

GALLUP®

GALLUP ACCESS

ACTION PLANNING



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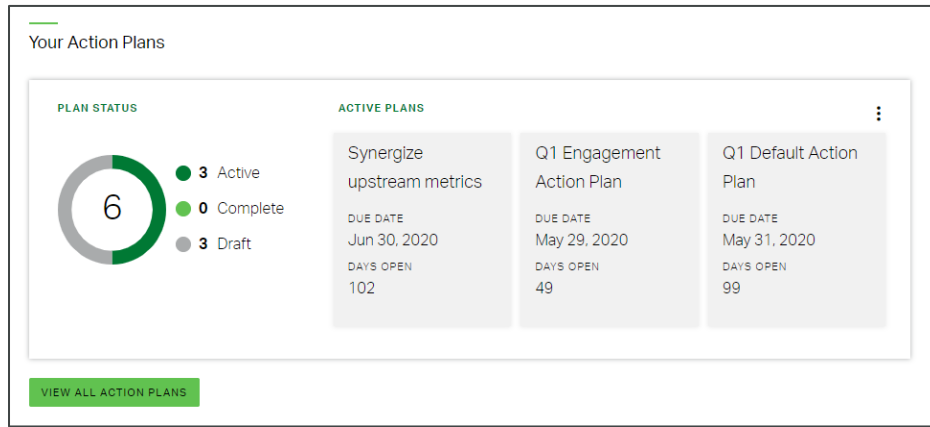
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YOUR ACTION PLANS

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.



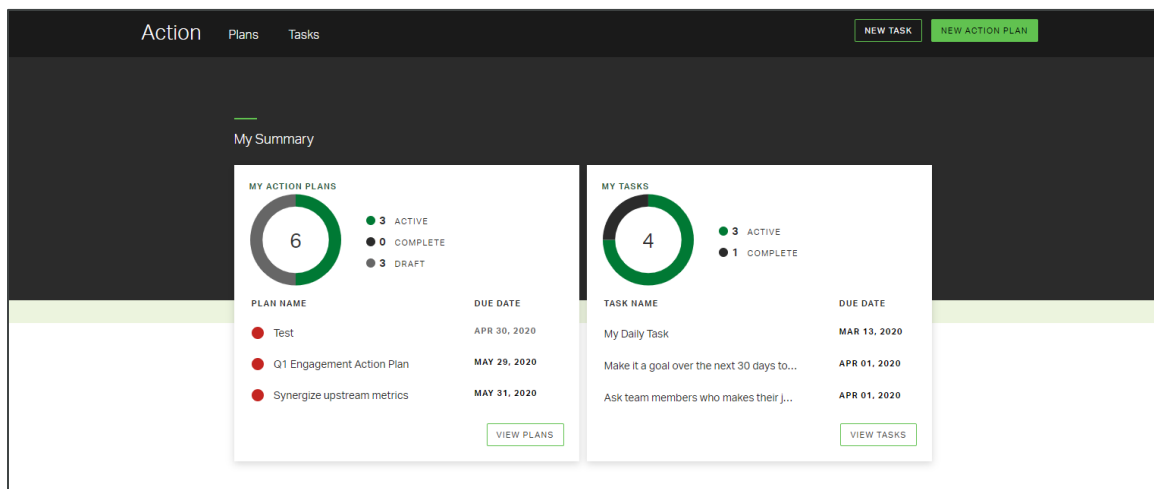
Your Action Plans area

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.

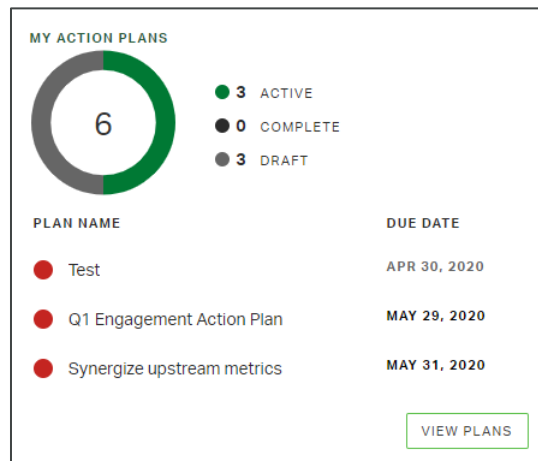


Summary page

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.

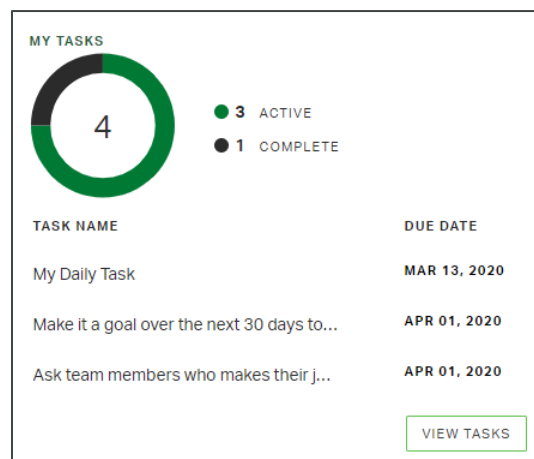
Active You activated the plan, and your team is currently using it.

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

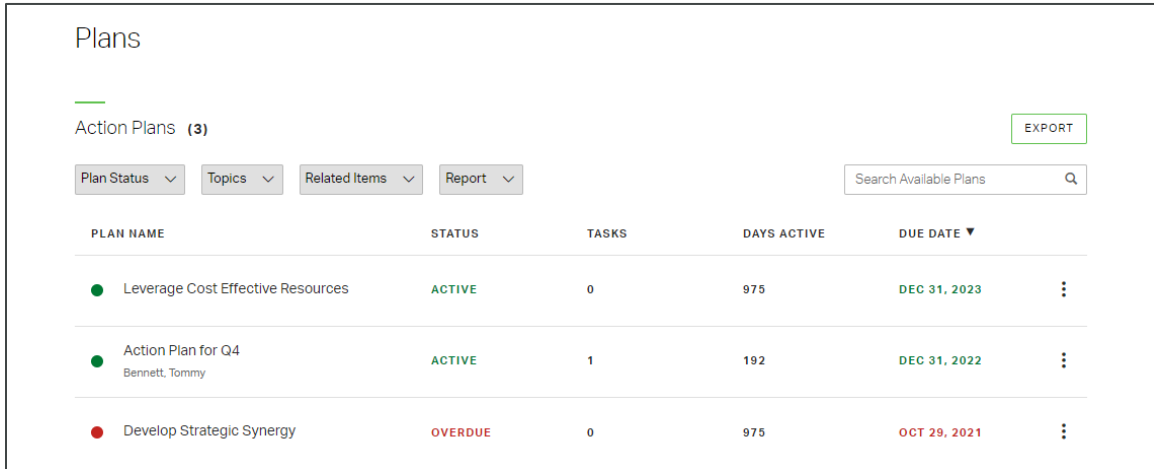


My Tasks area

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:

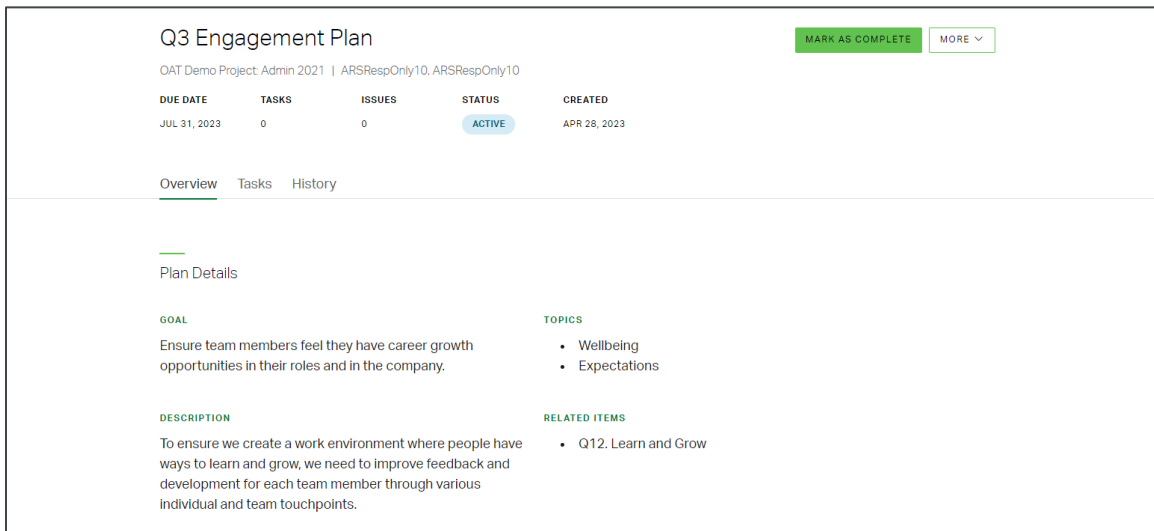
- Plan Status** The status of an action plan (e.g., Draft, Active or Complete).
- Topics** The subjects associated with an action plan.
- Related Items** The engagement items associated with an action plan.
- Report** The survey report associated with an action plan.

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.

Action Planning

The screenshot shows a table of action plans with columns for status, resources, and dates. A 'More Options' menu is open for the first plan, listing actions like 'View Plan', 'Edit Plan', 'Add Task', 'Mark As Complete', 'Transfer Plan', 'Export Plan', and 'Delete'.

Plan Name	Status	Resources	Due Date
Improve Summer Engagement Dragoon, Merlin	ACTIVE	0	22
Q3 Engagement Plan Dragoon, Merlin	ACTIVE	0	22
Q3 Engagement Plan Dragoon, Merlin	ACTIVE	188	22
Synergize upstream metrics Department Leaders	OVERDUE	0	163
Q1 Strengths Action Plan 0, team	OVERDUE	1	0
Q1 Default Action Plan Dragoon, Merlin	OVERDUE	0	160

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

Create New Past Reports

*Export Name

My Exports

The following selections will export **5 Action Plans***.

Filters

* The number of action plans that will be exported is displayed in real time and could change while the export is being generated.

CANCEL CREATE

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.

EXPORT NAME	CREATED	
My Exports	Mar 13, 2023	📄 🗑️

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.

The screenshot shows the 'Tasks' tab interface. At the top, there are tabs for 'My Tasks' (selected) and 'Team Tasks'. Below the tabs, there is a 'My Task List (4)' header and an 'EXPORT' button. There are three filter dropdowns: 'Action Plans', 'Status', and 'Team'. A search bar labeled 'Search Tasks' is also present. The table below has the following columns: 'TASK NAME', 'STATUS', 'TASK ADMINISTRATOR', 'DUE DATE', and 'LAST UPDATED'. Two tasks are listed:

TASK NAME	STATUS	TASK ADMINISTRATOR	DUE DATE	LAST UPDATED
Individuals who receive recognition and praise for doing good work are more productive, engaged a... Q1 Engagement Action Plan	ACTIVE	Smith, John	AUG 08, 2020	AUG 01, 2020
Ask team members who makes their job easier and how they could make something more manageable for... Q1 Strengths Action Plan	ACTIVE	Smith, John	AUG 01, 2020	JUL 14, 2020

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.

The screenshot shows the filter options section. It contains three dropdown menus: 'Action Plans', 'Status', and 'Team'. To the right of these is a search bar labeled 'Search Tasks' with a magnifying glass icon.

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).

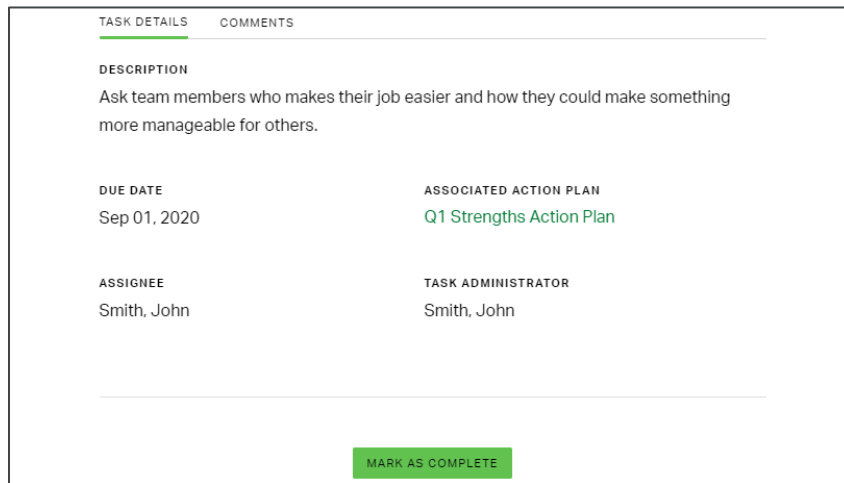
Team The team the task is associated with.

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.

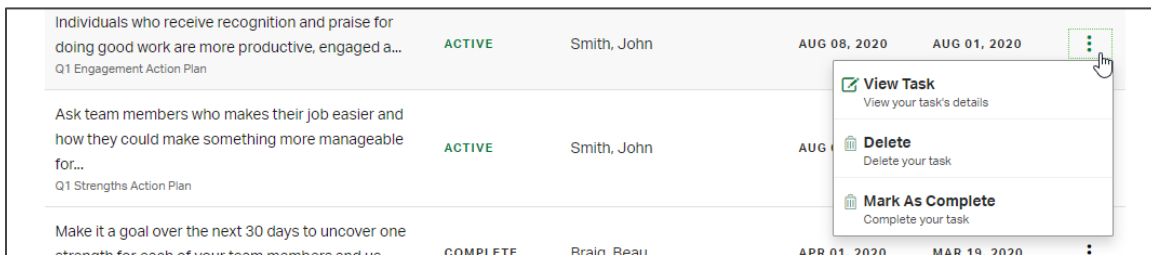
You can also use the search field on the right side to locate tasks with a specific word or phrase in their title.

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.

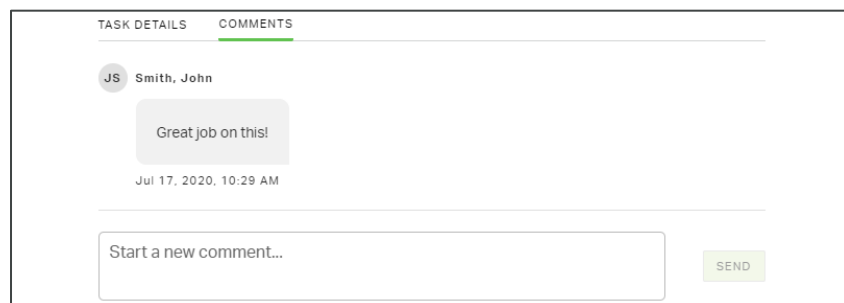


Task Details tab, Task window



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

Create New Past Reports

*Export Name

My Task Exports

The following selections will export **3 Tasks***.

Filters

* The number of tasks that will be exported is displayed in real time and could change while the export is being generated.

CANCEL CREATE

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.

Create New Past Reports

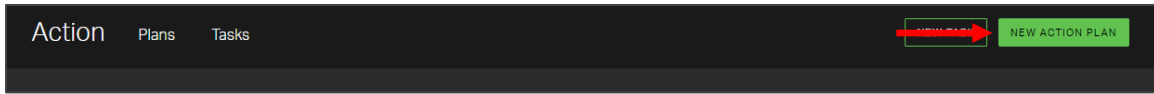
C REFRESH

EXPORT NAME	CREATED	
My Task Exports	Mar 13, 2023	📄 🗑️

Past Reports tab, Download Report window

CREATING A NEW ACTION PLAN

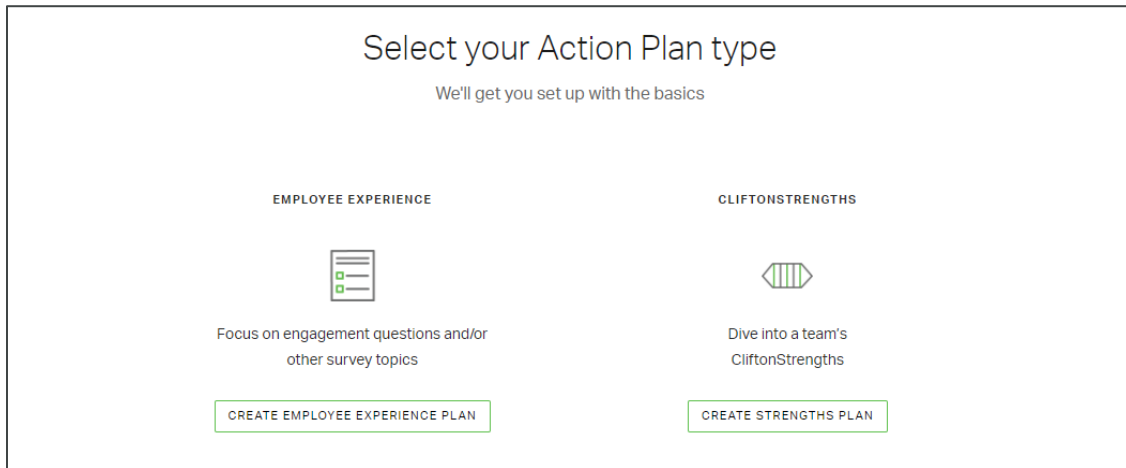
1. Click **New Action Plan** on the upper-right corner of the page.



New Action Plan button

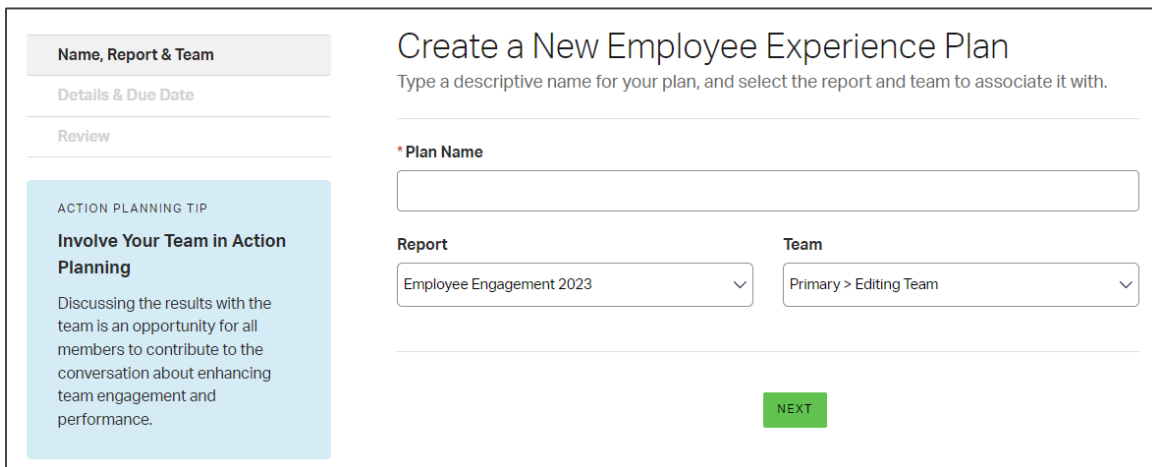
2. On the Select your Action Plan type page, select the type of plan you want to create.

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.

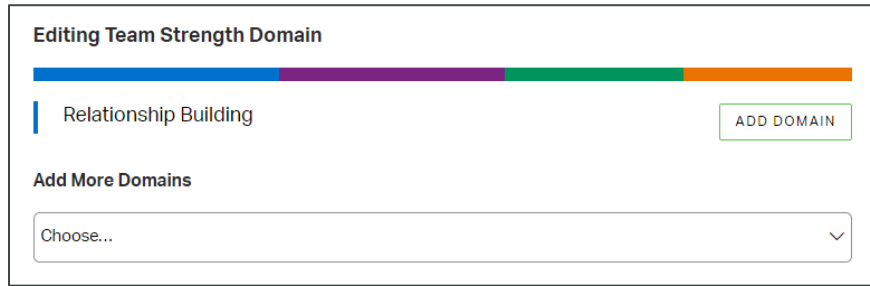
5. On the Provide the Plan Details page, use the following fields to enter the details of your plan:

- 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.

The screenshot shows a web form titled "Provide the Plan Details". On the left is a sidebar with three tabs: "Name, Report & Team", "Details & Due Date" (which is active), and "Review". The main content area has a heading "Provide the Plan Details" and a sub-heading "Select the related items and topics for the team to focus on, and type an actionable goal for your plan. [View a sample plan](#) for help." Below this are three sections: "Related Items (3 max)" with a note "High- and low-ranking items apply only to direct team data." and a dropdown menu; "Topics (3 max)" with a dropdown menu; and "Goal" with a text input field. A grey suggestion box below the goal field says "Suggestion: Discuss with the team what helps or hinders this item or concept." Below the suggestion is a green link "+ Add Description". At the bottom is a "Due Date" field with a calendar icon and a note "(MMM DD, YYYY)". At the very bottom are two buttons: "SAVE DRAFT" and "NEXT".

Provide the Plan Details page

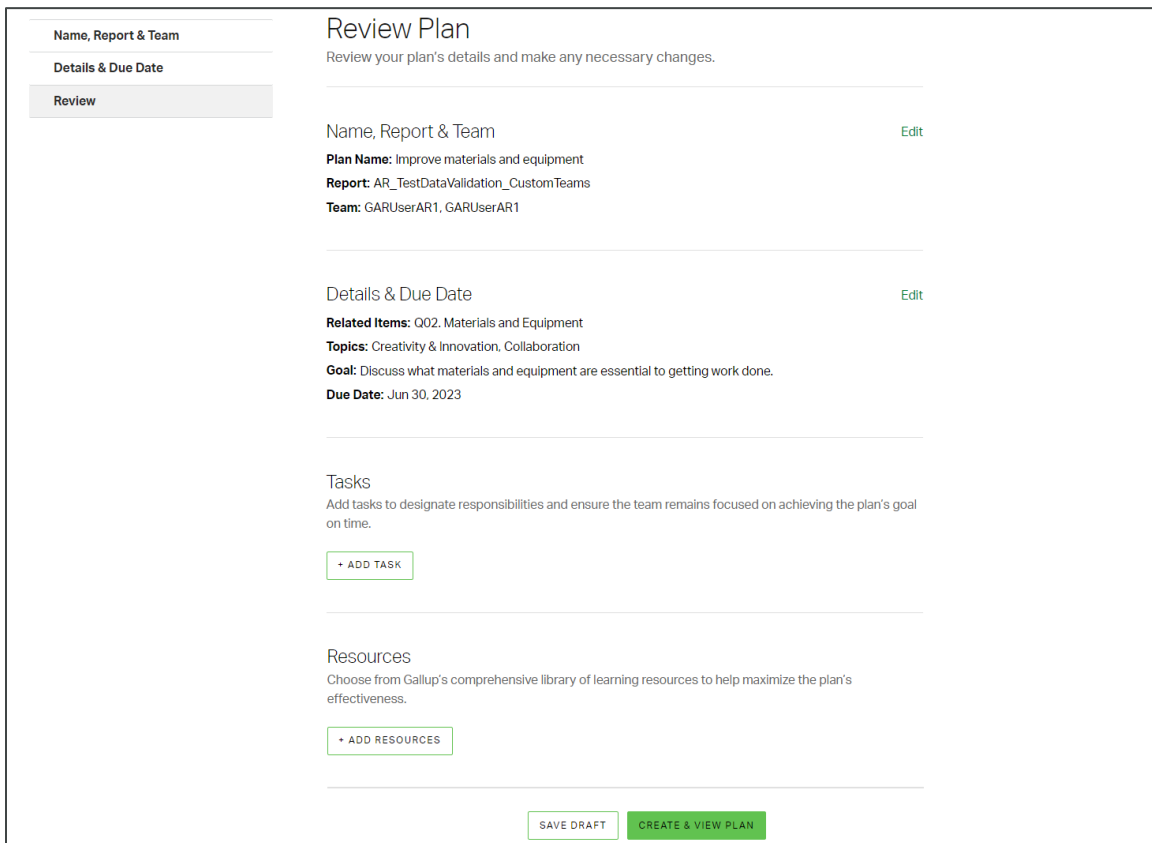
- If you are creating a strengths plan, use the available options to associate one or more strengths domains with the plan for the team to focus on.



Strengths domain options

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

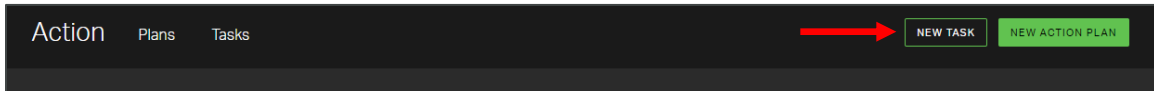


Review Plan page

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.

A screenshot of the 'Add A New Task' window. The title is 'Add A New Task'. Below the title, there are two radio buttons under 'Get Started by:'. The first is 'Creating a Custom Task' (selected) and the second is 'Choosing a Recommended Task'. Below that are two required text input fields: '* Task name' and '* Description'. Underneath is the 'Add to Action Plan' section, which includes a dropdown menu with 'Choose...' and a toggle switch for 'Escalated Issue'. Below that is the '* Due Date' section, which includes a date input field with a calendar icon and a toggle switch for 'Recurring Task'. At the bottom are two buttons: 'CANCEL' and 'SAVE'.

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.

- (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.

- (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.

The screenshot shows a form for configuring a recurring task. It includes a 'Frequency' dropdown menu set to 'Weekly', an 'Every' input field with the value '1' and the label 'Week(s)', an 'On' section with checkboxes for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat), where 'Mon' is checked, and an 'At' dropdown menu set to '9:00AM'. Below these is an '* End Date (MMM DD, YYYY)' field with a calendar icon.

Recurring task options

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

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