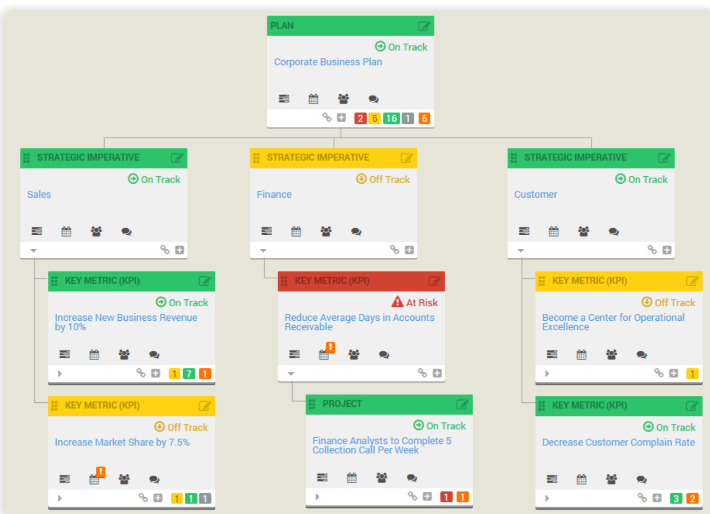
QUICK START GUIDE

Contributor User Guide

We have made Achieveit as intuitive as possible for our users to easily track and report on their strategic and operational plans all in a single place. As a Contributor user, you have the ability to provide critical progress updates on plans and access reports that will help your organization achieve its most important goals and objectives. This Quick Start Guide will walk you through the basics of how to get started.

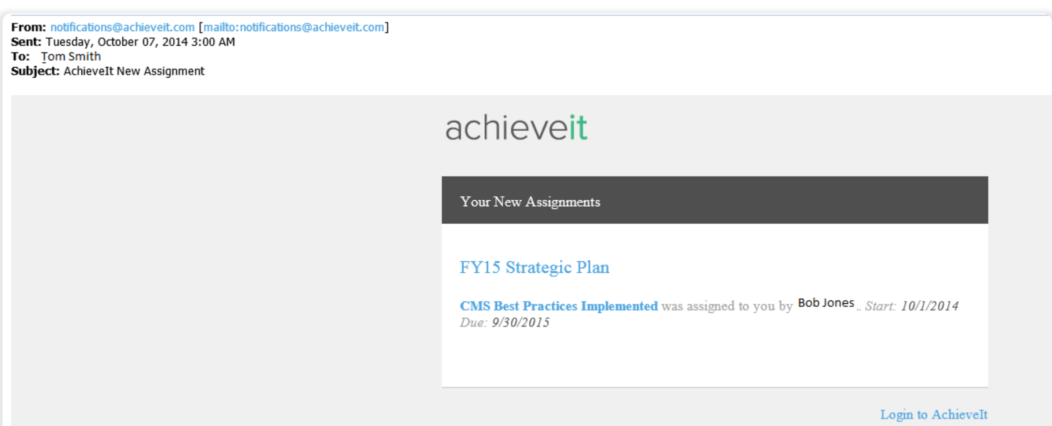
Creating Plans: This part has already been completed for you!

Based on the goals of your organization, your assignments have already been created. In most cases, a regular update frequency, start dates, and due dates have already been identified for your assignments.



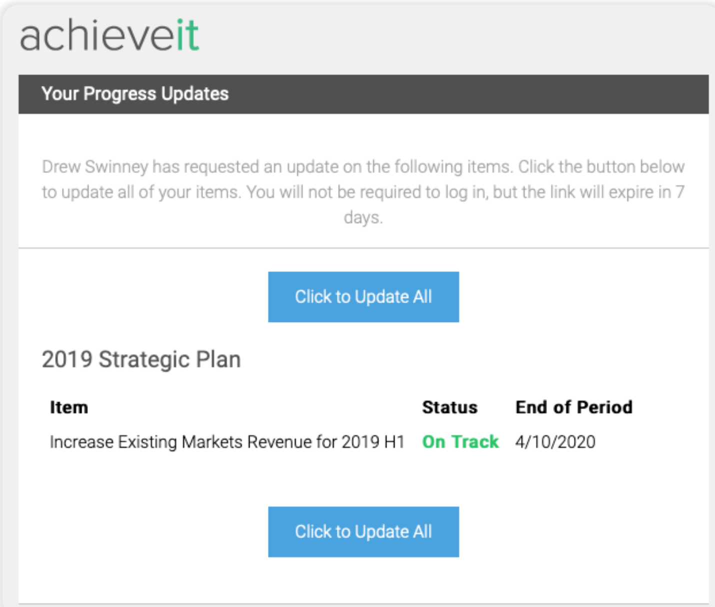
New Assignment Email Notifications

In most cases, once your new plan is activated, you will receive an email from **notifications@achieveit.com** informing you of all the plan items that you have been assigned to prove updates on throughout your planning cycle. There is no action required from you regarding this email – it is simply to inform you of your upcoming assignments.



Progress Update Email Notifications

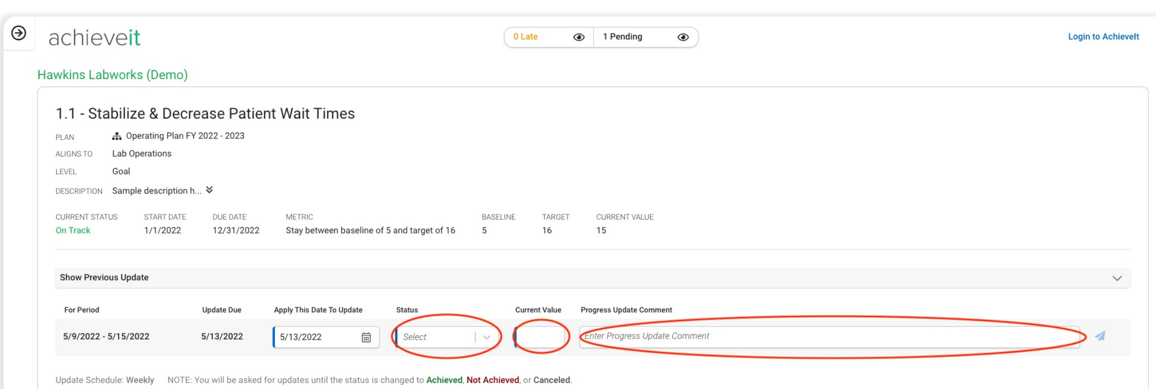
On a regular cadence determined by your plan administrator, you will receive automatic notifications about your assigned items. These notifications will ask you to provide an update on progress for a specific time period (the past month or quarter, for example). Select 'Click to Update All' to provide progress updates on any items with an outstanding request:



Providing Progress Updates

Clicking the link within your email notification will redirect you to your own customized landing page. On this page, you will be able to select the relevant status and provide commentary about your assigned item's current status. AchieveIt always recommends providing commentary to explain how you're doing with work on this item, as well as what you'll be focused on next to continue progress. If your assignment is a measurable item, you will also be required to provide the item's current value in the 'Current Value' field. Do **not** include symbols for the unit of measurement, such as $ or %. Only include the numeric value.

Once you mark an assigned item as **Achieved**, **Not Achieved** or **Canceled** the software will no longer send you notifications for additional progress updates throughout the remainder of your plan's lifecycle.

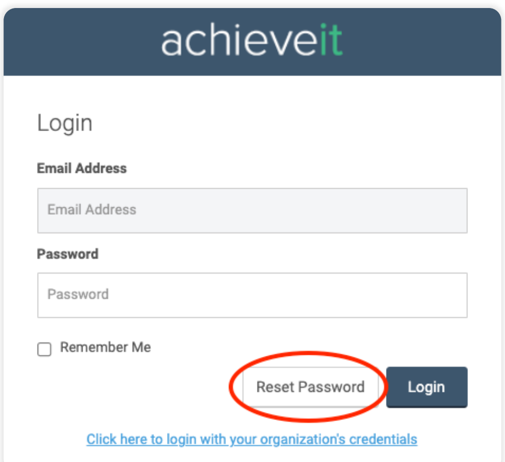


Progress Update Email Notifications

Although AchieveIt recommends utilizing the progress update email notifications for prompts to provide updates on your assigned items, you always have the option to log into AchieveIt and provide updates within the platform as well.

- Navigate to my.achieveit.com
- Enter your email address and password. For first-time logins, you'll need to provide your temporary password. This can be confirmed with your plan administrator.

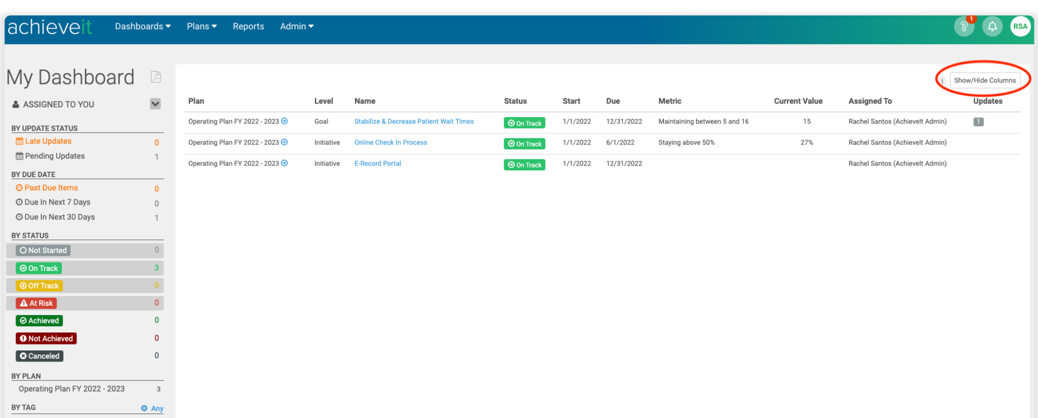
If you are having trouble getting logged in, you can always reset your password by clicking the "Reset Password" button just beneath the login button. Or you can call our 24-help desk at (866) 438-8993.



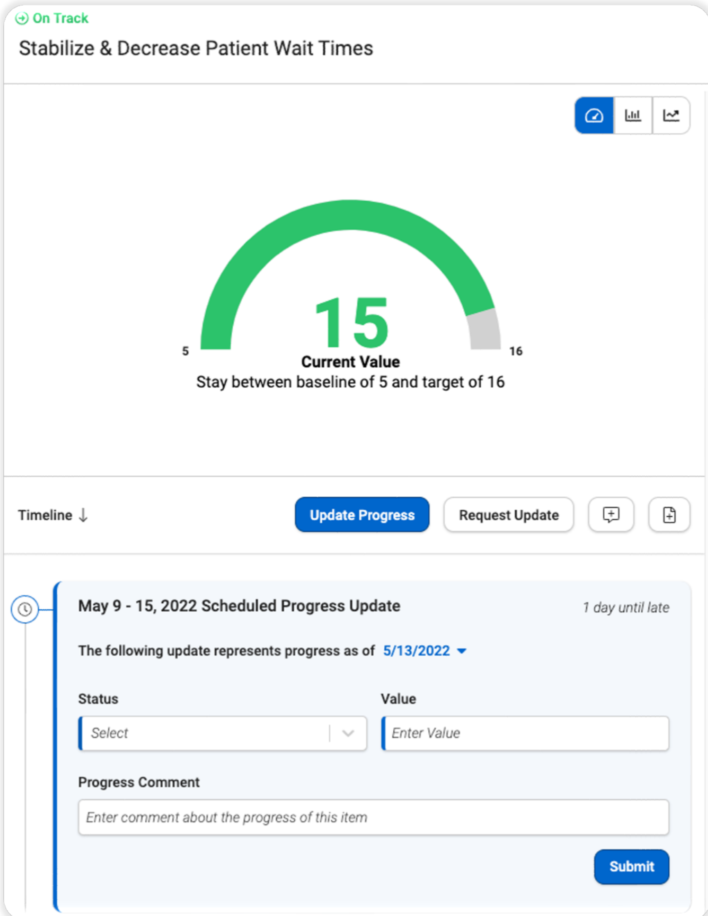
My Dashboard

Your My Dashboard view will be the first page you see upon logging in. This view is custom-tailored to each individual user and will show your assigned items across any plans that you are contributing to. You can customize the information that displays on this view by clicking the 'Show/Hide Columns' button in the top right-hand corner.

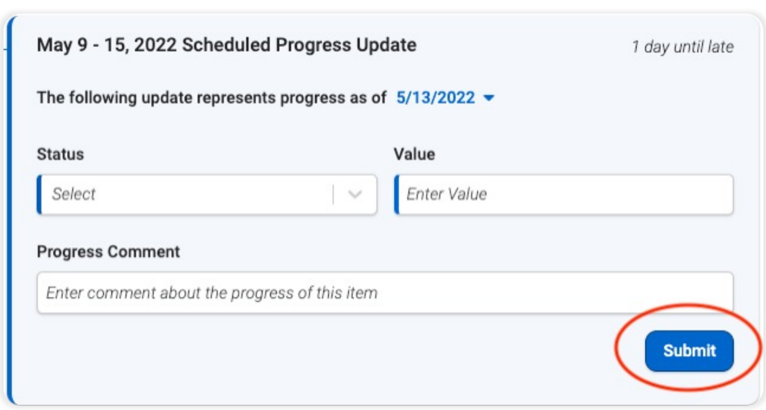
You can update any of your assignments by clicking on the "Name" or "Status." Then you will be able to click the "Update Progress" button.



You can update any of your assigned items by clicking on the plan item's name in the Name column. Once your plan item's details appear, look for the outstanding update on your item's Timeline. Pending update requests will display in blue and late updates will display in orange.

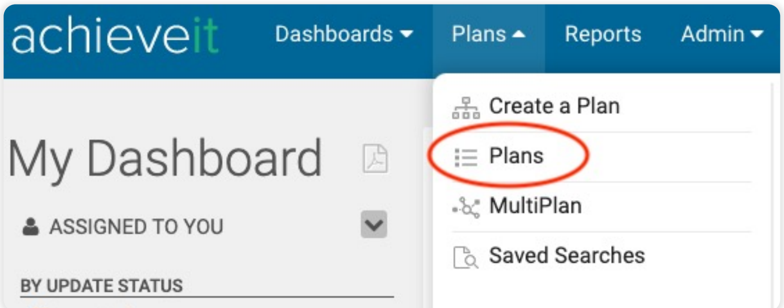


Click the 'Status' drop-down menu to select the appropriate status, provide a current value if required, and relevant commentary in the Progress Comment field. Then make sure to click the 'Submit' button in the bottom left-hand corner of the outstanding update request on the timeline.

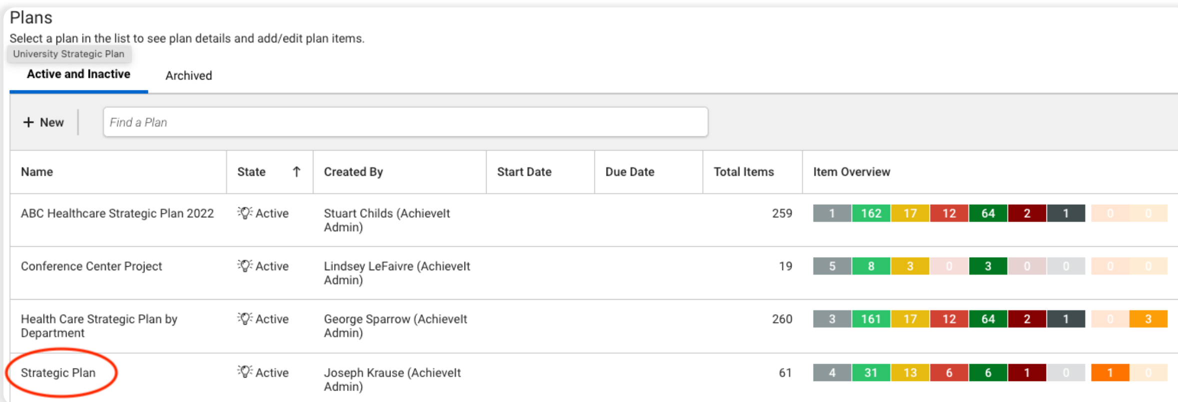


Viewing Your Plan

In addition to your My Dashboard, you also have access to see the plan(s) you are contributing to regularly. To view the plan, click the 'Plans' drop-down in your top navigation bar, then select the 'Plans' option.

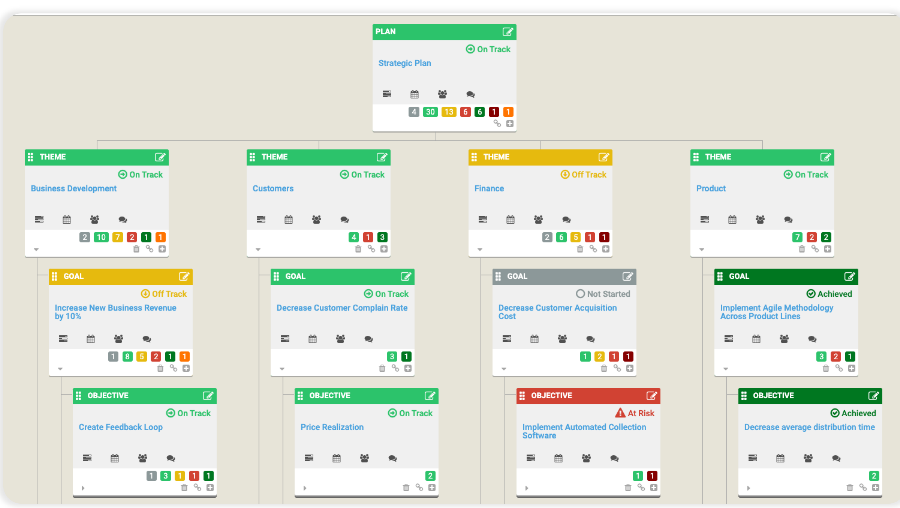


On the plans page, you'll be able to review a list of all the plans you've been granted access to within your organization's account. Simply click the Plan Name to be redirected into the plan's full details.

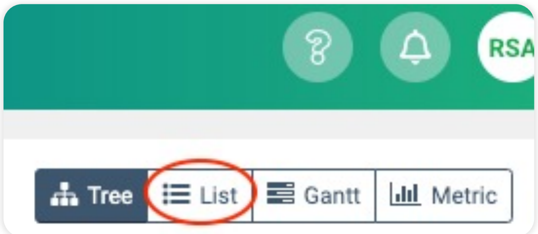


Name	State	Created By	Start Date	Due Date	Total Items	Item Overview
ABC Healthcare Strategic Plan 2022	Active	Stuart Childs (AchieveIt Admin)			259	1 162 17 12 64 2 1 0 0
Conference Center Project	Active	Lindsey LeFaivre (AchieveIt Admin)			19	5 8 3 0 3 0 0 0 0
Health Care Strategic Plan by Department	Active	George Sparrow (AchieveIt Admin)			260	3 161 17 12 64 2 1 0 3
Strategic Plan	Active	Joseph Krause (AchieveIt Admin)			61	4 31 13 6 6 1 0 1 0

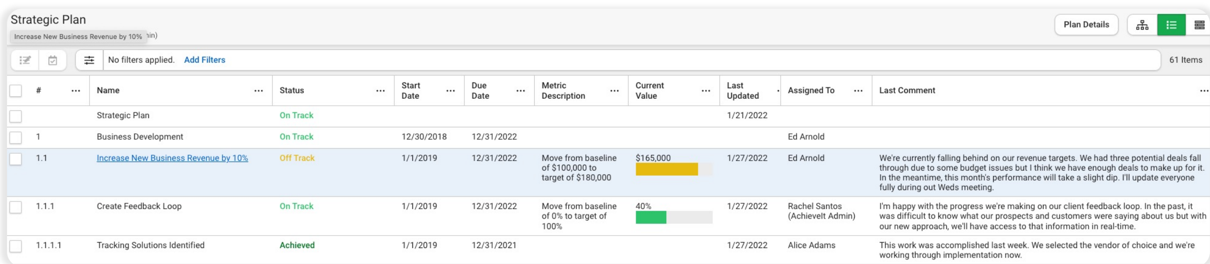
If it is your first time viewing the plan, it will open to your Tree View. This view gives you a visual representation of your plan and shows how all individual items are aligned and connected together. To navigate the tree, click the bottom left triangle to expand and collapse supporting items within the plan.



One of the key benefits of AchieveIt is that you can visualize your plan in different ways depending upon preference and need. In the top right-hand corner, you will find your Plan View Menu.



Toggle to the List View to easily consume details around Start and Due Dates, Assigned Users and Latest Comments that have been provided on all of the plan's items.



For more details on how to navigate List View, see the List View Overview article.