GALLUP

GALLUP ACCESS

ACTION PLANNING

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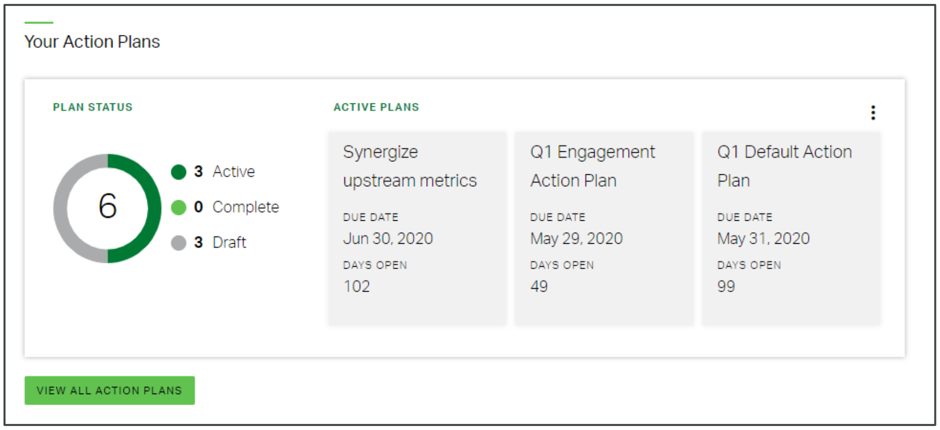
YOUR ACTION PLANS

The homepage of Gallup Access features the **Your Action Plans** area, which displays the status of your action plans and a summary of your active plans.



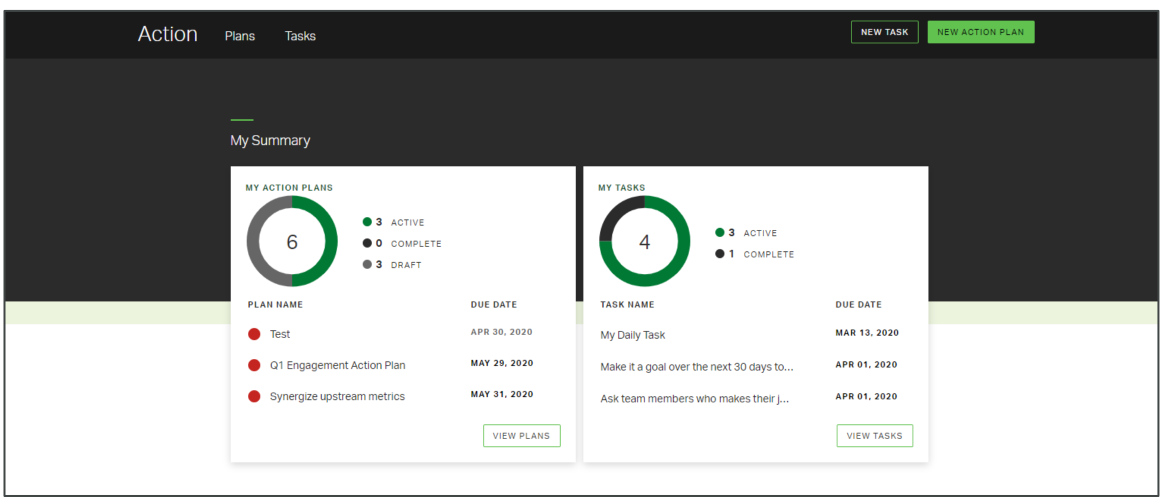
Your Action Plans area

Click an active plan's name to view its details, or click **View All Action Plans** to view all of your action plans.

NOTE: You can also view your action plans by selecting **Action** from the **Menu** on the upper-left corner of the page.

SUMMARY

The summary page of the **Action** product provides an overview of your action plan activity and tasks, allowing you to quickly assess the status and activity of your tasks and action plans.

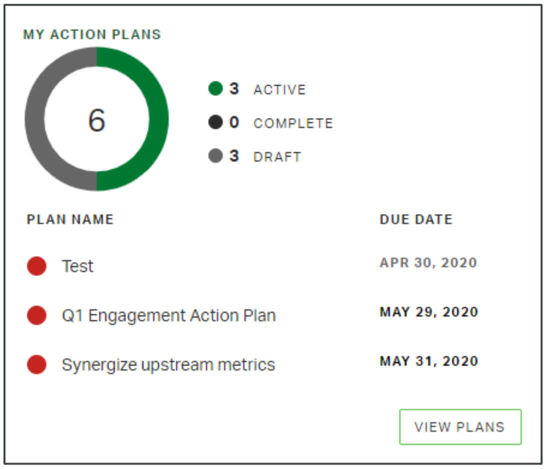


Summary page

The summary page consists of two areas:

- My Action Plans
- My Tasks

MY ACTION PLANS



My Action Plans area

This area indicates the number of action plans you have created and their distribution among the different statuses. Use it to quickly determine how many of your plans exist for each status type. A plan can have one of the following statuses:

Draft You started to create a plan, but have not activated it yet.

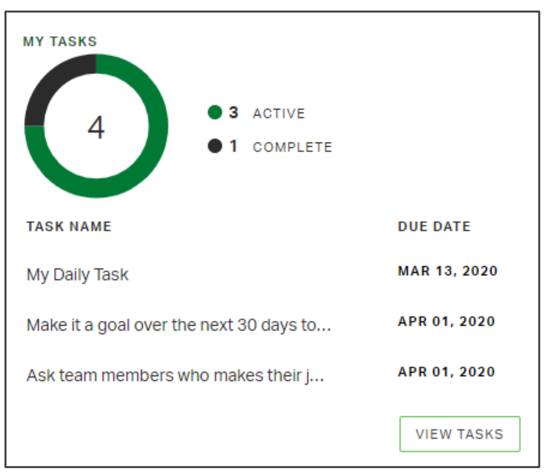
Active You activated the plan, and your team is currently using it.

Complete The plan was active, and you marked it as complete.

NOTE: A plan may have a status of **Overdue** if it is active with a past due date.

Click an action plan's name to view its details, or click **View Plans** to view all plans on the **Plans** tab.

MY TASKS

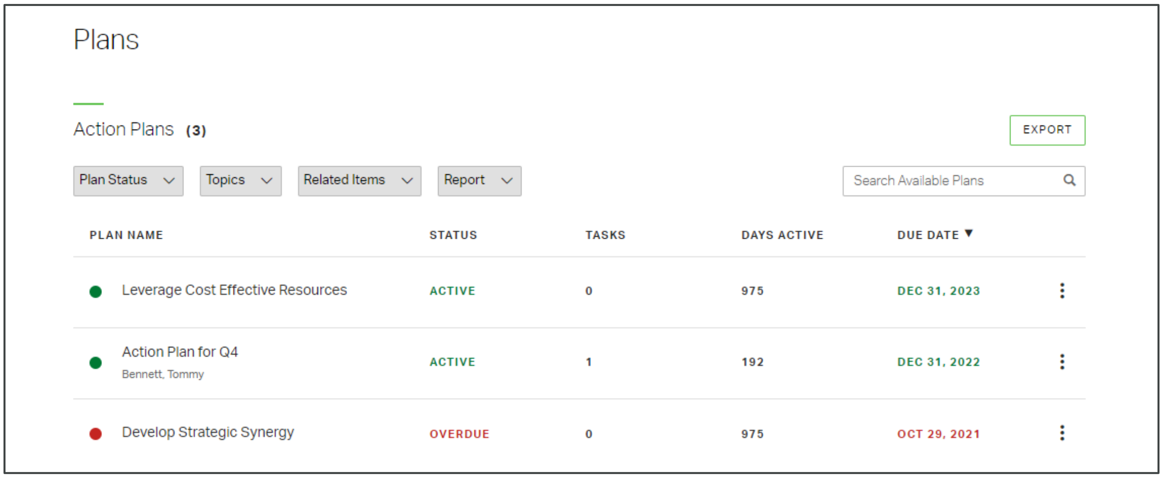


My Tasks area

This area indicates your tasks and whether they are **Active** or **Complete**. Click a task's name to view its details, or click **View Tasks** to view all tasks on the **Tasks** tab.

PLANS

The **Plans** tab of the **Action** product lists all action plans you have created. Use the features on this tab to filter, review, edit, manage, export and delete your plans.



Plans tab

The information on this tab consists of the following columns:

Plan Name	The name of the plan.
Status	The status of the plan (e.g., Draft, Active, Complete or Overdue)
Tasks	The number of tasks associated with the plan.
Days Active	The number of days the plan has been active (or was active for a completed plan).
Due Date	The due date of the plan.

FILTERING PLANS

Use the filter drop-down lists at the top of the tab to select criteria for viewing specific action plans.

Filter options

You can use any combination of filter criteria to isolate the plans you want to view. The following criteria are available:

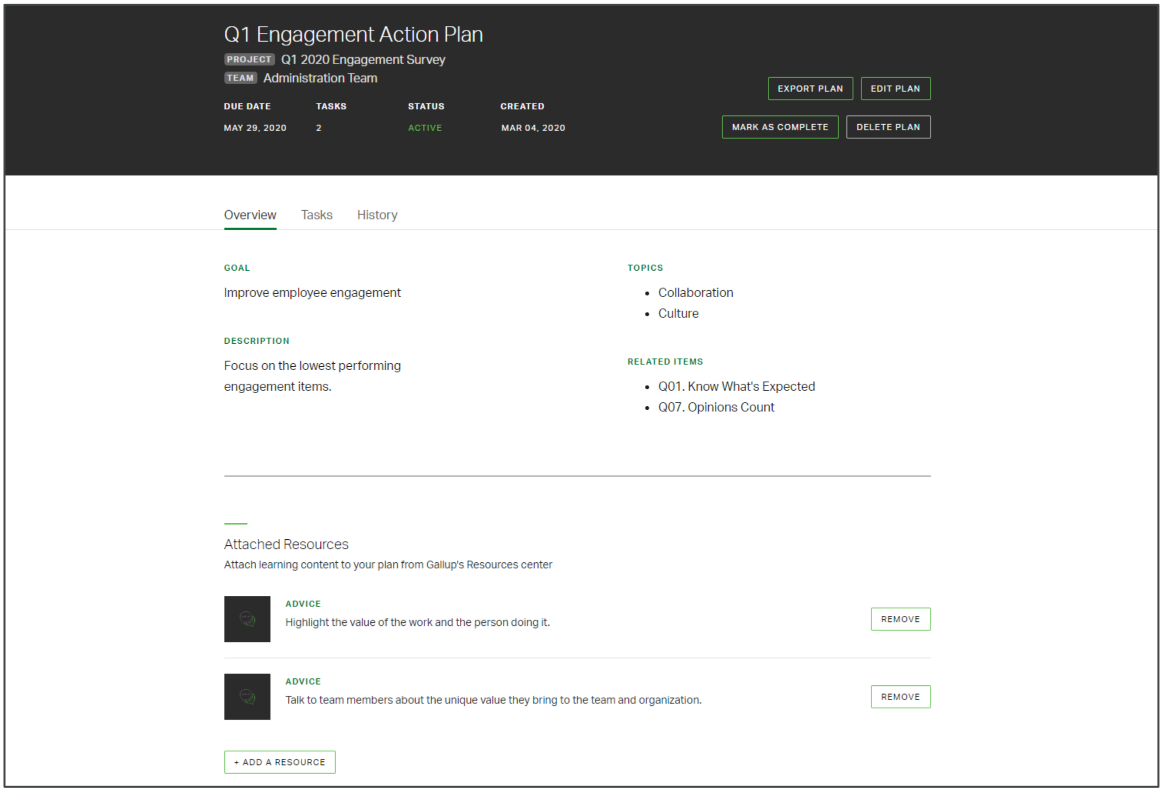
Plan Status	The status of an action plan (e.g., Draft, Active or Complete).
Topics	The subjects associated with an action plan.
Related Items	The engagement items associated with an action plan.
Report	The survey report associated with an action plan.

Filter criteria currently in use appear below the filter options. Click an item's close symbol (**x**) to remove the item from your current filter. Or, click **Clear All** to remove all filter criteria items.

You can also use the search field on the right side to locate plans with a specific word or phrase in their title.

REVIEWING AND EDITING PLANS

Click an action plan's title to view its details, including its associated learning topics, engagement items, resources, tasks, notes and change history.



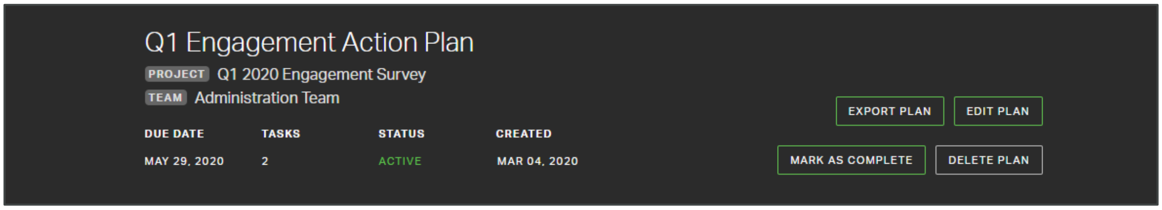
Action plan details

When viewing an action plan's details, use the following sub-tabs to review and modify the plan:

Overview Lists the plan's goal, description, topics (employee experience), related items (employee experience), strengths domains (strengths) and attached learning resources (employee experience or strengths). If you are viewing an employee experience or strengths plan, this sub-tab also allows you to view, add or remove attached learning resources.

Tasks Lists the plan's active and completed tasks. Click a task to view its full details. You can also use the options on this sub-tab to add a new task, mark a task as complete or delete a task.

History Lists the plan's change history and provides an option to add notes to a plan.



Action plan buttons

The following buttons appear on the upper-right corner of the page when viewing an action plan's details:

Export Plan Download a PDF version of the plan.

Edit Plan Modify the details of the plan, including adding or removing resources and tasks. This button is not available for completed plans.

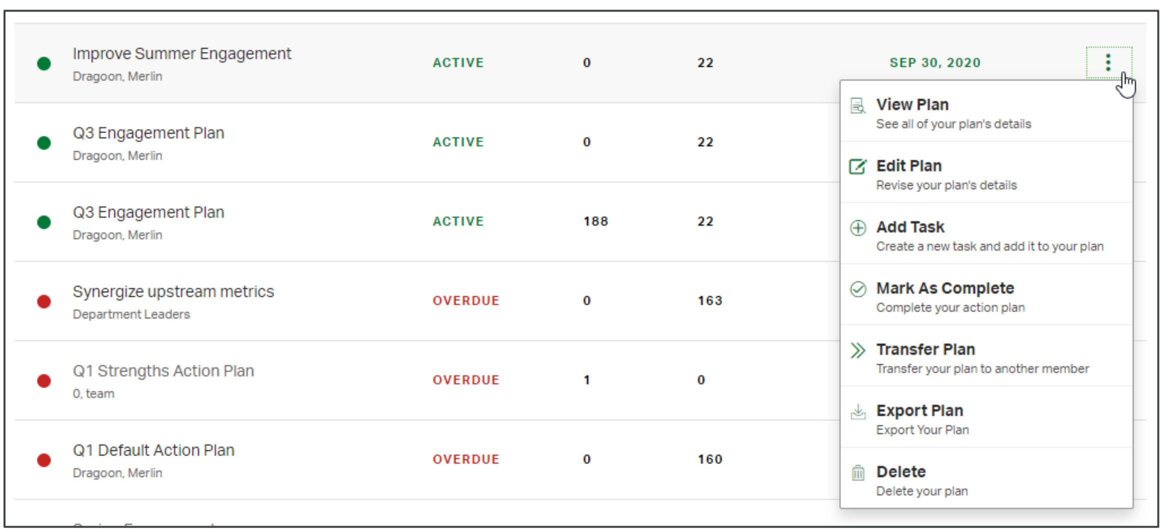
Activate Plan Make the plan active, indicating that you and your team are currently using it. This button is available only for plans with a **Draft** status.

Mark as Complete Indicate that you and your team have completed the plan. This button is available only for plans with an **Active** or **Overdue** status.

Delete Plan Permanently remove the plan.

Reactivate Plan Make a completed plan active. This is useful if you accidentally marked a plan as complete.

In addition to these options, you can also click a plan's More Options menu (⋮) on the **Plans** tab to access options for quickly modifying or exporting a plan.



More Options menu, Plans tab

The following options are available:

View Plan View the plan's details.

Edit Plan Modify the details of the plan, including adding or removing resources and tasks. This option is not available for completed plans.

Add Task Create a new task and add it to the plan. See page 16 for details on creating a task.

Mark as Complete Indicate that you and your team have completed the plan. This option is available only for plans with an **Active** or **Overdue** status.

Reopen Make a completed plan active. This is useful if you accidentally marked a plan as complete.

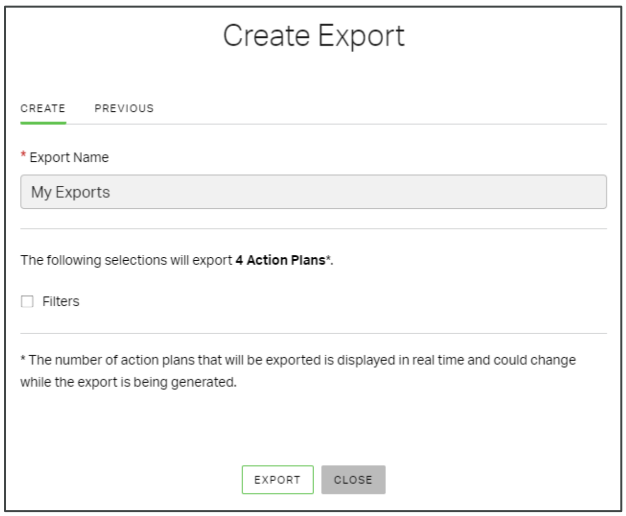
Transfer Plan Assign the plan to another team leader or team member.

Export Plan Download a PDF version of the plan.

Delete Permanently remove the plan.

EXPORTING PLANS

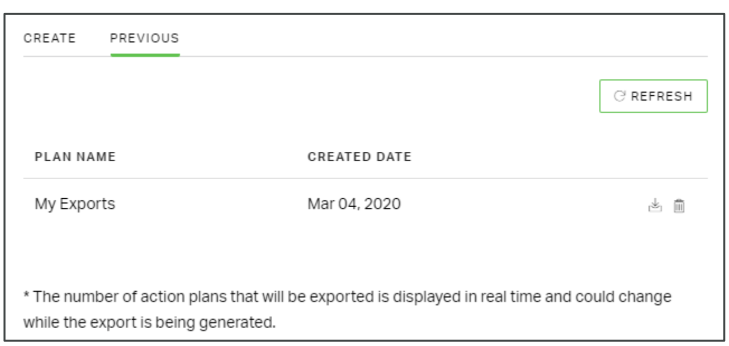
To download your action plans, click **Export** on the upper-right corner of the **Plans** tab. This will display the **Create Export** window.



Create Export window

Use the options of the **Create Export** window to edit the name of your export and determine which action plans to include. To export specific action plans, select **Filters** to display options for selecting action plans based on certain criteria.

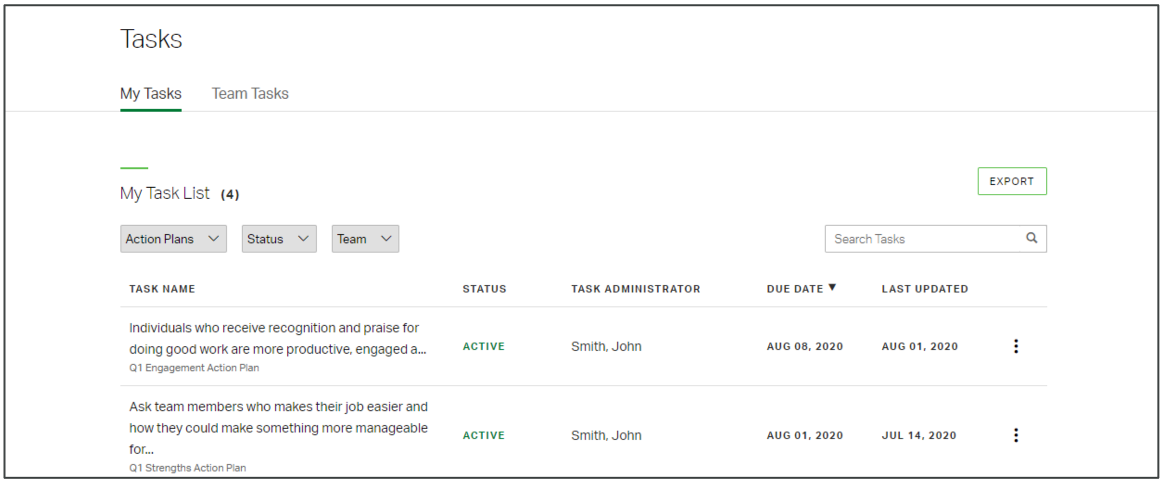
After you click **Export**, you can check its status and download it via the Create Export window's **Previous** tab. Click an export's download symbol ( ) to download it.



Previous tab, Create Export window

TASKS

The **Tasks** tab of the **Action** product lists all tasks assigned to you and all tasks you have assigned to others. Tasks are useful for helping you and your team remain focused on your action plans and completing them on time. Use the features on this tab to filter, review, edit, manage, export and delete your tasks.



Tasks tab

The **Tasks** tab consists of the following sub-tabs:

My Tasks	Displays all tasks assigned to you.
Team Tasks	Displays all tasks assigned to another person and that you are the task administrator of. These are usually tasks you have created and assigned to your team members.

The information on these sub-tabs consist of the following columns:

Task Name	The name of the task.
Status	Whether the task is active or complete.
Task Administrator	The person who is the task administrator (usually the task creator).
Assignee	The person the task is assigned to.
Due Date	The date the task is due to be completed.
Last Updated	The date the task was last edited.

FILTERING TASKS

Use the filter drop-down lists to select criteria for viewing specific tasks.

Filter options

You can use any combination of filter criteria to isolate the tasks you want to view. The following criteria are available:

Action Plans	The action plan the task is associated with.

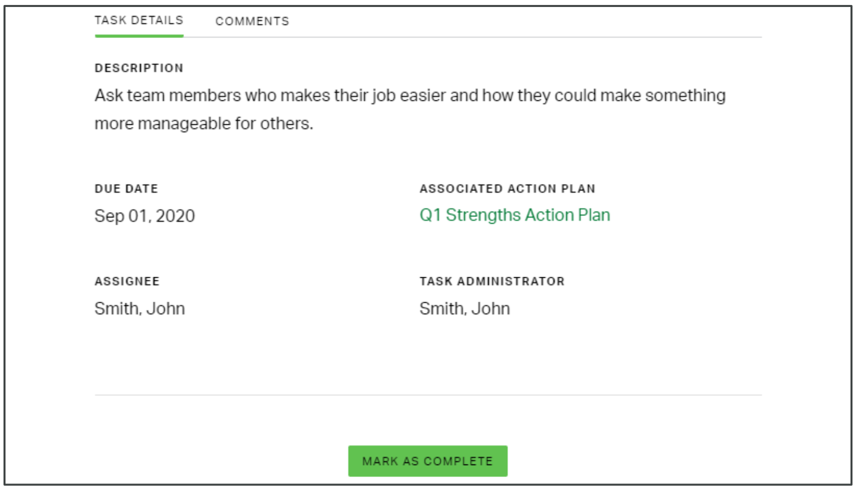
Status	The status of the task (e.g., Active or Complete).
Team	The team the task is associated with.

Filter criteria currently in use appear below the filter options. Click an item's close symbol (**x**) to remove the item from your current filter. Or, click **Clear All** to remove all filter criteria items.

You can also use the search field on the right side to locate tasks with a specific word or phrase in their title.

REVIEWING AND EDITING TASKS

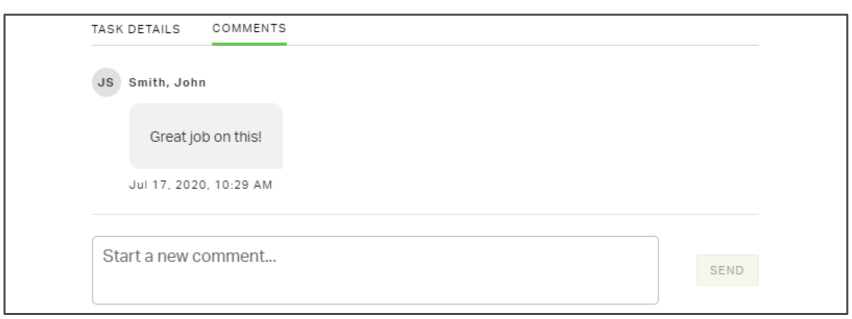
Click a task's title to view its details, including its description, due date, recurring information, the name of the action plan it is assigned to (if any), the assignee and the task administrator. You can also click a task's More Options menu (⋮) on the **Tasks** tab to access options to view the task, delete it or mark it as complete.



Task Details tab, Task window

More Options menu, Tasks tab

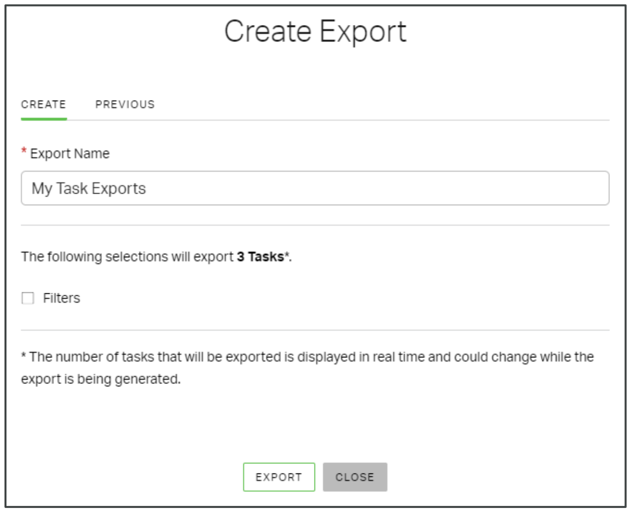
When viewing a task's details, click **Edit** in the upper-right corner to modify the task, or click **Mark as Complete** to indicate that you or the assignee have completed the task. You can also use a task's **Comments** tab to communicate with the assignee (or the task administrator if you are the assignee) related to the task.



Comments tab, Task window

EXPORTING TASKS

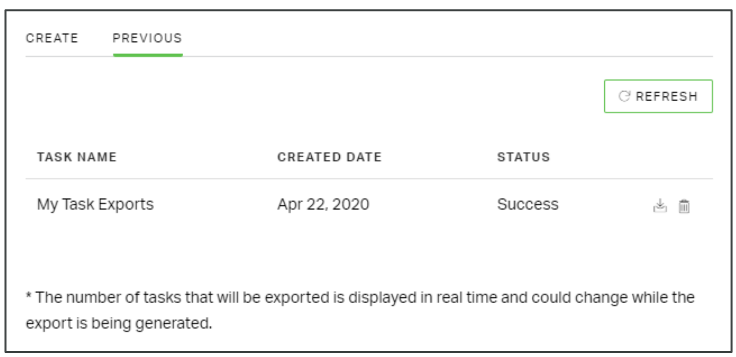
To download your tasks, click **Export** on the upper-right corner of the **Tasks** tab. This will display the **Create Export** window.



Create Export window

Use the options of the **Create Export** window to edit the name of your export and determine which tasks to include. To export specific tasks, select **Filters** to display options for selecting tasks based on certain criteria.

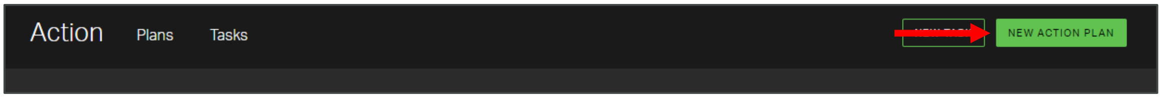
After you click **Export**, you can check its status and download it via the Create Export window's **Previous** tab. Click an export's download symbol ( ) to download it.



Previous tab, Create Export window

CREATING A NEW ACTION PLAN

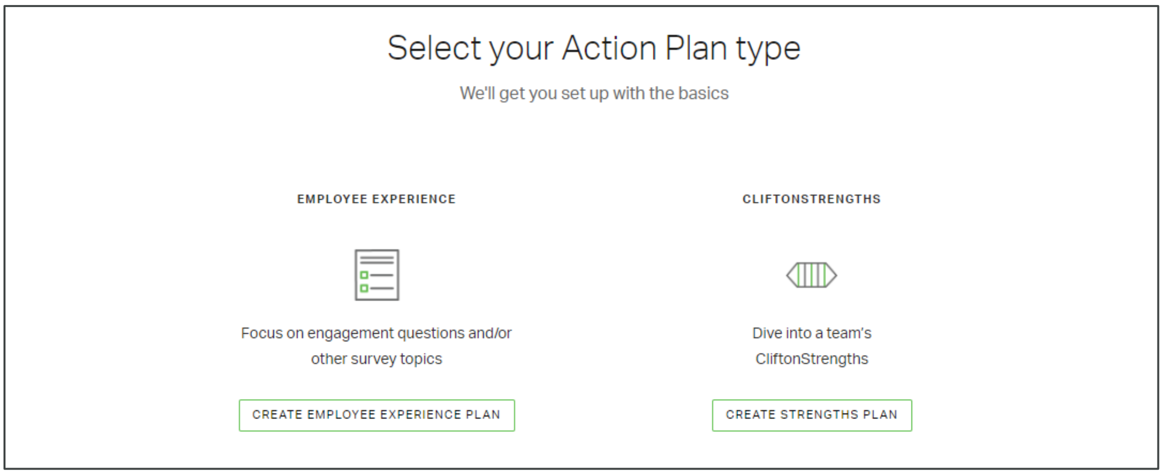
1. Click **New Action Plan** on the upper-right corner of the page.



New Action Plan button

2. On the Select your Action Plan type page, select the type of plan you want to create. If you want to skip the guided wizard and create your plan without assistance, click **Skip the Wizard** at the bottom of the page.

   NOTE: The availability of plan types depends on the products and features you have access to.



Select your Action Plan type page

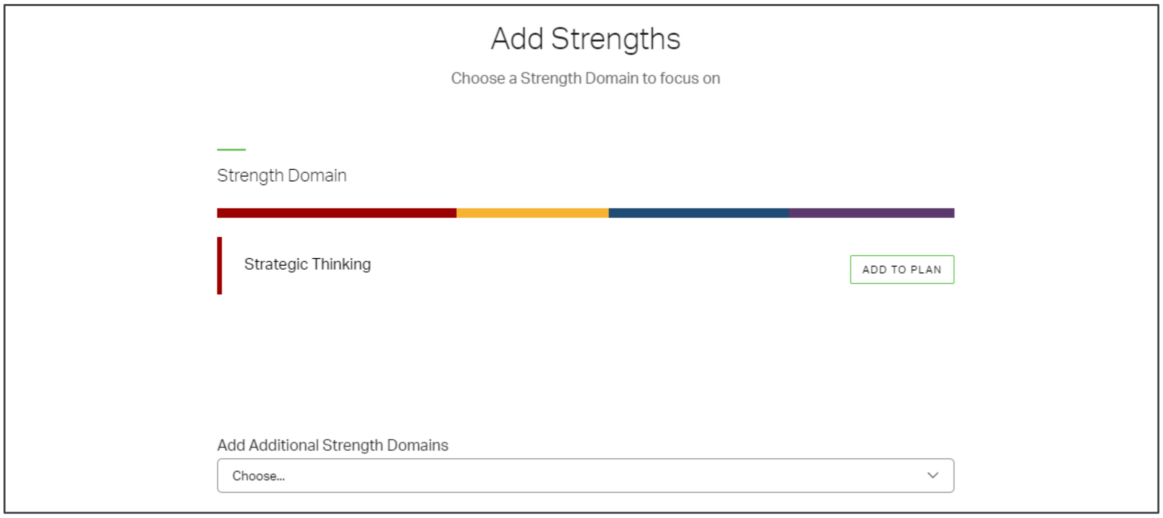
3. Follow the guided on-screen steps to enter the details of your plan. Depending on the type of plan you are creating, you will encounter the following fields:

Plan Name	Type a concise description to identify the plan (maximum 100 characters). This is a required field.
Due Date	Click this field to display the date selection calendar. Use the calendar to choose a date by which you and your team should complete the plan. This is a required field.
Report	Use this drop-down list to select a survey report to associate with the plan (for example, your most recent employee engagement survey report). This is a required field for employee experience plans.
Team	Use this drop-down list to select the team to associate with the plan. This is a required field for employee experience and strengths plans.
Topics	Use this drop-down list to associate up to three subjects with the plan, which you and your team can learn about and focus on to help you successfully achieve the plan's goal.
Related Items	Use this drop-down list to associate up to three engagement items with the plan and set as the engagement goals of the plan.

Goal Type the primary purpose or achievement of the plan, specifying what success looks like (maximum 4,000 characters).

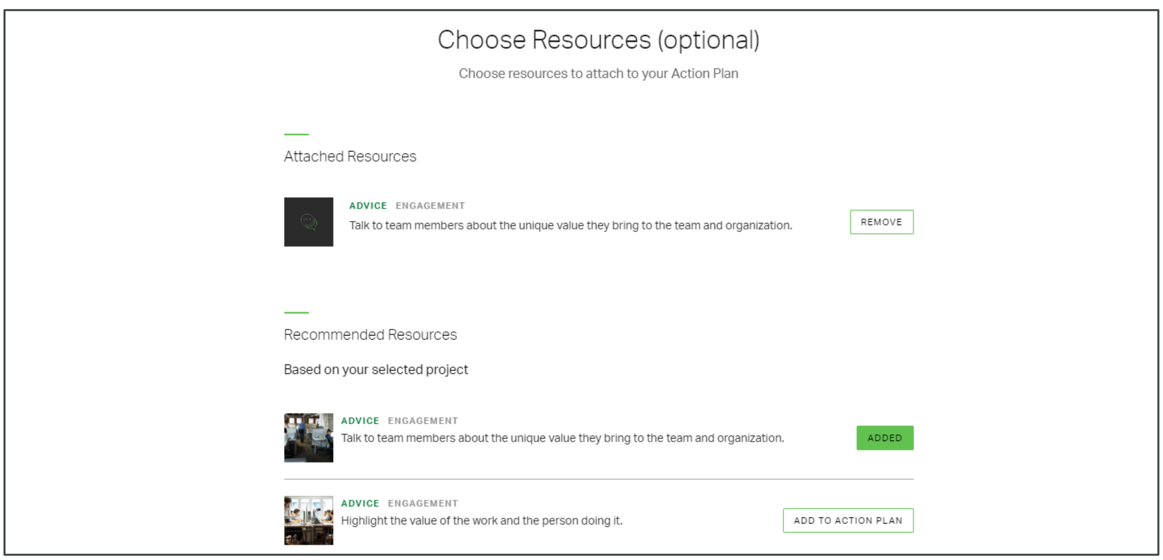
Description Type specific actions and activities that will take place to complete the plan (maximum 4,000 characters). If possible, indicate specific deadlines and individuals responsible for completing the plan, as well as the frequency of how often individuals will perform the actions and activities. If your plan requires specific tools or resources to complete it successfully, include them as well.

4. (Optional) If you are creating a strengths plan, use the options on the Add Strengths page to associate one or more strengths domains with the plan and set as the focus of the plan.



Add Strengths page

5. (Optional) If you are creating an employee experience or strengths plan, use the Choose Resources page to select learning resources to add to the plan. Gallup Access will recommend relevant resources based on the type and details of the plan you are creating.

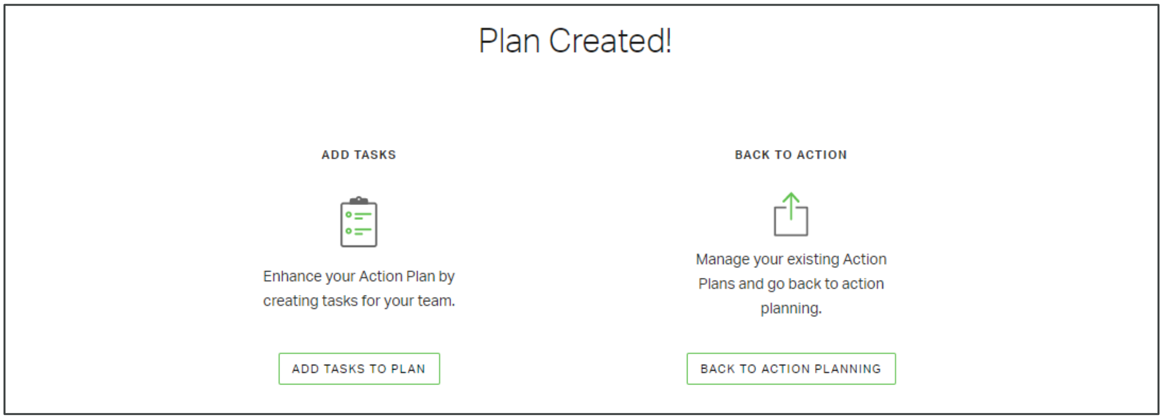


Choose Resources page

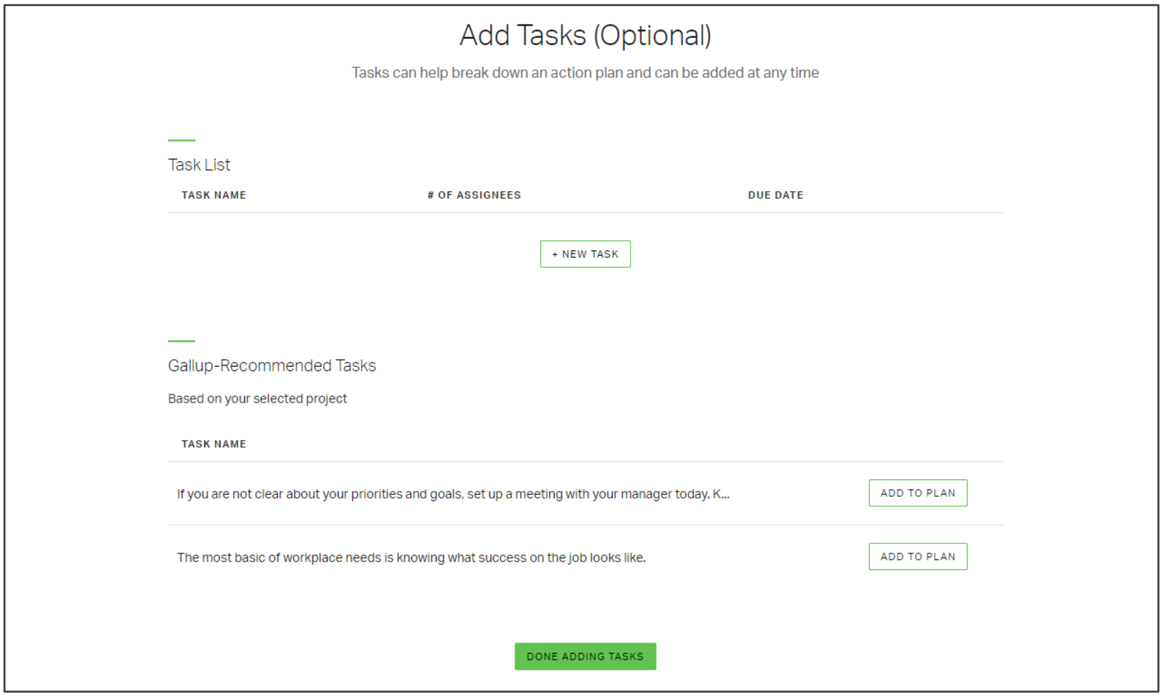
6. After entering the details of your action plan, click **Create Plan** to activate it immediately, or click **Save as Draft** to edit the details of your plan later and activate it in the future.

7. (Optional) If you activate your plan immediately, you can click **Add Tasks to Plan** on the Plan Created! page to display the Add Tasks page. Use the options on the Add Tasks page to create one or more tasks to add to the plan, or add predefined tasks from the list of tasks that Gallup Access recommends based on the type and details of the plan you are creating. See page 16 for details on creating tasks.

   NOTE: You can always add tasks to a plan later. If you do not want to add tasks now, click **Back to Action Planning** on the Plan Created! page.



Plan Created! page



Add Tasks page

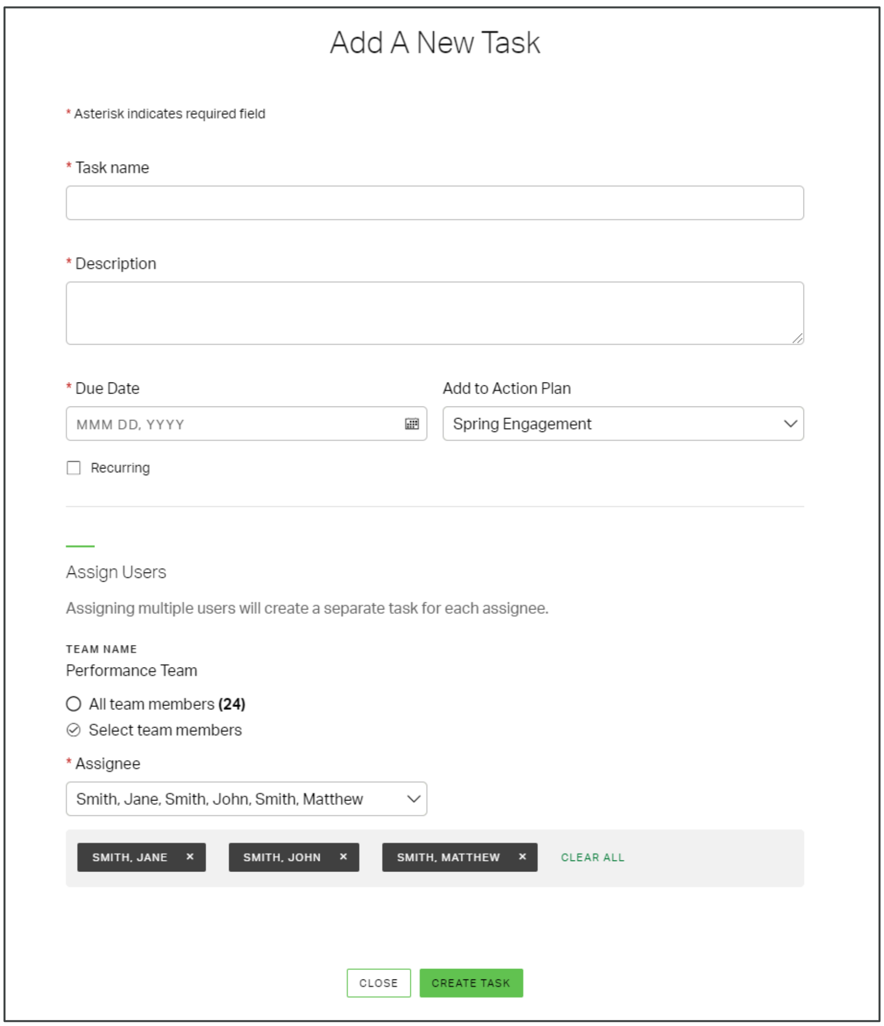
CREATING A NEW TASK

Tasks are useful for helping you and your team remain focused on your action plans and completing them on time.

1. Click **New Task** on the upper-right corner of the page.

New Task button

2. Use the options on the Add A New Task window to create your task.



Add A New Task window

The following options are available:

Task Name	Type a concise description to identify the task. This is a required field.
Description	Type specific actions and goals for the task. If possible, indicate specific individuals, tools or resources required to complete the task successfully. This is a required field.

Due Date Click this field to display the date selection calendar, and then select a date by which you or your team should complete the task. This is a required field.

Add to Action Plan If the task is specific to an action plan's goal or its completion, use this drop-down list to select the action plan to associate the task with it.

Assign Users This area is available if you associate the task with an action plan. Use the **Assignee** drop-down list to select one or more individuals to assign the task to, or select **All team members** to assign the task to all members.

3. (Optional) If you want to create a recurring task, select the **Recurring** checkbox, and then use the following options to configure the recurring details:

   Recurrence Frequency Use this drop-down list to select the time measurement to use for how often you want the task to occur (e.g., daily, weekly, monthly or yearly).

   Every Type a number for how often you want the task to occur, based on your frequency selection. For example, if you selected a **Weekly** frequency and you want the task to occur every other week (i.e., every two weeks), type **2**.

   NOTE: If you selected a **Yearly** frequency, use the drop-down list to select the month during which you want the task to occur.

   On Select the day on which you want the task to occur. For tasks with a **Weekly** frequency, you can select multiple days of the week (e.g., Monday and Friday of every week).

   NOTE: This option is not available for tasks with a **Daily** frequency.

   At Use this drop-down list to select the time of day you want the task to occur at.

   Ends Click this field to display the date selection calendar, and then select a date by which you want the task to stop recurring. This is a required field for recurring tasks.

Recurring task options

4. Click **Create Task** to save your task.

   NOTE: You can view your created tasks on the **Tasks** tab of the **Action** product.

