

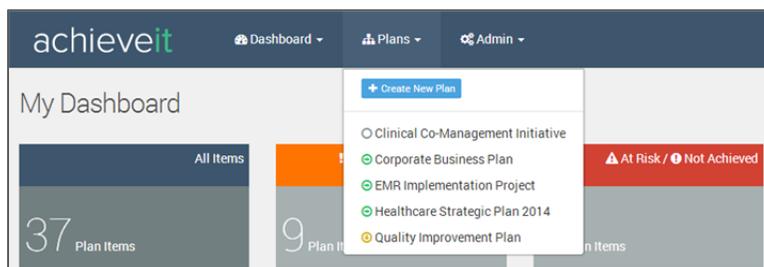
## Administrator Quick Start Guide

We have made Achieveit as intuitive as possible for our administrators to easily conceptualize, build, maintain and report on your strategic and operational plans. This Quick Start Guide will walk you through the highlights on how to get started in your organization.

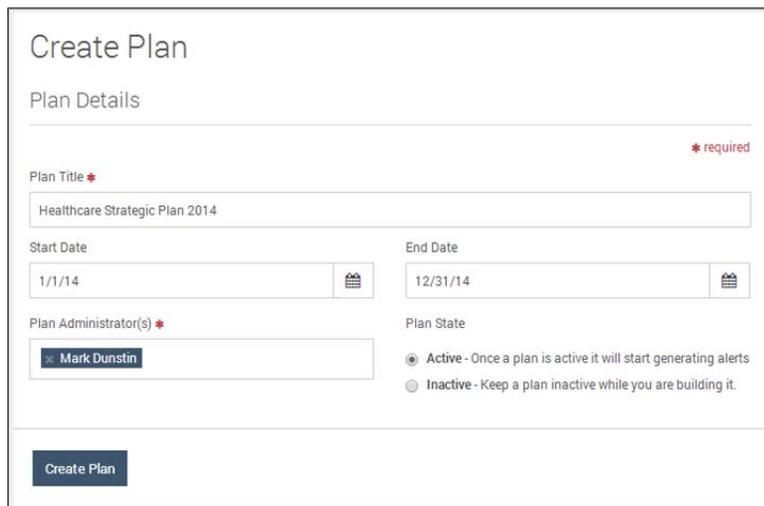
### Step 1: Create a New Plan

It's very easy to create a new plan in Achieveit to monitor your strategic and operational plans.

A. To get started, click: Plans > Create a New Plan



B. Once you have clicked on the 'Create New Plan' button, the 'Create Plan' screen will appear:



C. Enter your plan information (Required Fields denoted are in Bold):

- **Title** – plan title you would like displayed on reports and on screen
- **Start Date** - by either typing the date or by clicking the calendar icon to the right and using the date selector.
- **End Date**
- **Plan Administrator(s)** – those users who will be able to add and build content to the plan

- Plan State
  - **Active:** Plans will begin to immediately send out email alerts and notifications to the team members tied to the plan.
  - **Inactive:** Plans will no longer send out email alerts and notifications.
  - **Archive:** Plans will not send out email alerts and will be moved to the Archived section under Plans

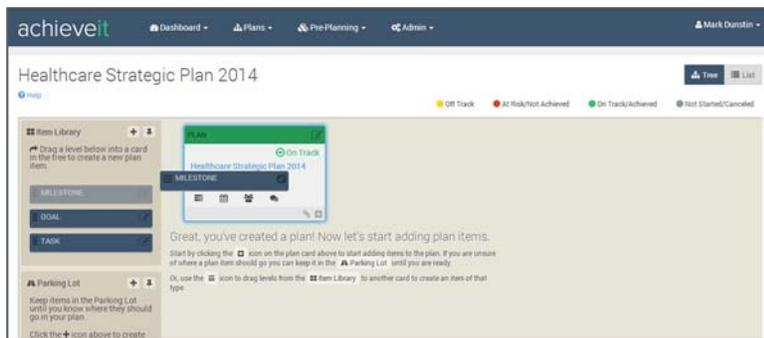
D. On the right hand side of the plan creation screen, is a section named 'Plan Levels.' This is where you can customize your plan structure names and add as many levels as you like.

NOTE: Milestone, Goal and Task are the default item names. You can customize the existing list or add more levels by clicking the 'Add Level' button. To get rid of levels you don't want, click the 'X' next to the level.

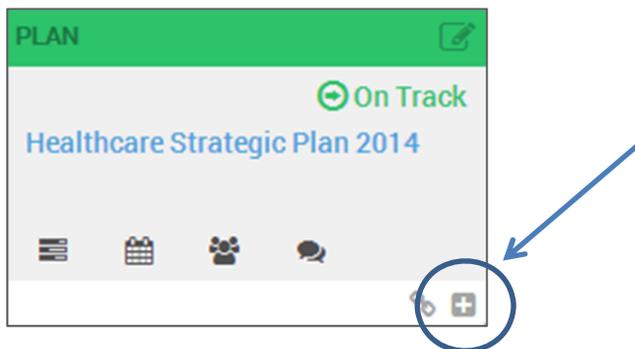
E. Click the “Create Plan” button, and you will be navigated to the Tree View screen:

F. Create your plan content. You have two ways that you can begin to build out your plan:

- Drag and drop a level into the plan



- OR Click the '+' icon at the bottom of your plan card.



## Step 2: Create Levels in the Item Library

The Item Library visually encourages users to understand the organizational hierarchy of the plan. Every plan can be structured with as many or as few levels as needed and you also customize the terminology to fit your organization. When you are creating your plan in Section 1, you have an opportunity to structure your hierarchy. If you did not change the hierarchy during Section 1, then here are additional steps:

- On the left hand side of the Plan screen, is the 'Item Library.' Click the pencil icon to edit the existing levels or the '+' button. If you didn't adjust the levels when you created the plan, then you will see the default levels of Goal, Milestone, Task
- After you have clicked the '+' or pencil button, it will direct you to the 'Add Level' pop up window. Enter your custom level name and click Save.

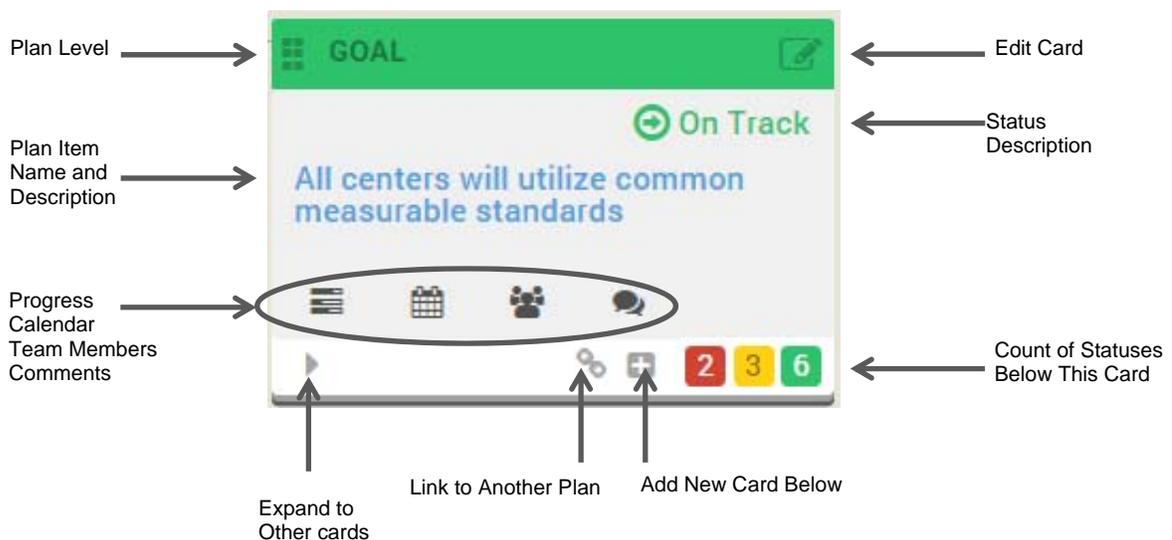
C. After saving your 'Level Name,' it will bring you back to the Tree View page and the new level will appear at the bottom under the 'Item Library' list.

D. If you need to change the sequence, then you can then drag and drop the Plan Card to the order of your choosing



## Step 3. Create and Edit Plan Cards

### Structure of the Card



The above diagram describes all the icons and areas of a plan card. We will go over how to create a new plan card.

- A. Once you have created a new card either by clicking the '+' sign at the bottom of a Plan Card or dragging over a plan card. The 'Add Plan Item' pop up window will open.

Under the 'Item Details' tab, you will need to enter (\*Required Field denoted on Bold):

- **Plan Item Name** – description of the plan item
- Parent Item – this will automatically be populated with the item you are building under. If you need to change the mapping, then select from the drop down list.
- **Level** - you wish to map to within the plan
  - **Status** - of that Plan Item, such as Off Track, On Track, At Risk, etc. When you change the "Status" of the Plan Item, the color of the card banner in the preview pane will appear with the appropriate "Status" color.
- Description - of that Plan Item (not required)

NOTE: As you name the item, choose the status, and level, the Card to the right will add that information simultaneously.

The screenshot shows the 'Add Plan Item' window with the following details:

- Plan Item Name:** Engineering
- Parent Item:** Healthcare Strategic Plan 2014
- Level:** Goal
- Status:** Off Track
- Description:** (Empty text area)
- Preview:** A card titled 'Engineering' with a yellow 'GOAL' banner and 'Off Track' status indicator.
- Buttons:** Add Another, Cancel, Save

- B. Click the 'More Options' tab to enter optional information:

- Assigned To - Name of person you wish to assign to this task
- Members - The members you want to include with the Plan Item
- Administrators – users that can edit/create content for this card and all cards below
- 'Start' and 'Due' date for the item
- When you select an "Assigned To" user then the 'Update Frequency' can be changed to: Never, Weekly, Monthly or Quarterly

C. After you assigned a team member, they will get email notifications letting them know what deadline is approaching

## Step 4. Create a Metric

Any plan card also has the ability to become a metric. To add metric elements to your plan card, such as a percentage, price, or a number, just follow these few steps:

A. Click the Metric tab and check the box

B. Once you have checked the box, more options will appear:

- Switch the 'Metric Unit' to a number, a price or a percentage
- Change the 'Rollup' to:
  - To be updated directly

- To be the sum of its children's values
- To be the average of its children's values
- "To be updated directly" means the Assigned To or Member users will enter the Current Value manually each time a progress update is given.
- "To be the sum of its children's values" means that any Current Values from metric cards built below the current card will be tallied together to provide the new Current Value.
- "To be the sum of its children's values" means that any Current Values from metric cards built below the current card will be averaged together to provide the new Current Value.
- Manually change the 'Current Value' status by adding any number(s)
- Edit the 'Metric Tracking' from
  - It will go from...
  - It will be maintained between...
  - It will be above...
  - It will be below...

PRO TIP: If you want to add another item in the same level to a 'Plan Card,' check the 'Add Another' box at the bottom. When you're finished, click 'Save.'

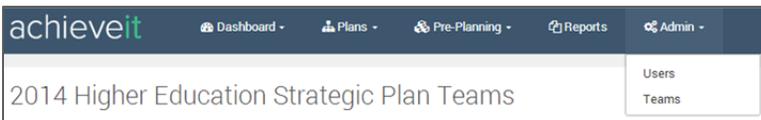
## Bonus Round! - Prep Work: Creating Teams

Often, you have functional teams that are tied to elements of your strategic or operational plans. Before you start building your plans and assignments, let's take a moment and review the steps to create teams in the software.

Teams serve a variety of functions:

- Teams serve as an easy way to gain visibility into the current performance of a group
- Teams allow for easy sorting within the list-view filters (link to the Link View Aspect)
- Teams create alignment around organizational goals

A. Click: Admin > Teams



**B.** Once you have clicked 'Teams,' it will bring you to the 'Teams' page. Click 'Add Teams'



**C.** Fill out the card with your team information > Add Teams. Create a team name, identify all members of the team and identify a team leader.

The screenshot shows the 'Add Team' form. It has three main input fields: 'Name' (a text box), 'Members' (a dropdown menu with the text 'Select some team members'), and 'Team Lead' (a dropdown menu with the text 'Select a team lead'). At the bottom right, there are two buttons: '+ Add Team' and 'Cancel'.

**NOTE:** If you ever need to edit your teams, then you can click the pencil icon to access the members list. To switch the team leader, click the star next to the team member you would like to become the leader.

Teams can be assigned as Members to a Plan Card Item.