GALLUP

GALLUP ACCESS

ACTION PLANNING

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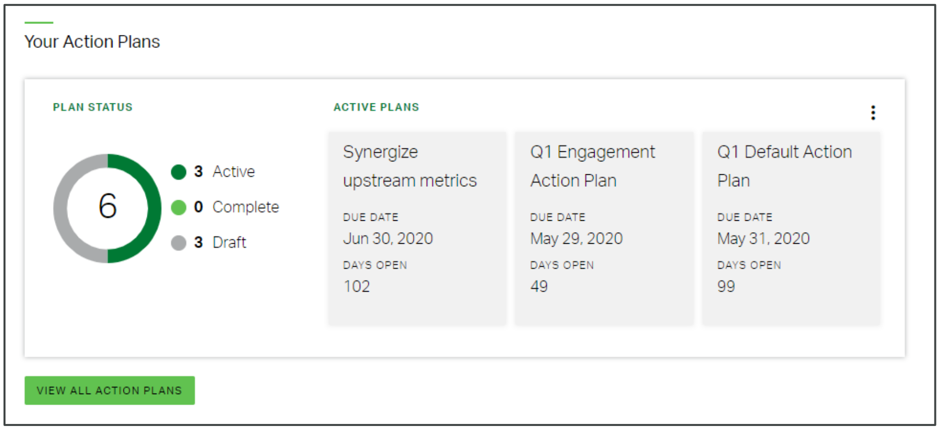
YOUR ACTION PLANS

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.



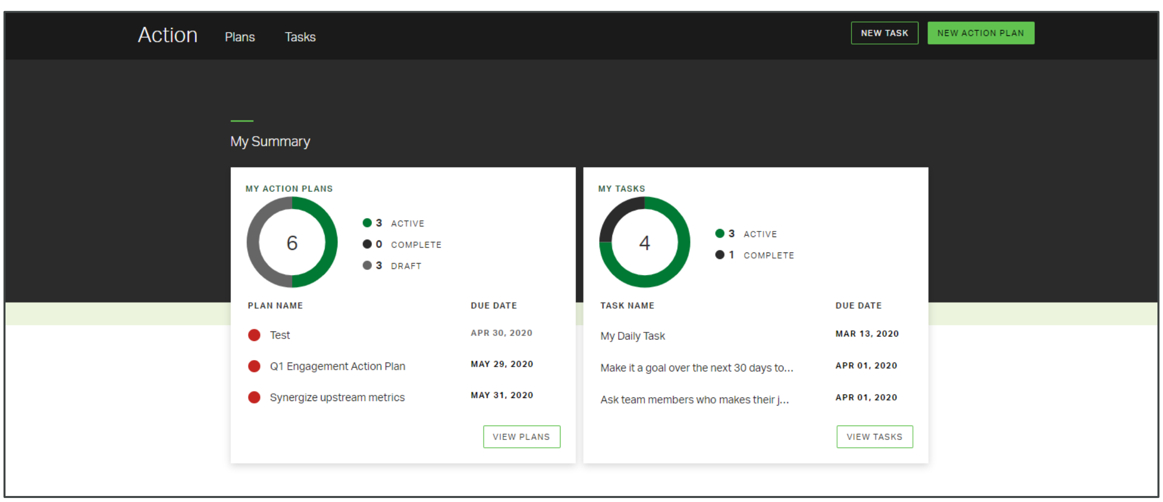
Your Action Plans area

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.

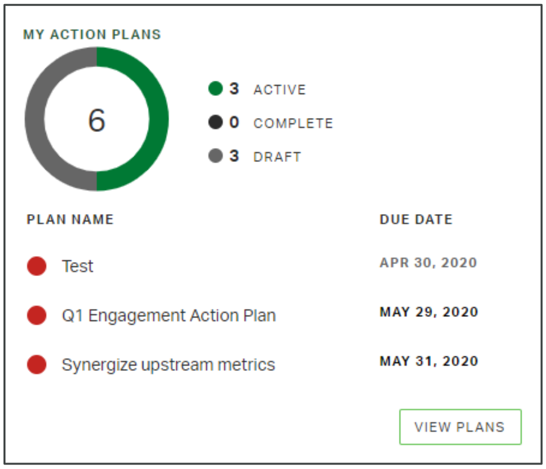


Summary page

The summary page consists of two areas:

- My Action Plans
- My Tasks

MY ACTION PLANS



My Action Plans area

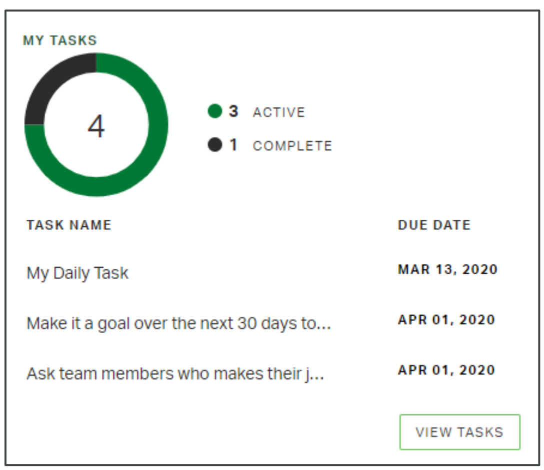
This area indicates the number of action plans you have created and their distribution among the different statuses. Use it to quickly determine how many of your plans exist for each status type. A plan can have one of the following statuses:

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

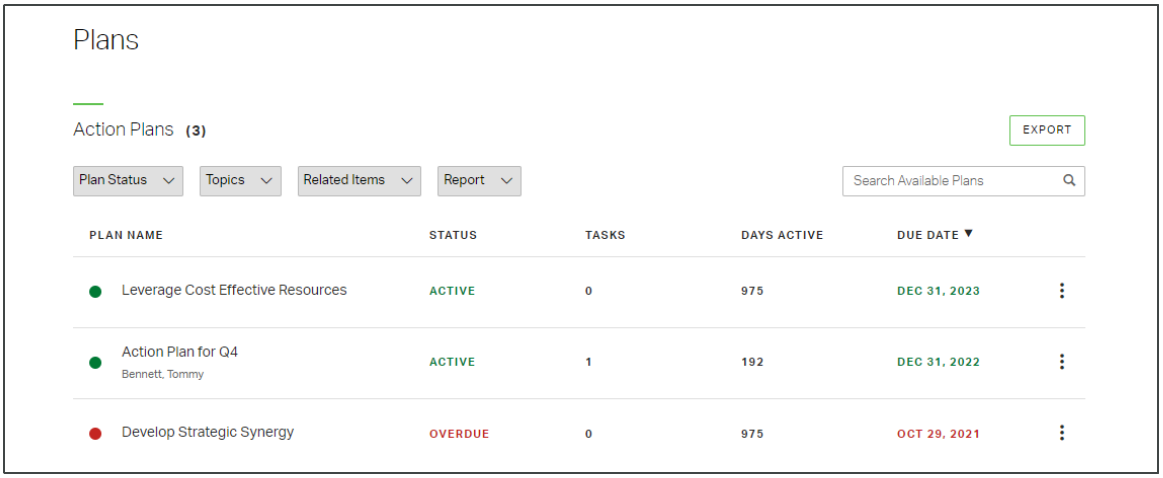


My Tasks area

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:

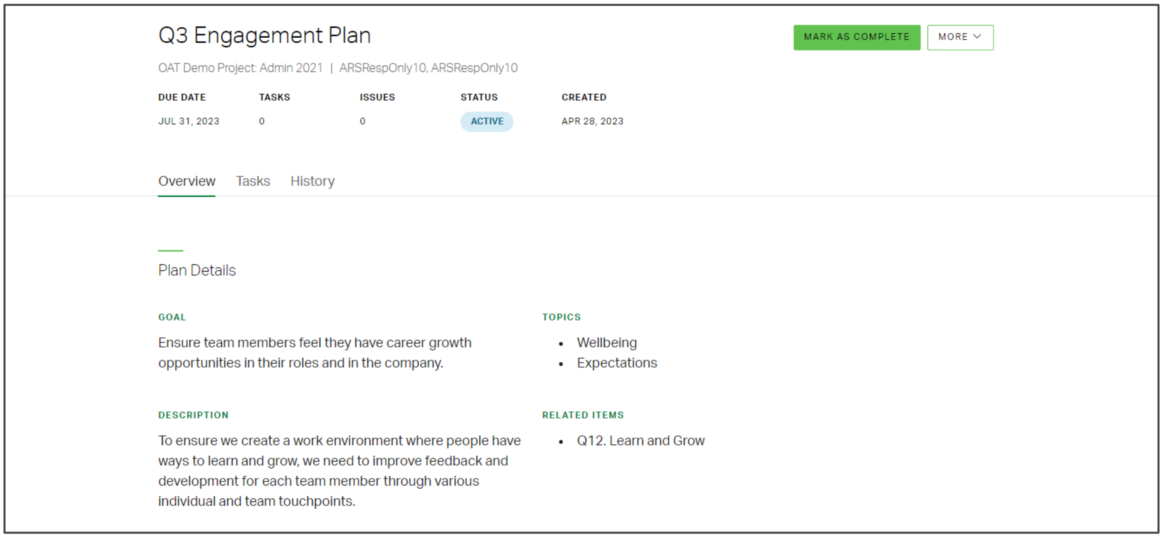
Plan Status	The status of an action plan (e.g., Draft, Active or Complete).
Topics	The subjects associated with an action plan.
Related Items	The engagement items associated with an action plan.
Report	The survey report associated with an action plan.

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, issues, notes and change history.



Action plan 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, including any escalated issues. Click a task or issue to view its full details. You can also use the options on this sub-tab to add a new task or issue, mark a task or issue as complete, or delete a task or issue.

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

The following options are also available on the upper-right corner of the page:

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.

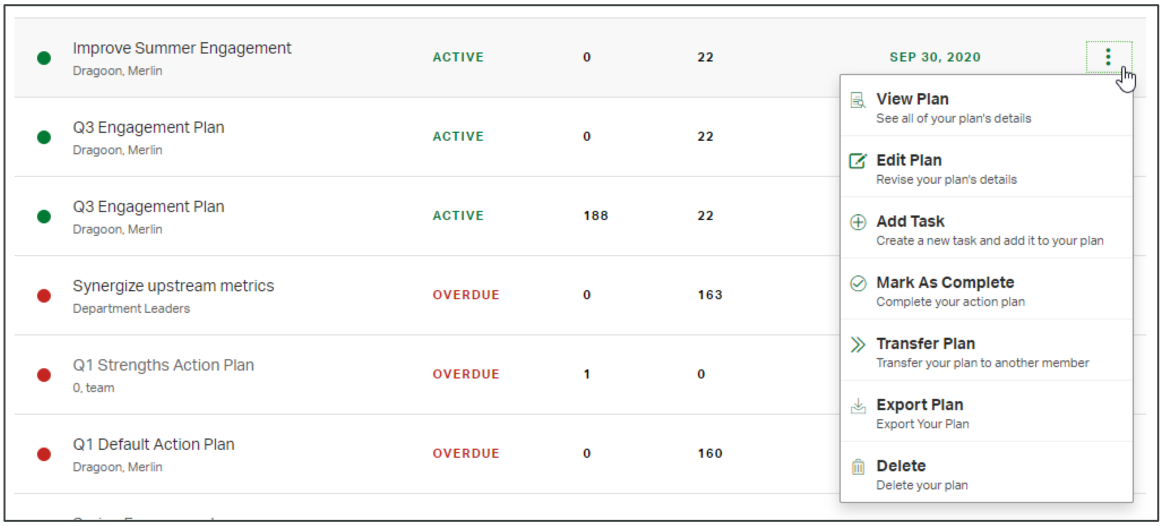
Activate Plan Make the plan active, indicating that you and your team are currently using it. This button is available only for plans with a **Draft** status.

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.



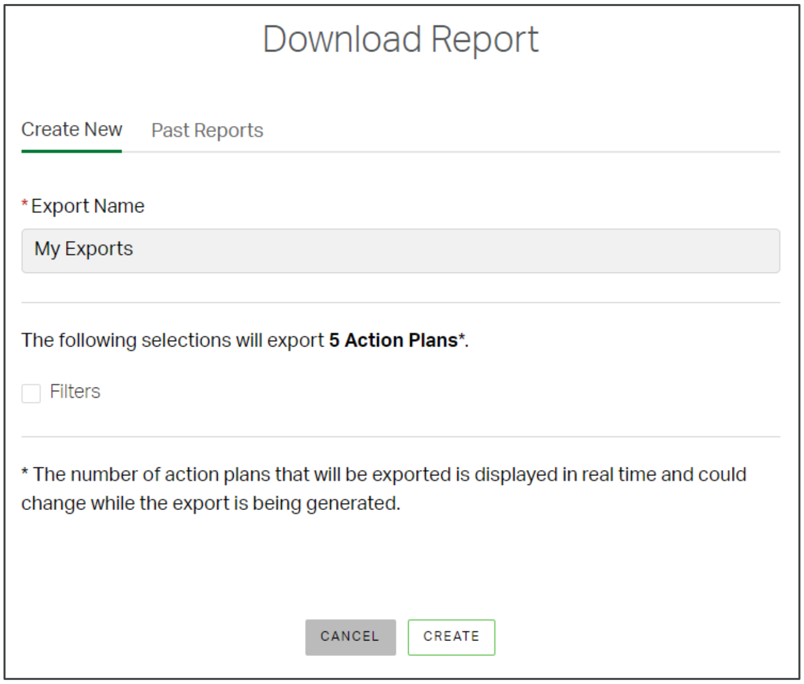
More Options menu, Plans tab

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.

DOWNLOADING PLANS

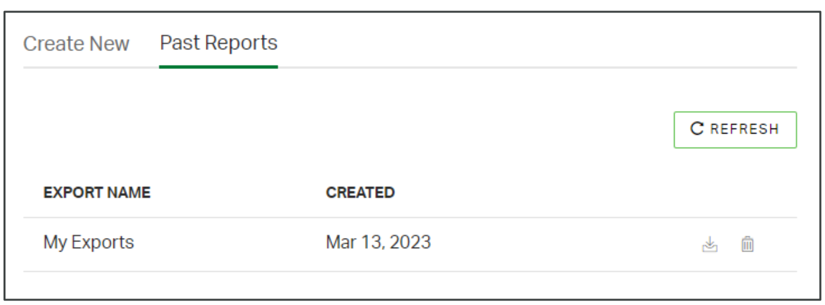
To download your action plans, click **Export** on the upper-right corner of the **Plans** tab.



Download Report window

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

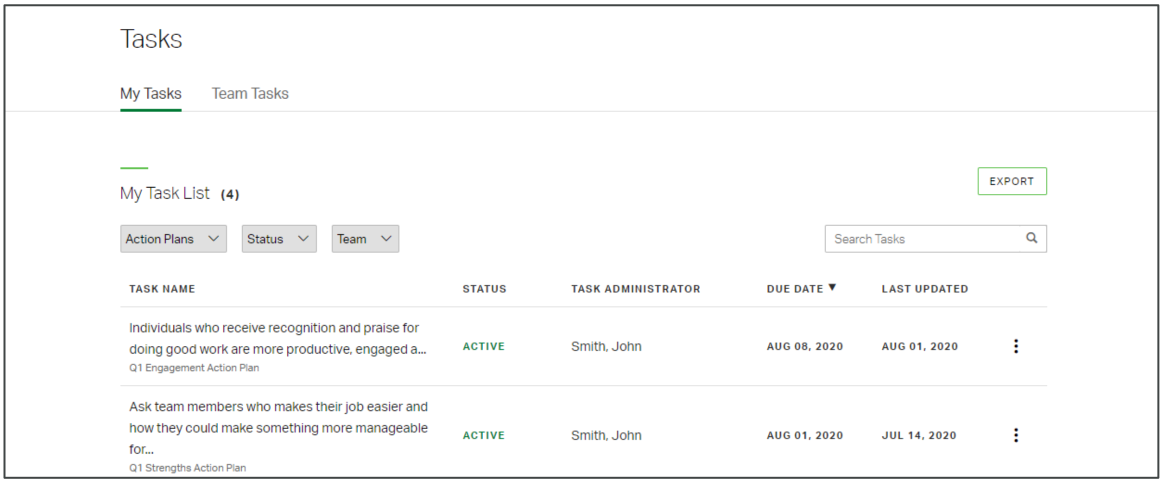
After you click **Create**, you can check a download's status via the Download Report window's **Past Reports** tab. Click an item's download symbol ( ) to download it.



Past Reports tab, Download Report 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.

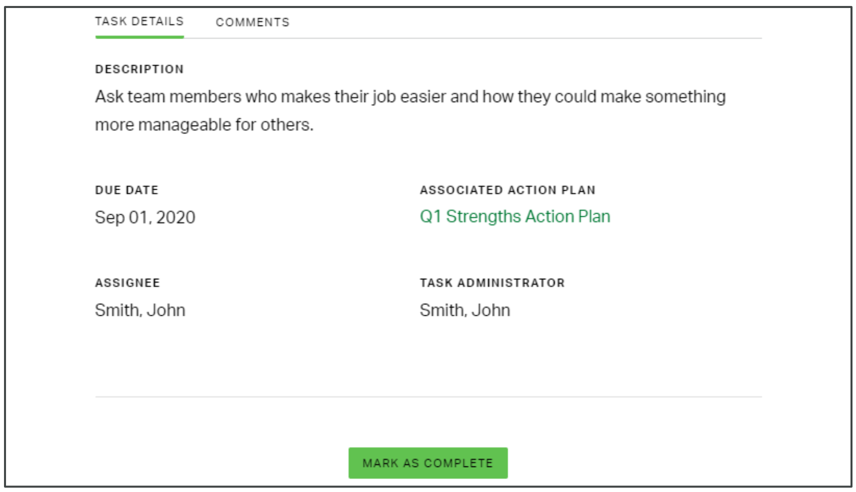
Status	The status of the task (e.g., Active or Complete).
Team	The team the task is associated with.

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

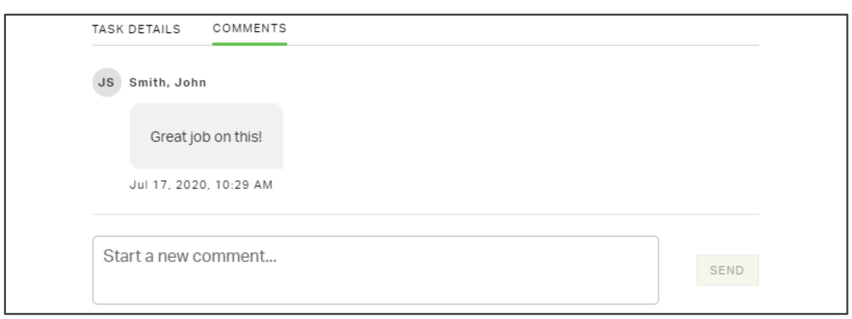
Click a task's title to view its details, including its description, due date, recurring information, the name of the action plan it is assigned to (if any), the assignee and the task administrator. You can also click a task's More Options menu (⋮) on the **Tasks** tab to access options to view the task,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



Task Details tab, Task window

More Options menu, Tasks tab

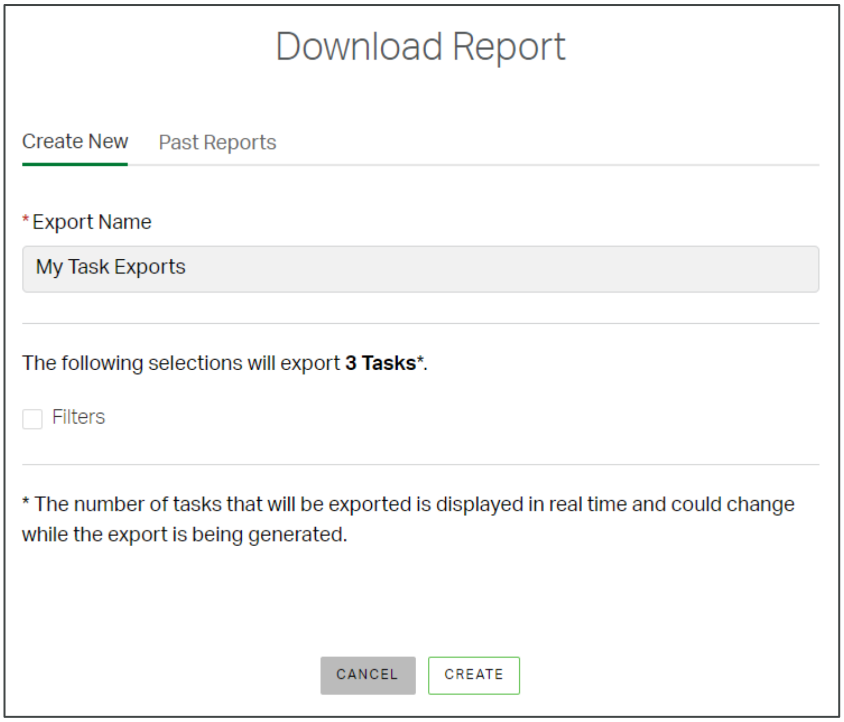
When viewing a task's details, click **Edit** in the upper-right corner to modify the task, or click **Mark as Complete** to indicate that you or the assignee have completed the task. You can also use a task's **Comments** tab to communicate with the assignee (or the task administrator if you are the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



Comments tab, Task window

DOWNLOADING TASKS

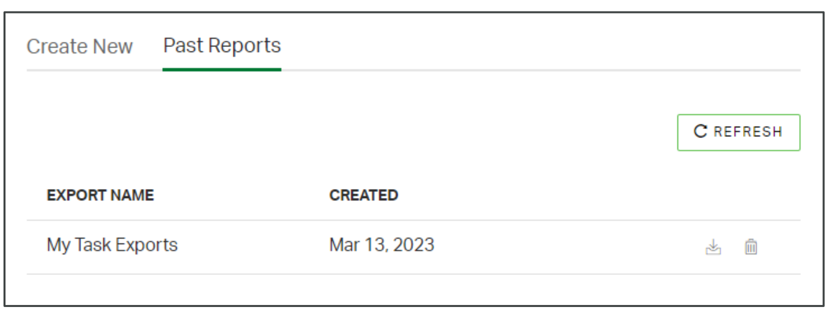
To download your tasks, click **Export** on the upper-right corner of the **Tasks** tab.



Download Report window

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

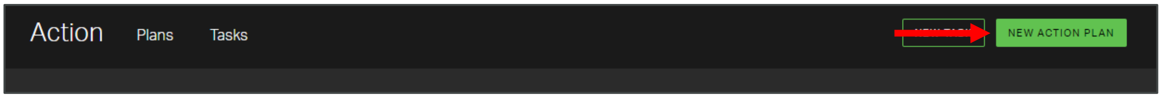
After you click **Create**, you can check a download's status via the Download Reports window's **Past Reports** tab. Click an item's download symbol ( ) to download it.



Past Reports tab, Download Report window

CREATING A NEW ACTION PLAN

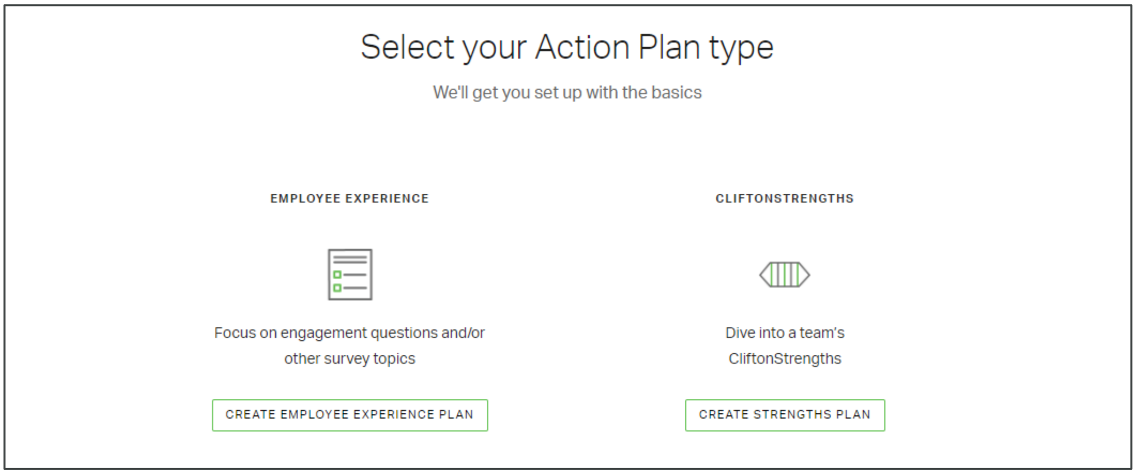
1. Click **New Action Plan** on the upper-right corner of the page.



New Action Plan button

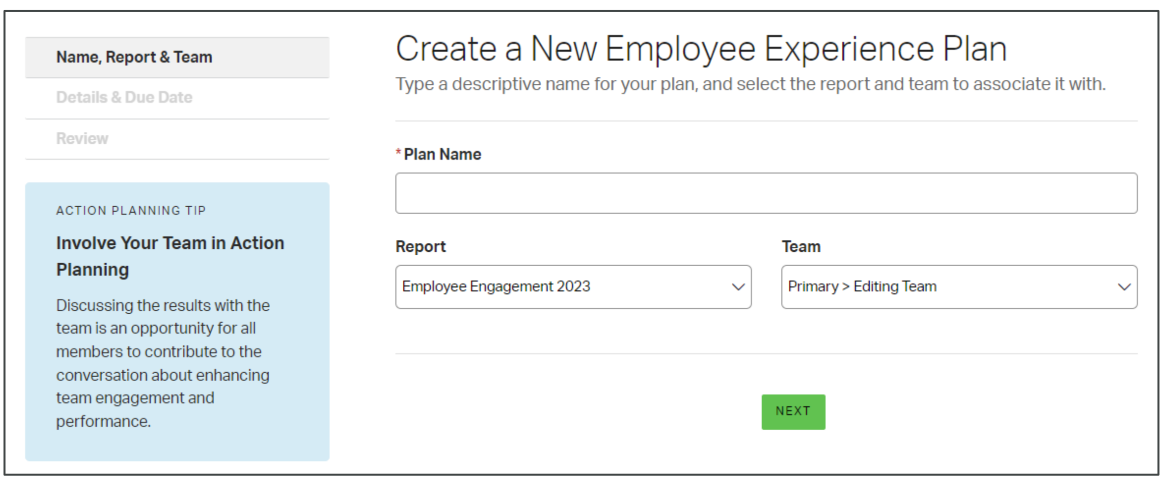
2. On the Select your Action Plan type page, select the type of plan you want to create.

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



Select your Action Plan type page

3. On the Create a New Plan page, type a concise description in the **Plan Name** field to identify the plan (maximum 100 characters).



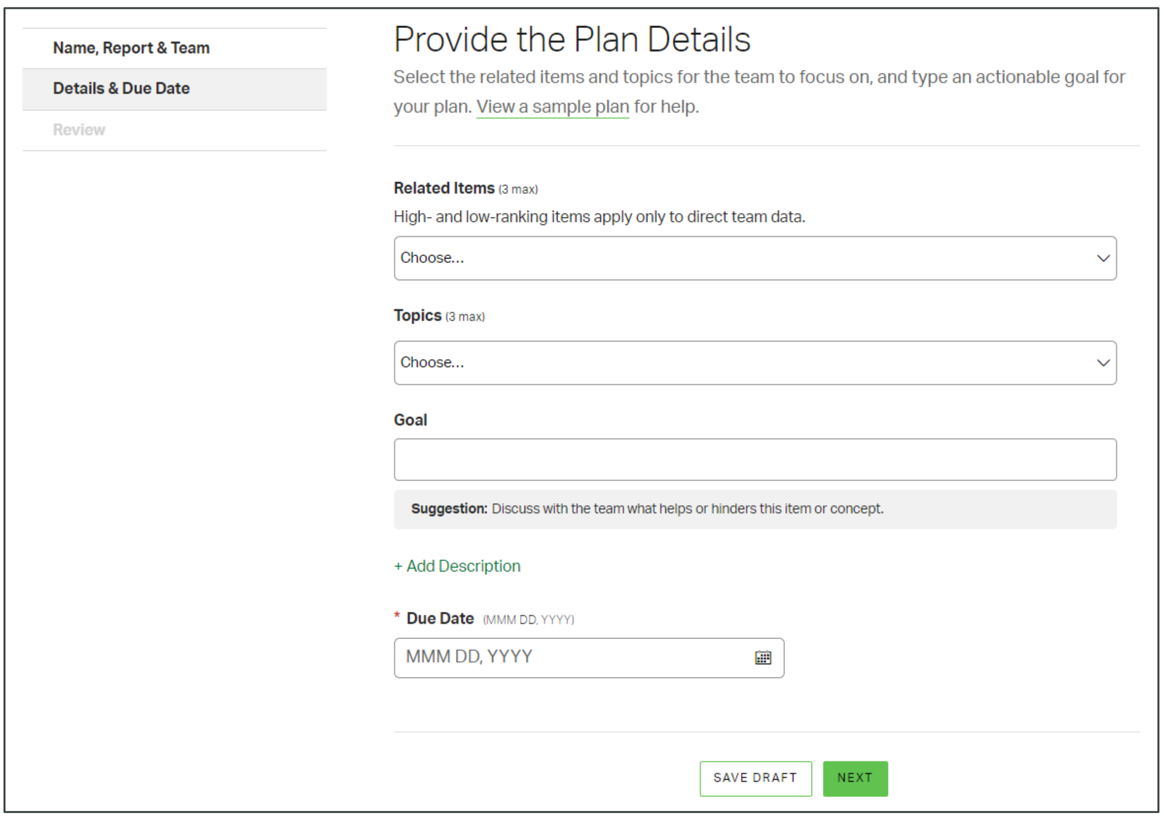
Create a New Employee Experience Plan page

4. To modify the survey report or team associated with the plan, use the respective **Report** and **Team** drop-down lists. Then click **Next**.

   NOTE: Only employee experience plans have an associated survey report.

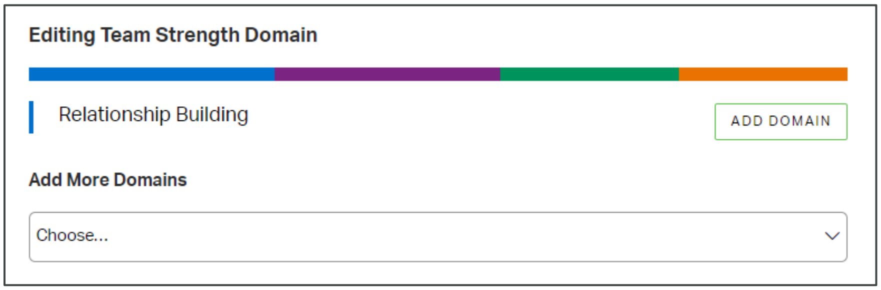
5. On the Provide the Plan Details page, use the following fields to enter the details of your plan:

Related Items	Use this drop-down list to associate up to three survey report items with the plan for the team to focus on (employee experience plans only).
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 (employee experience plans only).
Goal	Type the plan's primary purpose, specifying what success looks like (maximum 250 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, and the frequency of how often individuals will perform the actions and activities. If your plan requires specific tools or resources to complete it successfully, also include them.
Due Date	Click this field to display the date selection calendar, and use the calendar to choose a deadline for completing the plan.



Provide the Plan Details page

6. If you are creating a strengths plan, use the available options to associate one or more strengths domains with the plan for the team to focus on.

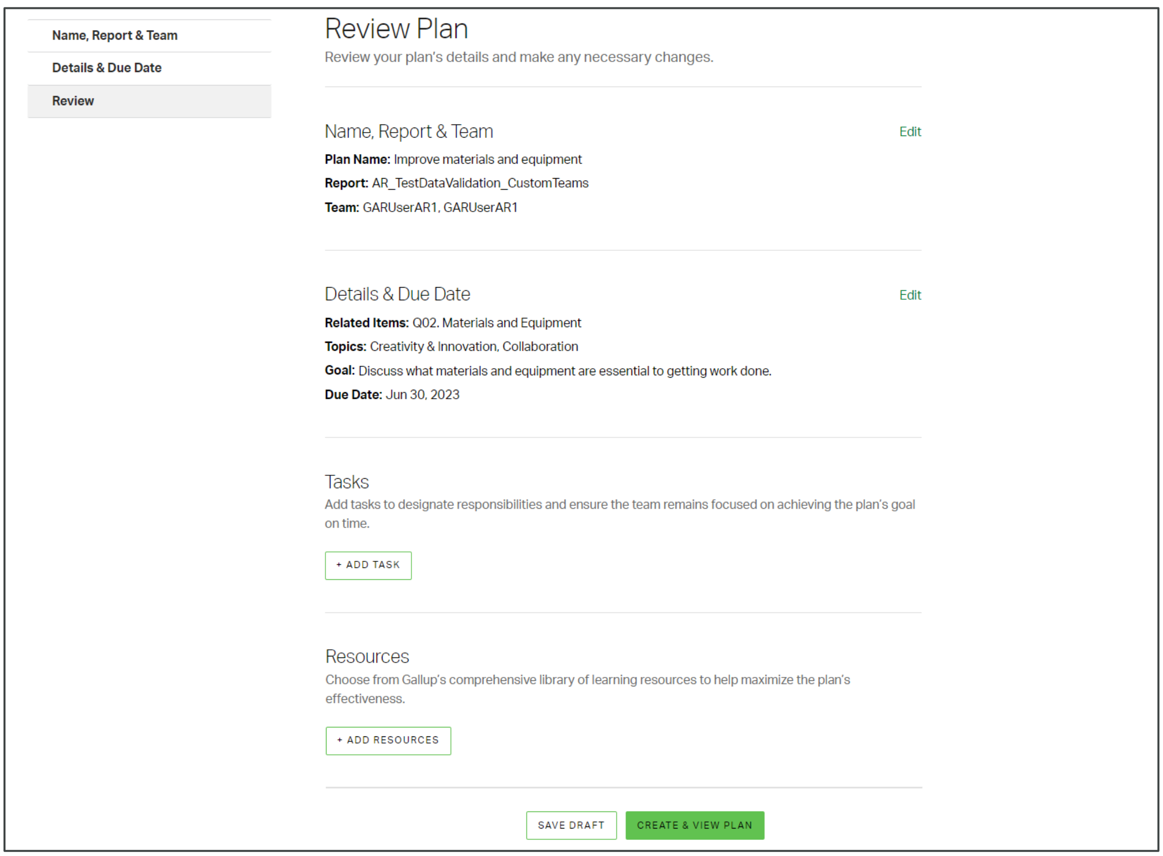


Strengths domain options

7. After entering your plan's details, click **Next**.

8. On the Review Plan page, review your plan's details and make any necessary changes. Then click **Create & View Plan** to activate it immediately, or click **Save Draft** to save the plan and activate it in the future.

   NOTE: To add tasks or resources to the plan, use the respective **Add Task** and **Add Resources** buttons. You can also do this later when viewing the plan.



Review Plan page

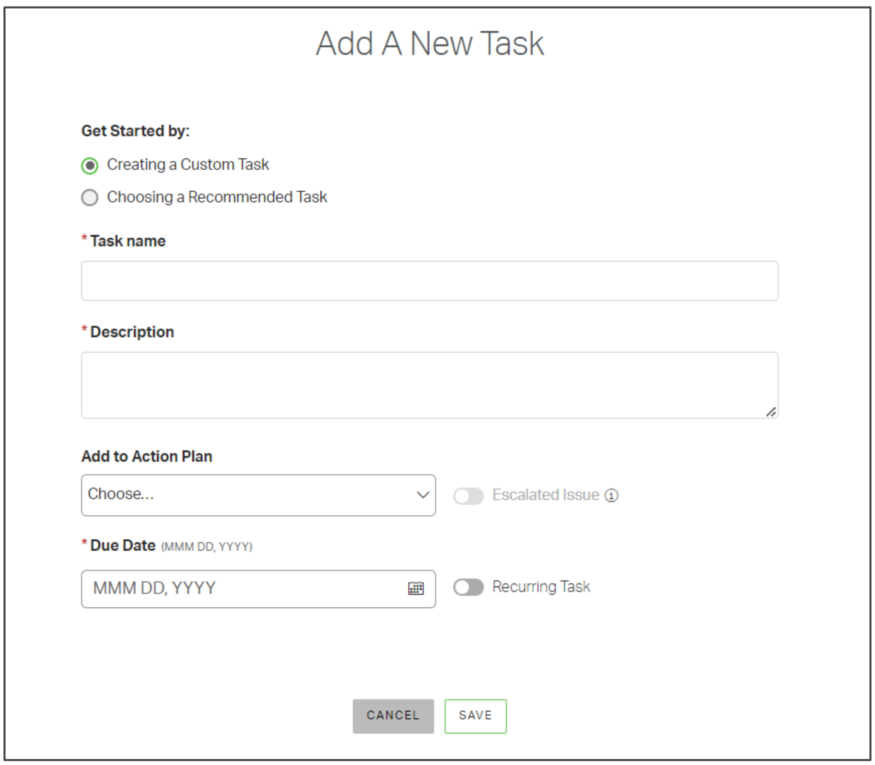
CREATING A NEW TASK

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.
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.
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.

Assign Users — This area is available if you associate the task with an action plan. Use the **Assignee(s)** 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 convert the task into an escalated issue so that specific individuals in your organization can view and address it, select **Escalated Issue**, and then use the **Category** drop-down list to assign an appropriate category. Escalating an issue removes it from you and your team's tasks.

   NOTE: To escalate an issue, the task must have an associated action plan with a report and team.

4. (Optional) If you want the task to happen regularly, select **Recurring Task**, and then use the following options to configure the details:

   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**.

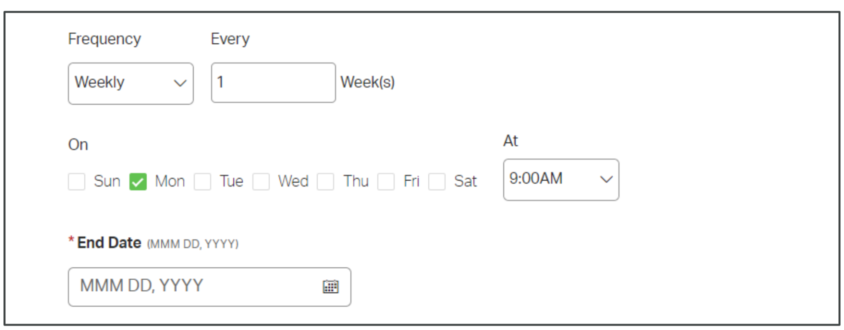
   NOTE: If you selected a **Yearly** frequency, use the drop-down list to select the month during which you want the task to occur.

   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.

   End Date — 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

5. Click **Save** to save your task.

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