.
   d. Save your edited file with corrected values as a .csv file.

4. Go to **Advanced Configuration** and select **Uploads** from the menu on the left.

5. On the **User file uploads** page:
   a. **Choose job type:** Select **USERS_UPLOAD**.

b. **Retroactive:** Leave toggle switched **off**.
c. **Incremental:** Switch on this toggle. This ensures that you update only the users related to your update.
d. Drag and drop your .csv file or browse to choose it in the **Drag and drop to upload** section.
e. Select **Upload.**
f. In the **Upload Job Details** page that appears, in the **Attributes** section, confirm that the **Updated users** count is accurate for all attributes involved in your retroactive update.
g. Select **Apply Upload To Database** and then select **Yes** to update attribute values.

6. After uploading your corrected data in **Uploads**, go to **Advanced Configuration** and select **Data Apps**.

7. In **Data Apps**, select **RETROACTIVE_PULSE_UPDATE**.

8. Select parameters to update Manager ID:
   a. **surveyName:** Select **Load Values** and choose an option from the dropdown list.
   b. **cycleName:** Select **Load Values** and choose an option from the dropdown list.
   c. **roleOrDistributionList:** Select **Load Values** and choose **(all)**.
   d. **attributeName:** Select **Load Values** and choose your Manager ID attribute.
   e. **reloadAnalytics:** Switch toggle to **Off**.
   f. Select **Execute, and show first 500 log records**.

9. Select parameters to update the overall Manager Hierarchy:
   a. **surveyName:** Select **Load Values** and choose an option from the dropdown list.
   b. **cycleName:** Select **Load Values** and choose an option from the dropdown list.
   c. **roleOrDistributionList:** Select **Load Values** and choose **(all)**.
   d. **attributeName:** Select **Load Values** and choose **(hierarchy) Manager**.
   e. **reloadAnalytics:** Switch toggle to **On**.
   f. Select **Execute, and show first 500 log records**.

10. Confirm Manager Hierarchy changes in your **Dashboard** and **Reports**.

11. If the user data updates made by the correction file loaded for this update should be reset to current attribute values, load the data exported in Step 1 to the Glint People page.

    For example, if Manager corrections apply to survey data in the past, but have since changed for employees, be sure to load data exported in Step 1 to restore current information.

Note

Depending on the number of Manager ID updates and users involved, it may take up to an hour to see changes reflected in reporting.

Use Advanced Configuration Uploads

Article • 09/15/2023

For highly trained users, Microsoft Viva Glint the Advanced Configuration Uploads option allows you to view file upload details, perform custom data access uploads for users in bulk, and complete complex data updates.

Review upload types

- **MANAGERS_UPLOAD:** To upload custom results data access for dashboard users in bulk.
- **USERS_UPLOAD:**
  - To upload employee data, follow the guidance in this article: Upload your employee attributes to Viva Glint .
  - Use the guidance in this article to perform a Retroactive USERS_UPLOAD.
- **ROLE_UPLOAD:** To upload users to a Viva Glint User Role, follow the guidance in this article: Import and export Viva Glint User Roles .

Perform a MANAGERS_UPLOAD

When several users need customized data access to their Viva Glint Dashboards, use the MANAGERS_UPLOAD to update their access in bulk. To grant 1 or a few users access to custom segments of data, grant custom access from their user profile: Learn more .

To upload custom access for multiple users:

1. Prepare a file with the following columns, in the order listed:
   a. **manager reference:** Populate with the email address of the user or users.
   b. **population:** Enter 0 for the first population. Each additional population increases in number for each user.
   c. **add or remove:** Enter ADD or REMOVE, in all caps.
   d. **survey uuid:** The survey ID of the program that the user should have customized access for.
      i. To find this ID, go to **Configure** and then choose **Survey Programs**.
      ii. Select the **Program** that a user will have custom access to.
      iii. From the **Program Summary** page, the link in your web browser contains the 36-character survey ID after the last forward slash.

   > ⓘ Note
   >
   > To apply custom Focus Area access, enter: GOAL in this column. To apply custom Admin access, for users with advanced permissions, enter: ADMIN.

   e. **Attribute(s) from your employee data:** Match the label and case exactly from the Viva Glint attribute setup and populate with values that indicate data that the user should have access to.
      i. To grant custom access to:

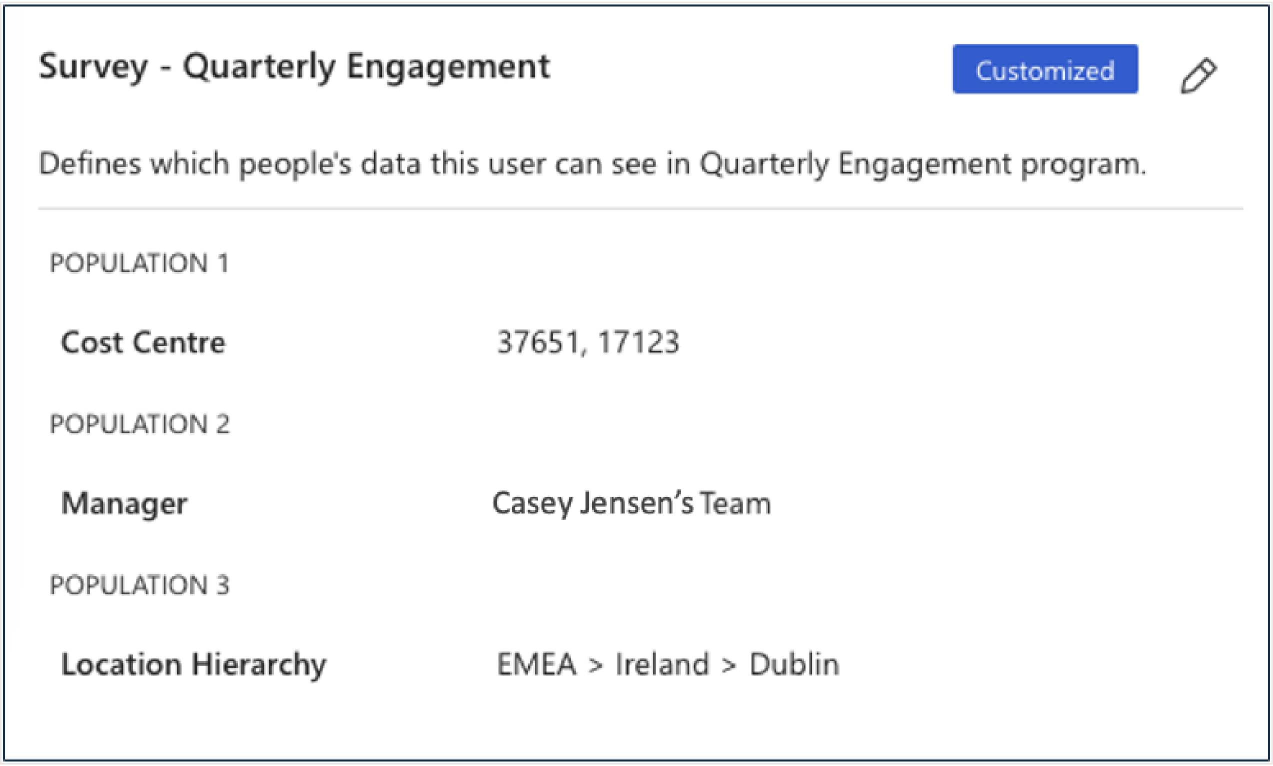
i. Another manager's team, include an attribute column labeled: Manager Level 1 and list the Employee ID of the manager that another user should have access to.
ii. A level in a non-Manager hierarchy, include all levels above the level the user should have access to. Example: To grant access to Location Hiearchy Level 3 = Dublin, include columns for Region, Country, and City.

2. Save your file in .csv format.
3. In the **Advanced Configuration** menu, select **Uploads**.
4. In the **Choose job type** dropdown list, select **MANAGERS_UPLOAD**.
5. **Incremental:**
   a. Switch on this toggle to append access to users in your file.
   b. Switch off this toggle to overwrite all access for users in your file. Users not included in the file aren't impacted.
6. Drag and drop your .csv file or browse to choose it in the **Drag and drop to upload** section.
7. In the **Upload Job Details** page that appears, confirm that the **Uploaded Lines Summary** matches the changes in your uploaded file.
8. Select **Apply Upload to Database** to upload new values to and kick off a process to refresh reporting data.
9. In the **Load import file into database?** dialog, select **Yes**.
10. Go to some users' profiles to confirm that customized access appears as expected.

For example, the custom data access for this user:

manager reference	population	add or remove	survey uuid	Cost Center	Manager Level 1	Region	Country	City
ana.bowman@contoso.com	0	ADD	ab1cd2ef-g3h4-5i6j-7kl8-901234567m89	37651				
ana.bowman@contoso.com	0	ADD	ab1cd2ef-g3h4-5i6j-7kl8-901234567m89	17123				
ana.bowman@contoso.com	1	ADD	ab1cd2ef-g3h4-5i6j-7kl8-901234567m89		7890			
ana.bowman@contoso.com	2	ADD	ab1cd2ef-g3h4-5i6j-7kl8-901234567m89			EMEA	Ireland	Dublin

Displays on her profile like this:



Perform a Retroactive USERS_UPLOAD

When a survey has closed, employee attributes that display in reporting aren't updated by regular employee data uploads. To update data in reporting in a closed survey, use the Retroactive Upload to apply new values. This option applies new data to past versions of user data and does not touch current employee information.

> ⓘ **Important**
>
> To retroactively update a Manager Hierarhcy, always use the RETROACTIVE_PULSE_UPDATE Data App and not the Retroactive USERS_UPLOAD option. **Learn more**.

To perform a Retroactive upload:

Use these steps to perform a Retroactive Upload:

> ⊗ **Caution**
>
> Do not perform a retroactive update while a Viva Glint survey is live.

1. Export survey cycle data with the EXPORT_USERS_FROM_SURVEY_CYCLE Data App for the survey(s) that will be updated. Learn more.
2. Prepare an update file with the EXPORT_USERS_FROM_SURVEY_CYCLE file from Step 1.
   a. To preserve special characters and formatting, always open files by importing data from .csv in Microsoft Excel.
   b. Delete all columns except for First Name, Last Name, Email, Employee ID, Status, and the attribute(s) that need to be retroactively updated (for example, Department).

c. Delete all user rows for employees whose data remains the same.
d. Correct values for users and attributes that need to be updated.
   i. For example: To correct Department = ‘Sales’, ‘SALES’, ‘sales’, which create 3 values where there should be one in reporting, update all users to Department = ‘Sales’.
e. Save your edited file with corrected values in.csv format.

3. In the **Advanced Configuration** menu, select **Uploads**.
4. In the **Choose job type** dropdown list, select **USERS_UPLOAD**.
5. Switch on the **Retroactive** toggle.
6. Switch on the **Incremental** toggle.
7. In the **Survey** dropdown list, select your survey.
8. In the **Survey Cycle** dropdown list, select your survey cycle.
9. Drag and drop your .csv file or browse to choose it in the **Drag and drop to upload** section.
10. Confirm the **File to be Uploaded** and select **Upload**.
11. In the **Upload Job Details** page that appears, confirm that the **Attribute(s)** and **Updated users** count match the attributes and count of users in your uploaded file.
12. Select **Apply Upload to Database** to upload new values and kick off a process to refresh reporting data.
13. In the **Load import file into database?** dialog, select **Yes**.
14. Confirm changes to attributes in your **Dashboard** and **Reports**.

ⓘ **Note**

Depending on the number of attributes and users involved, it may take up to an hour to see changes reflected in reporting.

Flag Sensitive comments in Viva Glint

Article • 09/20/2023

Sensitive comment flagging in Microsoft Viva Glint surfaces comments in the admin view of the Comments report that contain personally identifiable information (PII), sensitive topics, and profanity. Admins can also quarantine and redact flagged comments in the Comments report when this feature is enabled.

Sensitive comment categories

Flagged sensitive comments fall into 3 categories:

1. **Profanity:** Curse words and explicit language.
2. **Personally identifiable information (PII):** Personally identifiable information, like names.
3. **Sensitive work environment:** Keywords related to discrimination, harassment, unsafe working conditions, and bullying.

> ⓘ **Note**
>
> Sensitive comment flagging doesn't currently support non-English comments.

Enable sensitive comment flagging

To enable sensitive comments:

1. From the admin dashboard, select the **Configure** symbol, then in **Service Configuration**, choose **Advanced Configuration**.
2. Select **Surveys** and choose a survey.
3. In the **Sensitive Comments** section, select checkboxes for:
    a. Flag PII
    b. Flag Sensitive
    c. Flag Profanity
4. Select **Save Changes**.

> ⓘ **Important**

This update flags new comments, but doesn't flag feedback submitted before enabling sensitive comments.

Manage sensitive comments as an admin

With sensitive comment flagging enabled, admins see 4 additional categories in their Comments report: PII, Profanity, Sensitive, and Quarantined. There are also **Redact All Terms** and **Un-Redact All** options available for redacting flagged words in bulk.

Quarantine comments

Quarantined comments are hidden from non-admin users. To quarantine a flagged comment:

1. From the admin dashboard, select **Reports**, then choose **Comments**.
2. In the **Comments** section, go to the **PII**, **Profanity**, or **Sensitive** sections to view flagged comments. Keywords are highlighted in red.
3. On each comment, select the ellipsis (...) and choose **Quarantine** to move comments to the Quarantined category.
4. To remove a comment from the Quarantined category, select the ellipsis (...) and choose **Un-Quarantine**.

Redact comments

To replace PII and profanity in flagged comments with "#####", choose to redact in bulk or for specific comments.

ⓘ **Note**

Flagged keywords for comments in the **Sensitive** category can't be redacted.

To redact all PII and profanity terms:

1. From the admin dashboard, select **Reports**, then choose **Comments**.
2. In the **Comments** section, select **Redact All Terms** to mask flagged words with "#####" for all comments.
3. Select **Un-Redact All** to restore the original comment text.

To redact PII and profanity for specific comments:

1. From the admin dashboard, select **Reports**, then choose **Comments**.

2. In the **Comments** section, go to the **PII** or **Profanity** sections to view flagged comments. Keywords are highlighted in red.
3. On each comment, select the ellipsis (...) and choose **Redact**.
4. To restore the original comment text, select the ellipsis (...) and choose **Un-Redact**.

Viva Glint Manager Quick Guides

Article • 12/06/2023

Manager Quick Guides are easy to share within your teams, providing your managers and leaders with a high level understanding of important features within the Viva Glint platform.

We are busy preparing them for our Viva Glint customers and will post them as they become available. **Available-to-date:**

Manager Quick Guide to Confidentiality

> Suppression thresholds add a layer of protection to your peoples' privacy. In some cases, even when the response threshold is met, the ability to filter results by responder attributes and might allow a responder's identify to be inferred by comparing results. Use this guide to learn about how to protect your people's confidentiality.

Manager Quick Guide to Interpretation

> Use this guide to navigate the Viva Glint platform and interpret your survey results effectively

Manager Quick Guide - Confidentiality

Article • 12/06/2023

Suppression thresholds add a layer of protection to your peoples' privacy. In some cases, even when the **response threshold** is met, the ability to filter results by responder attributes and might allow a responder's identify to be inferred by comparing results.

In these cases, responses are "suppressed" — not reported even if the minimum response threshold was met. The *suppression threshold* requires more than two responses that separate the smallest attribute group from the smallest group that meets the minimum response threshold.

Understand insufficient and sufficient data suppression

Viva Glint protects the confidentiality of individual survey responses

- For confidential surveys, Viva Glint doesn't show individual responses. Within reports, scores are only shown in combined totals.
- To analyze data by different populations, Viva Glint needs to connect scores to individuals, but this data can only be seen in a restricted raw data file. Data is private and can only be pulled by system administrators.
- Viva Glint doesn't show scores for teams or groups that fall below the confidentiality threshold and limits the use of filters that could inadvertently reveal confidential information.

Viva Glint’s sets standard confidentiality thresholds

- 5 respondents per reporting group to display scores
- 10 respondents per reporting group (not 10 comments) to display open- ended comments (if a manager’s team had 10 responses but only 1 comment, that comment shows)

The difference between insufficient data and suppressed data

- A manager sees an insufficient data message if the number of respondents or total group size doesn’t meet the minimum threshold set.
- To prevent guessing the scores of respondent groups with insufficient data using simple math, the next smallest group is also suppressed.

Let’s check out an example...

Michelle's team has five (5) or more respondents, but their score is not displayed. Why?

Expand table

Group	All	Amy's team	Mike's team	Michelle's team	Dave's team
Respondents	23	10	7	5	1
Score	73	76	76	~~76~~	?
Display Status	Displayed	Displayed	Displayed	Suppressed	Insufficient

The chart tells us that:

- Dave's team, with only one (1) respondent, is insufficient. It does not meet the minimum confidentiality threshold of five (5) required respondents, therefore, the score from Dave's team is not displayed.
- Michelle's team has the next smallest number of respondents, and her team met the minimum threshold of five (5) required respondents. However, by displaying Michelle's team's score, it may become possible to deduce Dave's team score using simple math. With calculation, the one respondent on Dave's team can be discovered, breaching that individual respondent's confidentiality. In turn, Michelle's team scores are suppressed and not visible.
- If Dave's team had two (2) respondents it would be difficult to calculate both individual scores, so Michelle's team's score would be displayed.

> ⓘ Note
>
> Dave's team score, even with two (2) respondents, won't be shown because it still doesn't meet the confidentiality threshold.

More Resources

Refer to the following pages for additional guidance:

> **Microsoft Learn Documentation**

- How Viva Glint helps you protect your data privacy

> **Microsoft Learn Training**

- What are the basics of how Viva Glint emphasizes confidentiality?

- What is Viva Glint confidentiality and how do I navigate the Viva Glint app?

Viva Glint best practices and program guidance

Article • 11/14/2023

From one program cycle to the next, you may want to make changes to the survey or reporting features. Use this list of articles to ensure your programs are the best they can be to benefit all the people in your organization.

Watch this 5-minute video on **Best Practice Survey Design Principles**: https://www.microsoft.com/en-us/videoplayer/embed/RW17rE8?postJsllMsg=true

Live versus Phased access In Viva Glint reporting

Make changes to a live Viva Glint survey

Understand Viva Glint programs and cycles

Understand Viva Glint Survey Access Methods

Preview demo data in reporting before your Viva Glint survey launches

Target and exclude items in a Viva Glint survey

Recommendations for using Viva Glint Survey Coach and Tooltips

Choose survey comparison data for Viva Glint reporting

Recognize survey field character limits in Viva Glint programs

Understand Viva Glint programs and cycles

Article • 06/15/2023

Setting up your first Viva Glint program in the manner suggested is the most efficient way to incorporate Viva Glint into your company's infrastructure going forward. Much of the setup will be used in your upcoming (future) programs, so taking the time to build your platform and plan ahead is key.

Learn our terminology

Pulse Program: A series of surveys, also called a "survey program." For example, a Quarterly Engagement Survey is a pulse series, with invitations sent out quarterly for each survey.

Cycle: One single survey within a program.

Tip: We use the word "survey" most often when referring to a cycle. This term aligns best for global translation.

Linked: By default, all surveys/cycles are "linked," meaning that any changes made at the program level will automatically apply to all future surveys in the program.

Unlinked: A single survey can be edited in ways that don't affect future surveys in the same program. When edits are made to a single survey, it becomes "unlinked." Edits made to an unlinked survey only affect that survey and not future surveys in the same program. Trend data is unaffected.

Edit a program vs. a single survey (cycle)

Once an entire program (pulse) has been set up, future surveys are edited at the program level in the Program Summary section of the admin dashboard. For example, if you want to set up a series and avoid major adjustments to each survey, edit at the program level. If untouched, the same survey emails, text, and questions are repeated with each cycle in the program. However, you might choose to edit a single survey, or cycle, in ways that won't affect future cycles in the program.

> **Tip**

Carefully consider edits at the program level which affect all future surveys.

The most common single survey editing involves survey emails

- If a survey is live, and you want to adjust the schedule or add email reminders, then you need to make edits at the cycle level.
- If you want email communication to be unique to one survey, and you don't want it to affect emails programmed for subsequent surveys, you can do so at the cycle level.

For other changes needed to a live survey, read Make changes to a live Viva Glint survey.

Tip

Between surveys, you can continue to edit email communications at the program level.

Edit a live survey schedule or add an email reminder

A live survey is considered "locked." To make edits to a survey schedule, editing at the individual cycle level is required.

Note

The Approved button on that page must be toggled to **YES**.

1. From your admin dashboard, in **Survey Programs**, navigate to the program name that you want to edit.
2. Select the **Upcoming and Live** tab.
3. Select the vertical ellipses next to the survey you edit.
4. Select **Manage Schedule**.

What does an "unlinked" survey notification mean?

Before making edits at the cycle level, a message warns that this cycle will become unlinked meaning that most changes made to the survey text, questions, or email and reminders will affect only this survey - future, linked surveys retain inputs at the program level.

Relinking surveys

If you've made edits at the cycle level and your survey is unlinked from the program, several unlinked reminders will be tied to the cycle.

> **Note**
>
> - If a survey is live, it cannot be re-linked. However, this will not affect the results outcomes (e.g., reporting trend).
> - If the survey has already ended, it does not need to be re-linked afterward.
> - Cycle-level edits will not be retained at the program level for future surveys. Edit both accordingly.

> **Tip**
>
> Make future survey changes at the program level, in between cycles. This will ensure its always clear what text, questions and communications schedule will be associated with the upcoming survey.

Viva Glint best practices and program guidance

Article • 11/14/2023

From one program cycle to the next, you may want to make changes to the survey or reporting features. Use this list of articles to ensure your programs are the best they can be to benefit all the people in your organization.

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Viva Glint aggregate groupings - trends and best practices

Article • 10/09/2023

Understand aggregate trending

Aggregate trending supplies historical data over time. There's a trend point, which reflects matching items from one cycle to the cycle immediately preceding it. Changing items within an aggregate (group) interrupts trend.

Viva Glint aggregate trending terminology

Term	Definition
Aggregate	A grouping of two or more items that measure a concept within a survey
Aggregate score	The average score of all the items divided by that number of items
Trend	Any difference in the score of a single item from one cycle to the previous cycle
Aggregate trend	Any difference in the combined score from one cycle to the previous cycle. Aggregate trend exists only when all items in two consecutive cycles are identical.

Tip

We recommend that aggregate groupings are not used in surveys.

Aggregate grouping can lead to unreliable aggregate trend

Why not to use aggregate groupings in surveys:

- Surveying more frequently with fewer individual questions produce more useful, focused results.
- Single-item measures are better than multiple-item measures when it comes to utility and reliability. They can predict future behavioral outcomes, and they can do it consistently over time.

- A multiple-question group (aggregate) may limit the intervention opportunities for a single item within that group. That one item can become lost inside the group of items.
- Action should only be taken at the single item level. Focusing managers on aggregate scores doesn't help enable action.

> ⊗ **Caution**
>
> Trend is considered unreliable when it is not measuring "apples to apples" - when there are differences in the items that appear in an aggregate between the new cycle and the same aggregate in the previous cycle. Trend will be shown when at least one item is identical in the same aggregate in two cycles, but unless all items are identical, the aggregate trend is not measuring a consistent group of items and is not as reliable as single item trend data.

Recommendations for using Viva Glint Survey Coach and Tooltips

Article • 07/13/2023

As you're setting up your Microsoft Viva Glint programs, you'll follow the in-platform setup wizard that takes you through the entire process, step-by-step.

To quickly summarize, you'll:

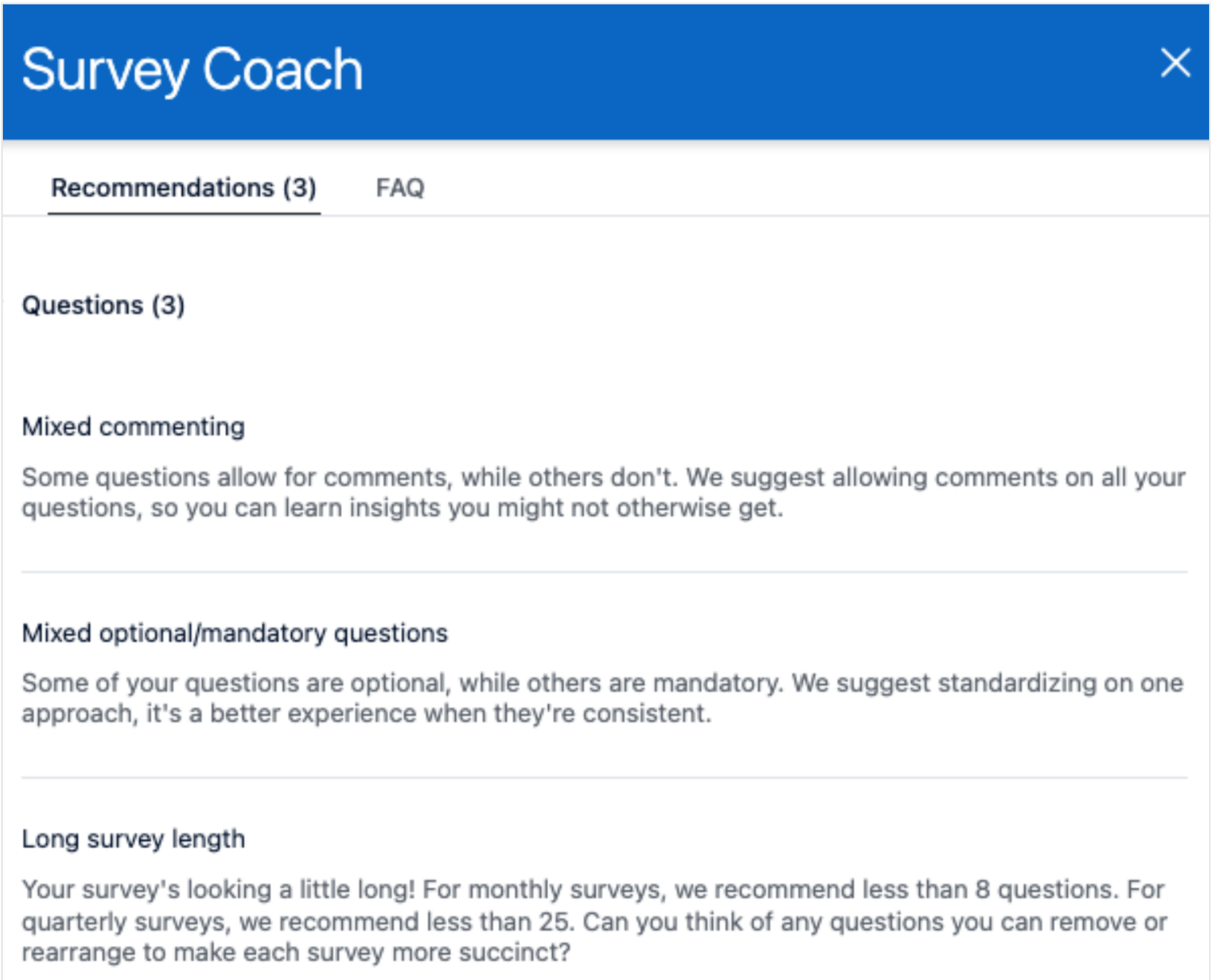
- Choose your program
- Set up the program by following the setup wizard. *The number of steps vary depending on the program.*
- Approve and enable the program

As you build your program, you'll see that Viva Glint provides helpful features as you move through the setup wizard. *Survey Coach* and *tooltips* are available to guide you through the process and help you create surveys according to Viva Glint best practices.

Use Viva Glint's Survey Coach

As you move through your program setup, select the **Survey Coach light bulb symbol** for recommendations to improve your survey and its reporting.

Survey Coach also provides links to additional guidance on the FAQ tab.



Use Viva Glint's Tooltips

Tooltips are available throughout the setup for guidance on how to complete each field or to provide additional information to understand how your decisions during setup impact reporting or other areas of the program. Tooltips show as pencil symbols, question mark symbols, and appear as *Learn more*.

Choose your comparison data for Viva Glint reporting

Article • 07/13/2023

Choosing the right comparison data when considering survey results sets the right context for understanding strengths and opportunities and make the difference between effective progress and misdirected actions. Good comparison choices are crucial, so managers need to be certain to find the right comparison for understanding their engagement feedback.

Comparisons come from these sources:

- Internal: Compared to your organization's overall scores or another internal group such as Division or Business Unit
- Historical: Compared to previous survey results
- External: Compared to external benchmarks comprised of scores across Viva Glint customers

Use a combination of comparative data to reveal the most comprehensive information for your managers.

How to change the comparison in a report

The company admin chooses the default comparison for survey data. Managers can choose a different comparison group to provide additional context for your survey scores.

1. Select the **Settings** button.
2. Use the down-facing arrow next to **Comparison** to select a different comparator.
3. Select **Done**.

Four comparison settings are available in reporting

Viva Glint provides four options for comparison reporting by default. In addition to the following four settings, your company may have one or more internal comparisons configured (for example, Division or Business Unit).

- **Benchmark** – Provides a comparison point for feedback based on survey data compiled from all Viva Glint customers. Helpful for admins and first-time survey results analysis.

- **Company** – Displays team scores in comparison to company-wide scores for the same questions. Helpful for users with more than one area of responsibility
- **My Teams** – Compares a manager's team score to an overall score derived from a filter. This setting is the superset of access and is best used with custom access or managers with large organizations
- **Average Question** - Presents a single, overall score for all questions and respondents within your access. Helpful for users looking for some level of variance in their score.

Understand why having comparison choices is beneficial

Comparison scores within the Viva Glint platform enable you to make sense of your results. Without meaningful comparison data, inaccurate conclusions may cause you to focus on the wrong areas for improvement.

Algorithms built into the platform take comparative data sets into consideration. Our platform intelligently highlights Strengths and Opportunities by considering a combination of survey results, their impact on the outcomes you care about (for example, engagement), and where you stand on available comparisons.

Comparisons between groups within an organization may be helpful in score interpretation. If there are certain groups that typically score higher relative to other groups on a set of priority questions, it may be useful to source best practices from that group and share them with other groups to support broad scale improvement.

Determine which comparison data to use

Consider your company's overall business and measurement strategy, including where you are in your survey cycle (for example, first survey, subsequent surveys, etc.) to decide which comparison data will be the most useful. In general, we believe that external benchmarks can provide some useful level-setting comparisons during an initial survey, but they aren't nearly as useful to the organization as internal and trend (historical) comparisons in subsequent surveys.

When is the external benchmark comparison useful?

For an initial survey, when no historical data exists, most organizations are interested in seeing how their scores compare to an *external* benchmark, to begin orienting themselves to their results. Glint has more than 180 survey questions with benchmark data by industry, function, and country.

External benchmarks are helpful initially, but as you begin to survey more frequently, trends and internal comparisons become more useful for making incremental improvements in areas that matter most to teams.

The external benchmark is useful for company admins to provide a meaningful reference point in assessing an organization's overall scores, however individual managers shouldn't heavily focus on the external benchmark. For them, the internal comparison and their own team's past survey scores are better comparisons.

> **Tip**
>
> Use **Viva Glint's global benchmark offerings and methodology** for external benchmarking comparisons.

When is the total company or other internal comparison useful?

For managers, we recommend utilizing the internal comparison. This is most often your organization's total company scores, however, your company may have additional internal comparisons set up (for example, Division or Business Unit) that may be more meaningful. The internal comparison provides a more relevant comparison point for managers than the external benchmark.

In addition, after your first survey, we recommend managers pay attention to their team's trend (change in scores) over time to see where progress is being made and where there are opportunities to improve or course correct.

For Employee Lifecycle surveys, we recommend using internal comparisons given the uniqueness of employee experiences by organization, although we do also have external benchmarks for our standard onboarding and exit items.

When is the My Teams comparison useful?

The My Teams comparison represents the scores for the user's total access within Viva Glint. For Company admins, the My Teams comparison will be the same as the Company comparison since they have access to the total company data. For a manager, My Teams will represent the scores for everyone who reports up through them (their roll-up organization).

> ⓘ **Note**
>
> If no filter is applied to your report, the My Teams comparison will be the same as your overall scores and will show no differences. For the My Teams comparison to be useful, you would want to be looking at filtered data (for example, subteams within the hierarchy, specific attribute groups, etc.)

The My Teams comparison tends to be most useful for higher level managers or those who oversee large organizations.

When is the Average Question comparison useful?

Use the Average Question comparison under these circumstances:

- For any survey when there's no available comparisons (such as trend or external benchmark)
- For any survey where the difference between your score and others is small, such as versus Company Overall

In these instances, the Average Question score allows a comparison measurement that highlights the highest and lowest scoring items, which can be used as a launching point for conversation and choosing focus areas.

Tips for choosing comparisons successfully

- **Don't rely on external benchmarks indefinitely.** For some leaders, it's critical to understand how similar organizations are scoring across the question set to help them decide where to prioritize actions to deliver the same or better employee experience. Viva Glint recommends that, eventually, you focus on internal comparisons over external benchmarks to address your organization's unique strengths and opportunities for improvement in the context of business goals and priorities.
- **Learn how to interpret differences in scores.** To determine where to take action, it's important to understand the magnitude of positive or negative differences between your scores and other comparison scores.
- **Caution small team managers on using external benchmarks as comparisons.** Benchmark data represents an average of millions of data points and is meant to be used for assessing organization overall scores. A better comparison for first-line managers is past survey scores (trend) for their own team or organization averages.

People Science recommendations around choosing comparators

Read this People Science explained article for a deep dive into choosing comparators.

Keep in mind

When comparing two groups, a group against a benchmark, or a score change over time, consider both practical and statistical significance.

- Practical significance: The difference in the scores between two groups that is large enough to observe unique patterns of working and behaving between the two groups. If a score difference between two teams is too small to detect any material difference, that difference may not carry as much practical significance.
- Statistical significance: The probability that the difference between the scores of two groups isn't chance or coincidence, but accurately represents the unique responses of individuals in each group. This becomes useful with larger groups, where it can be used to surface reliable patterns in data. On your platform, Alerts and Driver Impact analyses automatically check for statistical significance and displays only statistically significant results.

> **Note**
>
> Your company may have substituted custom terms for the Viva Glint terminology explained in this article.

Understand Viva Glint survey access methods

Article • 10/24/2023

Microsoft Viva Glint offers multiple survey access methods that can be used independently or in combination to meet the needs of your employee population.

> ⓘ **Note**
>
> Viva Glint recommends that admins enable the requirement for users to authenticate with Microsoft Entra ID as the most secure method to administer surveys.

Set up survey access that requires authentication with Microsoft Entra ID

To enable this survey access method:

1. Work with your Viva Glint Global administrator to establish access to Viva Glint via Microsoft Entra ID.
2. From the admin dashboard, select the **Configure** symbol, then in **Client Settings**, choose **General Settings**.
3. In the **All Settings** menu, select **Engage Survey Details**.
4. Switch the **Require Microsoft Entra ID for links in survey emails** setting to **Yes**.
5. Select **Save Changes** in the top right of the **General Settings** page.
6. Select the **Configure** symbol, then in **Employees** , choose **User Roles**.
7. Select **Active Employees** , then choose **Permissions.**
8. In **Survey Programs**, select the **View My Surveys** checkbox,then in the top right of the **Permissions and Access** page, select **Save Changes**.

Use a personalized survey link

When access with Microsoft Entra ID isn't enabled, this is the survey access method for users. Survey emails contain a personalized survey link that is tied to each participant and shouldn't be forwarded. When users select this personalized link, they access an active survey with no authentication.

Set up attribute-based survey access

Viva Glint's attribute-based survey access allows users without a corporate email account to complete surveys by entering two unique pieces of employee information selected by an admin rather than authenticating in Viva Glint. To set up attribute-based survey access, follow the guidance in this article: Set up attribute-based survey access in Viva Glint.

Recognize survey field character limits in Viva Glint programs

Article • 07/13/2023

The character limits for each open text area in your survey setup are given in the below tables:

General and survey setup

Field	Character limit
Customer UUID	64
Data File Attribute Values	64
Data File Attribute Labels	64
Data File Name	255

Survey Text

Field	Character limit
Program Name	50
Intro Text	1024
Thank You Text	1024
Description	4000 if imported and 1024 if edited directly in the program
Section Title	128

Question/item components for surveys and 360 Feedback

Field	Character limit
Item Text	512
Report Label	128

Field	Character limit
Instruction Text	1024
Comment Placeholder Text	256
Open-ended Comments Box	1000
Scale Label Values	100
Number of Response options allowed for Multiple Choice Questions	126
Number of characters for Multiple Choice Responses	100

Communications

Field	Character limit
Greeting	1024
Message	1024
Privacy Message	1024
Questionnaire Button	128
Questions	1024
Signature	1024
Subject	1024
Title	1024

Fields

Field	Character limit
Rater Category name	30
Reporting Name/Label	128
360 Report Display Name	50

Overview content

Field	Character limit
Headers	50
Action Buttons	24

Rater Selection Content

Field	Character limit
Greetings	100
Subtext	400

Competencies

Field	Character limit
Competency Name	80
Competency Description	400

Content Resources

Field	Character limit
Name	100 (no spaces)
Title	2048
Description	2000
Rich Text	2000
Image File Name	255 (includes file extension)
PDF File Name	255 (includes file extension)
Video Link URL	5048

Preview pre-launch demo data in Viva Glint reporting

Article • 07/13/2023

How will your employee attributes and potential survey responses look in Microsoft Viva Glint reporting? Previewing demo data enables leaders and program admins to familiarize themselves with our dashboard, understand how manager hierarchy and user file attributes appear in different reporting scenarios, and conduct manager training.

Demo surveys are available for engagement surveys only.

> **Tip**
>
> Preview an upcoming survey for reporting so the survey can be edited if needed prior to launch.

Procedure for previewing demo data reports

> **Caution**
>
> If Nudges or Team Conversations are enabled, they must be temporarily disabled before proceeding. This ensures that no unintended notifications are sent.

1. From the Viva Glint admin dashboard, select **Configure** and then **Survey Programs.**
2. Select the survey you would like to preview.
3. On the page that opens, in the *Upcoming and Live* tab, select **Preview** from the vertical ellipses next to the program. A *Survey Preview* dialog box opens.
4. Select **Generate Report Preview** to view a one-time, randomized data survey report. An email will let you know when the report is available; the report may take up to 24 hours to generate. Once generated, your report remains visible for seven days.

> **Note**

Until you receive your email, ensure that your survey program remains in an **Approved** status. Your report will not generate successfully if your survey program is not **Approved**.

5. To make changes to your survey once you have previewed how the reporting will appear, select **Edit** from the vertical ellipses next to the program.

Can I generate a new demo data report preview after editing a survey?

To replace a generated report, preview with newly uploaded employee attributes, a dialog box tells you that a report preview has previously been generated. To replace this demo report with the new version, select **Generate Report Preview**. The seven-day report visibility will start over with the generation of the new report.

How do I see my demo report?

From your Viva Glint dashboard:

1. Select **Reports.**
2. Choose the **Demo Data** report.
3. Select any report to review.

> **Tip**
>
> To navigate to reports for other existing survey programs, select **Switch Program** from your demo dashboard, select your program, and navigate to **Reports**.

Grant Live versus Phased access in Viva Glint reporting

Article • 07/13/2023

Levels of reporting access

The following are the two levels of reporting access in Microsoft Viva Glint:

- **Live access**: Reporting access is readily available, in real time, as surveys are completed. Admins always have live access and can't be included in phased access rollout.
- **Phased access**: Recommended for managers and HRBPs (Human Resources Business Partners) for action planning, tracking, and reviewing feedback results for completed surveys, excluding this role group from real-time, live survey results. Phased access is configured at the program level but occurs at the cycle level.

Phased access is recommended for managers

Keeping survey results classified while the survey is live, among just a small group of leaders, is often prudent. Incomplete results may lead to unintended and inaccurate conclusions. Feedback results aren't final until all results have been considered.

Change from Live access to Phased access

1. Switch to the **Completed** view and hover over the survey cycle.
2. Select the content in the **Reporting Access** column in that row.
3. The Program Summary page will display, and then Reporting Access.
4. Select **Grant Access**.
5. Check the box of the roles you wish to grant access to. Once access is granted, it can't be revoked.
6. Select **Provide Access**. *Visible to All Reporting Roles and Release Completed* is displayed.

Once the next program cycle begins, and if the last cycle has Phased access, the access would default back to Live.

Make changes to a live Viva Glint survey

Article • 07/13/2023

While many elements of a live survey can be adjusted, only make live edits when necessary.

> **Tip**
>
> Thoroughly preview your survey before launching and follow these practices:

- **Don't stop the survey.** Unless you need to completely replace a survey cycle, never *stop* a survey. Many edits can be made while the survey is enabled.
- **Make email and reminder edits only at the cycle level.** Many changes at the program level won't apply to a live survey.
- **Always leave the meaning of a question intact.** You may need to fix spelling, grammatical or translation errors.
  - The adjusted question's/item's meaning should remain the same before and after edits.
  - Don't adjust any rating scale or multiple-choice options to ensure the integrity of the resulting survey outcomes (for example, scores and comments) is retained.
- **Always Save and re-approve.** When making live edits, save any changes you make and *reapprove* the survey before ending your session.Use this guidance for approving, previewing, enabling, and disabling your survey .
- **Be consistent across languages.** Make text changes uniformly, across all languages included in the survey.

Rules to edit a live recurring or ad hoc survey

The following content provides the required steps to edit a live recurring or ad hoc survey. The information is broken out across *Program Summary* setup pages.

Program Setup

Topic	Scenario	Considerations
Various	You want to edit the *Program Name* or *Allow Survey Resubmission* items*.*	Edits are only visible to users who haven't yet started the survey.

Topic	Scenario	Considerations
Additional languages	You want to add a new language as a survey option.	If custom translation text hasn't been provided, Viva Glint's standard text translations will be featured.

Distribution

Topic	Scenario	Considerations
Adding users	Employees not yet included in your Employee Attribute *File* need to participate in the survey.	From the admin dashboard, select the **People** section and select **Send Survey**. Each new user will be sent the email invitation immediately. From then on, the new users will receive reminders according to the same schedule as all other users.
Editing a Distribution List	The list of which employees are included/excluded in the survey needs adjustment.	A Distribution List can be adjusted at any time, but it will not automatically send a survey invitation to new users. That has to be done manually, as above.

Schedule

Topic	Scenario	Considerations
Survey launch date	You need to postpone the launch date of the survey.	To avoid potential challenges, make this update a minimum of 24 hours before the survey was scheduled to go live.
Response window	You want to decrease/increase the number of days within the survey window.	Adjust a minimum of 48 hours before the original survey end date. Also, make sure your *Communications* emails align with any updated survey window planning. **Note** : Live *Schedule* edits will only be applied when made at the Cycle level.

Questions

Topic	Scenario	Considerations
The text at the beginning (top) and	The *Intro* or *Thank You* text needs adjustments or	Newly edited text will be featured immediately and *only* on surveys that

Topic	Scenario	Considerations
end (bottom) of the survey	corrections.	haven't yet been started.
Question text	The phrasing of a question needs to be edited.	Use this guide. Viva Glint will then push your edits into production (that is, live survey and reporting). **Note:** that this can cause a disruption to employees taking the survey at the moment this change is implemented. They can start over by refreshing their page.
Adding or removing a question/item	You want to add a new question/item or remove a question/item from a live survey.	A question/item *can't* be added or removed for a live survey except within an *Always-On*, Onboarding, or Exit pulse program.
Question/item order	The questions need to be reordered.	The newly edited question/item order will be featured immediately and *only* on surveys that haven't yet been started.

Reporting

Topic	Scenario	Considerations
All items in the *Reporting* section	Any section in the *Reporting* section needs adjustment.	Save all changes, then return to the **Program Summary** and adjust the Approve toggle to **Yes**.
Benchmark update	Your external comparison benchmark was updated.	If changes are made to the benchmark in a live program, be certain any user with live access is aware so they aren't confused by results that don't mirror what they may have seen during their last viewing.

Communications

Live *Communications* edits will only apply when made at the cycle level.

Topic	Scenario	Considerations
Reminders	You need to add or delete email reminders, or otherwise edit existing text.	Future reminders can be added, edited, or deleted if adjusted at least the day before they're scheduled to be sent. Reminders can't be added,

Topic	Scenario	Considerations
		edited, or deleted, on the day that they're scheduled to be sent.
Results Notification	You want to turn this feature on/off, edit existing text or adjust the number of days until the message is sent.	To avoid potential challenges, make changes at least 48 hours before the closing of the survey window.

Other Survey Settings

Topic	Scenario	Considerations
Driver labels	The reporting label for a question/item needs adjustment.	Proceed as needed.
Manager hierarchies	Your reporting is displaying incorrect leadership hierarchies or due to errors in your Employee Attribute File.	Change only after the close of the survey window.
Adding survey participants	You've discovered that an extra group of employees needs to be added to the platform.	Submit a delta file of the employees to be added. Then, manually send them the survey invite from within the **People** configuration page > Send Survey.
Adding users not in the Distribution List	You've discovered that employees outside of the Distribution List need to be included.	Navigate to Configuration, then **People** , then **Employee** , then **Action** , then **Send Survey**.
Email timing	You want to adjust the time in which emails are sent.	Do this at the cycle level only and consider the user time zones.

Share Viva Glint post-survey learning experiences with your employees

Article • 07/13/2023

Employee engagement is most successful when every member of an organization takes actions to drive their own happiness at work.

Post-survey learning experiences are an engagement feature offering People-Science-curated videos at the end of a survey to help your employees prepare for Team Conversations and Focus Area planning sessions.

Post-survey learning videos are available with all recurring surveys

Currently, the four videos included are:

- Building personal resilience
- Listen with empathy
- Use your strengths
- Your job, your comfort zone, and your potential

Videos can't be edited.

How to enable or disable post-learning videos in a survey

The default for the experience is YES (On) but the experience may be switched to NO (Off). Enable or disable from your admin dashboard.

- Select **Configure**
- Select **General Settings** in the **Client Settings** section.
- Choose to enable or disable the learning experience.

What survey takers gain from the post-learning experiences

The post-learning survey experience increases preparedness for valuable ACT conversations and builds on the momentum of feedback by providing an opportunity for learning as soon as a survey is completed. End users find high quality, bite-sized learning videos, which allow them to take immediate steps around their feelings of engagement. The video selections are designed to inspire a greater sense of ownership over the work experience, facilitate self-reflection and quality team discussions, and foster broad participation in action-taking, which leads to sustainable improvements.

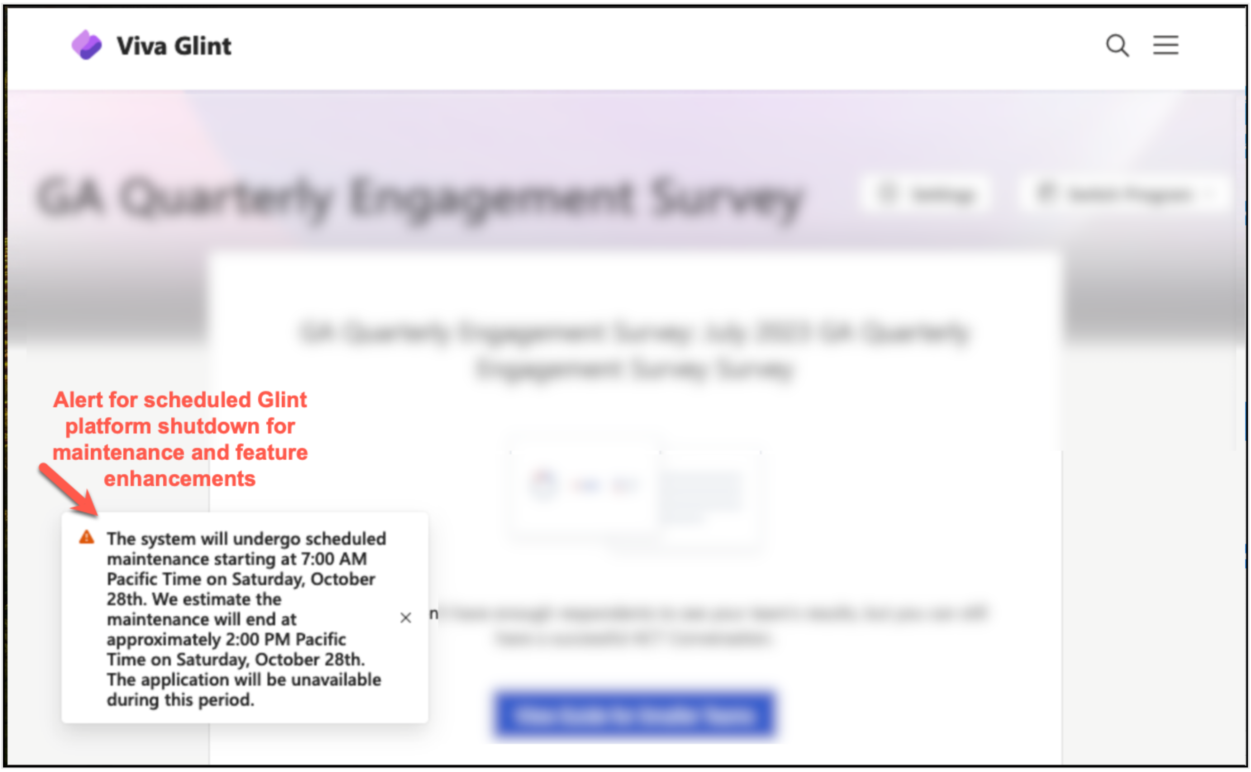
Plan ahead for scheduled monthly Viva Glint maintenance shutdowns

Article • 11/02/2023

Microsoft Viva Glint is committed to consistently improving their customer experience. The cloud-based platform maintains an agile production cycle with fixes, enhancements and new features. Release notes provide details coming to the Viva Glint platform. The release schedule is subject to change and are updated, as appropriate.

> ⓘ **Important**
>
> Be mindful of scheduled dates when your Viva Glint platform will be down for maintenance and feature enhancements. Any time a person logs into a Glint and a scheduled maintenance instance is impending within 2-3 days, a message alerting the user to the scheduled shutdown will appear.

How a scheduled maintenance alert message displays on your platform



> 💡 **Tip**

Inform survey takers if this short instance of downtime will occur during their survey-taking window. In most cases, platform downtime will be less than twelve hours.

Alert your people to impending platform shutdowns using these release dates

Release number	2023 Release Date*
65	October 28
66	December 9
	2024 Release Date*
67	January 13
68	February 3
69	March 2
70	March 30

*Viva Glint is committed to consistently improving the customer experience. The cloud-based platform maintains an agile production cycle with fixes, enhancements, and new features. Planned program release dates are provided with the best intentions of releasing on these dates, but dates might change due to unforeseen circumstances. Schedule updates are provided as appropriate.

Set up Program Summary pages for a Viva Glint survey

Article • 07/13/2023

The first step for setting up a Microsoft Viva Glint program is to set up **Program Summary**.

Access Program Summary to set up a new survey

If you need help with choosing a survey, learn about survey types here. The Project Workbook will help you choose the survey program that provides the best feedback for your organizational goals.

1. From your admin dashboard, select the **Configure** symbol.
2. In the Survey section, choose **Survey Programs**.
3. Select + **New Program.**
4. Choose your survey template or start from scratch with a blank template.
5. On that card, select **Create Program**.

Program Summary setup

In the Program Summary section, there can be up to seven pages to be set up. Not all pages are needed for all programs. Only necessary pages for the program you have chosen will be available. Pages for setup can include:

- Program Summary: Program Setup
- Program Summary: Distribution
- Program Summary: Schedule
- Program Summary: Questions
- Program Summary: Reporting
- Program Summary: Communications
- Program Summary: Coaching

A checkmark indicates that the page is set up correctly and allows you to move to the next page. If you'd like to move ahead before finishing a page, you need to add dummy data to a page – but, don't forget to come back and change that dummy data to accurate information.

Program setup in Program Summary

Article • 07/13/2023

The Program Setup page is the first configuration page within Program Summary. It allows you to define the basics of your program.

Procedure for setting up the Program Setup page

1. Enter a **Program Name**.
2. Select the administrators by searching by **Role** or entering their name into the **Search** feature.
3. Select the **Default Language** from the dropdown menu.
4. The list of **Additional Languages** is open and prepopulated with languages that have been set up for your organization in **General Settings**. To remove languages, select the **X** next to the language name.
5. **Admin Notifications** To are prepopulated. Use the **Search** field to add other admins. To remove an admin, select *X* next to their name.
6. Use the **Suggested Action Available** toggle to disable or enable users to create goals.
7. Use the **Eligible for Nudges** toggle to disable or enable timely messages to managers. Refer to the Nudges lesson for additional setup.
8. Confidential Responses are set to YES by default.
9. **Allow Pulse Resubmission** is enabled by default. **NO** disables the feature and a user who wants to retake their survey must request a manual reset.
10. **Enable Team Conversations** is enabled by default. **NO** disables the feature for the program. For more information, see Team Conversations.
11. When Team Conversations is enabled, **Enable Team Conversations Sharing** is enabled by default. **NO** disables managers from sharing this read-only version of Team Conversations.
12. Select the right-facing arrow symbol to **Save and continue**.

Set up and use Distribution Lists in Viva Glint

Article • 09/14/2023

Distribution Lists define which employees within your organization should receive a survey. When creating a Distribution List, start with the list of all active employees and then refine this list using employee attributes. This creates a custom list of employees that can be chosen as recipients for any Microsoft Viva Glint program within your organization.

Distribution Lists are essential when a survey program isn't intended to be sent to all active employees.

Create, edit, or delete a Distribution List

In surveys, you can use existing Distribution Lists or edit or create new ones.

There are two ways to access Distribution Lists:

From the admin dashboard:

1. Select the **Configure** symbol.
2. Select **Distribution Lists** under the **Employees** section.

Or, from your survey program:

1. Select the **Configure** symbol at the top right of your Viva Glint dashboard.
2. Select **Survey Programs** in the **Survey** section.
3. Select the survey for which the Distribution List needs to be edited.
4. Select the **Distribution page** in **Program Summary**.
5. Select the pencil symbol to Modify Distribution Lists.

Create a new list

The first page that appears displays all Distribution Lists that exists for your organization and indicates the number of members in each list.

1. Select **+ New Distribution List**.

2. Enter a title for your list by selecting the pencil symbol next to the Untitled Distribution List box. For example, if you're creating a Distribution List for new employees, you could title your list *New Employees* or *New Hires*.
3. Select **Add/Edit Employees**.

Add attribute rules to create a new list

There are two options:

- All active employees
- Filter all active employees

All Active Employees

1. Select **I want to include all active employees only**.

2. For an Exit survey, consider enabling **Include Inactive Employees**, located below the selection box. To include inactive employees, contact them via their personal email; ensure you have a personal email when an employee leaves your organization, if possible.

3. If you need to exclude someone, search for their name and select **Exclude**.

4. Conversely, if you need to remove someone from the Excluded list, search their name and select **Remove**.

5. Confirm your list and select **Save Changes**.

Filter all Active Employees

1. Select **I want to filter all active employees by the following populations**.

2. Select **+ New Population**.

3. Select **+ Add Filter** to select the attribute you want to use to filter your employee list. Your attribute list is unique to your organization based on your Employee Attribute File.

4. Select **Done**.

5. For an Exit survey, consider enabling "Include Inactive Employees," located below the selection box. To include inactive employees, contact them via their personal email.

6. If you need to exclude someone, search for their name and select **Exclude**.

7. Conversely, if you need to remove someone from the Excluded list, search their name and select **Remove**.

8. Confirm list and select **Save Changes**.

> **Note**
>
> The date range selected for an attribute should always be equal to or greater to the frequency at which you update your Employee Attribute File. For companies that integrate their Human Resources Information System (HRIS) files automatically, this will work well. For companies that manually update files, ensure that the window you've set is wide enough to include the frequency with which employee data is refreshed. For example, if a window is set to 15 days but employee files are only updated once every 30 days, the survey will likely miss people who should get the survey, since the date range is only set to look at people who started 30-45 days earlier. Instead, set the window for at least 30 days so you are sure to include everyone.

After selecting an attribute, you'll see a list of employees that match your criteria. From here, employees can be manually excluded by selecting that employees name in the Included box and then selecting **Exclude** when it appears.

> **Note**
>
> You do not have the option to manually include employees.

Modify a Distribution List

Editing a Distribution List is a global change and will affect any program using that list. To modify:

1. Select the Distribution List you want to modify.

2. Select **Add/Edit Employees** or **Edit Attribute Rules** if there are filters available.

3. Make the necessary changes and select **Save Changes**.

After confirming you have the list you want, select **Save Changes**.

Understand why frequency of updating your Employee Attribute File matters

The date range selected for an attribute should always be equal or greater to the frequency at which you update your employee data files. For companies that integrate their HRIS files automatically, this works well. For companies that manually update employee files, make sure that the window set is wide enough to include the frequency with which employee data is refreshed. For example, if a window is set to 15 days but employee files are only updated once every 30 days, the survey will likely miss people who should get the survey, since the date range is only set to look at people who started 30-45 days earlier. Instead, set the window for at least 30 days so you're sure to include everyone.

Tip

Consider using the blended membership functionality, explained below.

Use the blended membership Distribution List functionality

Dynamic attributes automatically add and remove users to and from a distribution list. They can also include or exclude certain users from a list. Knowing how your distribution list has been populated helps you make decisions about how to add users.

View how a Distribution List was populated

From the Distribution Lists page, the far-right column entitled **Membership Type** defines if the list in that row has been populated manually, by attribute rules, or both.

Note

If a distribution list is populated by an Import, it will have the membership type "manual".

Use the dynamic Distribution Lists functionality

Your decision whether to use manual population or attribute rule population should be guided by these principles:

- If membership type is based on Attribute Rules and a user is manually added in the platform, employee data file imports (i.e. Rubicon) will automatically update the Distribution List.
- If the Distribution List began manually, adding attribute rules will change the list to include both Attribute Rules and Manual.
- If a manually added member is deleted and they match the filter criteria, they'll still appear in the Distribution List, but the Added by method will change from Manual to Attribute Rules.

> ⓘ **Important**
>
> Importing users to an Attribute Rules Distribution List removes existing rules.
>
> - Activate the **Preserve the employees already in this distribution** list functionality to convert membership type to **Manual** for existing users.
> - Uncheck to deactivate and remove the users based on the rules, and only include those in the import file.

Set up Schedule page in Program Summary

Article • 07/13/2023

Choose the cadence for your program. This determines your launch date(s) and how often your employees receive this survey.

Procedure for setting up Schedule page

1. In the **Surveys should go out every** section, set a number, and then select Weeks or Months using the dropdown arrow.

   > **Note**
   >
   > Survey dates can be edited on a per survey basis, and surveys will have to be manually approved and enabled to be sent out.

   > **Tip**
   >
   > Consider other survey programs already in place and business processes that might influence your ability to act on the outcomes of the survey in a timely, meaningful manner.

2. Select your target launch date in the **Send the next survey** on section. Dates are displayed in the time zone that your program admin has preselected.

3. Once you select the date for your survey to be sent, a tentative schedule, based on the cadence selected, will appear in **Schedule Preview**.

   > **Note**
   >
   > Survey dates can be edited on a per survey basis, and surveys will have to be manually approved and enabled to be sent out.

4. In the **Response Window** section, set the total number of days you're allowing respondents to submit their survey. The survey closes at 11:59 PM on the cycle end date.

Best Practices:

- For Recurring programs, use a two weeks response window.
- For Ad Hoc programs, use a seven days response window, as these programs typically require faster action.

5. The **Team Conversations Window** should remain open for a manager and their team to finish their conversation after the survey closes. Once set, the program indicates the conversation start and end date scheduled, and how many days remain. Visit Team Conversations for a deeper dive.

   Best Practice: Use our 28 days default window (about four weeks), although the window can be set for up to 180 days (about six months).

   > ⓘ **Note**
   >
   > Response window refers to the number of days the survey is open to responders and is not related to Team Conversations.

6. Select the right-facing arrow symbol to **Save & Continue**.

Questions setup in Program Summary

Article • 07/13/2023

The Questions page allows you to add or modify the items included in a survey. If you selected a default template, Glint recommended items prepopulate. Refer to the "Setting up Survey Items" lesson to add or modify survey items.

Use Viva Glint's prepopulated survey template

Standard templates provide prepopulated questions and items, along with an introductory and "thank you" page for users. You may customize any of these.

Edit survey introduction

Customize the introduction message for the survey by hovering over the box with the "Hello" message and select it. In the window that opens you can:

- Select languages
- Edit the greeting
- Edit the text content

When you have finished, select **Save Changes**.

Edit individual questions (items)

Hover over the vertical ellipses next to the question to select one of the following:

Edit Targeting

Adding a target to a specific question ensures that only the population targeted sees it within the survey. Using the search boxes, select a User Role to include or exclude. When finished, select **Save Changes**.

Edit Question

Changes you make here will instantly propagate to all programs that use this question. In this section you can:

- Select languages
- Select the question (item) type

- Edit the default text
- Change the reporting label
- Provide instructional text
- Select whether to label for all options
- Illustrate the rating scale
- Allow or disallow comments
- Make the question (item) optional
- Map the question to a Suggested Action Template

When finished, select **Save**.

Delete

Remove this question (item) from the program.

Edit 'Thank You!'

Customize the 'Thank You!' message for the survey by hovering over the box with the "Thank You!" message and select it. In the window that opens you can:

- Select languages
- Edit the greeting
- Edit the text content

When you've finished, select **Save Changes**.

Add questions to a survey cycle

You can add questions to specific question cycles by selecting the corresponding question cycle number next to the question. For example, if you only want a certain question asked on the first survey, deselect all numbers except for 1.

> **Tip**
>
> Do not edit our standard survey items. Item edits may impact language translations and the item's intention, which would affect the accuracy of the benchmark tied to the question. Custom items are not mapped to external benchmarks.

Related topics

Reporting setup in Program Summary

Article • 11/06/2023

The Reporting page allows admins to customize how dashboards are set up and how specific roles view survey results.

In the **Program Roles** section, you'll see which User Roles have access to the survey results for this program. The dropdown menu contains User Roles that you have already created and allows you to select report settings. Each role displays in its own box.

Procedure

To give extra User Roles access to view this program's survey results:

1. Select **Add Role**.

   > **Note**
   >
   > User Roles need to be created first to appear. Refer to **Set Up User Roles**.

2. Select the desired **Reporting Access:**
   a. **Live Access**: Roles have full access to results as they come in, and when surveys are completed.
   b. **Phased Access**: Roles don't have automatic access to Live or completed surveys until they're granted access by the admin, on a per program case. This access does allow retained access to previous surveys and other data inside Viva Glint programs.

3. Toggle **Concierge Visibility** to enable or disable Manager Concierge. Visit Manager Concierge for a deeper dive.

   > **Tip**
   >
   > Use Manager Concierge for your manager to get the most out of their survey feedback.

4. Toggle **Broader Team Insights** to enable or disable a roll-up level of survey results that can be visible to managers if they haven't met survey confidentiality thresholds within their team. Visit Broader Team Insights for a deeper dive.

5. Team Conversations is enabled by default. Toggle to **OFF** to disable this feature.

6. Select the desired **Dashboard Default** from the dropdown menu.

   > **Tip**
   >
   > Company Admin roles should have the **Executive Summary dashboard** and all others should have **Team Summary**.

7. Recommended reports will prepopulate. To add extra **Report Template Access**, use the **Search** field. Select the **X** next to the report to remove a Report Template access.

8. If you need to delete a role for this survey, select **Delete Role** in that role box.

9. Repeat the steps for each extra role.

Finish additional schedule setup

Aggregate Indices

If adding an Aggregate Index:

1. Select **+ Add Aggregate Index**.
2. In the **Create Aggregate** panel, enter a name. For example, <Engagement> or the name, which makes the most sense for your users.
3. For **Calculation Method**, select **Average**.
4. In the **Search Questions** dropdown menu, search and select **eSat** and **Recommend** items.
5. Select the **Include in Driver Impact Report** checkbox to see this aggregate in the Driver Impact Report.
6. Select **Save Add to Program**.
7. Select **X** to close the panel.

To add employee Net Promoter Score™ (eNPS):

> **Note**
>
> Viva Glint People Science doesn't recommend the use of an employee Net Promoter Score™ due to its calculation method and inability to act as the best predictor of employee engagement.

1. Select + **Add Aggregate Index**.
2. In the **Create Aggregate** panel, enter a name. This displays in reports, select a name that makes the most sense for your users.
3. For **Calculation Method**, select **eNPS**.
4. In the **Search Questions** dropdown menu, search and select your eNPS question.

   > **Important**
   >
   > To select eNPS, first set up the question in the Viva Glint **Question Library** and add to the **Questions section** in your program.

5. Select the **Include in Driver Impact Report** checkbox to see this aggregate in the Driver Impact Report.
6. Select **Save Add to Program**.
7. Select **X** to close the panel.

> **Tip**
>
> Use Glint's 2-item Standard Engagement Index and no other aggregates. Glint has strong benchmarks on this measurement, which can provide insightful focus areas in results reporting.

> **Note**
>
> When Glint's 2-item index is used, we recommend using it on every survey to ensure the capture of engagement trends to accumulate benchmark data.

Key Outcome

Select the desired **Key Outcome** from the dropdown menu.

Driver Impact Outcomes

Select the **Driver Impact Outcomes** from the search field.

Manager Report Defaults

Select the desired **Manager Report Defaults**.

PowerPoint Export Template

Select the desired **PowerPoint Export** template.

Boarder Team Insights PowerPoint Export Template

Select the desired **Broader Team Insights PowerPoint Export** template.

To complete this page, select the right-facing arrow to **Save & Continue**.

Related topics

Set up Program Summary pages for a Viva Glint survey

Communications setup in Program Summary

Article • 09/11/2023

Setting up notifications and providing translations to your programs happen in this section of Program Summary.

> **Note**
>
> If you are configuring an Always-On program, you'll not have to complete this step.

Understand the fields for setup

Change Reminder Times: Reminders are sent after the survey invitation has been sent and at different intervals while the survey is live. Reminder times are set according to the default time zone for your account.

Language: English is the default language for all programs initially, but the default language can be changed to any of the languages in the dropdown menu.

Best Practice: *Ensure that the questions (items) selected for use in your survey are available in the default language.*

Pencil Icon: Personalize the message that goes along with any reminder you'd like to include.

Procedure to set up communications

1. Select the desired **Notification Timing** to send invites and reminders. Be sure to select AM or PM.
2. In **Configure Notifications**, you'll see a list of predetermined email notifications and the dates the emails will be delivered. To add more notifications, select **Add Survey Reminder**.

   > **Tip**
   >
   > Send at least two reminders a week.

3. Select the desired notification to preview or edit.

4. In the slider panel, select the **pencil** symbol to edit the notification.
5. Enter the number **of days after survey start** to send the notification.
6. If you have **Additional Languages**, select the Language dropdown, and add languages.
7. Select **Save Changes** and then **X** to close the slider panel.
8. Repeat the process for each other language required and for each notification.
9. Select the **Survey End** pencil symbol to preview or edit what survey takers see.
   a. Turn **ON** to send notification.
   b. In the **Send** field, enter the number of days after the survey ends to send the notification.

      > ⓘ **Note**
      >
      > Reporting Access configured on the Reporting page must manually be switched to "Live Access" at least 48 hours before the scheduled Survey End notification date. Survey End notification will not be delivered if access is not switched over.

   c. If desired, select the **pencil** symbol to edit the Survey End Notification. Make the necessary changes and repeat the process for each extra language being used.
   d. Select **Save Changes** and then **X** to close the slider panel.

Understand the results notification email

The results notification email is a one-time notification to let users know that results are available to them. The email goes out to those users in roles with **live** reporting access 24-hours prior to the time of the email to all others (including phased access). Best practice is to make sure that roles are programmed and aligned before survey closes.

> ⓘ **Important**
>
> Access must be turned live 24 hours before the results notification email is scheduled to be sent.

Related topics

Set up Program Summary pages for a Viva Glint survey

Set up Coaching page in Program Summary

Article • 07/13/2023

The final setup page in Program Summary is the Coaching page. Managers can see coaching assistance admins provision for them on this page on their Team Summary dashboard.

Admins who enabled Team Conversations for a survey have two additional sections to set up on this page.

Coaching set up for managers not using Team Conversations

Coaching content provides best practices for your managers to have meaningful conversations with their teams about the future. Within Manager Coaching Content, provision these sections:

- Interpretation: Customize the Interpretation Guide
- Top Strengths: Customize the coaching content for Top Strengths
- Top Opportunities: Customize the coaching content for Top Opportunities

Coaching set up for managers using Team Conversations

Two additional coaching sections need to be set up for managers with Team Conversations enabled.

- Team Conversations presentation guidance
- Team Conversations resource guidance

Refer to Team Conversations Coaching Page for setup of these two sections.

Viva Glint's Quarterly Engagement Survey template

Article • 11/14/2023

Microsoft Viva Glint has seen a shift in focus on what is most important to the happiness and success of employees since the mid-2020 because of the COVID-19 pandemic and other global factors. For this reason, we knew we needed to reexamine our current measures of employee engagement (2018) to ensure we're focusing on the most meaningful engagement drivers for this modern era.

We analyzed over 350 million employee survey responses collected since 2020 to determine the employee experiences that were most predictive of engagement - happiness at work and willingness to recommend the company. We discovered some new key driver themes, which resulted in a new top-20 list of core engagement drivers. Additionally, we identified several other drivers that may be beneficial for consideration by individual organizations.

Read The Elements of People Success blog . Using Viva Glint solutions, our customers gain powerful insights on what drives employee engagement and can use those insights to build towards their own People Success culture.

How we arrived at the Viva Glint Quarterly Engagement template

The result of our re-examination of the focus of engagement is a modernized framework (early 2022) called **People Success Elements. These elements are six constructs**: Purpose, Clarity, Growth, Empowerment, Connection, and Wellbeing. The constructs summarize the fundamental needs and expectations that are most critical to a person’s holistic life experience (not only their work experience) and that best shape an environment for high engagement.

People Success Elements

In addition to evidence of a strong linkage between the following six elements and engagement, People Science also found relationships with other important outcomes like burnout and attrition. Key findings include:

- **Purpose**: Employees feeling a sense of purpose are 120% more likely to recommend their company as a great place to work.

- **Clarity**: 54% of employees lacking role clarity reported burnout in 2021, compared with 38% of employees with role clarity.
- **Growth**: Employees who see opportunities to grow are three times more likely to say they'll remain with the company in two years.
- **Empowerment**: Employees empowered at work are 2.4 times more likely to be happy at work.
- **Connection**: Employees with a strong sense of belonging are six times more likely to be engaged.
- **Wellbeing**: Employees who feel cared for at work are over three times as likely to be happy at work and recommend working for their organization, an increase of over 35% since 2020. Flexible work arrangements, inclusive workplaces, and work-life balance are the fastest growing priorities for job candidates since the COVID-19 pandemic began.

Terminology of survey items

The following terminology helps you to understand our methodology for determining survey items:

Term	Definition
Core Drivers (also referred to as Recommended Drivers)	Items hand-picked by Viva Glint People Science for customer use are included on templates. These items are the strongest predictors of the outcome item(s) in a survey program. We recommend customers to consider these items first when building a survey and to consider them as the best practice “short list.”
Other Drivers	Most Viva Glint programs have “other” drivers, too - items that are strong drivers of engagement that we want customers to be aware of but aren't part of the core/recommended driver selection for that program.
Key Drivers	These items have the highest impact on program *outcome*. They're statistically calculated based on feedback, thus likely to change.
Outcome	The purpose of your survey; what you are trying to measure. Viva Glint uses surveys to measure engagement (the *outcome*) and calculates the impact of survey items (*drivers*) and how much they influence engagement. Work on the top items (*key drivers*) for the most efficient use of feedback - the most bang for your buck!

View the core survey driver items for Viva Glint's Quarterly Engagement survey

You can view the core drivers in the Viva Glint platform when you create a new Quarterly Engagement survey. From your **admin dashboard**:

1. Select **Survey Program**, then **+ New Program**, and then the **Quarterly Engagement card** and **Create Program**.
2. In **Program Summary**, select **Questions** (can't be selected until the pages prior have been configured).
3. The template items populate.

Add items to your Quarterly Engagement survey using the Question Library

Viva Glint’s research found several other items for customers to consider as important drivers of engagement which can be added to any engagement survey. These items can be found by searching the item name in the Question Library and added to any survey you're setting up:

Item Text	Core Driver
I rarely think about looking for a job at a different company.	Retention
I plan to be working at <COMPANY_NAME> two years from now.	Intent to stay
<COMPANY_NAME> delivers a great customer experience.	Customer Focus
I understand how <COMPANY_NAME> plans to achieve its goals.	Strategy
I have good career opportunities at <COMPANY_NAME>.	Career
Diverse perspectives are valued at <COMPANY_NAME>.	Diversity
Top leaders demonstrate a visible commitment to diversity.	Diversity Commitment
I would recommend my manager to others.	Manager
Overall, I am satisfied with how decisions are made at <COMPANY_NAME>.	Decision Making
I am encouraged to find new and better ways to get things done.	Initiative
Everyone at <COMPANY_NAME> has an equitable opportunity to succeed.	Equitable Opportunity
<COMPANY_NAME> takes a genuine interest in the employees' well-being.	Well-Being

Diversity and Inclusion survey program in Viva Glint

Article • 10/26/2023

Fostering a strong sense of belonging in your organization is essential. Customer data shows that those employees who feel a strong sense of belonging are over six times as likely to be engaged as those who don't. Belonging is strong when work environments are inclusive of differences, everyone feels accepted, and can bring their best selves to work. Using the Microsoft Viva Glint Diversity and Inclusion approach, organizations can measure perspectives that matter, empower managers to build inclusive practices, and understand how to create an environment where all people feel they belong.

> **Note**
>
> The Viva Glint survey strategy can incorporate domains of diversity, belonging and inclusion into any survey, voiding the need for a standalone Diversity and Inclusion measurement. For this reason, consider adding items from Glint's Diversity and Inclusion survey template to an engagement or a culture survey.

The Viva Glint Diversity and Inclusion program (survey template) exposes fundamental insights

DIBS survey feedback provides:

- Short research-validated survey items.
- Access to intuitive and insightful data at both leader and manager levels.
- Key drivers to understand how diversity, inclusion, and belonging influence engagement and business outcomes.
- Benchmarked items using proprietary hybrid methodology.
- Attrition predictions to identify groups at risk of leaving due to lack of inclusion and belonging.
- Actionable resources from curated content to improve teams' diversity and inclusion experience.
- Powerful comment analytics to identify what groups are saying about diversity and inclusion experiences.

- Easy integration of diversity, inclusion, and belonging items into existing agile survey programs, as well as the ability to derive cross-program insights.

Set up a Viva Glint Team Effectiveness survey

Article • 07/13/2023

The bulk of modern work is team-based and while organizations rely heavily on teams to get work done, few have specific measurements to evaluate the components of what makes an effective team. Most organizations focus solely on individual performance, instead of seeking to understand what contributes to high team performance. For organizations to realize their full potential, a greater focus is needed on measuring and facilitating team effectiveness. In other words, shift the focus from who is on the team, to how they work together.

Microsoft Viva Glint’s Team Effectiveness survey is a diagnostic assessment that shows how teams are working and communicating. Survey results provide prescriptive guidance to enhance collaboration and productivity.

What is the best cadence to use for a Team Effectiveness survey?

Setting up a Team Effectiveness survey as a recurring, stand-alone program or as an Always-On survey allows your leaders to use the program whenever it's needed.

> **Tip**
>
> Repeat the survey in one-two months to check on progress made and adjust actions as needed.

Follow the guidance for Program Summary for setup.

Set up a Viva Glint Manager Effectiveness survey

Article • 07/13/2023

Microsoft Viva Glint's Manager Effectiveness program helps develop stronger managers through frequent team feedback and data-driven insights specific to each manager. Viva Glint uses this data to provide managers with action plans to improve their effectiveness. These plans include learning resources and tracking tools.

As a part of Viva Glint's integrated employee engagement platform, Manager Effectiveness lays the foundation for seamless assessment, analytics, and action planning across the complete manager experience.

Viva Glint provides customizable survey content that covers key areas of manager performance. These areas represent industry best practices including priority setting, decision making, collaboration and communication, as well as how well managers provide motivation, recognition, career development, and feedback to their teams. Each area includes best practice content and suggested actions to help managers improve.

Follow the guidance for Program Summary for setup.

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- Powerful comment analytics to identify what groups are saying about diversity and inclusion experiences.

- Easy integration of diversity, inclusion, and belonging items into existing agile survey programs, as well as the ability to derive cross-program insights.

Set up a Viva Glint Patient Safety survey

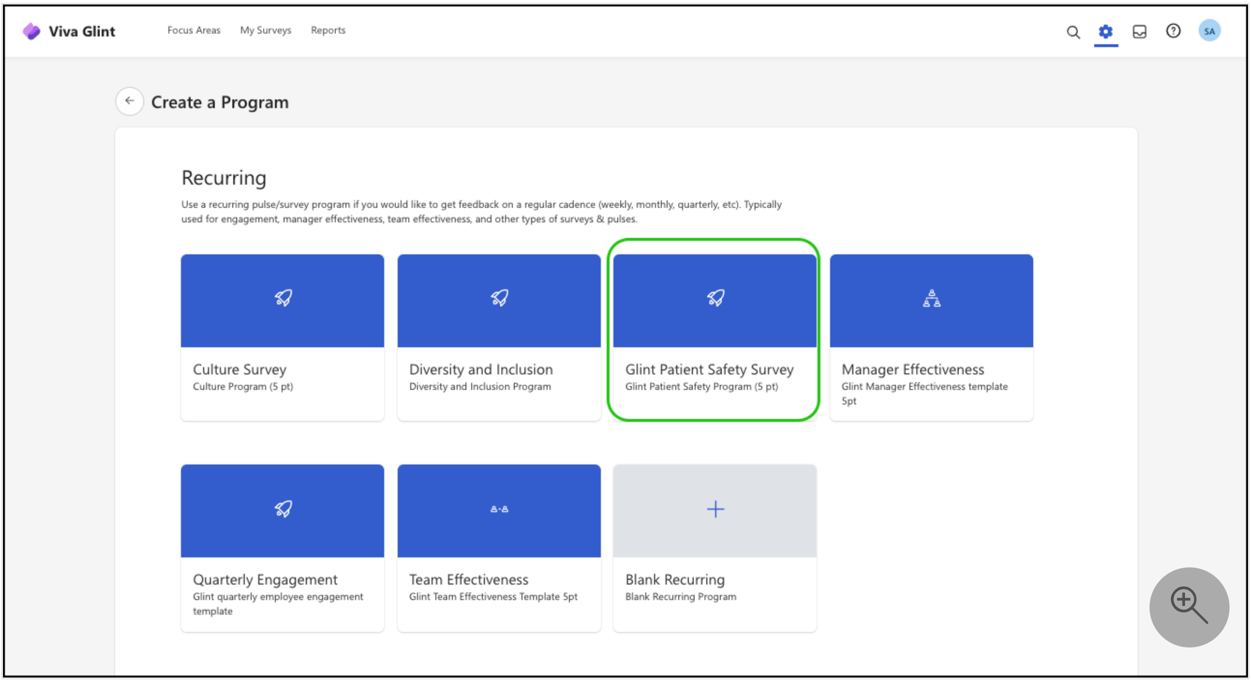
Article • 11/14/2023

Many healthcare customers move to the Viva Glint patient safety survey to assess and improve their patient safety culture. It was approved as a reliable measure of patient culture by Leapfrog's expert panel in the spring of 2020 and is among the most succinct Leapfrog-approved safety surveys currently available. Seamlessly integrated with Viva Glint, patient safety survey insights are designed to get to healthcare leaders clearly and quickly.

Save time using Viva Glint's safety survey

Gynelle Miller, Lead Patient Safety and Reliability Specialist at Corewell Health, said that compared to their old safety survey reporting process, her team saved approximately 200 hours of time leveraging Viva Glint patient safety survey insights on the Viva Glint platform!

Read Viva's Principal People Scientist's Ryan Lebow's datasheet on using the Microsoft Viva Glint patient safety survey to help improve patient safety culture.



Easily launch the survey on Viva Glint for timely and powerful insights

Follow the guidance for Program Summary for setup

Preview and filter Employee Lifecycle programs

Article • 06/15/2023

Approve your program

When each section of a Viva Glint Employee Lifecycle survey has been set up successfully, a blue checkmark displays to the right of the section name on the *Program Summary* page. The survey can now be approved and enabled.

Procedure

To approve a program, toggle the Approved button to YES.

Preview your survey

Once your program is approved, you can preview the survey to test the user experience.

Preview the survey

1. Hover over the box to the left with the survey name and select the **Preview** option.
2. Select the user whose survey you will preview.
3. Select **Preview Questionnaire**.
4. The introductory page of the program opens in a new tab, in the default language of the selected user.

Tip

When reviewing the introduction and summary for each item, ensure that:

- Rating scale is as expected (1-5 or 1-7)
- Rating scale labels are written as expected (Strongly Disagree/Strongly Agree)
- Comments are available
- Items are not skippable unless intended
- Macros appear as actual values and do not show up as macros
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Preview a survey invitation for an Employee Lifecycle program

Preview a survey from an invitation email. Use this preview survey email to ensure surveys will be received by your employees and do not end up in a spam or junk folder.

Procedure

1. Use the vertical ellipses next to the survey name to select **Preview**.
2. Select the user whose survey you'll preview.
3. Select **Send a sample pulse invite**.
4. Select **Preview Questionnaire**.
5. Check your email for your survey invite.
6. Review the email content and select **Get Started**. The introductory page of the program will open in a new tab, in the default language of the user you're previewing.

Enable an Employee Lifecycle program

After a survey is approved, it must be enabled to go Live on the scheduled date. Surveys move to Live status at midnight on the day it's scheduled to go out, in the default time zone.

1. Use the vertical ellipse next to the survey name to **Enable Survey**.
2. Select **Enable Survey** (again).
3. The **Status indicator** changes to blue. If the survey is Live, the Status indicator will show green.

Employee Lifecycle reports are unique

Employee Lifecycle reporting behaves differently than that of Viva Glint's recurring programs.

- Scores displayed in the dashboard/reports are filtered to responses received in the last 90 days by default.
- As Employee Lifecycle surveys don't have a traditional start/stop time - they are always active - reports will aggregate scores based on the date ranges selected or the default 90-day period.
- Responses appear on the dashboard as feedback is submitted.
- The report user will see responses on the dashboard after the program thresholds are met and according to their user profile permissions (manager hierarchy or

customized populations).

Understand the Trend Graph in Employee Lifecycle reporting

When using the default time period:

- The *latest data point* on the Trend Graph will be any surveys received during the past 90 days.
- The *next point* is 90 days before the first data point (180 days - 91 days before today).
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- The date displayed when hovering over data points is considered Day 1 of that range, meaning that the most recent data point will have a date of 90 days before today's date (the date, which is being studied). This date is not capped by the actual survey launch date.
- If a custom date range (x date to y date) is selected, the trend shows for the same number of days selected. For example, if you select the last 30 days, trend shows for the previous 30 days.

Additional resource

Set up Program Summary for Viva Glint Employee Lifecycle Programs .

Create Viva Glint Onboarding and Exit survey programs

Article • 07/13/2023

Microsoft Viva Glint believes that ongoing, frequent communications to solicit and collect employee feedback is crucial to an organization's success. Viva Glint offers programs as a way for customers to send short, targeted surveys to their employees, which will deliver rich insights that translate into actionable opportunities to improve business.

Employee Lifecycle programs – Onboarding and Exit - provide data about how a new hire feels about their introduction to your organization and its culture and collects information about why an employee has voluntarily left your organization.

Our Viva People Science team continually updates Viva Glint survey templates so that they're always relevant in the current world of work.

Creating a people-centric organization begins with Onboarding

We have all been new employees at one time or another. We start with excitement for the future, anticipation of challenges to come, and desire for belonging with new colleagues. With effective people practices, hopes can become a reality, and we can go on to become happy and successful in our new roles. Successful onboarding experiences can increase new hires' self-efficacy, role clarity, social integration, and learning in the short-term, and can increase performance, retention, and organizational commitment.

Why is onboarding so important?

Research shows it typically takes 12 months for new hires to reach their full performance potential, but many organizations continue to think of onboarding as just a few events, often focusing on orientation and risk early disengagement and undesirable attrition.

- 56% of newly onboarded employees are likely to consider changing jobs within a year (Microsoft 2022 Work Trend Index)
- 30% of new hires have left a job in first 90 days
- With the "Great Reshuffle" trend, many people are rethinking where, when, and why they work

This information creates a unique opportunity for organizations to rethink their onboarding experience to direct their new hires’ excitement and curiosity to sustainable, positive outcomes.

Tip

Use the Viva Glint Onboarding template (with Employee Lifecycle surveys) to set up an ongoing program for your organizational new hires.

Why understanding the Exit experience matters

Your team reported great quarterly numbers; the customers are raving about your product; you're excited about the future and realize that it's all because of your employees. One day you open your inbox and read that your star performer is leaving. Could this have been prevented?

Most organizations recognize that long-term business success is connected to engaging and retaining capable and motivated team members. Turnover’s negative impact on a business is hard to ignore. Even worse, a single departure can trigger other employees to leave, resulting in compounded recruitment costs, knowledge loss, blows to productivity, and overall disruption to important business activities.

An employee’s exit is a critical part of the employee lifecycle. Without an effective exit program, you may miss the opportunity to gather feedback that helps identify triggers that may cause future employee departures. Organizations that collect exit data can use it to proactively improve the overall employee experience, resulting in better engagement, performance, and retention, as well as reduced business disruption and costs.

Exit surveys are the first step to helping organizations understand why people leave, the experience they had as they left, and even what they're willing to do for the organization after departing.

Consider that although an employee is no longer part of your team, they can still be a brand ambassador, singing your organization’s praises or tarnishing your reputation through negative feedback and reviews.

Tip

Use the Viva Glint Exit template (with Employee Lifecycle surveys) to set up an ongoing program for employees that v

Set up Program Summary for Viva Glint Employee Lifecycle programs

Article • 07/13/2023

Employee Lifecycle programs measure the employee experience during key moments in the employee journey. They allow organizations to get a holistic understanding of the employee experience from beginning to end via automated survey invitations to new hires and exiting employees.

Employee Lifecycle programs are considered "trigger events" because they use the hire or termination date to automatically be sent.

Recommended cadence for Employee Lifecycle surveys

Viva Glint recommends this cadence:

- Onboarding surveys for new hires: Within the first week of employment, then again at 30 days *and* at 90 days
- Exit surveys with voluntary terminations: As soon as possible

Distribution List setup for Employee Lifecycle surveys

Before configuring an Employee Lifecycle program, visit the Distribution Lists lesson to create new lists based on hire date for Onboarding surveys and on Termination date for Exit surveys.

Follow these steps to create an Employee Lifecycle distribution list:

1. Begin by selecting the **configure symbol** on the admin dashboard and then select **Distribution Lists**.
2. Select **New Distribution List**.
3. Name the new list.
4. Select **Add/Edit Employees**.
5. Select the **Attribute Rules** tile.
6. Select **I want to filter all active employees by these populations.**
7. Select + **New Population** and find the respective attribute value from your user data, such as "Hire Date" for Onboarding or "Termination Date" for an Exit survey.

8. Set the date range for your distribution list window.
9. Add additional filters if the distribution should only go to a select population.
10. If the survey should include Inactive employees (Exit surveys), be sure the "Include Inactive Employees" box is marked.
11. Select **Save Changes** and align to your respective Employee Life Cycle survey program.

Tips

Onboarding

- Onboarding surveys distribution list date ranges will be relative to Hire Date.
- If the users are to receive the survey 30 days after their hire date, then ensure you set the first value to "after 30 days". For the end value, provide enough of a window so that if someone has their hire date updated late in your user data, they can still be triggered the survey.
- Don't make the window something too small as delayed imports might cause people to miss being included.
- You can't use the same number of days for the beginning and end value in the distribution list, for example: "45 days after to 45 days after." The query would be unable to find any users.

Exit

- Exit survey distribution list date ranges are relative to the Termination Date.
- Choose to have Exit Surveys go to a company email and/or a personal email.
- If using **Company Email Address**, we recommend setting the date range from *14 days before the Termination Date to 1 day after.*
- If using **Company email + Personal email**, we recommend setting the date range from *14 days before termination date to 30 days after*.

Populate the Program Summary pages in a survey template

Select **My Surveys** on the admin dashboard. Choose the Onboarding or Exit survey template and then in the *Program Summary* section, set up the following pages (note the important boxes below which are specific to Employee Lifecycle surveys only):

- Program Setup

- Distribution

- Questions
- Reports

  > **Important**
  >
  > The Overall Results report is recommended for viewing Employee Lifecycle surveys.
  >
  > Within the Viva Glint Overall Results report, data can be configured and customized to surface useful insights. Filters are dependent on the attributes sent to Viva Glint in your Employee Attribute File and must meet confidentiality requirements for results to display. **Read about the Overall Results** report here.

  > **Important**
  >
  > Understanding **how to interpret the trend graph** is essential to gaining the best insight from Employee Lifecycle data.

  > **Tip**
  >
  > **The default** for Employee Lifecycle reports is a 90-day look-back period.

- Communication
- Coaching

Additional resource

Preview and filter Employee Lifecycle programs

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Article • 06/15/2023

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Additional resource

Set up Program Summary for Viva Glint Employee Lifecycle Programs .

Assign the right survey items to users with Viva Glint Display Logic

Article • 10/30/2023

Microsoft Viva Glint admins can set up survey items with conditions that personalize surveys for users by applying display rules. Display logic rules allow you to show or hide survey items depending on the survey taker's previous responses. For example, if a person answers "No" to item 4 on your survey, and the following items 5-7 no longer apply to them, these items can be automatically hidden, and the survey taker moves to item 8.

Scenarios for Display Logic

Display Logic can be applied based on:

- Answers to previous multiple-choice/multi-select questions
- Answers to previous rating questions
- Whether a user skipped an optional question

> ⓘ **Important**
>
> A question will always display unless it has display logic defined, in which case it displays only when display logic rules are met.

Set up Display Logic in your survey program

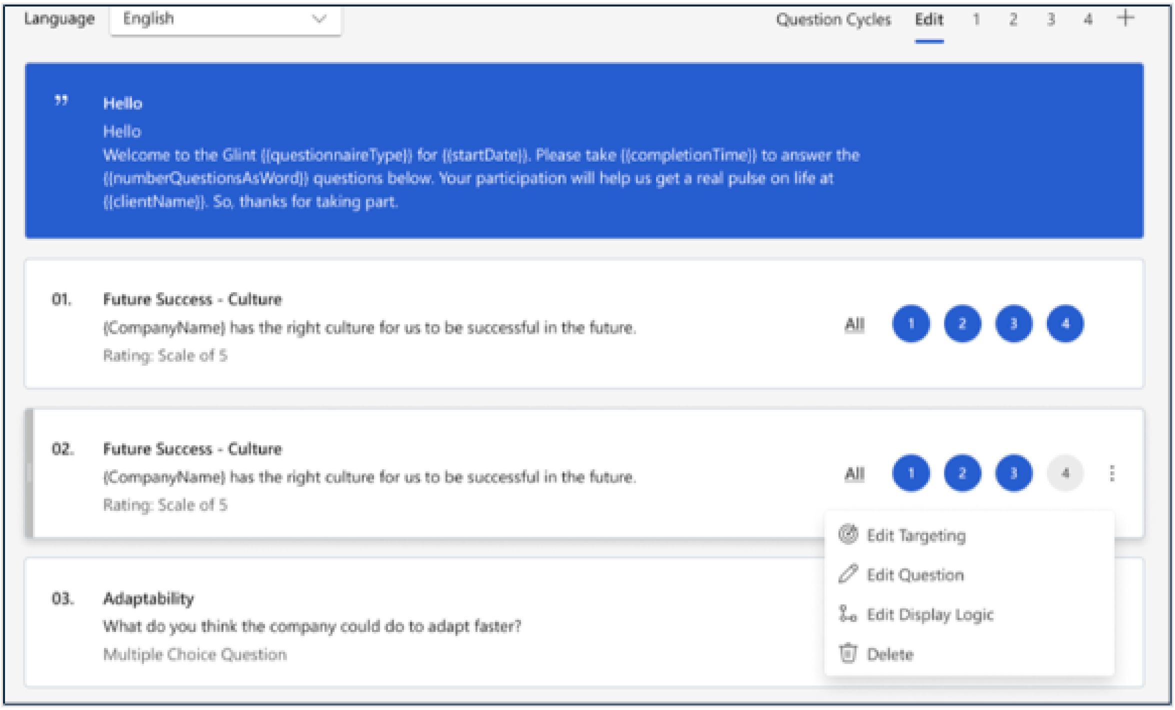
From the admin dashboard, go to the survey you want to edit. Display logic can be set up in the **Questions** section in **Program Summary**.

1. Arrange your survey items in the order you want them before adding Display Logic.

   > ⊗ **Caution**
   >
   > Display Logic only works correctly when all survey items are added to your program in the exact order that should appear for survey takers.

2. Select the **vertical ellipses** next to a survey item to display the dropdown menu.

3. Select **Edit Display Logic** to open the Display Logic slider window.

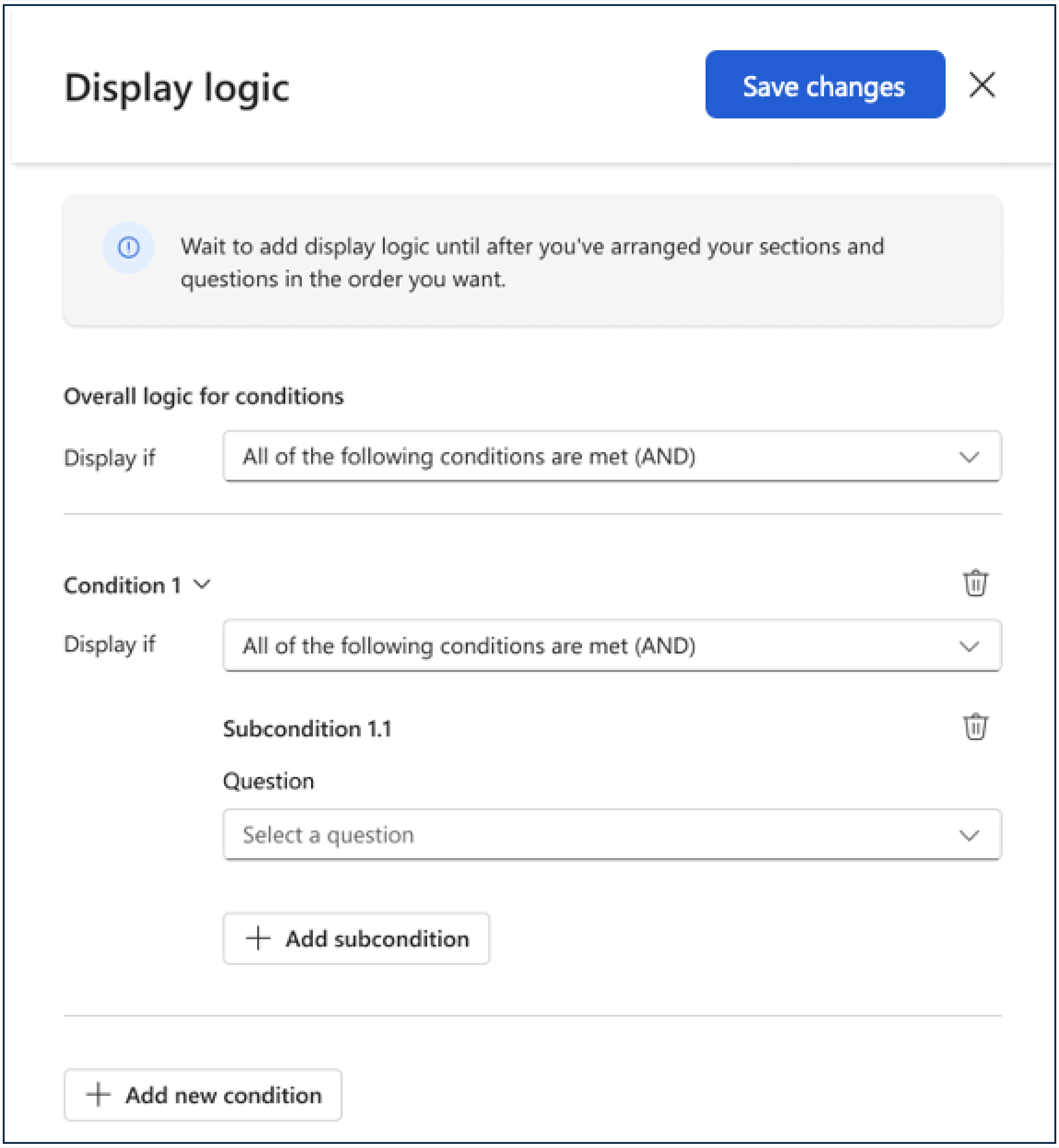


4. Choose the **overall logic for conditions**, using the dropdown menu.

5. Next, choose the **condition** and **subcondition** using the corresponding dropdown menus.
   a. The subcondition opens the Question box where you can choose the survey item that the display logic is dependent upon.
   b. **Select an operator** – the instance that is to be acted upon.
   c. Add additional subconditions as desired.

6. Add additional conditions as needed.

7. Select **Save Changes**.



> ⓘ **Important**
>
> The first item in your survey can't have display logic, which is based on responses to previous survey items.

Delete survey data from Viva Glint

Article • 10/25/2023

As your company's data controller, Microsoft Viva Glint admins can delete nonactive surveys data. This action deletes every data entity directly related to the survey, including overall survey configuration, items/questions, reports, responses, etc. The action won't delete distribution lists or any roles related with the survey.

> **Note**
>
> Viva Glint admins must have Advanced Configuration access enabled to delete survey data.

> **Caution**
>
> Survey data deletion in Viva Glint is an irreversible process. Perform this action only when confident that the data of the survey is not required anymore.

Survey data can be deleted from Surveys Programs on the admin configuration dashboard

To delete survey data from Viva Glint, follow this process:

1. Select **Survey Programs** from your admin **Configuration** page.
2. Use the search box or navigate over the **Survey Programs** list to identify the survey that data should be deleted from.
3. Select the three dots and then from the dropdown menu, choose **Delete**.
4. A **Survey Delete** confirmation box will ask for confirmation and display the following message: "This will permanently delete all data associated with this program."
5. If you aren't sure if they should complete the action, then select **No, I am not sure**, otherwise **confirm the action**.
6. Once the delete action has been completed, return to the Survey page to verify that the survey doesn't appear in the Survey Programs list.

Preview, manage, and enable Viva Glint surveys and dashboards

Article • 07/13/2023

After all the sections in Program Summary have been set up, use the following guidance to approve, preview, edit, and launch your Microsoft Viva Glint program.

Approve a program

When each section of a survey has been set up successfully, a blue checkmark displays to the right of the section name on the Program Summary page. This indicates that the survey can be approved and enabled. Approving the program takes it out of draft state and displays scheduled survey cycles on the Upcoming and Live section of the page.

After a program is approved, all programs except for Employee Lifecycle and Always-On surveys must be enabled to go Live on the scheduled date. Surveys go into Live status at midnight on the day they're scheduled to go out, in your default time zone.

> ⓘ **Note**
>
> When Employee Lifecycle and Always-On surveys are updated, admins are prompted to re-approve them. This automatically re-enables the cycle. This helps admins ensure live surveys are always active.

Procedure

To approve a program, change Approved to **YES**.

> ⓘ **Note**
>
> After it has been approved, a program must be enabled for the survey to go live.

Preview the survey

When your survey is approved, you can preview how the survey, dashboard, and reporting will appear to end users.

Procedure

1. Select the **vertical ellipses** next to the cycle to be previewed.
2. Select **Preview**.
3. Select the user whose survey you'll preview.
4. To preview the survey invitation email, check **Send a sample survey invite to**.

   > ⓘ **Note**
   >
   > The user you select will not receive a preview survey invitation email.

   > **Tip**
   >
   > Use the preview survey email to ensure your surveys are received by your employees and do not end up in a spam or junk folder.

5. Select **Preview Questionnaire**.
6. Review the email content and then select **Get Started**.

   > **Tip**
   >
   > Share the preview questionnaire with your team for approval.

7. The introductory page of the program opens in a new tab, in the default language of the user you preview.

   When reviewing the introduction and summary for each item, ensure that:

   - Rating scale is as expected
   - Rating scale labels are written as expected (Strongly Disagree/Strongly Agree)
   - Comments are available
   - Items aren't skippable unless intended
   - Macros appear as values
   - Additional language options are available as expected

Preview the dashboard and reporting permissions

Admins can view how attributes and potential survey responses look in reporting before employees take a survey. This enables familiarization with Viva Glint's dashboard, understanding of how the manager hierarchy and user attributes appear in different reporting scenarios, and allows you to conduct manager training.

To preview the dashboard and reporting:

1. Select the **vertical ellipses** next to the cycle you want to preview.
2. Select **Preview**.
3. Select **Generate Report Preview**.
4. You will receive an email to let you know when the report is available; the report may take up to 24 hours to generate. Once generated, your report remains visible for seven days.

> ⓘ **Note**
>
> Until you receive your email, ensure that your survey program remains in Approved status. Your report will not generate successfully if your survey program is not Approved.

Edit a cycle schedule

After previewing your questionnaire, if you notice changes need to be made:

1. Select the **vertical ellipses** next to the cycle to be previewed.
2. Select **Edit**. Once a survey is live, the edit option isn't available.
3. Make the necessary changes.

Manage a cycle schedule

To reschedule the survey:

1. Select the **vertical ellipses** next to the cycle you want to edit.
2. Select **Manage Schedule**.
3. In the **Reschedule Survey** dialog box, make the necessary changes. If the survey is Live, the **Schedule** section is disabled.
4. Select **Save Changes**.

Enable a program

Once enabled, surveys go live at midnight on the day they're scheduled to go out, in your company’s default time zone. Survey invitations are sent according to your delivery window set up on the Communications page.

1. Select the **vertical ellipses** next to the cycle to be enabled.
2. Select **Enable Survey**.
3. The **Status indicator** changes to blue. If the survey is Live, the Status indicator shows green.

Once the program is enabled, the following can't happen:

- Survey name can't be changed
- Removing, adding, or editing items or text on a live survey
- Adding or editing distribution lists on a live survey
- Removing items from the dashboard.
- Removing comments
- Reopening a closed survey

Verify a launch

Check your email and the email of at least one other survey recipient when your program is scheduled to be live. If your survey is missing, check to confirm that the dates are correct and that the survey was enabled.

Viva Glint’s Survey reports overview

Article • 07/13/2023

Admins establish access to survey reports in the Reporting step of Program Summary for each specific User Role. Defining access status is available for recurring and ad-hoc survey programs.

Report suggestions by role

Admins can assign specific reports for distinct roles.

Report name	Description	Intended for use by
Alerts	Identifies statistically significant patterns, outliers, and deviations in your organization’s data, based on demographic attributes or combinations of attributes. Alerts surface business critical issues or strengths that may not have been initially identifiable.	Admins
Comments	Offers insights into employee verbatim comments, providing helpful context around survey scores. Highlights key topics, topic sentiment, topic connections, and prescriptive and representative comments.	Senior leaders, HRBPs (Human Resources Business Partners), admins (anyone who would benefit from looking across multiple groups for comparisons)
Driver Impact	Allows managers to easily identify Strengths (areas the team should celebrate) and Opportunities (areas the team should work to improve engagement) based on key engagement driver scores.	All, but specifically managers
Executive Summary	Presents high-level data views for team presentations at all levels. This report resembles the overall dashboard view.	All
Goals Overview	Shows the status of completion of identified goals across teams. Provides critical insights briefly, with access to more details.	Admins and managers
Heat Map	Identifies high and low scoring teams on engagement and corresponding drivers. Based on permissions, these can also be filtered by demographic attributes.	Senior leaders, HRBPs, admins (anyone who would benefit from looking across

Report name	Description	Intended for use by
		multiple groups for comparisons)
Overall Results	Mimics the Glint dashboard but allows data filtering and reviewing of more demographics.	All
Manager Report	Displays a *direct* or *role up hierarchy* view of all managers within a specific Manager/HRBP hierarchy.	Admins and managers
Response Rate Report	Provides a deep dive into survey response rates across hierarchies and key demographics. Displays trends and benchmark comparisons.	All
Team Summary	Captures employee feedback as an easy-to-use, insightful experience, designed to empower managers to approach feedback with a growth mindset, understand the unique strengths and opportunities that drive team engagement, and to encourage the next steps in sharing results and seeking team input on Focus Areas.	All
Multi-Attribute Export	Admins can deep dive into survey scores and view results of combinations for up to three attributes. The Multi-Attribute Export report is available for both engagement-type surveys and employee lifecycle surveys.	Admins

Choose reporting access level

There are two levels of reporting access you can choose for your leaders.

- **Live access**: Reporting access is readily available in real time as surveys are completed. Administrators will always have Live access and can't be included in Phased access rollout.
- **Phased access**: Recommended for managers and HRBPs (HR Business Partners) for action planning, tracking, and reviewing feedback results for *completed* surveys, excluding this role group from real-time, live survey results. Phased access is configured at the program level but occurs at the cycle level.

  Tip

Keep survey results classified while the survey is Live, among just a small group of leaders. Incomplete results may lead to unintended and inaccurate conclusions. *Feedback results aren't final until all results have been considered*.

Change from Live access to Phased access

1. Switch to the **Completed** view and hover over the survey cycle.
2. Select the content in the **Reporting Access** column in that row.
3. The **Program Summary** page will display along with Reporting status.
4. Select **Grant Access**.
5. In **Grant Report Access**, check the box of the roles you wish to grant access to. Once access is granted, it can't be revoked.
6. Select **Provide Access**. The message *Visible to All Reporting Roles and Release Completed* confirms the change.

Once the next program cycle begins, and if the last cycle has Phased access, the access will default back to Live.

Use Viva Glint's Executive Summary dashboard

Article • 07/13/2023

The Executive Summary is a group of reports useful to admins for presenting high level results to your team, leaders, or the company. This report is your overall dashboard view.

Choose reports to share on your Executive Summary dashboard

There are many reports that you can choose to be part of this dashboard. The following descriptor table provides you with instructions on how to add reports or sections. Some items appear separately, and others may group as part of a related section.

Report or section	Description
Survey Results	Overview of the most recent results from a survey
Scores Trend	A historical graphic display of score variance over time, as available
Scores Trend by Demographic	How a score varies over time by demographic
Score by Demographic	How a score varies by demographic
Demographic breakdown by Attribute	How demographic breakdown varies by attribute
Survey Overview	Overview of the key results item/question
Survey Participation	Overview of the response rate and comments for the survey
Question/Item Overview	Overview of just a single item or question from the survey
History	How key item/question, response rate, and favorability changed over time, as available
Scores	View of the overall survey score
All Scores	Detailed view of each item/question score
Heat Map by Demographic	How all items vary by demographic
Heat Map by Survey Date	How all questions/items vary over time, if applicable

Report or section	Description
Celebration	Highlights improvements from previous pulse
Driver Impact	Surfaces key strengths and opportunities across the entire survey
Strengths	Top strengths relative to comparator
Opportunities	Top opportunities relative to comparator
Response Rate History	How response rates have changed over time, if applicable
Response Rate by Demographic	How response rates vary by demographic
Multiple Choice Questions by Demographic	How response rates to a multiple-choice question vary by demographic
Radial by Demographic	How the key question/item varies by demographic
Score Benchmarks	How my teams score against the entire company
Non-Rating Questions	How people respond to each non-rating item
Driver Impact by Demographic	How a single item score and impact vary by demographic
Comments Overview	Overview of comments including overall sentiment and top topics
Comments Questions	How questions/items vary by volume and sentiment
Comments Topics	Top comment topics and how they're related to each other
Keywords	A visual of top keywords from comments
All Comments	Read representative, prescriptive, or all comments

To learn about other reports available, see Report types.

Edit a report

The settings button opens a window where you can choose the right comparison data to interpret survey results within the context of how others are doing. Viva Glint provides four options for comparison reporting:

- **Benchmark**: Provides a comparison point for feedback based on survey data compiled from all Glint customers. Helpful for admins and first-time survey results analysis.

- **Company**: Displays team scores in comparison to company-wide scores for the same questions. Helpful for users with more than one area of responsibility.
- **My Teams**: Compares a team's score to an overall score derived from a user’s data access. Helpful for users with more than one area of responsibility.
- **Average Question**: Presents a single, overall score for all questions and respondents within your access. Helpful for users looking for some level of variance in their score.

> ⓘ **Note**
>
> Your company may have substituted custom terms for the Viva Glint terminology used in our guidance.

Filter a report

Most reports are filterable by attribute and hierarchy. Use the **filter** symbol.

Add or delete a report

To add a report, select the **More** dropdown button at the bottom of the page and then **+ Add Section**.

If you already have some reports displayed but want to add more, the More button won't be available, but you will find the **+Add Section** at the bottom of the page.

If you choose not to share one of the reports that already appears, choose **Delete** on the vertical ellipses at the right of the report.

Export a report

Use the dropdown arrow in the **Export** button to choose your method of export.

Use the trend graph in a Viva Glint Employee Lifecycle program

Article • 07/13/2023

The Trend Graph for Employee Lifecycle (ELC) surveys behaves differently than that of a Microsoft Viva Glint recurring program.

- By default, the scores displayed in reports are filtered to responses received in the last 90 days.
- As ELC surveys are always active: Reports will group scores based on the date range selected or the default 90 days.
- Responses appear on the dashboard as feedback is submitted. The manager will see responses on their dashboard after the program thresholds are met and according to their user profile permissions.

When the default period is used

- The latest data point on the graph will be any surveys received within the past 90 days.
- The next point will be the 90 days before the first data point (180 days - 91 days before today).
- The point prior to that will be 90 days before the second data point (270 days - 181 days before today), and so on.

The date that is displayed when you hover over data points is Day 1 of that range, meaning that *the most recent* data point is 90 days before today's date (the date being studied). This date is not capped by the actual survey launch date, so a date earlier than the survey launch date can be displayed on one of these data points.

Tip

Example:

- Today's date is May 21, 2022.
- The Exit survey launched on January 9, 2022.
- The first data point on the trend graph shows February 21, 202 - 90 days before today's date.

- The second data point on the trend graph shows November 23, 2021 - 180 days before today's date.

Note

The trend graph doesn't reference the actual survey launch date when determining the date to display. It uses 90-day intervals. In this scenario, no responses were received from November 23 - January 8th as the program did not open until January 9th.

Use the Viva Glint Alerts and Attrition Risk report

Article • 07/13/2023

Microsoft Viva Glint's Alerts algorithm finds statistically significant patterns, outliers, and deviations from the scores in survey data and surfaces populations or demographic groups that have:

- Low or high scores
- Notable changes in scores

> **Note**
>
> Statistically significant/notable insights are gathered using p-value, as well as select thresholds for the minimum population size (defaults to 20 respondents) and the minimum score difference or change (defaults to 8 points) to qualify for an alert. The defaults are configurable at the client level (p-value = 0.05, min N = 20, and delta = 8).

The Alerts report is found on the **Reports** tab of the admin dashboard. Alerts are only visible to admins.

How is the Alerts report generated?

Populations are defined by the attributes supplied within your Employee Attribute File. The alerts algorithm searches for patterns within single attributes (for example, Team: Sales > Corporate Sales) and combinations of attributes (for example, gender and tenure > 5 years).

If a population or demographic group has scores for items that are different from a comparison point in a statistically significant way, that population is tagged for an alert.

You can configure which demographic attributes are used by the alerts algorithm.

- **Alerts for low and high scores:** For low and high scores, the algorithm uses comparisons against the external benchmark and Company average.
- **Alerts for changes to scores:** The algorithm looks for notable changes to scores between the current survey and the last time each item appeared on a survey.
- **Hierarchies:** Alerts are smart about hierarchies and display only the highest relevant level for any given survey item.

Learn from working examples

Example #1:

If all the subpopulations in Engineering have low scores on *Purpose* and *Role*, but one subpopulation of Engineering (for example, *Engineering & Tenure > 5 years*) has low scores for *Career*, then two Alert populations will be visible:

- Engineering for both questions – *Purpose and Role*
- Engineering & Tenure > 5 years for the question on Career

> ⓘ **Note**
>
> If certain demographic groups are highly correlated with other demographics, multiple alerts may be generated for the same underlying population.

Example #2:

Consider that everyone in *Sales in Location (California)* was hired in the last year and also that everyone hired in the last year in sales went to California. If this group had a low score, the algorithm may generate two Alerts - one for *Sales in California*, and *Sales in California with Tenure < 1 year*, since the two groups are the same.

Attrition Model Attrition Risk Index

The Elevated Attrition Risk, part of the Alerts report, is key for providing information about populations that may be at elevated risk for turnover.

What is the Attrition Risk Index?

Viva Glint can predict the effect of score differences and overall response profiles of each population for employee attrition. The Attrition Risk Index is a model trained on aggregated turnover data across all Viva Glint clients and can predict elevated risk for voluntary attrition based on scores for standard items.

Populations identified with elevated attrition risk are those that show a higher future attrition rate than your company's average.

Based on extensive cross-validation studies, when using our standard survey questions/items, risk alerts have a precision of at least 80% and in many cases, even higher. If a population is flagged for elevated attrition risk, there is at least an 80% chance that attrition will be elevated.

The model uses Viva Glint standard items in making predictions to allow for the most useful information to be available. The model is structured in a way that recognizes if nonstandard items are used - the use of custom items degrades the model. Outcome items - eSat and Recommend - are immensely powerful and are a proxy for many insights, so a minimal set of items should include at least eSat and Recommend.

> **Tip**
>
> Regularly incorporate the Alerts report into your Viva Glint dashboard.

> **Note**
>
> - The Elevated Attrition Risk model was updated in October 2022.
> - If you have worked to implement a custom model, platform alerts remain unchanged.

Set up the Alerts report

Configure which demographic attributes you want to include in **Alerts** from **General Settings** on the admin dashboard. To configure them initially, or to change them over time:

1. Navigate to **Reporting**, then **Attributes for Alerts.**

2. From the attributes you have sent in your Employee Attribute File, narrow down which you'll see in the Alerts report to those items *most important to attrition risk* within your organization.

   - Use the Search box to add attributes if you're making changes.
   - Delete attributes by choosing the **X** next to those you don't wish to see on the report.

   > **Tip**
   >
   > Select only attributes that are necessary for Alerts, such as important hierarchies, tenure, and generation. Avoid attributes with many values that cannot be grouped, such as hire date, birth date and manager email. Using all attributes cannot surface helpful insights.

3. Select thresholds for the minimum population size (default is 20 respondents) and the minimum score differences (default is eight points) that will qualify for an alert. You may choose not to see alerts for populations smaller than 25 respondents or score differences smaller than 10 points. Filter the populations by size using the slider in the Alerts report.

Use the Viva Glint Driver Impact report

Article • 07/13/2023

Drivers are the factors that affect employee engagement; a driver's *impact* is described as its correlation with employee engagement in the current world of work. Strengths and Opportunities (S&Os) for creating focus areas and action plans are derived from driver impact data.

There can be a significant difference in how important a specific driver of engagement is to one team compared to another team, or to the rest of the company. For example, the engineering team's engagement level may be highly impacted by a lack of career growth opportunities, whereas the finance team may have been overworked this quarter and thus work-life balance impacts them the most. Key drivers vary within organizations and populations.

Strengths and Opportunities are derived from the Driver Impact report

The algorithm used to identify Strengths & Opportunities (S&O) is composed of question/item scores, impact on engagement, and relativity of the score to a comparison point. This comparison could be internal company scores, an external benchmark, or the score for the average question for that survey.

Strengths are areas that the team should celebrate, and opportunities are areas the team should work on to improve overall engagement (or the key outcome).

To determine a driver's impact, individual survey responses are analyzed to determine how closely aligned scores are for each driver and the outcome variable (typically engagement). A driver's impact is classified as *high* when, in general, the following is true:

- Employees who rate a driver high also rate engagement high
- Employees who rate a driver low also rate engagement low

If a driver's score isn't related to engagement, then it has low or zero impact. Knowing which drivers have a high impact allows managers to focus on improving the scores of drivers that matter the most.

Two options for viewing the Driver Impact Report

You can choose from the following formats to view your report:

Driver Impact graph view

When a user navigates to the Driver Impact report, the first view is in graph format.

The graph plots each driver's impact on the x-axis and the selected comparison on the y-axis. The comparison can include:

- An internal comparison such as the overall company,
- An external benchmark, or
- The average question score for the survey

Items on the right side of the graph have a high statistical correlation with the selected outcome (typically engagement or eSat) across all the respondents in a group. Often a person will rate a driver and its corresponding outcome the same. For this reason, acting on those items likely has the biggest impact on engagement (or the selected outcome).

In determining strengths and opportunities, the platform considers the distance to the comparison point and the impact on the key outcome. Only items with a "High" or "Very High" impact will be considered when determining strengths and opportunities. Of these, the ones relatively highest in relation to the comparison will be marked as Strengths, and the ones relatively lowest in relation to the comparison will be marked as Opportunities. Based on this analysis, a rank ordered list of items is displayed:

- Relative Strengths are indicated by points with a **bold white dot**.
- Relative Opportunities are indicated by a **red dot**.

Driver Impact table view

The Driver Impact table view displays the top three strengths and opportunities, exactly as managers see them on their Strengths & Opportunities report. Selecting **Show more** will display all extra strengths and opportunities. Select **Show less** to hide them.

The circle next to each driver's name indicates the iImpact level and score in relation to the comparison:

- A filled circle indicates the highest impact
- A partially filled circle indicates relatively lower impact

- Blue indicates that the question scored above the comparison
- Red indicates that the question scored below the comparison

Understand settings on the Driver Impact report

The default driver impact report is set at the client level and is either an internal comparison such as the *Total Company* or an external *Benchmark*. This dictates what appears on the dashboard and for all reports as a comparison across all programs. Comparison groups can be changed, but the views revert to the default settings upon logging off or changing views.

If you're looking at *Total Company* results *and* the default comparison is Total Company, the driver analysis will show *Average Question* as the comparison - otherwise there would be no comparison ratio.

Applying filters

Applying filters allows admins to look at strengths and opportunities for specific groups. To apply a filter:

1. Select the filter symbol at the top of the page.
2. Select + **Add Filters.**
3. From the dropdown menu, choose a filter from the People or Question Responses section.

Reference **Reports Filtering** for detailed information.

Strengths & Opportunities can be added to the Executive Summary report

The view provides a ranked list of both strengths - areas to celebrate - and opportunities - areas to focus on for improvement.

> **Tip**
>
> For admins, the first look at S&O should be versus *Benchmark* to understand which areas should be focused on to improve your organization's competitive advantage in attracting and retaining talent. Only items with a benchmark are part of this view.

If there are multiple items without a benchmark, change to view S&O versus Average Question. This view shows the comparison to the average score of all selected questions/items, indicating a team's relative strengths and opportunities compared to the *company mean* across items.

Example:

If there are 10 rating questions in a survey and the average of all the question scores is 75, then the difference between a question with score 70 versus the question average is calculated as 70 - 75 = -5.

Managers should view Strengths & Opportunities versus Company

Managers should first look at the Strength & Opportunity report *vs. Company (or other internal comparison, if available, such as Division)*. While Benchmark is a valuable comparison, most often Company is more informative because the comparison is internal.

A manager with scores *below* company average should focus on the items with the biggest gaps as those reflect the greatest opportunity for improvement. For this reason, the **Take Action** button defaults to the Opportunities section of the S&O report.

Managers with scores *above* Company can change to view S&O vs. Benchmark to gain a sense of what areas may help to close gaps.

Small teams can use the Driver Impact report

The algorithm used to determine driver impact scores includes a statistical test to determine if it has enough data points to establish a significant correlation.

A minimum number of 20 respondents is the default threshold to determine whether to produce impact scores for a team. Managers of smaller teams that don't meet the minimum number of respondents will see their S&O based on the impact calculated at the *Company level*. This provides the most statistically sound results for the small team.

Key points for managers with fewer than 20 respondents:

- S&O on the dashboard are the areas a manager's team scored relatively high or low in relation to the comparison. These areas have the strongest impact on engagement at the larger company level; they impact isn't reflective of your team specifically. The dashboard doesn't show impact scores at the team level if there are fewer than 20 respondents.

- One manager's S&O may be different from other leaders within their organization.
- If enabled, including Broader Team Insights (BTI) into conversations will provide understanding for what drives engagement closer to the manager's own level within the organization.

Use Viva Glint to act on Strengths and Opportunities

Article • 11/07/2023

The Strengths & Opportunities (S&0) report is designed so a manager can focus on opportunities first, as they have the highest impact on employee engagement. For this reason, the option to *Take Action* appears by default in the Opportunities section. Taking action is initiated by:

- Selecting the **Take Action** button.
- Selecting the **vertical ellipses** in the Strengths or the Opportunities column and selecting **Take Action**.

Watch these videos

Lean into your strengths with Microsoft Viva Glint (2:30)
https://www.microsoft.com/en-us/videoplayer/embed/RW132G0?postJsllMsg=true

How to think about your opportunities with Microsoft Viva Glint (3:00)
https://www.microsoft.com/en-us/videoplayer/embed/RW12ULW?postJsllMsg=true

Why does my screen indicate *View Focus Area* rather than *Take Action*?

When a manager has already acted - by choosing a Focus Area - the platform indicates View Focus Area. This option is to view how the manager and their team are progressing in their team conversations and action taking.

> ⓘ **Note**
>
> *Take Action* or *View Focus Area* does not appear for users without *Create Focus Areas* enabled within their role permissions.

Understand realized vs. unrealized strengths

Within the strengths section, you may see "realized" or "unrealized" labels or no such label.

- Realised strength - something your team is good at and that they do on a regular basis
- Unrealised strength - something that your team is good but doesnt practice regularly and should be considered as an opportunity
- Unlabeled - the gap between what is realized and unrealized, for purposes of calling out the items that deserve attention

Custom Strengths and Opportunities

Outcomes and comparisons used to calculate S&Os can be customized in either of the following ways:

- Select **Settings** at the top right, to reveal the option to change outcomes and comparisons.
- At the top of the Strengths and Opportunities section, select the hyperlinked words to change the outcome or comparison.

Use Viva Glint's Focus Area Overview report

Article • 07/13/2023

The Focus Areas Overview report provides a status of the completion of Focus Areas across teams. The report provides critical insights immediately with easy access to additional details.

Grant permission to view the Focus Area Overview report

Access is approved to the roles with **View Focus Areas Reports and Manager-Visible Focus Areas** within **User Roles** in the **Employees** section of an admin's Microsoft Viva Glint dashboard. The scope of the report respects access at a per-person level.

Access the report

From the admin dashboard, follow this procedure:

1. From the top menu bar, select the **Reports** tab.
2. In the left-most column of the Reports page, select **Focus Area Overview**.
3. Now select the **Focus Area Overview** card.

How leaders can use this report

Your leaders and admins use this report to:

- Connect managers working on similar Focus Areas.
- View feedback comments to provide context for what their managers are working on.

Report section summary

The table below explains the report sections and descriptions.

Term	Description
Summary	Provides a sense of Focus Area completion across teams and answers the following:

Term	Description
	- How close are we to Focus Area completion? - What's the status of the Focus Areas? - What percent of the population makes up each status? - How many managers have created Focus Areas?
Overall Focus Area Completion	Shows progress toward 100% Focus Area completion. View the count of Focus Areas completed and the number of employees who completed them.
Focus Area Status	Illustrates each Focus Area status and the populations they cover; hover over each status to see a deeper dive into the information.
% of Employees with Focus Areas	Displays the overall percent of managers and others with Focus Areas; hover over the number for a deeper dive into the information.
% of Employees without Focus Areas	Displays the percentage of employees that don't have Focus Areas.
Goal Status by Type	The breakdown of Focus Areas by type. Many sections of the report are dynamic, displaying additional details when you select them.
Column Headers	Select column headers to sort by status in ascending or descending order.
Status Bars	Select any status bar to include that data in the **Summary** section. This provides additional insights about the Focus Area type, specifically: - Overall completion status - % of employees that don't have the focus area
Percentages	Hover over percentages throughout the report to see more detailed information.
Filter	Located in the header menu at the top of the page. It's indicated by an arrow and any selected filters, when collapsed. The selections you choose for the report are automatically added to the filter. Select the arrow to expand the menu to view past reports or modify filters. The current Focus Area period appears by default, but you can look back at previous periods as well.

Exporting Focus Area data

You can export Focus Area data from two different dashboard sections:

Export data from the Focus Area Overview report

1. The down-facing arrow in the circle opens the Export options.

2. Select **Export All Action Items to Spreadsheet**.

3. Select the option to download action items for the selected goal period in the **Usage Report**.

Exporting Focus Area data from the admin dashboard

1. In the Action Taking section, select **All Action Items Report**.
2. The report automatically generates as a *.csv* file.

What will the report show?

- Employee email
- First and last name
- Focus Area(s)
- Goal period
- Focus Area(s) window and due date
- Action item/description
- Action item/Goal status
- Whether the items are a Viva Glint suggested item
- Focus Area comments: Following the Viva Glint Suggested Action Item column in the exported spreadsheet, admins can see
  - The number of comments supporting a Focus Area
  - The comment, each displays in its own row

Use Viva Glint’s Comments report

Article • 11/16/2023

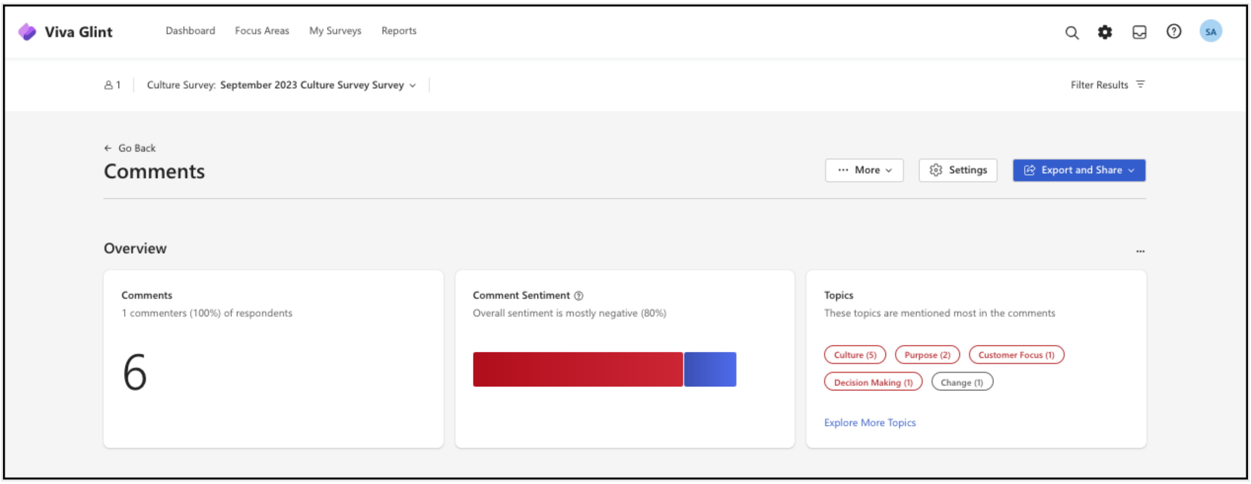
The Comments report is your window into Viva Glint's Narrative Intelligence technology, which helps managers interpret comment data by highlighting important topic areas, sentiment analysis, and keywords. Reviewing comments allows managers to gain further insights into their results. Comments can provide helpful context around scores you are exploring in the rest of the application. When a comment count is present, you can select it to view the comments and interact with Viva Glint’s full Narrative Intelligence experience. Comments can be viewed by any demographic and/or question.

Access the Comments report

The Comments report, for those with comments permission, is found from the Viva Glint admin dashboard > **Reports** > **Comments**.

Choose which comment sections to view on your dashboard

The Comments report is divided into sections; the Overview section displays on your screen by default.



- **Comments** - Total number of comments, defined by number of commenters and percentage of respondents.
- **Continent Sentiment** - A bar graph indicating overall positive, negative, and neutral sentiments.
- **Topics** - Topics mentioned most often appear here, including the number of mentions.

Add additional sections to your comments report

There are two ways to add additional sections:

- Select the + **Add section** button, or
- Use the **More** dropdown menu and then choose + **Add Section**

Select sections by scrolling through the tabs at the top of the slider window to add sections. Add or delete sections at any time.

- Select the + **button** to add the section.
- If a **right-facing arrow** displays, choose that to open the window which allows you to filter by attributes. Then select **Add**.

Questions section

This section can be viewed in either grid or table view and includes:

- Top questions by volume
- Top questions by positive sentiment
- Top questions by negative sentiment

Keywords section

This section can be viewed by keyword view or table view. Keywords are words and phrases that occur most frequently across comments. Use this key:

- The color of each keyword indicates the aggregated sentiment or favorability of related comments.
  - Blue = positive
  - Grey = neutral
  - Red = negative
- The *size* of a keyword reflects the volume of related comments.
- Hover over a keyword for more information about sentiment or favorability.
- Select a keyword to view all related comments.

Topics section (or Topics cloud)

Topics are a high-level summary of comments that generate deeper insight. This section may be viewed as a forced, directed view (cloud view) or a table view. Use this key:

- The color of a topic bubble indicates the aggregated sentiment or favorability of related comments.
  - Blue = positive
  - Grey = neutral
  - Red = negative
- The gray lines connecting bubbles indicate related topics. The thicker the line, the stronger the relationship.
- The *size* of a topic bubble reflects the volume of related comments.
- Hover over a topic bubble for more information about sentiment or favorability.
- Select the topic bubble to reveal a slider window with all related comments.

Comments section

In this section, you can view all comments or see them by category. The total number of comments appears in the blue box at the top and comments by category, underneath.

Redacting and Quarantining comments

You may redact terms - flagged as Personally Identifiable Information (PII) or as profanity:

- Select **Redact All Terms** to replace all PII and profanity with five-pound signs (#####).
- Select **Un-Redact All** to replace ##### with the original comments.
- Use the **vertical ellipses** next to an individual comment to select **Redact** or **Un-Redact**.

Learn the importance of quarantining comments when necessary.

Sensitive comments can be quarantined by using the **vertical ellipses** next to the comment. By selecting **Quarantine**, the comment is now only visible to admins with 'Manage Sensitive Comments' capability. Similarly, comments may be un-quarantined. See Advanced privacy guide for data usage and survey item creation for more information.

Export, save, or share from the Comments report

Selecting this dropdown menu allows you to perform these functions:

- Export report to PowerPoint
- Export report to PDF
- Export report to spreadsheet
- Export report to Images
- Export Comments to XLSX Spreadsheet
- Save
- Save As - Rename a customized report and indicate if it should automatically update with the most current data.
- Share

> **Note**
>
> Managers with multinational teams can export and read all comments in their preferred languages so that they can easily dig deeper into the comments offline. For Comment reports generated in less than ten seconds, the file downloads automatically in-browser. For reports requiring longer than a ten-second generation, the user will receive an email link to download their file when it is ready.

Choose your benchmark in the Settings window

Selecting this button opens the Report Settings slider. Here you can choose your benchmark. Choosing the right benchmark data helps users interpret survey results within the context of how others are doing. Glint provides several options for benchmark reporting. Note that your company may have substituted custom terms for the Glint terminology explained below.

Internal Benchmarks:

- **Average Question**: Presents a single, overall score for all questions and respondents within your access. Helpful for users looking for some level of variance in their score.
- **Company**: Displays team scores in comparison to company-wide scores for the same questions. Helpful for users with more than one area of responsibility.
- **My Teams**: Compares a team's score to an overall score derived from a user’s data access. Helpful for users with more than one area of responsibility. Select **Done** after customizing. To save the report, use the **Export** button > **Save As**.

Add a filter to your Comments report

Selecting **Add a filter** expands the filter panel to allow Advanced Filtering. Advanced Filtering enables you to see how one program impacts another. For example, you can view Engagement results filtered by those who had a good onboarding experience. You can also add attribute or hierarchy filters available for your program in this expanded panel.

Interpret the Keyword Cloud

Article • 11/20/2023

Viva Glint’s Natural Language Processing (NLP) technology extracts keywords and phrases that are relevant, commonly occurring, and unique to a filtered population. The keyword cloud is a section available on the Comments report.

- **Relevance** is defined by how much more frequently a keyword appears than the naturally expected occurrence in organizational surveys.
- The **size** of the word in the keyword cloud is based on the relevancy of the term.
- **Color** represents the sentiment (positive, negative, or neutral).

Generation of the keyword cloud

A minimum number of comments is required in order for the keyword cloud to be generated by a report. There also needs to be a minimum number of occurrences for the keyword to appear, and the word needs to be in Viva Glint’s proprietary dictionary. The keyword cloud will always be in English, but NLP will translate the comments left into other languages.

Understand the keyword cloud methodology

Viva Glint’s keyword methodology requires that keywords are:

- **Inherently meaningful** within the context of employee engagement
- **Relevant** within the context of a survey’s results
- **Unique** compared to other companies’ survey

The following steps explain how and why keywords are considered for inclusion in a keyword cloud.

Isolating Keywords

The first step to building a keyword cloud is to identify if a word actually qualifies as a keyword. To do so, Viva Glint's Natural Language Processing (NLP) technology defines keywords, excludes stop words, and analyzes word sequence.

Defining Keywords

Viva Glint has a proprietary dictionary with over 16,000 keywords that are commonly associated with employee engagement. For this reason alone, even some of a survey's most commonly used words may not be included in a keyword cloud.
Viva Glint's dictionary is continually updated through a combination of machine learning and human touch. Survey comments are matched against the dictionary in order to isolate keywords that should be considered for keyword cloud inclusion.

Excluding Stop Words

By its very definition, a keyword must be significant. For example, words like "the" or "to" have little inherent meaning and are considered "stop words." These are excluded from Glint's dictionary. In turn, any comments analysis will account only for meaningful words like "satisfied" or "leadership."

Analyzing Word Sequence

Technically, a keyword can be a single word (e.g. "priorities") or a word string, like "career development." In order to isolate a single or multi-word keyword, each survey comment is split into various sequences. As an example, let's look at this comment: "I am happy and have work life balance."

- One-word sequence: I, am, happy, and, have, work, life, balance, ...
- Two-word sequence: I am, am happy, happy and, and have, ...
- Three-word sequence: ...and have work, have work life, work life balance. Each sequence is then matched against Viva Glint's keyword dictionary. **In this example, the keywords "happy" and "work life balance" are defined as keywords**.

Scoring Keywords

Once a keyword is isolated, Viva Glint assigns it a score based on its relevance and salience (i.e. usefulness).

- To calculate **relevance**, the scoring algorithm determines a keyword's frequency within a slice. A slice is a cut of data, such as the results of a company-wide survey or the results of a filtered group within a survey. A higher frequency of the keyword within a slice indicates higher relevance, which increases its score.
- To identify salience, a keyword is featured only if it is unique compared to other slices or surveys. The scoring algorithm also determines a keyword's frequency within all comments on Viva Glint across all companies. Here, a higher frequency of the keyword indicates lower salience, which decreases its score. Keywords with the

highest scores go through a final sorting process to determine which are ultimately featured in a keyword cloud.

Sorting Keywords

In order to properly represent a survey's results, the keyword cloud should also represent as many of a survey's comments as possible. A balance must also exist between representing keywords from all comments and keywords which are still the most meaningful.

For example, certain keywords (management, communication, feedback, etc...) typically have a high frequency across comments in every slice and across all companies. Keyword clouds could easily look the same in almost any scenario, which isn't helpful.

To sort keywords effectively, Viva Glint uses an optimal range of times that a keyword is represented in a slice's comments in order to be included in the keyword cloud. This is referred to as **slice coverage**. Optimal slice coverage range does not include keywords with the highest frequency; the purpose is to include commonly occurring high-scoring keywords and not those that aren't so frequent that they lose their unique value.

Viva Glint puts a slice's keywords through a final sorting process where:

1. The highest-scoring keyword is pulled forward for consideration. If it falls within the most optimal slice coverage range, it is added to the keyword cloud.
2. The comment with the next highest-scoring keyword is then compared to the optimal slice coverage range. And so on...
3. Since not all keywords will match the first optimal slice coverage range, Viva Glint matches keywords from the remaining comments against the next most optimal slice coverage range.

This sorting process is repeated until a target number of keywords for inclusion in the keyword cloud is reached.
Through this process of isolating, scoring, and sorting, Glint's keyword clouds contain keywords that are meaningful, commonly occurring, and unique.

Incorporate Microsoft Copilot in Viva into your Viva Glint Comments report

Article • 11/20/2023

We are excited to add Copilot in Viva Glint for comment summarization to all Viva Glint customers at all contracting levels (standalone, Workforce Analytics and Employee Feedback mini suite, and Microsoft Viva suite customers). Copilot in Viva Glint is exclusive to the Viva Glint app.

Copilot in Viva Glint allows users to explore employee comments with natural language queries or suggested prompts. Copilot in Viva Glint brings the AI revolution into your employee engagement programs.

Copilot in Viva Glint:

- Provides leaders the opportunity to dig deeper into employee feedback by asking questions and receiving summaries of the comments and suggestions left by their employees in Viva Glint surveys
- For leaders and managers with thousands of comments to sift through, Copilot in Viva Glint saves time, providing new ways of understanding employee feedback.

A Private preview of Copilot in Viva Glint will begin in January 2024.

The full general availability (GA) date for Copilot in Viva Glint will be announced thereafter. Stay tuned!

> **Note**
>
> Copilot in Viva Glint is separate from Microsoft 365 Copilot and other Microsoft Copilot products. Future Copilot in Viva Glint features may use data from other sources besides Viva Glint and may require additional product licenses.

Learn more about Copilot for Microsoft 365

Use the Manager report in Viva Glint

Article • 07/13/2023

The Manager Report displays a *Directs* or *Roll-up Hierarchy* view of comparisons for two different survey items. These preset items are assigned during the survey setup process and appear by default, however the Manager or Human Resource Business Partners (HRBP) can change which items are displayed by clicking the question label at the top of the column. Similar to other reports, column headers are static and can be used as a sorting feature.

Understand Manager report terminology

Directs: Displays data for all the managers within a specific managerial roll-up hierarchy. It only displays data for those employees that report directly to the Manager.

Roll-up Hierarchy: Displays data for all employees within a manager's hierarchy. This includes any employees that fall below a manager in the org chart, even if they don't report directly to that manager. In other words, more levels of the organizational chart.

Use the Manager Report filter

The Manager Report has a unique filter option, which isn't present in other reports.

Select **Add Filters**, then choose **Managers** or **Respondents**.

The Respondent and Manager filters specify to which responses the subsequent filters will be applied. Managers will only apply those filters to managers within the employee's hierarchy, whereas respondents filter data for all respondents within the manager's hierarchy.

Use Viva Glint's Multi-Attribute Export report for admins

Article • 06/15/2023

Admins can deep dive into survey scores and view results of combinations for up to three attributes. The Multi-Attribute Export report is available for both engagement-type surveys and employee lifecycle surveys.

Access the Multi-Attribute Export report from the admin dashboard

Available only to admins:

1. Select **Reports** from the navigation menu bar.
2. Select the **Multi-Attribute Export** report tile.

Select up to three attributes to generate the Multi-Attribute Export file

Attributes are available in the dropdown menu based on those sent to Viva Glint in your Employee Attribute File. Filtering this report will look a bit different for Engagement cycle reports and Always-On and Employee Lifecycle reports. When the attributes have been chosen, select **Export**.

Filtering the export file for Engagement reports

Engagement report setup requires the *Program Cycle* date.

Filtering the export file for Employee Lifecycle and Always-On reports

Employee Lifecycle and Always-On report setup requires that a Start Date and End Date be provided.

Access the downloaded Multi-Attribute Export file

Once an onscreen message appears indicating that the report has been downloaded, select **Close Tab**, and open your newly generated file.

Admins may change the three attributes selected as often as desired.

Use the Viva Glint Response Rate report

Article • 07/13/2023

The Response Rate report provides a deep dive into survey response rate trends and comparisons across hierarchies and key demographics. The report is available to anyone with Program Access and is viewable by admins after the survey launches. When the file is ready, the admin receives an email notification and can share results with their managers. The Response Rate report is accessible through the Reports tab on the Microsoft Viva Glint dashboard.

> **Tip**
>
> Viva Glint's global industry average response rate is 75% and was last updated June 2022.

Customize your report settings

In the Response Rate Historical Trend section, you can see the average response rate, the comparator, and any percentage change (if available). Comparator choices are:

- **Benchmark**: Provides a comparison point for feedback based on survey data compiled from all Viva Glint customers. Helpful for admins and first-time survey results analysis
- **Company**: Displays team scores in comparison to company-wide scores for the same questions. Helpful for users with more than one area of responsibility.
- **My Teams**: Compares a manager's team score to an overall score derived from a filter. This is the superset of access and is best used with custom access or managers with large organizations.
- **Average Question**: Presents a single, overall score for all questions and respondents within your access. Helpful for users looking for some level of variance in their score.

Filter your report settings

Select the filter symbol at the top of the dashboard to expand the Filters panel. Select **+ Add Filters** to select attributes available in either the People section or the Question Responses section. Select the **X** to hide the filter panel.

What is advanced filtering?

Advanced filtering enables you to see how one program impacts another. For example, you can review Engagement results filtered by those who had a good onboarding experience. filtering enables you to see how one program impacts another. For example, you can experience.

1. Select **Advanced**.
2. Select **Yes, enable advanced filtering**.
3. Select the + symbol that has been added to the Filter panel. Choose the program from the dropdown menu.

Change the comparator to see how others are doing

Choose a different comparator if they're available to you.

1. Select the **Settings** button.

2. Use the down-facing arrow next to **Comparison** to select a different comparator.

3. Select **Done**.

> ⓘ **Note**
>
> Your company may have substituted custom terms for the Glint terminology explained above.

Add sections to your Response Rate report

The report is versatile and can encompass many different views.

1. Select the **More** button.
2. Select **+ Add Section**.
3. From the *Add section* window that opens, use the top menu bar to help you select sections within these categories: All, Scores, Comments, Demographic, and More.
4. Hover over different sections. Those with data for this report will show a + symbol. Select the + symbol to add to your report. The slider window will close, and a new section will be added to your report.

Search feedback comments in the Response Rate report

Using the down-facing arrow in the **More** button, select **Search Comments**. A slider window with program comments will open. Use the vertical ellipses to quarantine comments, as necessary. Use the **Export** button to export comments as a PowerPoint, PDF, Images, or spreadsheet.

Export the Response Rate report

Admins can download, save, or share this report with managers eligible to receive survey results. Visibility into whether managers have sufficient data to view results allows admins to target groups with more specific and appropriate messaging in advance of survey results rollout.

The report can be exported as a PowerPoint, PDF, report to Images, or a spreadsheet.

Share the Response Rate report with managers

1. Select **Share** from the Export dropdown menu.
2. Name the report in the window that displays.
3. Choose whether to use the latest data.
4. Select **Save**.

Email managers without results

Customize the email template for small teams to explain to managers of small teams or teams who haven’t met confidentiality requirements to let them know what survey results they can see and share with their team.

> **Tip**
>
> Send this email to any manager who needs this information, one day post-survey close.

Viva Glint’s position on expected response rates

Article • 07/13/2023

Expect the unexpected! Response rates differ between surveys, industries, and populations. They can be filtered by teams, locations, or any demographic cut you've supplied in your Employee Attribute File.

- **For recurring and ad hoc surveys** : The response rate is a percentage calculation of the number of people who completed the survey, divided by the number of people who received the survey invitation.
- **For Employee Lifecycle surveys** : The response rate is a percentage calculation of the number of people who completed the survey, divided by the number of people who received the survey invitation. Unlike recurring and ad-hoc surveys, the response rate may change depending on the date range selected in the report. When selecting a date range, the response rate will include people who responded to surveys generated during that period.
- **For Always-On surveys** : Because the survey is always live, the response rate can't be calculated in the same manner. In this case, the response rate percentage refers to the number of participants who submitted the survey, divided by the total number of eligible participants who started the survey.

> ⊗ **Caution**
>
> Comparators are never apples to apples. For this reason, Viva Glint discourages placing too much value on them. Because many companies like to see response rate benchmarks, Viva Glint provides them below for informational purposes only.

The response rate benchmark score used on the platform

The benchmark score of 75% displayed on the platform reflects Glint's latest global industry update on engagement from June 2022.

If you require a deeper dive:

This table uses the mean (average) response rate and is suggested for use as your primary metric:

Program	2021	2020	2019
Engagement (recurring survey)	75%*	76%	80%*
Onboarding (Employee Lifecycle survey)	42%	45%	NA
Exit (Employee Lifecycle survey)	50%	48%	NA

* Ongoing stressors introduced by the pandemic, alongside a potentially fickle workforce looking for change have likely driven the 5% change in response rate.

For more context, you can refer to the median response rate to consider trends:

Program	2021	2020	2019
Engagement (recurring survey)	77%	79%	79%
Onboarding (Employee Lifecycle survey)	43%	46%	48%
Exit (Employee Lifecycle survey)	53%	47%	51%

Is my response rate high enough to be considered representative?

For organizations of 1000 employees, once a representative sample of data from 50% of the organization is collected, we can say with 95% (+/- 3%) confidence that the score reported on the sample is within 3% of the true score (the score we would get if the entire population responded).

Most of our customers have more than 1000 employees. For these companies, when responses reach or go above 60%, we typically don't see company-wide scores change by more than a point or two at higher response levels.

Sample size varies. The most important factor in judging the sample's quality isn't its size but how similar it's to the population of interest. For example, a random sample of 100 out of a company's full 2000-employee population will be much more informative than a sample of the 200 out of 2000 who work in Human Resources.

What percentage of respondents leave at least one comment?

Across all Glint survey cycles completed in 2022, 57% of respondents left at least one comment and this didn't change from 2021. 29% of the comments were prescriptive in nature, which is up 2 pts since 2021.

Which of the core engagement items has the largest percentage of comments? Which has the least?

eSat has the largest percentage of comments among the core Engagement items.

Role continues to have the smallest percentage of comments.

Resources has the highest percentage of prescriptive comments.

Care has the least number of comments.

Does favorability affect frequency of comments?

Across all core items, 1.7% of favorable respondents left a comment, while 4.7% of neutral respondents and 9.4% of unfavorable respondents did. What does this mean?

Negative responders are more likely to leave a comment compared to **favorable** responders.

Related articles

- Use the Response Rate report
- Internal benchmark comparisons

Make the most of Viva Glint reporting features

Article • 10/06/2023

The following terms will help you understand Viva Glint People Science terms and ensure that you get the most useful information from all your Viva Glint reports.

Term	Definition
Mean score	The average for all provided questions/items in a survey, transformed into a 100-point scale.
Engagement score	Calculated by computing the average score for eSat (Employee Satisfaction) - or eSat and Recommend (key driver) - or a customized aggregate. The overall score has the highest correlation with the drivers of engagement, along with outcomes like productivity and retention. This overall score can help managers understand how happy their team is at work.
Favorability	Favorability provides the distribution of responses that make up the overall average score. It's useful to know if there's a strong consistency in responses or if the average is a result of a wide and divided range of opinions.
Favorability score	Favorability is calculated by looking at responses that fall within a specific range based on the rating scale used. In Viva Glint reporting schematics: - Questions scored as favorable show in blue. - Questions scored as neutral show in grey. - Questions scored as unfavorable show in red. For items scored on a 5-point rating scale (Viva Glint's best practice), - Items scoring mostly 4 s and 5 s are considered favorable. - Items scoring mostly 3 s are considered neutral. - Items scoring mostly 1 s and 2 s are considered unfavorable.

Read People Science explained: Primary Metric of Analysis

While using the Viva Glint platform to review survey results, leaders and managers can apply two types of reporting metrics for insights:

- Average scores for each survey question/item and dimension, and
- Favorability distribution comprising the percentage of favorable, neutral, and unfavorable responses for each question and dimension.

Read the People Science explained article: Primary Metric of Analysis for an in-depth understanding of how these metrics provide a holistic understanding of survey scores, enabling you to easily interpret results, take action on the right areas, and monitor improvement over time.

Filter a Viva Glint report

Microsoft Viva Glint survey reports use one process across all reports for filtering. This fixed panel identifies survey programs, attributes, and survey item subsets in which your data can be filtered for interpretation.

Select the filter symbol at the top of the dashboard to expand the Filters panel. Select **+ Add Filters** to select attributes available in either the *People* section or the *Question Responses* section. Select the **X** to hide the filter panel.

What is advanced filtering?

Advanced filtering shows how one program impacts another. For example, you can review engagement results filtered by those who had a good onboarding experience.

1. Select **Advanced**.
2. Select **Yes, enable advanced filtering**.
3. Select the + symbol that has been added to the Filter panel. Choose the program from the dropdown menu.

Understand the scores calculation overview

The primary metric (average score):

- Best demonstrates how a group rates a particular question or item
- Provides the strongest insight across different scenarios, including viewing scores for small populations and trends over time

The average score for each question is the average of all the responses when converted to a 0-100 rating scale.

The favorability score:

In addition to the converted 0-100 rating scale, the Viva Glint platform reports favorability in percentages. There are three categories: Unfavorable, Neutral and Favorable.

Favorability provides an understanding of the spread and variability of the scores within the average. Looking at how the favorability distribution has changed over time also lets managers know where the movement occurred.

Why using the mean score over the favorability score is recommended

Mean scores are:

- More robust and meaningful to track over time, even for smaller teams
- Highly correlated with behavioral, and business outcomes
- Consistent with other analysis performed

Favorability helps with understanding the spread and variability of responses, but there are drawbacks:

- The mean score isn't shown.
- External benchmarks aren't available for favorability scores.
- Calculations to measure engagement and other areas of sentiment are based on the mean score, not favorability.
- Percent favorability is prone to error and instability in smaller teams.
- The mean score is the better statistical predictor of behavioral and business outcomes.
- Percent favorable isn't consistent with other analyses.
- Percent favorable only shows the respondents who agree with the statement. No other information is provided (neutral or unfavorable).
- Percent favorable doesn't reflect changes in scores over time.

Understand color coding in Viva Glint reports

Color coding for Strengths and Opportunities

All items are ranked by comparing them to an existing benchmark. The top half of the items are considered strengths exhibited by your team, and the bottom half are considered opportunities for your team to focus on.

- Red: Opportunity - Scores may be above or below benchmark, but items in red are considered opportunities.
- Blue: Strength - Scores may be above or below benchmark, but items in blue are considered strengths.

- Gray: Items are excluded from scoring because there's no benchmark comparison, or they're low to medium impact drivers.

Color coding for the Favorability scale

Favorability is calculated by looking at responses that fall within a specific range based on the rating scale used.

In Viva Glint reporting schematics:

- Questions scored as favorable show in blue.
- Questions scored as neutral show in gray.
- Questions scored as unfavorable show in red.

Color coding for the Heat Map report

The colors in the Heat Map are meant to allow quick identification of systemic patterns and outliers. Color coding is relative and not absolute. To determine the relative coloring within a Heat Map, Viva Glint looks at the range of scores displayed.

- The maximum and minimum are always displayed as dark blue and dark red.
- All scores between the maximum and minimum are evenly bucketed in up to seven different colored buckets, with the median score being shown in the gray middle bucket.
- For example: If the minimum and maximum scores are 52 and 80, then Viva Glint will create 7 evenly spaced buckets between 52 and 80.
    - Dark red would be 52-55
    - Dark blue would be 77-80
    - Gray would be 64-68 with the other shades being in between *(For changes and differences, the middle gray is used for 0 change or difference. Dark red is used for the biggest negative difference/change, and dark blue for the biggest positive change, and the other color buckets are evenly spaced between the maximum/minimum values and 0 on either side.)*

Understand aggregate trending

Aggregate trending supplies historical data over time. There's a trend point, which reflects matching items from one cycle to the cycle immediately preceding it. Changing items within an aggregate (group) interrupts trend.

Dashboard experiences for Viva Glint roles

Article • 07/18/2023

Microsoft Viva Glint allows admins to customize Viva Glint dashboards for different roles and with varying permissions. To choose the right dashboard for your leaders, understand the following options:

Use Viva Glint's Executive Summary dashboard

Use Viva Glint's Broader Team Insights feature

Use the Manager Concierge dashboard in Viva Glint

The Team Summary dashboard in Viva Glint

Take action with Viva Glint Team Conversations

Create a Viva Glint Focus Area report

Use Viva Glint’s Broader Team Insights feature

Article • 09/11/2023

Team leaders who use Microsoft Viva Glint’s action taking tools see a significant increase in scores. However, up to 50% of managers’ teams are too small to allow them access to their own team’s results. By enabling Broader Team Insights (BTI), managers are empowered to significantly impact employee engagement.

Managers of small teams may not have enough team members with overall size or response rate size - to view their own team’s survey responses. Viva Glint considers this number to be a team of five or five respondents. While it's critical to protect survey respondents’ confidentiality, it's also critical to empower small team managers with feedback and action-taking capabilities. Broader Team Insights helps to bridge that gap.

Broader Team Insights isn't only limited to managers of small teams. Team leaders at all levels who use Broader Team Insights are better able to anchor their team’s feedback in the context of their larger department, have better conversations, and align actions.

What does the Broader Team Insights dashboard show?

The Broader Team Insights dashboard allows managers to review a high-level summary of their direct team leader’s results. For small team managers who don't have access to their own team’s results, this provides:

- Visibility into their broader team’s opportunity areas
- Access to dashboard and action-taking capabilities
- Starters for ACT and 1:1 conversations
- Ownership and accountability for their team’s engagement scores

By enabling bottom-up change, you can create more engaged people, align teams, and promote greater business performance.

How teams use Broader Team Insights

When a team’s number of responses fall below the confidentiality threshold, the team manager isn't able to view their *own* team’s results. With Broader Team Insights, however, the team leader can view the results of their direct leader’s team.

When results are ready, the team manager receives an email with a link to view results. When selecting this link, however, a message indicates that while there is no access to their own team's results (because minimum confidentiality standards weren't met), a summary of the broader team's results are available for reviewing and sharing.

This BTI summary report view provides this manager the opportunity to see guidance on how to have a conversation with their own team about the Broader Team Insights results and an abbreviated view of the Executive Summary report.

Set up Broader Team Insights

From the admin dashboard, Broader Team Insights is enabled following this procedure:

1. Select **Survey Programs**.
2. Select the program name to be enabled.
3. Select **Reporting**.

Set up Program Roles

The first section in **Reporting** is **Program Roles**. In this section, you customize how your dashboard displays results and when your people can view survey results. This section allows set up by specific roles.

> ⓘ **Note**
>
> When a manager is in a role with Broader Team Insights enabled, cascaded results are based on their custom permissions, irrespective of their rollup managerial hierarchy. Decide whether this role's reports are visible to directs only or are visible to their entire roll-up hierarchy. **ON** enables sharing of report. **OFF** disables the role from sharing reports.

- Use the dropdown menu to assign report visibility to direct report or roll-up hierarchy.
- The padlock icon symbolizes that this role isn't editable on this page and can only be edited in **Program Setup**.
- Hovering over a role displays the trash can symbol. Select the **trash can** to remove that role.

How turnover affects what Broader Team Insights results display

Turnover within roles is inevitable. For this reason, as with action taking, we recommend that either HR or the next level up manager exports all feedback results to save and share offline as needed.

A manager's feedback won't transfer to a new manager that fills that position. Feedback is specific to a manager at the time the survey is taken; survey results happen point-in-time, hence, only reflect results (if any) for the current manager in that position.

Choose Live versus Phased reports access

Once a survey is completed, it moves to the Completed section of the Program page, and you can view the access it has been assigned by hovering over the **Reporting Access** column. For more information, see Live vs Phased access .

> **Tip**
>
> Set a calendar reminder to grant Phased access to leaders without Live access permissions.

How to change access once User Roles are set

Access can be changed in **Program Summary** for upcoming cycles and Live cycles. All upcoming surveys for that program will be changed.

Follow these steps to change the access:

1. In **Program Summary** switch the Approved status from YES to **NO**.
2. Select **Save Changes**, then switch Approved status from NO to **YES**.

Use the Manager Concierge dashboard in Viva Glint

Article • 07/13/2023

Manager Concierge is a four-step on-screen guidance and timeline feature, which assists managers to understand survey results, share them with their teams, and take ongoing action.

Manager Concierge is enabled per User Role at the program level in the Reporting step of Program Summary and appears at the top of a manager's dashboard, greeting them by name. This timeline automatically updates based on when the survey closes and as the manager is sharing results and committing to next steps with their team.

Managers who have both Manager Concierge and Team Conversations enabled, receive a guided, customized presentation kit to share with their teams in real-time and progress is recorded as it's completed. Managers can switch back and forth between steps and come back to the kit even after completion.

View Manager Concierge without Team Conversations

Managers follow these prescribed steps, which autoupdate as they progress:

1. Give feedback: Managers receive emails or notifications to remind their teams to submit feedback.

2. Interpret results: Using the **View Interpretation Guide**, managers see guidance for having a conversation with their team about survey feedback.

3. Discuss with your team: Using the **Download Presentation Kit** and results from Team Summary or the Reports tab, managers can customize a slide deck to share with their team.

4. Commit to next steps: Using **Choose a Focus Area**, managers choose a Focus Area and then provide communications to drive sustained action. Learn to create a Focus Area report here.

View Manager Concierge with Team Conversations

Managers follow these prescribed steps, which autoupdate as they progress:

1. As above
2. As above
3. Once the survey closes, the hyperlink switches from *Download Presentation Kit* to **Launch Team Conversation**. Follow on-screen guidance and Managers Using Team Conversations. This link remains available even after the conversation has been marked as complete; the kit can continue to be customized.
4. Select **Choose a Focus Area** based on recommendations provided by the platform and insights from team discussion. For more information, see Learn to create a Focus Area report.

View Manager Concierge in Live or Completed cycles

This table shows the Manager Concierge view for Live and Completed Cycles, with and without Team Conversations:

Step #	Live cycle without Team Conversations enabled	Completed cycle without Team Conversations enabled	Live cycle with Team Conversations enabled	Completed cycle with Team Conversations enabled – note that checkmarks will appear to replace the step # once the task is completed
Give feedback	1 – Survey close date	1 – Survey closed on date	1 – Survey close date	✓ Survey closed on date
Interpret results	2 – View Interpretation Guide	2 – View Interpretation Guide	2 – View Interpretation Guide	✓ View Interpretation Guide
Discuss with your team	3 – Download Presentation Kit	3 – Download Presentation Kit	3 – Download Presentation Kit	✓ Launch Team Conversation
Commit to next steps	4 – Choose a Focus Area	4 – View Focus Area (after selected)	4 – Choose a Focus Area	✓ View Focus Area (after selected)

The Team Summary dashboard in Viva Glint

Article • 07/13/2023

Team Summary is an enhanced survey results dashboard for managers that captures employee feedback in an easy-to-use and insightful way.

Team Summary is designed to:

- Empower managers to approach feedback with a growth mindset
- Understand the unique strengths and opportunities that drive team engagement
- Encourage the next steps in sharing results and seeking team input on focus areas

Team Summary is compatible with all recurring and ad hoc feedback surveys.

Why use Team Summary?

The likelihood of employee feedback fueling organizational success hinges on the actions managers take based on that feedback. While many companies build energy and excitement around taking the survey, momentum can slow after managers receive and view their results.

This can happen because:

- Data can feel overwhelming and difficult to make actionable.
- Next steps aren't always clear.
- Engagement feedback by a manager as a reflection of their performance.

To overcome these challenges, Team Summary offers:

- **Clarification of insights**: data is presented in a simple, narrative format, so that managers at all levels can easily understand and interpret their team’s feedback. Personalized opportunity areas and tailored learning videos help managers focus directly on what is important to their team.
- **On-screen guidance**: provides reflection to reinforce interpretation of feedback with the intent in which it was given.
- **Guidance on next steps**: Viewing results is only the first step in improving engagement. Manager Concierge, an integral part of the Team Summary feature, guides managers through key next steps toward leading meaningful team conversations and setting Focus Areas to continue the ongoing process of improving engagement.

Enable and manage the Team Summary dashboard

Article • 07/13/2023

Enable Team Summary as the default dashboard

Admins are encouraged to enable the Team Summary dashboard for their managers.

1. From the Glint dashboard, select **Configure** and then **Survey Programs.**
2. Select the survey.
3. In *Program Summary*, select **Reporting**.
4. In *Program Roles*, open the role section by selecting the down arrow on the right.
5. In *Default Dashboard,* use the dropdown menu to select **Team Summary.**
6. Select **Save Changes.**

Enable roles and add roles to Team Summary

If a program is approved in **Program Summary** , the **Approved** status must be changed to **NO** to add roles.

1. From the dashboard, select **Configure** and then **Survey Programs.**
2. Select the survey.
3. In *Program Summary*, choose **Reporting**.
4. Select **Add Role**. From the dropdown menu, select the new role title. The new role will be added to the *Program Roles* section. Now enable Team Summary for the new role as per the procedure above.
5. Select **Save Changes**.

Preview the Team Summary manager dashboard

Prepare your manager to use their dashboard by previewing what they see.

1. From the dashboard, select **Configure** and then **User Roles.**
2. Select the **User Role** you have enabled Team Summary for.
3. In the *All Members tab,* select an **active employee** with that role only (not multiple roles).

4. Select **Login As** on the employee information page.
5. Choose the program that is enabled for Team Summary in *Switch Program*.

Managers using the Team Summary dashboard in Viva Glint

Article • 07/13/2023

The Team Summary manager dashboard experience displays results from the most recently closed program. You can choose to see results from previous programs as well. The following guide describes each section in the manager dashboard.

Understand the survey title card

The title section includes:

- The current survey title that you have chosen
- The date the survey closed or is closing on: For Recurring and Ad Hoc surveys
- Viewing window: For Employee Lifecycle and Always-On surveys
- Settings button: For filtering comparison and outcome items
- Switch Program button: For changing to view another completed program

Manager Concierge visibility

Your manager sees the following four steps:

1. Step 1: Give feedback
2. Step 2: Interpret results
3. Step 3: Discuss with your team
4. Step 4: Commit to next steps

What else will your manager see on their dashboard?

The manager dashboard defaults to showing the results from the most recent survey program. Switch to another program by using the **Switch Program** drop down menu.

Survey participation

In this section, you'll see

- Response Rate: The percentage of how many team members responded to the survey, compared to a benchmark response rate.
- Comments: The number of comments overall, which question received the most comments and the opportunity to view the comments (if the confidentiality threshold has been met). You can drill down to see comments, but we recommend reviewing reports at a high-level first.

Celebrations

Managers may see an animated Celebrations display if there are positive trends or the number of items above benchmark have improved compared to past reports. Celebrations don't show in an initial survey.

Extra factors are considered when populating this section.

The table below helps to understand them:

Improved Score type	Compared to	Minimum Response Count and score difference	Celebration message
Focus Area	Previous survey	< 50 responses: Five points 50-99 responses: Two points 100+ responses: One point	Our team Focus Area increased by [#] points from [month, year] from the survey where this question was previously asked!
Focus Area	All historical data (from at least two historical surveys)	< 50 responses: Five points 50-99 responses: Two points 100+ responses: One point	Our team's [key outcome] score has trended up over the past [#] surveys!
Key Outcome (e.g., Engagement)	All historical data (from at least two historical surveys)	< 50 responses: Five points 50-99 responses: Two points 100+ responses: One point	Our team's [key outcome] score has trended up over the past [#] surveys!
Questions	Selected benchmark	< 50 responses: Five points	Our team's scores for X questions are above [the company's/the

Improved Score type	Compared to	Minimum Response Count and score difference	Celebration message
		50-99 responses: Two points 100+ responses: One point	benchmark/all my teams]!

ⓘ Note

Users with Live reporting access may see confetti fly before the survey is closed and that conclusion may not be indicative of actual results when the survey is completed. Keep in mind that the Celebrations section is not party-worthy until your survey is closed!

Overview

This section contains the metrics for the key outcome of the survey. The number in the blue box is the overall result for this survey.

In this section, you'll also see:

- Trend survey: Your current score versus any previous scores. Keep in mind that trend results won't be available for the first survey.

- Your team score compared to the Company score. To view your team score in comparison to the external comparison score (outside your organization), use the **Settings** button to switch to **Benchmark**. The Benchmark may be global, or it may be industry or location specific. Your administrator made this choice when setting up your survey program.

- Favorability breakdown of responses to your key outcome question - on a 5-point scale (recommended), favorability is based on the following response scores:
  - A score of 4-5 indicates favorable: Blue
  - A 3 indicates the responder was neutral: Gray
  - A score of 1-2 indicates unfavorable: Red

Use the right-facing arrow to drill down for more information and suggested actions for each item.

Scores

Overview

This section shows the Top Strengths and Top Opportunities that can drive your business. Strengths and opportunities are derived from a manager's Driver Impact report.

The following colors are used:

- Blue: Strength
- Red: Opportunity
- Gray: Excluded; items may be excluded from a Strength & Opportunity calculation because they don't have a benchmark comparison, or they don't have a high impact on engagement.

Top Strengths

The Top Strengths are as follows:

- Up to three high impact strength scores with their correlating driver and survey item
- Benchmark comparison where applicable
- Link to comments
- A video selected by your admin that will enhance your attention to your team's strengths. Videos are available in English, French, German, Dutch, Spanish, Japanese, Portuguese (Brazil), Simplified Chinese, Italian, Polish, Turkish, and Russian.

Top Opportunities

The Top Opportunities are as follows:

- Up to three high impact opportunity scores with their correlating key driver and question
- Benchmark comparison where applicable
- Link to comments
- A video selected by your admin that provides guidance for working with your team to achieve opportunities. Videos are available in English, French, German, Dutch, Spanish, Japanese, Portuguese (Brazil), Simplified Chinese, Italian, Polish, Turkish, and Russian.

All scores

This section provides an overview of every item within your survey.

Other reports

The following additional reports are selected by your admin for you to view within the **Reports** tab Summary:

- Broader Team Insights (BTI)
- Heat Map
- Comments
- View All Reports

To learn about other survey reports, see Reports.

Take Actions with Viva Glint Team Conversations

Article • 07/13/2023

Microsoft Viva Glint Team Conversations feature makes the best use of the Manager Concierge and Team Summary experiences. When managers lead team conversations to share results, invite their teams to participate in prioritizing Focus Areas, and brainstorm action taking, they draw their employees into the process of improving their experience at work.

Team Conversations brings Viva Glint's ACT (Acknowledge, Collaborate, and Take one step forward) Conversation methodology to managers, providing them with presentation exports, Focus Area creation guidance, and links to suggested learning resources. The Team Conversations feature is compatible for all feedback surveys.

Team Conversations results sharing is a feature available at the program level for customers and can be enabled and disabled on a per program basis.

Have an ACT Conversation

Team Conversations uses Viva Glint's ACT Conversation framework at its core. ACT methodology encourages a manager and their team to consider feedback results in the following way:

- **A**: **A**cknowledge where we are
- **C**: **C**ollaborate on where we want to go
- **T**: **T**ake one step forward

Sometimes conversations amongst team members can be difficult

Managers are not always comfortable talking about survey results because of the following reasons:

- They may have difficulty understanding their survey results.
- They may not feel their results are "good".
- They may feel the time it might take to put together a presentation is daunting.

- They may not have confidence in their ability to facilitate a meaningful conversation.

Viva Glint believes in the ACT framework

ACT framework:

- Facilitates trust, as transparency and openness are key elements of trust,
- Involves employees as active participants and collaborators in reflecting on results and sharing improvement ideas.
- Strengthens ownership among the team.

The ACT foundation:

- Is built on a combination of behavioral science and practical expertise about what fuels change within organizations.
- Encourages integration of Team Conversations into the daily flow of work, ensuring that employees feel heard, actively participate in determining Focus Areas, selecting next steps and that they leave the discussion with a sense of shared ownership.
- Targets even the most introverted employees who may not have strong working relationships with their manager and supports confidentiality of all conversation responses.

Team Conversations exists in the flow of work

Make Team Conversations part of the regular workday. These conversations should become the norm and not a planned conversation initiated by a meeting agenda. People within your organization with the right mindset, skills, and behaviors can learn to support this shift in conversations.

Admin setup for Viva Glint Team Conversations

Article • 07/13/2023

To learn more about Team Conversation, see Team Conversation .

Setting up Team Conversations in Program Summary

1. From your admin dashboard, select **Survey Programs** from the Surveys section.
2. Select the program for which you want Team Conversations to be enabled.

Within Program Summary, follow these procedures:

Program Setup page

There are two enablement options to consider on this page:

- Enable Team Conversations – Toggle to **YES**.
- Team Conversations sharing - managers can share their Team Conversations Presentation Kit with users who have **View My Surveys** permissions.

Tip

Team Conversations are only generated for managers with survey results that meet confidentiality threshold requirements.

Note

Ensure user roles have the permissions of "View My Surveys" and "View Dashboard and Reports.

Schedule page

Indicate how many days the Team Conversations Window should remain open for. This drives the reminder schedule for Team Conversations. Even after the Team Conversation window has closed, users can still access their Team Conversation via My Surveys. Once set, the program indicates the conversation start and end date scheduled and how many days remain.

Tip

The default response window is 28 days, although the window can be set for up to 180 days. Response window refers to the number of days the survey is open to responders and is not specific to Team Conversations.

Reporting page

There are two items to configure on the Reporting page for each User Role that should have access to Team Conversations. Select the down-facing arrow next to the User Role in the **Program Roles** section and then:

1. Enable Team Conversations for that role by toggling Team Conversations button to **ON**.
2. Select **Team Summary** as the default dashboard from the dropdown menu for that role.

Communications page

Default Team Conversations email presets:

- Conversation Start Notification: Seven days after survey results are released
- Reminder 1: If conversation isn't done, send seven days before due date
- Reminder 2: If conversation isn't done, send three days before due date
- Conversation Summary Notification
- Conversation Overdue Reminder 1: Sent three days after conversation due date

Rules for editing communications

Emails send if these circumstances are met:

- Team Conversations is ON
- The cycle is closed
- Seven days have passed since live access

Emails won't send under these circumstances:

- Team Conversations is OFF
- The cycle is closed

- Seven days have passed since live access

If past the conversation start date and a role are enabled for Team Conversations, emails will immediately initiate once Team Conversations is switched to **ON**.

> ⓘ **Note**
>
> Nudges can coexist with Team Conversations but will not send when the Team Conversation window is open.

> **Tip**
>
> If Team Conversations are enabled, do not enable Nudges for that User Role.

Are Team Conversations on?	Is the cycle Live	Have days passed since live access?	Can emails be edited?
Yes	Yes	N/A	Yes
No	Yes	N/A	Yes
Yes	No	No	Yes (after October 23. 20121)
Yes	No	Yes	No, emails have already sent
No	No	No	Yes, Team Conversations can be turned on and emails can be edited
No	No	Yes	No, but emails send it Teams Conversations is switched to ON

Editing communications

Edit and preview by selecting **Edit**. Edits made to notifications are only for the current program. Switching from Edit to **Preview** (and languages) will automatically save changes.

Conversation Start Notification

- Can be enabled or disabled
- Can be edited for the number of days after survey results are released
- Our default and Best Practice are seven days after survey results are released
- Can be sent in any languages enabled for this survey

- Can be previewed

Conversation Reminders

Reminders begin when the User Role group gets Live access. This may be different if role groups are turned to Live Access at various times. The Conversation Start email can be turned on or off up until the day it's sent but not after the start of the Team Conversations. An existing Reminder email (before the Conversation End date) can be deleted or modified up until the day before the last group of users are scheduled to receive it.

- Can be sent any number of days before Conversation End date. Our default and Best Practice are to send both seven and three days before Conversation End date.
- Additional reminders can be added by selecting **+ Conversation Reminder**
- Can be sent in any language enabled for the survey
- Can be previewed

Conversation Summary Notification

- Can only be enabled or disabled, no date changes
- Broader Team Insights (BTI) links appear when appropriate
- Can be sent in any language enabled for the survey
- Can be previewed

Conversation Overdue Reminder

- Can be edited for a specified number of days after Conversation End date. The default and Viva Glint Best Practice is three days.
- Can be sent in any language enabled for this survey
- Can be previewed

Coaching page

This is where you set up the Team Conversations presentation kit for your manager to share with their teams. As this configuration is so important for your managers, it needs its own page! See Coaching Setup for Admins.

Managers and teams using Viva Glint Team Conversations

Article • 07/13/2023

Managers use their Team Conversations Presentation Kit to launch, send, and present Team Conversations to their team. Team Conversations help you have a meaningful conversation that moves your team forward to achieve organizational goals.

Manager guidelines for launching Team Conversations

From your dashboard

1. Select **Launch Team Conversation** (Step 3) in Manager Concierge. A customized message will appear, explaining the Team Conversations presentation process.
2. Select **Get Started**.
3. Review the presentation using the slide titles on the left for navigation. Each slide is intended to facilitate conversation with thought starters your admin has provided.

Sharing Team Conversations

When **Team Conversation Sharing** is enabled, employees can be sent a link to Team Conversations. The presentation will look the same as the manager's presentation, but it can't be edited or marked as complete. The recipient can't forward the presentation to anyone.

The procedure is as follows:

1. From the results dashboard, in Manager Concierge, select **Launch Team Conversation.**
2. Select **Get Started**.
3. Select the **Share** button at the top right on the screen.
4. Select **Send a Copy**.
5. Select the **Email** option.
6. **Add the email address(es)** for the employee(s) the presentation is to be shared with. The attachment is read-only.
7. Select **Send**.

ⓘ Note

To receive Team Conversations, the user must have access to the user role permission *View my Surveys*.

Present the Team Conversations Kit

Select **Start Presentation**. This will hide the page list, practices, and tips. **Stop Presentation** can be selected when you want to pause for conversation with your team.

Team Conversations cover the following, in the terminology your admin has preselected:

- How to have a successful meeting
- Reflections
- Data around how the team is doing
- A look at high-level results
- A look at Multiple Choice questions
- Assistance with choosing a Focus Area
- Assistance with taking small steps forward

Slide Guidance

ⓘ Note

Terminology may appear differently than in this guidance, depending on what your admin has pre-configured.*

Choosing a Focus Area

1. Select an Opportunity along with your team from the choices available.
2. Select **Choose** next to the opportunity your team agrees to work on.
3. Use the **Remove** option to change the selection. Focus Areas can also be chosen from the **Strengths** tab and **Other** tab, which includes actionable items that aren't part of the top three Strengths & Opportunities (S&O) list.

Steps Forward

The Focus Area selected will have been added to this slide. Now, add Action Items to support the effort. Suggested Actions are available for your consideration. Select **+ Add**

Action Item to add it to your team plan. Multiple items may be added.

Summary Section

When the conversation has been shared with the team, the manager should **Mark as Done**. You may go back and make changes later.

Actions to take after Team Conversation is set up

Recap window

Displays where you are in your conversation. Check marks indicate when:

- Results are reviewed
- A Focus Area is selected
- The team has Committed to Focus Area

Sharing results

1. Select team members from the search box.
2. Use the default message or customize the message in the **Add a message** box.
3. Select **Share Results.**

Team Conversations can be accessed after the conversation end date

Managers with dashboard access can review Team Conversations status.

1. From the Glint dashboard, select the **My Surveys** tab.
2. There are different views within Manager Concierge:

    - If the survey is Live, Step 3 will indicate *Discuss with your team*.
    - If the survey is closed, Step 3 will indicate *Launch Team Conversation*. Team Conversations will generate only under these conditions:
        a. The cycle is closed
        b. The role has Live access
        c. The role's Team Conversations permission is enabled

- When the Team Conversation is complete, **Commit to next steps** will become available.

How end users receive shared Team Conversations

Employees within organizations that have Team Conversations Sharing will receive an email with a link to the Team Presentations slide deck. The presentation will look the same as the manager's presentation, but it can't be edited or marked as complete. The recipient won't be able to forward the presentation.

Set up Viva Glint Team Conversations coaching for managers

Article • 07/13/2023

The last survey setup page in Program Summary is the Coaching page. Managers who have Team Conversations enabled benefit from extra guidance made available within the setup of this page.

Program Summary setup occurs at the program level, not at the individual cycle level. The Coaching page appears differently for customers with Team Conversations enabled vs disabled.

- Coaching section: Setup required for all admins
- Team Conversations presentation guidance section: Visible with Team Conversations enabled only
- Team Conversation resource guidance: Visible with Team Conversations enabled only

Team Conversations presentation guidance

Customize Team Conversation Presentation Guidance to help your managers have successful conversations around survey results.

- Team Conversations must be enabled. Do that in Program Setup
- If your program is already approved, toggle to **NO** so editing can occur. **Save changes**
- The presentation can't be set up after survey results have been released
- Managers will configure the *Pick a Focus Area* and *Choose Action Items* sections with their team. They are unable to make any other changes to the presentation

The following information applies to each section:

- The Section Name for each page is used for navigation and can be customized
- Customize content by selecting **Edit** to reveal the slider panel. You may use the default text content provided or customize
- **Preview** at any time
- **Save Changes** after editing each section
- Each translation added will auto-save after another language is selected

Title

Add your spin to the first slide to welcome the team.

- Section Name - Customize or use the default
- Conversation Title - Fill in the blue macro fields to personalize the slide title

Introduction

Personalize headings and body content for three conversation points. You must include three conversation points. Use the + **button** to add any macro fields you want to incorporate.

- Section Name - Customize or use the default
- Slide Heading - Customize or use the default
- Step 1 - Step 3 Header - Customize using the + **button** or use the default
- Step 1 - Step 3 Body - Customize using the + **button** or use the default

Reflection Point

The presentation kit makes two Reflection Point pages available for managers. The first slide is for the team to consider *before* reviewing their results; the second slide is for *after* they have seen results. Both pages can be turned on or off.

- Show Reflection - Switch the button to **ON** or **OFF** to include or exclude the slide
- Section Name - Customize or use the default
- Reflection Text - Use the default text or customize by using the + **button**

How We're Doing

- Section Name - Customize or use the default.

Each of the following slides have prepopulated default text or you can customize the header and thought starter, using macro fields if desired. The presentation must include all the slides provided.

- Thank You slide
- High-Level Results slide
- Biggest Changes slide
- Relative Strengths slide
- Relative Opportunities slide
- Multiple Choice Questions slide - The preview will show all multiple-choice questions, but the actual manager presentation will only show the questions from the applicable cycle.

Pick a Focus Area

This section is where each team will collaboratively choose a Focus Area. Detailed guidance for your manager is available to them directly in their presentation kit.

- Section Name - Customize or use the default
- Slide Heading - Customize or use the default
- Subtext - Use the default text or customize by using the **+ button**

Choose Action Items

The team will work together to identify action items to improve Focus Areas.

- Section Name - Customize or use the default
- Slide Heading - Customize or use the default
- Subtext - Use the default text or customize by using the **+ button**.
- Button Text - Use the default or customize what the manager will use in their presentation.

Summary Page

The summary shown changes depending on whether the manager has marked the conversation as completed.

- Section Name - Customize or use the default
- Before Conversation is marked Done
  - Slide Heading - Customize or use the default
  - Subtext - Use the default text or customize by using the **+ button.**
- After Conversation is marked Done
  - Slide Heading - Customize or use the default.
  - Subtext - Use the default text or customize by using the **+ button.**

Add resources to the Team Conversations kit

Enable or disable guidance by switching to **ON** or **OFF**. Enabling Guidance allows you to select a Content Resource from the dropdown menu. Guidance is specific to the process of conversations and doesn't correlate with the specific Focus Area a manager and their team choose.

> ⓘ **Note**

View Content Resources already suggested in this kit by navigating from your dashboard to Content Resources and you may add your own resources here as well. All suggested Content Resources and added resources appear in the dropdown menu and can be added to the presentation kit.*

At any time, or once this page is entirely set up, select **Preview** to see the managers' view. The presentation includes:

- Slide names (on the left) for navigation
- A personal note to the manager
- Best Practices & Tips (resources) you have selected.

Select **Get Started** to begin the presentation.

Select **Read More** in Best Practices & Tips to ensure that you have chosen the resource that will best assist your managers. Edit your presentation, as necessary.

Use Viva Glint's Focus Area Overview report

Article • 07/13/2023

The Focus Areas Overview report provides a status of the completion of Focus Areas across teams. The report provides critical insights immediately with easy access to additional details.

Grant permission to view the Focus Area Overview report

Access is approved to the roles with **View Focus Areas Reports and Manager-Visible Focus Areas** within **User Roles** in the **Employees** section of an admin's Microsoft Viva Glint dashboard. The scope of the report respects access at a per-person level.

Access the report

From the admin dashboard, follow this procedure:

1. From the top menu bar, select the **Reports** tab.
2. In the left-most column of the Reports page, select **Focus Area Overview**.
3. Now select the **Focus Area Overview** card.

How leaders can use this report

Your leaders and admins use this report to:

- Connect managers working on similar Focus Areas.
- View feedback comments to provide context for what their managers are working on.

Report section summary

The table below explains the report sections and descriptions.

Term	Description
Summary	Provides a sense of Focus Area completion across teams and answers the following:

Term	Description
	- How close are we to Focus Area completion? - What’s the status of the Focus Areas? - What percent of the population makes up each status? - How many managers have created Focus Areas?
Overall Focus Area Completion	Shows progress toward 100% Focus Area completion. View the count of Focus Areas completed and the number of employees who completed them.
Focus Area Status	Illustrates each Focus Area status and the populations they cover; hover over each status to see a deeper dive into the information.
% of Employees with Focus Areas	Displays the overall percent of managers and others with Focus Areas; hover over the number for a deeper dive into the information.
% of Employees without Focus Areas	Displays the percentage of employees that don't have Focus Areas.
Goal Status by Type	The breakdown of Focus Areas by type. Many sections of the report are dynamic, displaying additional details when you select them.
Column Headers	Select column headers to sort by status in ascending or descending order.
Status Bars	Select any status bar to include that data in the **Summary** section. This provides additional insights about the Focus Area type, specifically: - Overall completion status - % of employees that don't have the focus area
Percentages	Hover over percentages throughout the report to see more detailed information.
Filter	Located in the header menu at the top of the page. It's indicated by an arrow and any selected filters, when collapsed. The selections you choose for the report are automatically added to the filter. Select the arrow to expand the menu to view past reports or modify filters. The current Focus Area period appears by default, but you can look back at previous periods as well.

Exporting Focus Area data

You can export Focus Area data from two different dashboard sections:

Export data from the Focus Area Overview report

1. The down-facing arrow in the circle opens the Export options.

2. Select **Export All Action Items to Spreadsheet**.

3. Select the option to download action items for the selected goal period in the **Usage Report**.

Exporting Focus Area data from the admin dashboard

1. In the Action Taking section, select **All Action Items Report**.
2. The report automatically generates as a *.csv* file.

What will the report show?

- Employee email
- First and last name
- Focus Area(s)
- Goal period
- Focus Area(s) window and due date
- Action item/description
- Action item/Goal status
- Whether the items are a Viva Glint suggested item
- Focus Area comments: Following the Viva Glint Suggested Action Item column in the exported spreadsheet, admins can see
  - The number of comments supporting a Focus Area
  - The comment, each displays in its own row

Communicate with Viva Glint Nudges

Article • 10/26/2023

Microsoft Viva Glint Nudges is a system of intelligent, personalized email notifications designed to meet managers where they are in their flow of work. Nudges encourage managers to take simple steps to drive their team's engagement and performance. Nudge notifications can include a link to the manager dashboard.

Who receives a Nudge is set up at the user role level. You're also able to determine which Nudges each User Role receives.

Nudges has filters to ensure they're only sent when relevant. If a user repeatedly doesn't open or interact with Nudge emails, they're automatically unsubscribed.

Nudges are sent on a recurring schedule

Recurring communications keep employees on track over time. Managers receive unique messages with each Nudge to keep the experience fresh, focused, and relevant. Nudges simplify key behaviors into lightweight, bite-sized steps and make action taking collaborative.

Notifications that survey results are ready for viewing aren't sent to managers of small teams or to managers who didn't receive enough feedback to meet confidentiality thresholds.

If a user is in multiple recipient groups, they may receive emails from either group depending on the cadence of each group and its next send date. Users are guaranteed to never receive more than one email per week.

Understand Nudge terminology

Term	Definition
Recipient group	Defines who receives Nudges and at what frequency
Teammates	This term has a different meaning dependent upon the employee role: - Individual contributors: Managers + peers - First-line manager: Manager + directs - Manager of Mangers: Manager + direct

How admins set up Nudges

To set up Nudges, recipient groups must be created and enabled. Only one User Role can be selected per recipient group. You may create multiple groups to reach more User Roles or choose to send Nudges at a different frequency for each group.

From the Microsoft Viva Glint admin dashboard, select **Configure**, then **Nudges** in the **Notifications** section.

> ⓘ **Note**
>
> Nudge configuration may also be accessed via the Communications set up page in Program Summary for a specific survey.

Add a new recipient group

There are several sections to set up.

Recipients

1. Select + **New Recipient Group**.
2. Choose who will receive the Nudges:
   a. User Role: Select a role from the dropdown menu. Add only one User Role per group. If you have one User Role that includes all managers, it reduces the number of recipient groups you need to create.
   b. Exclude: Select individual users or Distribution Lists from the search bar. A Distribution List must already be created for it to be available.
   c. Recipient List: Download the list of recipients to a *.csv* file to have it for reference.

Timing

Defines when and how frequently users receive Nudges.

- Frequency: From the dropdown menu, choose to send Nudges from every one to eight weeks. Frequency can be adjusted after a survey launches.

  > **Tip**
  >
  > Send Nudges every two to four weeks. Send Day: Choose a business day of the week. Window: Select the number of days Nudge messages will send after a survey closes.

Align Nudges to your survey cadence, i.e., 90 days for quarterly surveys, 180 days for biannual survey.

Content

Configure the emails that will be sent to your recipient group.

Select the **Nudge #** to enable, disable, or preview. The corresponding slider window opens.

- Enable or disable by using ON and OFF.
- Preview what your Nudge looks like: It includes your company logo, the survey name, highlight where the user is in the results process, and a link to view results.
- Results process:
  - Nudge #1: Interpret results
  - Nudge #2: Share with your team
  - Nudge #3: Choose a Focus Area (or whatever term your organization uses)
  - Nudge #4: Focus Area reminder

Enabled programs

Nudges are enabled at the program level within each specific survey program. Your Recipient Group appears on the Nudges landing page under **Configuration**.

Edit Nudge details

Once Nudge details are saved, they can't be edited within specific programs or cycles. All editing must be done by first selecting **Configure** on the admin dashboard, then **Nudges**. For each recipient group for which changes will be made:

1. Select **Disable**, then **Disable Recipient Group**, then **Edit Details**.
2. Make changes and then select **Save Changes**.
3. Now select **Enable** and then **Enable Recipient Group** on the Configuration section of the Nudges landing page to incorporate the changes into your programs.

How long will Nudges continue to send?

Nudges will send only within 90 days of the survey closing, regardless of the date Nudges are enabled. For example, if a program is on a quarterly cadence, Nudges will stop when the next cycle starts.

Include or exclude programs from receiving Nudges

Switch the **Eligible for Nudges** feature to **YES** or **NO** on the **Program Setup** page in **Program Summary**. **Suggested Action Plans** must be switched to **ON**, to enable Nudges.

View a list of programs enabled for roles in Nudges

From the admin dashboard select **Nudges**, then **View Details** (for an enabled User Role within the Configuration section). The Recipient Group Setup page opens for that User Role. The bottom section displays *Enabled Programs*.

Use Viva Glint email templates to share survey expectations within your organization

Article • 07/13/2023

You'll want every person (role) in your organization to understand why you've partnered with Microsoft Viva Glint. To share the importance of the programs you'll introduce, customize these templates, divided into three time frames to coincide with the survey journey:

- Introduce survey taking to your employees
- Communicate prelaunch and live Viva Glint program information
- Communicate results rollout plans

Introduce Viva Glint survey taking to your employees

Article • 07/13/2023

To ensure a successful survey process, we suggest you email your employees to let them know that they'll be asked to take a survey, explain why taking a survey is important, and share FAQs with them.

To assist you with introducing the survey and for helping users troubleshoot, provide the following to your employees:

- A sample email to introduce your survey
- A list of troubleshooting FAQs that we suggest sharing with survey takers

Introduce the survey with this email template

Use the email template provided here as the first of your survey communications. Customize the template to capture your program's brand, voice, goals, and plans. The template is written with these goals in mind:

- To drive buy-in and a high response rate by sharing:
  - What's in it for employees
  - Timing
  - Ease and confidentiality of participation
  - Your organizational culture, values, and brand
- To reduce the burden on Human Resources by providing answers to anticipated questions or challenges

Sample template

Dear [Employee Name],

[Your company name] is committed to ensuring your wellbeing, happiness, and engagement at work. We always want you to:

- Be absorbed in and enthusiastic about your work
- Find meaning in what you do
- See a connection between your strengths and your role
- Be well and healthy
- Perform at your best

For this reason, we're partnering with Microsoft Viva Glint to deliver our [survey name] survey. This first survey goes live on [date]. Surveys may take place repeatedly throughout the year. Short, frequent surveys allow us to best turn your feedback into action and be responsive to your needs.

Thank you for your participation,

[Name, Title]

FAQs for survey takers

We suggest customizing, then copying and sharing the following information with survey takers:

What will the survey process look like?

You'll receive an invitation to the survey. It should take no more than about 10 minutes to complete and you can be assured that your responses are completely confidential. Those with company email accounts receive a link by email. Employees without company email addresses or computer access receive survey access onsite. You'll be notified of the date the survey opens and how long you have to complete it. Complete the survey with honest, thorough feedback.

Once the survey closes, we analyze your feedback. Your manager will share results and host a conversation about which actions to prioritize. Be prepared to share ideas about solutions that you believe can fuel progress over time.

What is the survey window?

The survey window is the time from the day the survey opens until the day it closes for participation. If you haven't completed your survey nearing its closing date, you receive a reminder.

I've misplaced the email with my survey link! What can I do?

Viva Glint offers an uncomplicated way to resend yourself an invitation to any Live survey. Using the appropriate URL (Uniform Resource Locator) mentioned below, replace **companyID#** with your company's Viva Glint ID. You'll then be asked to provide your email address.

- For non-EU based customers: https:// app. **us1**.glintinc.com/q/ **companyID#** /resend-pulse

- For EU (European Union) based customers: https:// app. **eu1**.glintinc.com/q/ **companyID#** /resend-pulse

If you don't receive an email within 30 minutes, there are several possible reasons:

- The email address you entered isn't an exact match with our records
- The company ID you entered was incorrect
- The survey is no longer active
- You aren't eligible for the current survey
- You have already participated in this survey

In all these situations, your company administrator is your best resource for assistance.

Can I start my survey and complete it later?

Yes, the survey will automatically save your answers and you can select the same link to complete it later.

I selected my survey and saw a "Thank you" page. Why?

This indicates that you have completed your survey.

I submitted my survey but would like to change some answers. Can I?

Include this question only for programs that have the Allow Survey Resubmission feature enabled.

Yes. Use the link in your survey invite to initiate a retake. You'll be directed to the *Thank You* page to restart your survey. Note that all responses previously submitted will be deleted. Select **here** to restart the survey.

Why do I keep receiving reminder emails?

Reminder emails are delivered to those who haven't fully completed the survey. Select the **Get Started** link in your reminder email to ensure you selected all answers. When you have completed the entire survey, you'll see a "Thank you" page and then no longer receive reminders.

Can I skip a question?

Unless it's specifically noted, all questions are mandatory.

I have a new manager and don't feel I know them well enough to rate. How should I respond?

Your opinion is always valid and will be helpful for your manager to see their progress over time.

In what languages are the survey questions available? How can I view questions in a different language?

Select the language you prefer by selecting the down-pointing arrow next to **Language** on the survey landing page.

How do I know my responses are confidential?

Viva Glint's platform makes confidentiality a priority and is GDPR (General Data Protection Regulation) compliant. Responses are combined into company and team scores, never individual scores. Your name is never associated with your responses and if there are too few respondents within a team, that team's responses are hidden altogether so that it would be impossible for someone to guess as to who said what.

Which browsers are supported?

- Microsoft Edge
- Google Chrome
- Safari
- Mozilla Firefox
- You can also gain mobile access through iOS Safari and Android Chrome

Communicate pre-launch and live Viva Glint program information using email templates

Article • 07/13/2023

Communicating survey expectations and results is an essential part of a strong engagement program strategy.

Use the pre-launch and live templates below to customize and send to the people in your organization to prepare them to participate in Viva Glint survey programs. The templates are for guidance only and assume a six-week launch, which may be longer than your timeline. Align your communications as appropriate.

Sample communications aren't generated in the Viva Glint platform.

Various templates are available:

- Presurvey templates for introducing various audiences to the Viva Glint survey process
- Presurvey templates for various times prior to survey launch
- Templates to provide leaders to training access
- Survey reminder for when your survey is live

Tips for using Viva Glint templates

- Customize the content in your voice. Look for placeholders, like [Company name], and insert applicable information.
- Adapt messages based on your organization's familiarity with engagement and the survey process. Organizations new to engagement may want to include more context in messages than those who survey regularly.
- Condense the communication cascade as much as possible. Be cautious of information overload.
- Consider the timing of other company-wide initiatives and communication plans. Look for opportunities to align communication and streamline employee touch points.

Consider adding this short snippet wherever it might be helpful

Security, Privacy, and Compliance are core principles at Microsoft. We value, protect, and defend data privacy. We empower and defend the data privacy choices of every person who uses our products and service. The Viva Glint service is governed by the Microsoft Product Terms, and the Microsoft Privacy Statement.

Each template in the tables below is bookmarked on this page. Copy, paste, and customize for internal distribution.

Email template for your entire organization

Template subject	Suggested timeline for sending
Upcoming survey	1 - 2 weeks prior to launch

Email templates for senior leaders

Template subject	Audience	Suggested timeline for sending
Upcoming survey	Senior and Human Resources (HR) leadership	six weeks prior to launch
Upcoming survey	Senior and HR leadership	three weeks prior to launch

Email templates for managers, HRBPs, and other company leaders

Template subject	Audience	Suggested timeline for sending
Upcoming survey	Human Resources Business Partners (HRBPs)	Four weeks prior to launch
Engagement training and resources for upcoming survey	HRBPs	Two weeks prior to launch
Upcoming survey	Managers, other leadership	One week prior to launch
Survey reminder	Managers, other leadership	During survey window

Email templates for customer stakeholders

Template subject	Suggested timeline for sending
Vision, strategy, and design prep	Five weeks prior to launch
Discovery Workbook prep	Five weeks prior to launch

Engagement and Upcoming Survey for All Employees

To: All Employees

From: **[First and Last Name]**, Chief Executive Officer

Subject: Engagement at **[Company Name]** for upcoming **[Name]** Survey

Date: **[1-2 days pre-survey]**

Dear **[First Name]**,

On **[Date]**, we'll launch a global employee survey, the **[Name]** Survey. This is a valuable opportunity for everyone to provide open, honest, and confidential feedback about what it's like to work at **[Company Name]**. Together, we'll take consistent and deliberate action to create positive change based on your input.

At **[Company Name]**, we strive to meet ambitious targets that help us stand out in the marketplace and distinguish us as an exemplary employer. To achieve these objectives, we focus on innovation and operational efficiency **[adjust based on company focus areas]** and create an environment where our people find success and exhibit elevated levels of engagement. Research shows that engaged employees are absorbed in and enthusiastic about their work, find a greater sense of meaning in what they do, and expend extra effort toward their performance. Positive behaviors make a difference to our business.

[Company Name] has chosen Microsoft Viva Glint, a third party, to ensure confidentiality and an exceptional experience for employees providing and receiving feedback. Viva Glint believes that high quality, frequent, and insightful conversations about your happiness at work is paramount to the success of any organization. Watch for a survey invitation and additional details in the days ahead.

I'm eager to hear what you have to say and committed to acting on your feedback.

[Salutation],

[Name]

Engagement and Upcoming Survey for Senior Leadership

To: Senior Leadership Team; CC: HR Leadership Team ** **From**: **[First and Last Name]**, Chief Human Resource Officer

Subject: Engagement at **[Company Name]** and upcoming **[Name]** Survey

Date: **[Six weeks pre-survey]**

Dear **[First Name]**,

Employee engagement is a key focus of our executive team. **[Update your company approach with examples of how engagement has been a key focus area or why it is now important]**. Engaged employees are absorbed in and enthusiastic about their work, find a greater sense of meaning in what they do, see a connection between their strengths and their role, and expend discretionary effort in their performance. These positive behaviors make a difference to our business in terms of reputation, productivity, and profitability.

Our **[Name]** Survey is live from **[date-date]** and will help us understand and drive action to improve employee engagement. Employee feedback uncovers opportunities to improve and strengths to leverage apply, and then together we'll take consistent action to create positive change.

[Company Name] has chosen Microsoft Viva Glint, a third party, to ensure confidentiality and an exceptional experience for employees providing and receiving feedback. Viva Glint believes that high quality, more frequent, and insightful conversations about engagement lead to happiness and success for people at work. Short, simple feedback surveys will provide the right people with the right data to improve our business.

You play a significant role in the survey process, from emphasizing the importance of the survey to empowering post-survey action. You're essential to creating an environment where people feel heard and empowered to help drive success.

Take these actions to help support your organization, managers, and employees before, during and after the **[Name]** Survey:

- Communicate the importance of the **[Name]** Survey, including participation, honest feedback, and action based on feedback.
- Be transparent about company and organizational results.
- Take ownership of your results and use them as a catalyst for ongoing conversations with your team about what needs to be solved, who can help, and actions that drive forward progress. Hold your managers accountable for doing the same.
- Model best practices.

Human Resources is here to support you throughout this process. Reach out with questions.

[Salutation],

[Name]

Engagement and upcoming Survey for leadership

To: Leadership/VP

From: **[First and Last Name]**, Chief Human Resource Officer or Senior Human Resources Business Partner

Subject: Engagement at **[Company Name]** and Upcoming **[Name]** Survey

Date: **[Three weeks pre-survey]**

Dear **[First Name]**,

Employee engagement continues to be a key focus at **[Company Name]**. **[Update per company approach with examples of how engagement has been a key focus area or why it is now important]**. Engaged employees are absorbed in and enthusiastic about their work; they find a greater sense of meaning in what they do, see a stronger connection between their strengths and their role, and expend discretionary effort in their performance. These positive behaviors make a difference to our business in terms of reputation, productivity, and profitability.

Our **[Name]** Survey, which will be live from **[date-date]** helps us understand and drive action to improve employee engagement at **[Company Name]**. Employee feedback uncovers opportunities to improve and strengths to leverage, and together, we will take consistent action to create positive change.

[Company Name] has chosen Microsoft Viva Glint, a third party, to ensure confidentiality and an exceptional experience for employees providing and receiving feedback. Viva Glint believes that high quality, more frequent, and insightful conversations about engagement lead to happiness and success for people at work. Short, simple feedback surveys will provide the right people with the right data to improve our business.

You are essential to creating an environment where our people are successful and, in turn, drive business success.

You can take these actions to support your organizations, managers, and employees before, during and after the **[Name]** Survey:

- Communicate the importance of [Name] Survey, including participation, honest feedback, and action.
- Take ownership of your results and use them as the basis for ongoing conversations with your team about what needs to be solved, who can help, and actions that drive forward progress. Hold your managers accountable for doing the same.
- Integrate the **[Name]** Survey into your business processes (e.g., quarterly meetings) and leadership practices (e.g., training and development).
- Champion employee engagement as a critical element of company strategy and a key enabler of business performance; ask about people metrics whenever you ask about business metrics
- Review and share the Manager Quick Guide to Interpretation and Conversation and the Manager Coach to an ACT Conversation to help shape an organization-specific support and rollout plan.

Your HRBP will schedule time in the next two weeks to walk through a rollout and communications plan for your organization. Managers will receive the **[Name]** Survey prep communications by **[date]**.

Please speak with your managers about preparing for the survey launch and post-survey activities.

[Salutation],

[Name]

Engagement and Upcoming Survey for HRBPs

To: Human Resources Business Partners

From: **[First and Last Name]**, Chief Human Resource Officer

Subject: Engagement at **[Company Name]** and Upcoming **[Name]** Survey

Date: **[Four weeks pre-survey]**

Dear **[First Name]**,

Engaged employees are absorbed in and enthusiastic about their work, find a greater sense of meaning in what they do, see a connection between their strengths and their role, and expend discretionary effort in their performance. These positive behaviors make a difference to our business in terms of reputation, productivity, and profitability.

Our **[Name]** Survey will be live from [date-date] and will help us understand and drive action to improve employee engagement. Employee feedback uncovers opportunities to improve and strengths to leverage, and then together we will take consistent action to create positive change.

[Company Name] has chosen Microsoft Viva Glint, a third party, to ensure confidentiality and an exceptional experience for employees providing and receiving feedback. Viva Glint believes that high quality, more frequent, and insightful conversations about engagement lead to happiness and success for people at work. Short, simple feedback surveys will provide the right people with the right data to improve our business.

You play a significant role in the survey process, from emphasizing the importance of the survey to empowering post-survey action. You are essential to creating an environment where people feel heard and empowered to help drive success.

We are here to support you throughout this process. Please reach out with questions.

[Salutation],

[Name]

Engagement Training for HRBPs

To: Human Resource Business Partners

From: **[First and Last Name]**, Chief Human Resource Officer

Subject: Engagement Training for Upcoming **[Name]** Survey

Date: **[Two weeks pre-survey]**

Dear **[First Name]**,

As a reminder, **[Company Name]**’s [Name] Survey is scheduled for **[Date]**. This initiative is a key focus area for our **[Year]** annual plan.

You play a significant role in the process, from emphasizing the survey's importance to empowering your managers to act. You are a thought partner for your managers when it comes to business and people's success. Look for opportunities to build manager capability and facilitate team connections to drive improvements.

We're here to support you throughout this process. Reach out with questions.

[Salutation],

[Name]

Engagement and Upcoming Survey for Managers/VPs

To: Managers/VP

From: **[First and Last Name]**, Chief Human Resource Officer or Senior Human Resources Business Partner

Subject: Engagement at **[Company Name]** for Upcoming **[Name]** Survey

Date: **[One week pre-survey]**

Dear **[First Name]**,

Employee engagement is a key focus at **[Company Name]**. **[Update per company approach with examples of how engagement has been a key focus area or why it is now important]**. Engaged employees are absorbed in and enthusiastic about their work, find a greater sense of meaning in what they do, see a stronger connection between their strengths and their role, and expend discretionary effort in their performance. These positive behaviors make a difference to our business in terms of reputation, productivity, and profitability.

Our **[Name]** Survey, which will be live from **[date-date]** helps us understand and drive action to improve employee engagement at **[Company Name]**. Employee feedback uncovers opportunities to improve and strengths to apply, and together, we will take consistent action to create positive change.

[Company Name] has chosen Microsoft Viva Glint, a third party, to ensure confidentiality and an exceptional experience for employees providing and receiving feedback. Viva Glint believes that high quality, more frequent, and insightful conversations about engagement lead to happiness and success for people at work. Short, simple feedback surveys will provide the right people with the right data to improve our business.

Take these actions to support your employees before, during and after the survey:

- Communicate the importance of **[Name]** Survey, including participation, honest feedback and action based on results
- Take ownership of your results and use them as a basis for better ongoing conversations with your team about what needs to be solved, who can help and actions that drive progress.
- Discuss findings with your team and commit to one focus area. Overcommitting can lead to disappointing results.
- Review and share the Manager Quick Guide to Interpretation and Conversation and the Manager Coach to an ACT Conversation to help shape an organization-specific support and rollout plan.

Inform your team that the **[Name]** Survey launches **[date]** and emphasizes the importance of their voice. The more meaningful feedback you collect, the greater impact you will have on your team's success. Note that for the confidentiality and integrity of surveys, only managers whose team responses meet the minimum confidentiality threshold will receive results in the Viva Glint platform.

Please reach out to your HRBP for support or more information. We are here to set up you and your team up for success with the **[Name]** Survey.

[Salutation],

[Name]

Survey reminder

To: Business Units/Functional Groups

From: **[First and Last Name]**, Senior Leader or VP

Subject: Engagement at **[Company Name]** for Upcoming **[Name]** Survey

Date: **[During survey window]**

Dear **[First Name or Team]**,

The **[Name]** Survey is important to me. I'm looking forward to reviewing the findings for our team and learning more about what you think and feel about working at **[Company Name]**. Given the realities of day-to-day life, I don't have enough opportunity to have meaningful conversations with most of you and it's challenging to dig deep into the kinds of topics the [Name] survey covers.

Participating in this survey will give you the chance to communicate, challenge us, and tell the truth about your experience at work. Your voice, insights, and opinions matter.

If you haven't yet taken the **[Name]** Survey, please do so today. It's confidential and will yield data we can use to improve our team's engagement and the company overall. Your survey invitation will be emailed shortly.

I hope you'll make the most of this opportunity to let your voice be heard.

[Salutation],

[Name]

Vision, strategy, and design preparation

To: Customer stakeholders participating in Vision, Strategy & Design Planning

From: **[First and Last Name]**, Survey Project Lead

Subject: Viva Glint Vision, Strategy and Design Preparation

Date: **[Five weeks pre-survey]**

Dear **[First Name]**,

As you know, **[Company Name]** is planning for our **[Name]** Survey, which will be live from **[date]**. Our [Name] Survey will help us understand the unique elements that motivate employees to do their best at **[Company Name]** and establish a regular cadence for conversations about what matters most. To ensure the **[Name]** Survey aligns to our company priorities, values, and culture, we invite you to share your opinion to help customize our approach and drive improvements for our people and business.

Vision and Strategy Planning

To identify strategies for **[Company Name]** for increasing employee engagement, we will be collecting information on our culture, priorities, stakeholders, etc. through a comprehensive discovery process. You may be asked to share insights into existing practices, barriers that may be keeping employees from bringing their best selves to work each day, and solutions for improvement.

Design Planning

We will embark on a detailed design process to ensure our **[Name]** Survey is set up for success, including identifying survey questions, confidentiality expectations, benchmarks, and action plans. You will have the opportunity to provide input during this phase to ensure our final program is tailored to **[Company Name]**'s unique environment and delivers valuable and actionable insights.

Resources

You will leverage multiple resources throughout our planning process. Additional resources and details on expectations for participation and input are forthcoming.

Transformation Workshop Invite (remove if not applicable)

Objective: Identify current and future capabilities needed within **[Company Name]** to successfully adopt practices leading to continuous employee conversations and increased employee engagement. The workshop will include activities focused on **[Company Name]** stakeholder groups (e.g., senior leaders, managers, employees, etc.) to clarify expectations and identify barriers and solutions for success.

Preparation: You have been assigned to a stakeholder group (e.g., senior leaders, managers, etc.). Each stakeholder group includes a team comprised of multiple types of stakeholders. You will be asked to be the voice of your stakeholder group by representing their perspectives throughout the day. To prepare, please consider the following questions with your stakeholders in mind:

- What is important to this stakeholder group (what they care about, their people challenges etc.)
- What does employee engagement mean to them?
- What skill set and capabilities do members of the group have today?
- What skill set and capabilities will they need to develop in the future to enhance employee engagement and enable continuous conversations at [Company Name]?

Following the workshop, the Viva Glint team will take the feedback from the day and translate it into a three-year transformation plan, including a summary of recommended themes to measure in the survey.

I'm available to support you throughout this process. Reach out with questions.

[Salutation],

[Name]

Discovery workbook preparation

To: Customer stakeholders participating in Vision, Strategy & Design Planning

From: **[First and Last Name]**, Survey Project Lead

Subject: Discovery Workbook Preparation

Date: **[Five weeks pre-survey]**

Dear **[First Name]**,

As a prerequisite for the Viva Glint Vision, Strategy and Design Preparation, work with your team to complete the attached Discovery Workbook. The purpose of the Discovery Workbook is to help you gather and document information about your company strategy and **[Name]** Survey objectives and constraints. This information is used to inform design decisions for this upcoming survey.

Detailed instructions for completing the workbook are found on the first tab.

[Salutation],

[Name]

Attachment: Discovery workbook

Communicate results rollout plans for Viva Glint programs using email templates

Article • 07/13/2023

Communicating survey expectations and results is an essential part of a strong engagement program strategy.

Use the results rollout templates below to customize and send to the people in your organization to prepare them to act on feedback from your Viva Glint programs. The templates are for guidance only and assume a six-week launch, which may be longer than your timeline. Align your communications as appropriate.

Sample communications aren't generated in the Viva Glint platform.

The following are hyperlinks to email templates that Microsoft Viva Glint recommends sending to your people post-survey close.

Tips for using Viva Glint templates

- Customize the content in your voice. Look for placeholders, like [company name], and insert applicable information.
- Adapt messages based on your organization's familiarity with the feedback and reporting process.
- Condense the communication cascade as much as possible. Be cautious of information overload.
- Consider the timing of other company-wide initiatives and communication plans. Look for opportunities to align communication and streamline employee touch points.

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Email templates for your entire organization

Template subject	Suggested timeline for sending
Survey results and next steps	One day post survey close
Survey results and next steps	3 - 4 days post survey close
Company-wide progress update	Week four and week eight after survey closes
Company-wide progress update and next survey communication	10 weeks post-survey or 2 weeks prior to the next survey

Email templates for managers

Template subject	Suggested timeline for sending
Survey results and next steps	One day post survey close
Results rollout progress update	Week four and Week eight after survey closes
Survey results and conversations	5 - 7 days after survey closes

Email templates for Human Resources Business Partners (HRBPs)

Template subject	Suggested timeline for sending
Survey results and conversations	5 - 7 days after survey closes
Survey support and next steps	3 - 12 weeks after survey closes

Survey results and next steps for all employees – 1 day post survey close

To: All employees

From: **[First and Last name]**, CEO

Subject: **[Name]** Survey results and next steps

Date: **[Day 1 post-survey close]**

Dear **[First name]**,

Thank you for making the **[Name]** Survey a success. At **[Company name]**, we believe that feedback from our people is essential to work toward continuously improving ourselves and achieving our mission of **[insert mission]**.

We're excited to announce that approximately **[##%]** of all employees--more than **[#]** of you--provided your valuable input through the **[Name]** survey. In the upcoming weeks, we share company-level results and plans for acting in response to your feedback.

Within the next few weeks, you'll also hear about the key results and focus areas for your specific business unit, and together with your manager, your team chooses your own focus area to prioritize. Be prepared to share your ideas about solutions that will fuel progress over time.

Thank you for your commitment to making **[Company name]** a place where people can thrive and do their best work.

Contact your manager or your HR business partner if you have any questions.

[Salutation],

[Name]

Survey results and next steps for all employees – 3-4 days post survey close

To: All Employees

From: **[First and Last name]**, CEO

Subject: Survey results and next steps

Date: [3-4 days post survey close]

Dear [First name],Thank you again to the over [#] employees who provided input through the **[Name]** Survey. Today I would like to share our company-level results and the steps we will take to respond to your feedback. Hearing directly from you makes us a stronger organization and helps us ensure that our actions and decisions align with the success of our people, the power of our business.

Your feedback *overall*:

- [High-level finding about company #1]
- [High-level finding about company #2]

What you said we do well as an organization:

- [Top strength #1]
- [Top strength #2]

What you said we need to do better as an organization:

- [Top improvement area #1]
- [Top improvement area #2]

From your feedback, the senior leadership team has aligned on taking action to improve **[Focus Area]**. [Discuss why chosen - e.g., high impact on engagement, etc., and who will own it, next steps, etc.]

Over the next week, leaders in your organization will share results with you and involve you in choosing focus areas for your individual teams. Your voice has allowed us to celebrate where we excel as a company and challenges us to rethink how we can work to make the best decisions for our employees, our customers, and our business.

[Salutation],

[Name]

Company-wide progress update

To: All Employees

From: **[First and Last name]**, Chief Executive Officer

Subject: **[Name]** Survey Results Update

Date: **[Week 4 and Week 8 post-survey close]**

Dear **[First name]**,

We want to share an update with you on our efforts to improve [Focus Area] based on the feedback we heard from the **[Name]** Survey results.

[Outline Focus Area along with the progress made, by whom, and what is the next phase or activity to be expected]

We view the **[Name]** Survey as a catalyst to ongoing focused conversations. Please continue to share feedback with leaders and managers in your organization on how we are doing to address our company-level Focus Areas, as well as your team's Focus Areas.

As a company, we will continue to provide progress updates via department, team, and individual meetings to ensure we are achieving tangible changes across our company. With your input, we will continue to celebrate where we excel and focus on improving the opportunities that matter most to you.

[Salutation],

[Name]

Company-wide progress update and next survey communication

To: All Employees

From: **[First and Last name]**, CHRO or Senior HRBP

Subject: **[Company name]** Survey Results Updates

Date: [10 weeks post-survey close or 2 weeks prior to the next survey]

Dear **[First name]**,

[Company name] is extremely proud of all the conversations, ideas, and actions we have seen because of the **[Name]** Survey. It is important to us that we continue to enhance your work experience and engage each of you in a meaningful way.

Our focus area as a company coming together was determined to be **[Focus Area]**.

Here are some of the accomplishments we have achieved:

- Item 1
- Item 2
- Item 3

And this is what's left to be done:

- Item 1
- Item 2
- Item 3

We will continue to drive this momentum into our next survey, launching on **[date]**. Again, we encourage you to share your feedback on what we are doing well as a company and what we can do better.

Our goal is to have continuous conversations on the things that matter most to you, your manager, and your teams. Let's keep openly talking about how together, we can continue living our values and mission at **[Company name]**.

[Salutation],

[Name]

Survey results and next steps for managers

To: [Manager]

From: **[First and Last name]**, Human Resources/Direct Manager/Other

Subject: **[Name]** Survey results and next steps

Date: [Day 1 post-survey]

Dear **[Manager First name]**,

You are probably eager to see the feedback data from your recent Viva Glint survey and to share these results with your team. Because **[Company name]** knows response data is impacted by how safe employees feel in providing feedback, minimum response thresholds were assigned to uphold the confidentiality of your team. If this minimum confidentiality threshold was not met - *the number of responses required so that it is not possible to determine who said what* - some of your results may not include data.

Additionally, if you had fewer than five employees participate in the survey, your team will not have a results report. To protect confidentiality, your team's data may roll up into the next level, so your team is represented in your direct manager's report. Let your manager know that you did not receive your own survey results and would like to use the Broader Team Insights (BTI) results as a starting point for your team's ACT Conversation. Your manager can share BTI results with you in a PowerPoint or a PDF download. Proceed with your conversation using the rollup results from the broader team and steer the conversation toward results pertinent to your group.

Survey scores are a starting point for a conversation that involves your team in identifying focus areas to improve engagement. Even if you have just a few responses, or limited views of your results, you can still foster a rich conversation with your team.

Please reach out as needed.

[Salutation],

[Name]

Results rollout progress update

To: Managers

From: **[First and Last name]**, Chief Human Resource Officer or Senior Human Resources Business Partner

Subject: **[Company name]** Survey results and next steps

Date: [Week 4 and Week 8 post-survey close]

Dear **[First name]**,

Our **[Name]** survey is just the starting point to open a rich dialogue with your team. Use your results as the basis for ongoing conversations that lead to continuous improvement over time.

The ACT conversation tools within Viva Glint help you work together on areas that make a difference in your team's performance and employee engagement by:

- Giving directions to keep the team on track and avoid going too broad or deep
- Providing guidelines for prioritization and decision-making.
- Seeking out differing opinions and ensuring all voices are heard.
- Overcoming organizational constraints, like policies, work structures, or budget constraints
- Connecting teams to broader priorities and groups working on similar challenges

Planned Actions Summaries

Summary of Company-Level Actions	Summary of Business Unit Actions
High-level finding company #1	High-level finding about BU #1
High-level finding company #2	High-level finding about BU #2

Take Action

Acting is the largest scale missed opportunity most organizations face. Employees who don't believe action will be taken are more likely to report being disengaged compared to those who believe action will be taken. Acting in a focused way can ensure long-term success.

We don't have to fix everything that comes out of feedback right away. Instead, we will use this opportunity to have meaningful conversations, commit to one simple change, share lessons learned, and then repeat the process.

Resources and Training

Leverage the resources on the Viva Glint adoption page or Viva Glint community page .Feel free to reach out with any questions or for additional support.

[Salutation],

[Name]

Survey results and conversations for managers and HRBPs

To: **[First and Last name]**, HRBPs and Managers

From: **[First and Last name]**, CHRO or Senior Human Resources Business Partner

Subject: **[Name]** Survey Results and Conversations

Date: [5-7 days post-survey close]

Dear **[First name]**,By now, you should have accessed your **[Name]** Survey results and scheduled your initial conversation with your team. Conversations about feedback can be challenging - planning is the best solution to help you feel prepared and get the most value from the exercise.

ACT framework How do you effectively share **[Name]** Survey results and involve your team to prioritize Focus Areas and identify solutions? Use Viva Glint's ACT Conversation Guide to help you prepare and facilitate your discussion:

- **Acknowledge** where we are
- **Collaborate** on where we want to go
- **Take** one step forward

Following the meeting, you should have chosen one to two focus areas for action taking (we recommend just one). Leverage the Viva Glint platform for suggested action plans and involve your team in developing solutions.

Company and business unit actions

Keep in mind the company and business unit commitments and align as appropriate.

Summary of Company-Level Actions	Summary of Business Unit Actions
High-level finding company #1	High-level finding about BU #1
High-level finding company #2	High-level finding about BU #2

Action Taking Acting is the largest scale missed opportunity most organizations face. Employees who don't believe action is taken are more likely to report being disengaged compared to those who believe action will be taken. Acting in a focused way can ensure its long-term success.

We don’t have to address everything that comes out of the feedback right away. Instead, let’s use this opportunity to have meaningful conversations, commit to one simple change, share lessons learned, and then repeat the process.

Resources and Training Leverage the resources on the Viva Glint adoption page or Viva Glint adoption page or Viva Glint community page to learn more action taking within Viva Glint.

If you have questions or need support, please reach out.

[Salutation],

[Name]

HR survey support and next steps

To: **[First and Last name]**, HRBPs

From: **[First and Last name]**, Chief Human Resources Officer

Subject: HR Support of **[Company name]** Survey results and next steps

Date: [3-12 weeks post-survey close]

Dear **[First name]**,

As our teams focus on employee engagement at **[Company name]**, you play a significant role in identifying and sharing best practices, connecting teams with similar needs, and sharing stories of our people success. You're a thought partner for your managers, an advocate for employees, and a true enabler of behavior change.

Take a moment to share two notable actions that best represent our ability to act on employee feedback and drive the culture we need at **[Company name]** to achieve our business objectives. We also discuss successes and opportunities at **[describe HR meetings, etc. to exchange ideas and build common solutions]**.

Summary of company-level actions

- [High-level finding about company #1]
- [High-level finding about company #2]

Summary of business unit level actions

- [High-level finding about business unit #1]
- [High-level finding about business unit #2]

Resources and training Become familiar with the Viva Glint application and leverage the resources on the Viva Glint adoption page or Viva Glint community page .

[Salutation],

[Name]

Resolve a manager hierarchy error in Viva Glint

Article • 11/16/2023

Symptoms

You receive the following error message when you upload employee attribute data to Microsoft Viva Glint:

> MANAGER HIERARCHY ERROR: Manager Email address snguyen@example.com is mentioned more than once in chain of commands, creating a cycle. They either are reporting to themselves or are creating a circular reporting with another user that needs to be resolved.

Cause

This error occurs if the employee attribute data shows that one or more managers either report to themselves or have a circular reporting relationship with other managers.

Resolution

To fix the issue, follow these steps:

1. In the admin dashboard, select the **Configure** icon, then select **Activity Audit Log** in the **Client Settings** section.

2. In the log, locate the file that didn't upload, and then select **Download errors file** in the **Details** column. The rows in the downloaded errors file represent both direct and indirect reports for each manager.

3. Find and remove duplicate data from the **Description** column of the errors file.

4. Identify the distinct manager email addresses that are noted as problematic in the errors file.

5. For each manager email address that's identified in step 4, review the employee attribute data to determine whether the following circular reporting relationships appear to exist:

- A manager reports to themself. Therefore, their employee ID and manager ID are the same.
- Two or more managers report to each other and create a reporting loop. For example, manager A reports to manager B, and manager B reports to manager A.

6. Correct all apparent circular reporting relationships.

> **Note**
>
> - The CEO or top-level person in your organization shouldn't be shown as reporting to themself. Their manager ID should always be blank.
> - If a manager is displayed as reporting to themself because their manager position has to be filled, specify the manager ID of their skip-level manager, instead.

7. Upload the file again to Viva Glint.

Feedback

Was this page helpful? Yes No

Provide product feedback

Understand file upload errors and warnings in Viva Glint

Article • 11/16/2023

When a file upload error occurs, you're directed to the **Error Messages** section on the **Activity Audit Log** page within your admin dashboard for full details of the error.

Viva Glint file upload messages indicate:

- file errors that prevent any data from processing.
- line/field warnings that prevent certain rows of data from processing.

Refer to the following tables to understand and resolve errors and warnings.

Address file errors

Address file errors related to attributes derived by Viva Glint

Category	Sample Message	Action
DERIVATION_ERROR	*The date format is incorrectly configured for the following columns: (Hire Date). We're expecting mm/dd/yyyy. For Microsoft Excel files, ensure that cells are in Text format.*	Update the date fields in your file to match what's configured for your organization. Be sure to use the same formatting.
DERIVATION_ERROR	*Attribute headers in the uploaded file don't match your Viva Glint configuration. Ensure that all attribute header names match and are included in your file. Include columns Hire Date and Birth Year. These columns are used for deriving attributes Tenure, Age Group.*	Make sure that all attribute header names match your configuration and are included in your file. Check for case sensitivity and extra spaces between the header row in your file and your Viva Glint setup.
DERIVATION_ERROR	*File isn't UTF-8 encoded. Error found near lines 4405-4605.*	Resave your file with UTF-8 encoding and reupload. If you're

Category	Sample Message	Action
	Format the file with UTF-8 encoding and then reupload.	unable to provide UTF-8 encoding, upload it as an .xlsx file instead.
DERIVATION_ERROR	*File is in an unexpected format. Expecting csv file format. Check to see if the file passed is a csv file with UTF-8 encoding and comma delimited values.*	Viva Glint expects csv or xlsx file format. Check whether the passed file is in the correct format.
DERIVATION_ERROR	*Processing the file failed. Derivation failed due to invalid data in Hire Date. Review and reupload file.*	Correct invalid values in the specified attributes (for example, 1/1/1900 or #N/A) and reupload the file.
ENRICHMENT_FAILURE	*Row 100 length doesn't match header's length. Can't create file.*	Review the row specified in the uploaded csv file and update to align with the number of columns in the file's header row.
MANAGER_HIERARCHY_UPDATE_ERROR	*There should be at least one employee record with no manager, otherwise the reporting hierarchy may be invalid. Leave the Manager ID empty for the CEO/top level leader.*	The Manager Hierarchy can't be created unless the CEO's Manager ID value is blank. Remove the Manager ID value for the CEO or top-level manager in the file and reupload.
MANAGER_HIERARCHY_ERROR	*Manager Email address `snguyen@example.com` is mentioned more than once in chain of commands, creating a cycle.*	Make sure that no manager reports to themselves or creates a circular reporting relationship with another user. No employee should be listed as managing themselves.

Address file errors related to attributes

Category	Sample Message	Action
DUPLICATE_COLUMN	*Column Tenure appears 2 times. Column Tenure can only appear once.*	Columns can only appear once. Delete the extra column. If Viva Glint creates a column based on source data (for example, Tenure from Hire Date), don't include the derived field as a column.
MISSING_COLUMN	*Missing required column Email Address. Add this column of data to your file and reupload.*	Confirm that all five required fields (Employee ID, Email, First Name, Last Name, Status) and all fields Viva Glint uses to derive other fields are included in the file.

Address line or field warnings

Address line or field warnings related to duplicated data

Category	Sample Message	Action
INVALID_EMPLOYEE_DATA	*Email `joe@example.com` is assigned to multiple users in the file.*	Verify that the uploaded file contains employees with duplicate Email Addresses or duplicate Employee IDs. Remove duplicates and reload files.
DUPLICATED_EMAIL	*The Email Address `Launa@example.com` in the user file is already assigned to a different user in your Viva Glint People Database.*	Verify and correct email addresses. Compare the ID associated with the email address in Viva Glint, under **Configure** > **People**, to the ID associated with the email address in your uploaded file (the Employee IDs need to match). If no email address for the employee exists, populate the employee's Employee ID.
DUPLICATED_EXTERNAL_USER_ID	*The Employee ID 1234 in the user file is already assigned to another employee with Email Address `sdd@example.com` in the Viva Glint database.*	Identify the correct ID for the associated employee records. Compare the employees in your user file against the **People** section in Viva Glint and then

Category	Sample Message	Action
		reupload your user file after it's corrected.

Address line or field warnings related to invalid or unexpected values

Category	Sample Message	Action
INVALID_EMPLOYEE_DATA	*Skipping line number 26 because column contains unsupported characters.*	View the line number (not including the file header in line counts) and column specified in the warning for special characters, most often older Kanji characters. Viva Glint supports only modern Kanji characters, remove, or replace before reuploading.
MISSING_REQUIRED_VALUE	*Line 250 is missing a required value for Employee First Name, Employee Last Name, and Email address for user ID EMP123.*	Review the file and add a value for the required attribute (Employee ID, Email, First Name, Last Name, Status).
INVALID_EMAIL	*There are 125 employees without a valid Work Email, which could be related to employees with an Employee ID sent as the email value.*	Verify that email addresses are in a valid format, including `@` and a domain. If you've intentionally populated the Employee ID into the Email attribute, consider appending `@example.com` to the Employee ID value to satisfy this validation.
FIELD_TOO_BIG_FATAL	*Required field Email can't be longer than 64 characters.*	Check for fields that may be accidentally strung together. Review the file and confirm that all required attributes have values fewer than 64 characters. **Note:** For

Category	Sample Message	Action
		Status, the character limit is 32.
CHAR_LIMIT_EXCEED_NON_MANDATORY	*Non-Required field Department is longer than 64 characters. As a result, the value has been truncated to 64 characters, which is what will be shown in reporting. (Number of employees impacted: 23)*	Check for fields that may be accidentally strung together. Review the file and confirm that attributes have values fewer than 64 characters. Shorten any truncated values as needed and reupload the file.
SUSPICIOUS_VALUE	*Value of Employee Last Name for Employee ID 1234 contains suspicious characters. Check for special/unexpected characters that may have been corrupted and reupload your file to correct.*	Review data and delete uncommon characters, such as `?` or `_` if needed. Special language characters may be corrupted.
INVALID_STATUS	*Status value 'LEAVE' is invalid. This value needs to be exactly "ACTIVE" or "INACTIVE", in all caps.*	Verify that the **Status** attribute contains only ACTIVE or INACTIVE. Check for capitalization.
UNEXPECTED_ATTRIBUTE	*The following attribute/attributes 'Personnel Area' are in the file but not configured in Viva Glint.*	If this is a new attribute, navigate to **Settings** > **Configure** > **People** to update your configuration.

Address line or field warnings related to manager hierarchy calculation

Category	Sample Message	Action
MANAGER_HIERARCHY_UPDATE WARNING	*There are 25 employee records without a manager. The CEO/top of hierarchy shouldn't have a Manager ID. Employees without a Manager won't be reported in Manager reports, their scores/response won't roll up into any manager. The first*	These employees' responses won't be included in manager hierarchy-based report views. Review data to

Category	Sample Message	Action
	20 records: `jsmith@example.com`*,* `dlopez@example.com`...	make sure that all employees except the CEO have a Manager ID value assigned.
MANAGER_HIERARCHY_UPDATE WARNING	*INVALID_MANAGER_HIERARCHY: User id 01234 has a nonexistent Manager ID 56789. This will cause your manager's hierarchy to be incomplete.*	The manager ID doesn't exist - there's no employee with that ID in the system. Review all assigned Manager IDs in your file and ensure that each manager has a corresponding employee record.

Feedback

Was this page helpful? Yes No

Provide product feedback

Duplicate entry error during historical imports

Article • 11/20/2023

Symptoms

When you import historical data into Viva Glint, you receive the following error message:

> Error:
>
> Exception [EclipseLink-4002](Eclipse Persistence Services – 2.7.3.v20180807 -4be1041): org.eclipse.persistence.exceptions.DatabaseException Internal Exception: java.sql.batchUpdateException: Duplicate entry '<ID>' for key 'AK1survey_result_answer' Error Code: 1062 Query: InsertObjectQuery(com.awareai.model.SurveyResultAnswer@122225f8

Cause

This issue occurs because there is at least one duplicate user record in the imported Raw Score File. Each respondent should have only one response row in this file.

Resolution

To fix the issue, remove duplicate user records from the Raw Score File, and then import the data again.

Feedback

Was this page helpful? Yes No

Provide product feedback

Exception date overlap error when processing historical imports

Article • 11/22/2023

Symptoms

When the Viva Glint app processes a historical import, you receive the following error message:

> Errors (1)
> Must correct to continue.
>
> Chosen exception date ('yyyy-mm-dd') overlaps an existing survey cycle/pulse. Please choose a different date.

Cause

This issue occurs because the exception date that's selected overlaps the start date of an existing or scheduled survey in your survey program.

Resolution

To fix the issue, select a different exception date that's in the past and that doesn't overlap the start date of any existing or scheduled surveys in the survey program.

> **Important**
>
> You can't select the same exception dates that you previously selected during any failed historical imports for the same survey. For example, if you tried to import the survey by using October 16, 2023, as the exception date, and that attempt failed, then you can't use October 16, 2023, as the exception date again.

To check the start date for all completed and scheduled surveys in the program, follow these steps:

1. In the admin dashboard, select the **Configure** symbol.
2. Select **Survey Programs**, and then select your survey program.

3. In the list of surveys, review the start date for all the surveys that are listed on the **Completed** tab. If your survey program is marked as **Approved**, you can also review the start dates for the surveys that are listed on the **Upcoming and Live** tab.

Feedback

"Missing required field" error during historical imports

Article • 11/20/2023

Symptoms

When you import historical data from a .csv file into Viva Glint, you receive an error message that has the following format:

> Error at line 2: missing required field – [<user>, <responses to survey questions>]

Here is an example:

> Error at line 2: missing required field - [reed@contoso.com, 4, We have wonderful career progression in the organization., 4,, 3, There are cool promotion opportunities in the organization. That makes me proud. I'm really excited about the future here. 4,, 3,, 5, We have cool team work in the organization., 5, We have fantastic recognition on my team. , 2,, 4, There is energizing support., 4, We have energizing department structure. This is really important to me.,...]

Cause

This issue occurs because the .csv file that's imported into Viva Glint isn't encoded correctly.

Resolution

To fix the issue, follow these steps:

1. Open the .csv file in a text editor, such as Notepad++ or Sublime.
2. Resave the file in UTF-8 encoding. (Don't save the file in UTF-8 with BOM encoding.)
3. Import the file again.

Feedback

"User is not in client" error during historical imports

Article • 11/17/2023

Symptoms

When you import historical data in Viva Glint, you receive the following error message:

> Errors (1):
> Must correct to continue.
>
> User ('`user@contoso.com`') found in user file is NOT in client.

Cause

This issue occurs because the user's email address in the Respondent User File and in the user's profile in Viva Glint don't match.

Resolution

To fix the issue, verify that the user's email address differs between the two locations. Then, revise the email address in the user's profile to match the email address in the Respondent User File.

After you save the revised user profile, import the historical data again.

Feedback

Was this page helpful? Yes No

Provide product feedback