

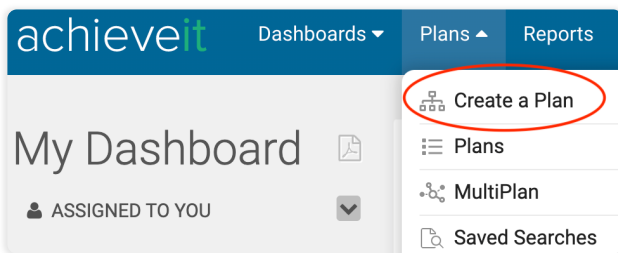
QUICK START GUIDE

Full Access User Guide

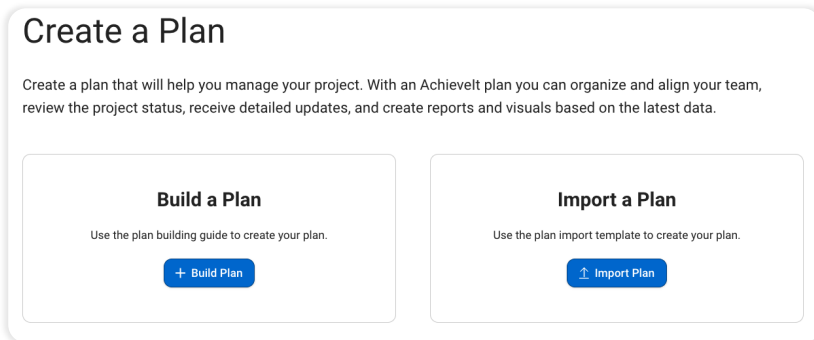
We have made Achievelt as intuitive as possible for our users to easily conceptualize, build, maintain, and report on their strategic and operational plans. As a Full Access user, you have the ability to create and manage plans in Achievelt. This Quick Start Guide will walk you through the basics of how to get started.

STEP 1 - Create a new plan

It's very easy to create a new plan in Achievelt. To get started, click the Plans drop-down menu in your top navigation bar. Then click Create a New Plan.

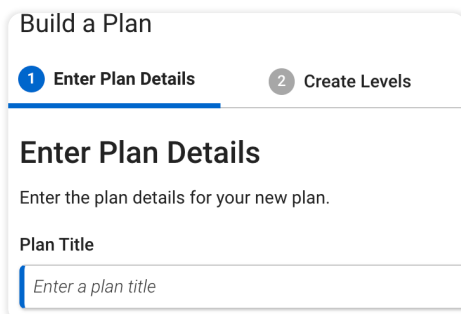


Once you have clicked on the 'Create New Plan' option, the 'Create Plan' page will appear. You can choose to build your plan within Achievelt, or import via our standard plan template.



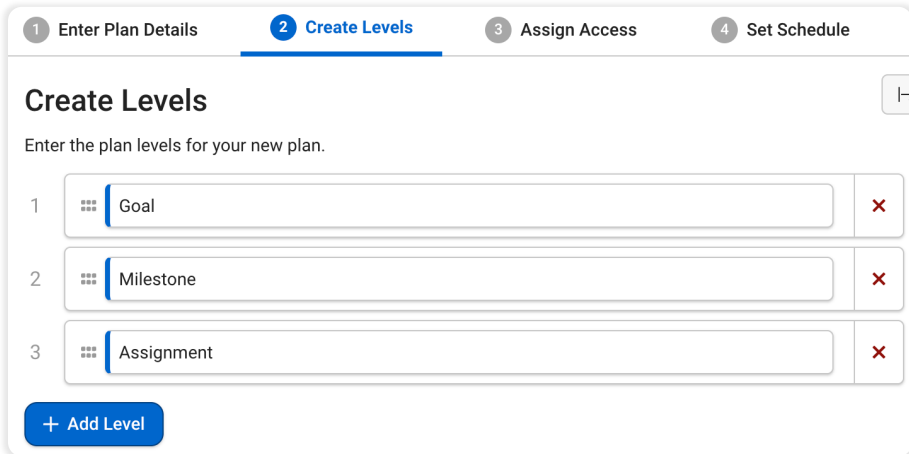
To Build a Plan, click the blue 'Build Plan' button to get started. You'll be guided through the basic required fields to create your plan in four sections: 1) Enter Plan Details, 2) Create Levels, 3) Assign Access, and 4) Set Schedule. (Required Fields denoted are in Bold).

Plan Title – the name you'd like your plan to have, which will be displayed throughout the system and on reports. You can also provide a description of the Plan below.

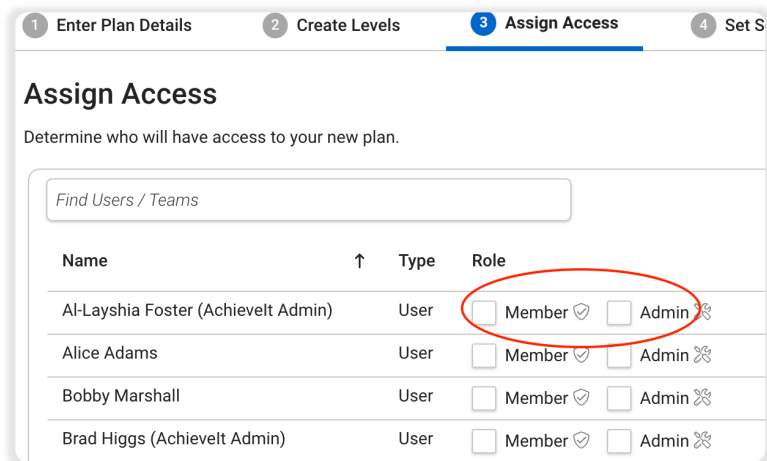


Plan Levels - the custom terms you'd like to use to organize the different units of work within your plan (i.e. Goal, Objective, Strategy, etc).

NOTE: Goal, Milestone, and Assignment are the default level names that will always appear on the Create page. You can customize the existing names by overwriting them with your own unique terms, add more levels by clicking the 'Add Level' button or delete levels by clicking the 'X' icon next to each level.



Assign Access - from the onset of creating a plan, you can set up additional users to have admin or member access to the full plan. Admin access allows a user to create new items within the plan and edit existing content just like the creator of a plan can. Plan Members can view the plan once Activated by an Admin. To grant a user either Member or Admin access to a plan, check the appropriate box next to the list of available users in the Access section.



Start Date – Select a start date for your plan by typing the date or by clicking the calendar icon to the right and using the date selector.

Due Date – Select an end date for your plan by typing the date or by clicking the calendar icon to the right. Note: if you select a start date, a due date will be required in order to continue.

Progress Update & Due Date Schedule – If desired, you can create an update schedule from the onset of creating your plan. See the Set the Progress Update Email Schedule article or Section 2: Notification Settings of this Guide for additional details.

The screenshot shows the 'Set Schedule' step, which is the fourth of four steps: 1. Enter Plan Details, 2. Create Levels, 3. Assign Access, and 4. Set Schedule. The main heading is 'Set Schedule' with the instruction: 'Set the timeline and progress update schedule settings for your new plan.' Below this, there are two input fields: 'Set Start Date' with a 'From' field and a calendar icon, and 'Set Due Date' with a 'To' field and a calendar icon. A dashed line separates this section from the 'Progress Update and Due Date Schedule' section below. This section has the instruction: 'Use the organizational defaults or fill in custom settings for update requests, grace periods, and late update reminders for the preferred cadences.' At the bottom of this section are two buttons: 'Use Organization Defaults' and 'Use Custom Settings'.

Click the “Create Plan” button on the bottom right corner, and you’ll be redirected to the Tree View.

This screenshot shows the 'Set Schedule' step with a 'Summary' sidebar on the right. The sidebar contains sections for 'Plan Details', 'Levels', and 'Access'. The 'Plan Details' section lists 'Title', 'Description', and 'Tags (0)'. The 'Levels' section lists '1. Goal', '2. Milestone', and '3. Assignment'. The 'Access' section shows 'Admins (1)' with a user 'Rachel Santos (AchieveIt Admin)'. At the bottom right of the main form, the 'Create Plan' button is circled in red. A dashed arrow points from this button towards the 'Tree View' screenshot below.

The screenshot shows the 'Tree View' in the AchieveIt interface. The top navigation bar includes 'achieveit', 'Dashboards', 'Plans', 'Reports', and 'Admin'. The main heading is 'ABC Company's Strategic Plan'. On the left is an 'Item Library' with options for 'GOAL', 'OBJECTIVE', and 'STRATEGY', and a 'Parking Lot' section. In the center is a 'PLAN' card for 'ABC Company's Strategic Plan' with a 'Not Started' status and a plus icon. Below the plan card, there is instructional text: 'Great, you've created a plan! Now let's start adding plan items. Start by clicking the + icon on the plan card above to start adding items to the plan. If you are unsure of where a plan item should go you can keep it in the 🚗 Parking Lot until you are ready. Or, use the 📁 icon to drag levels from the 📁 Item Library to another card to create an item of that type.'

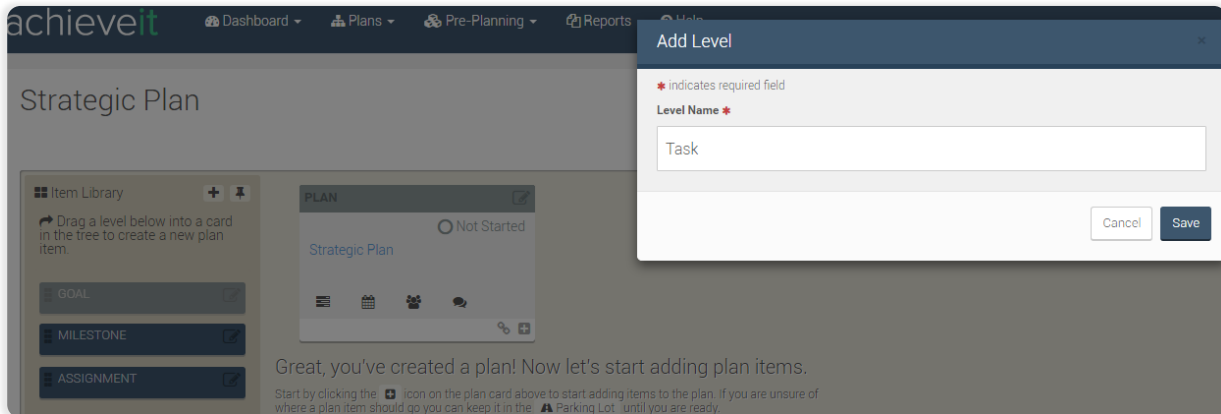
STEP 2 - Manage Levels in the Item Library

The Item Library allows users to understand the hierarchy of the plan. Every plan can be structured with as many or as few levels as needed and terminology can be customized to fit your organization.

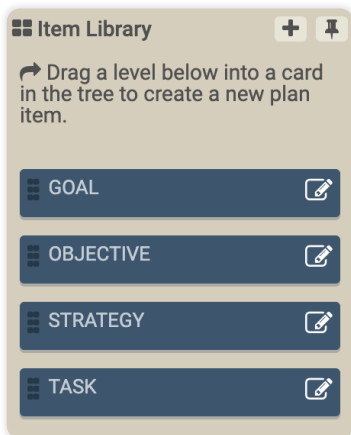
To add a new level to your plan, locate the Item Library and click the '+' button.



After you have clicked the '+' or pencil button, the 'Add Level' pop-up window will appear. Enter your custom level name and click Save.



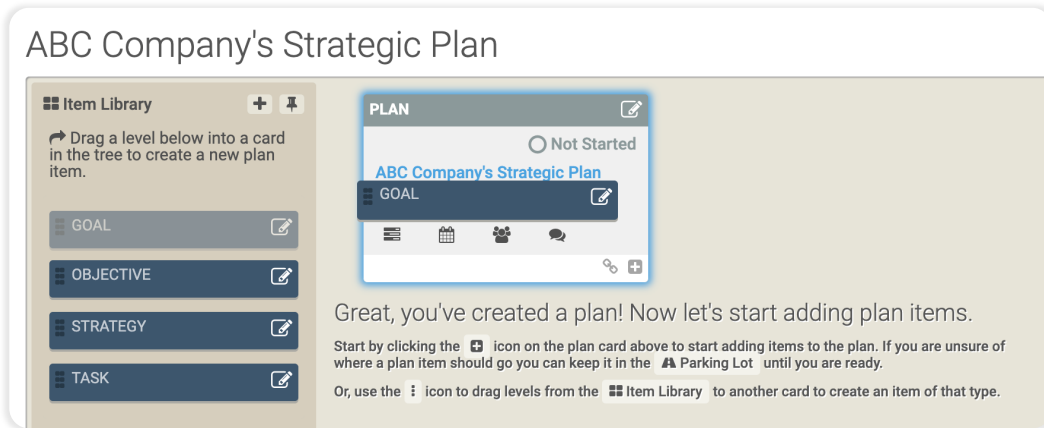
After you have clicked the '+' or pencil button, the 'Add Level' pop-up window will appear. Enter your custom level name and click Save.



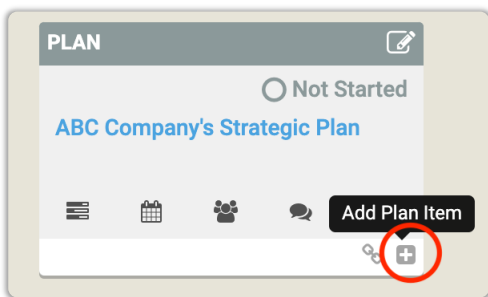
STEP 3 - Create plan items

Now you can create items to build out your plan. There are two ways that you can begin to build out your plan on Tree View:

Option 1 – Click and hold a Level from the Item Library, then drag it onto an existing item (such as the top plan card). The plan item's card will highlight in blue. Release your mouse and the 'Add Plan Item' menu will appear, allowing you to create the item.



Option 2 – Click the '+' in the bottom right-hand corner of any existing plan item, such as the top plan card.



Once you have created a new item by either method the 'Add Plan Item' menu will appear.

Step 1 - Fill in basic plan item information
 You can change any of this information later

Plan Item Name:

Description (Optional):

Initial Status:

Alignment (i.e. Parent of Item):

Level:

Step 2 - Fill in additional information (Optional)
 You can change any of this information later

Metric Details
 No metrics exist for this item.

Schedule and Assignment

Item Timespan
 Start Date: Due Date:

Assigned To: Progress Update Frequency:

• The assigned to user is ultimately responsible for updates and completion of this item.

Access
 Select Users / Teams to have access to this item

Copy Current Values

Required Fields will be listed to the left, such as:

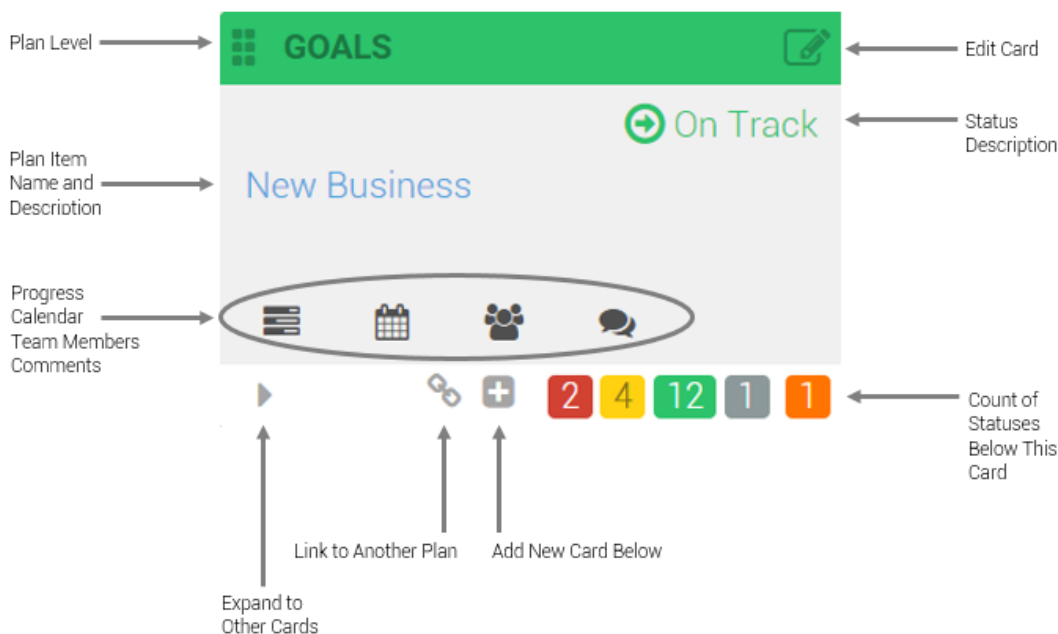
- **Plan Item Name** – Title of the plan item
- **Initial Status** – ‘Not Started’ is the default, but a status can be selected from the creation page
- **Aligns To** – Automatically populated with the name of the item that you are building under, but can be edited by clicking into the drop-down menu
- **Level** – Automatically populated based on the plan levels you have created, but can be edited by clicking into the drop-down menu

If you have additional information about your item, you can go ahead and fill in the additional information fields to the right. For the highest rates of success and execution, AchieveIt always recommends completing the following information:

- **Assigned To** - Click into the drop-down menu to select the person you wish to assign to the item. The Assigned User will receive progress update requests once your plan is Active
- **'Start' and 'Due' Dates** - Type or click the calendar icon to select appropriate dates for when this work will take place
- **Update Frequency** - Click into the drop-down menu to select the appropriate reporting frequency for this item. You can select from: Daily, Weekly, Bi-Weekly, Monthly or Quarterly

See the [Plan Item Card Overview](#) article for details about all of the additional information that can be tracked for any plan item in AchieveIt.

The below diagram describes all of the icons and the areas of a plan card:



STEP 4 - Create a metric

You can track a quantifiable outcome as a metric for any item within your plan. To activate a metric on a plan item, locate the plan item from any view and bring up the plan item's details. Click the blue 'Create Metric' button.

The screenshot shows a plan item titled "Acquire 80% of Regional Prospects" which is "On Track". The plan is active. The interface includes a timeline with a "Plan Item Created" event by Joseph Krause on 1/21/2022. Action buttons include "Update Progress", "Request Update", and "Create Metric". The "Metric Details" panel on the right shows a message: "No metrics exist for this item." with a "Create Metric" button.

Complete a few fields of information to begin tracking a metric for your plan:

- **Metric Unit** – A dollar amount, a percentage, or a number
- **Tracking Success** – How you would like to track and visualize success for this metric. You can track: maintain between a baseline and target, stay above or below a baseline, or move from a baseline to a target value. Once selected, make sure to input your custom baseline and target values
- **Metric Calculation** – Select whether the metric will be provided by the Assigned User with regular progress updates, or calculated automatically based upon other items' metric values
- **Initial Value** – Make sure to provide an initial starting value for your metric

Are you tracking a dollar, percentage, or number?

% Percentage

How do you want to track this metric's success? Baseline Target

↳ Move from a baseline to a target 0 % to 30 %

How will the metric value be calculated?

Manually (value will be entered by Assigned To)

Initial Value

10 %

See the [Creating a Simple Metric](#) and [Creating an Advanced Metric](#) articles for additional details about setting up metrics for plan items in AchieveIt.

Additionally, if you would like to understand more about the roles you can play in your AchieveIt account as a Full Access User, see the [Understanding User Types and Permissions](#) article.