Full Access User 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 Full Access User Guide will walk you through the highlights on how to get started in your organization.

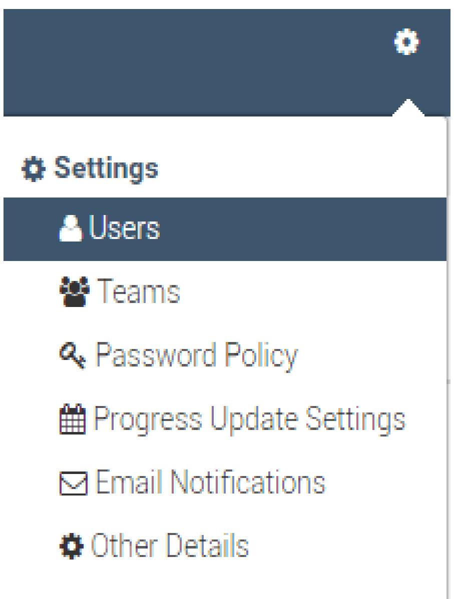
Section 1: Fundamentals

This section of the User Guide walks through the basic skills you will need in order to begin receiving value from AchieveIt. We recommend you master these skills before moving on to the Advanced section.

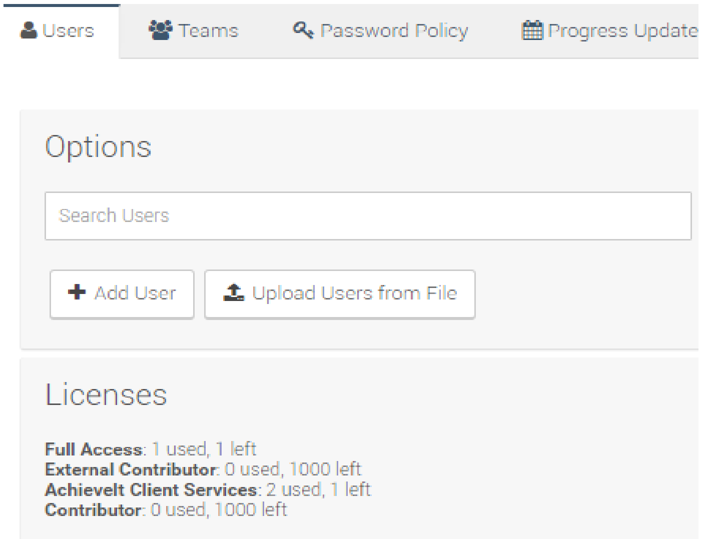
Adding Users

If you are designated as one of your organization's User Managers, adding users is the first crucial step on the path to execution. This will allow you to delegate responsibility to the respective parties, seamlessly collect updates for their items, and monitor each individual's progress across all items.

A. To begin adding users, navigate to the Admin gearwheel at the top, right-hand side of the screen and select the Users tab.

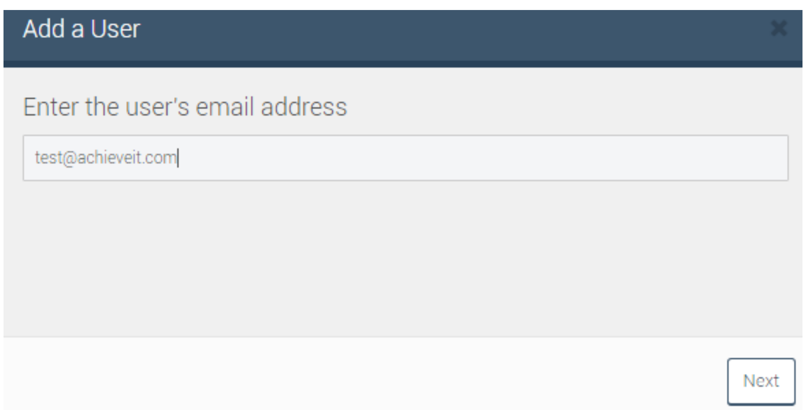


B. Upon arriving in the User Portal, you should see the Add User and Upload Users from File options directly above a License bank depicting your remaining licenses



C. To add a handful of users individually, chose the Add User option.

  a. Enter the user's email address and select Next



  b. Enter the user's first and last name, chose a temporary password, designate their user type, and select the appropriate time zone

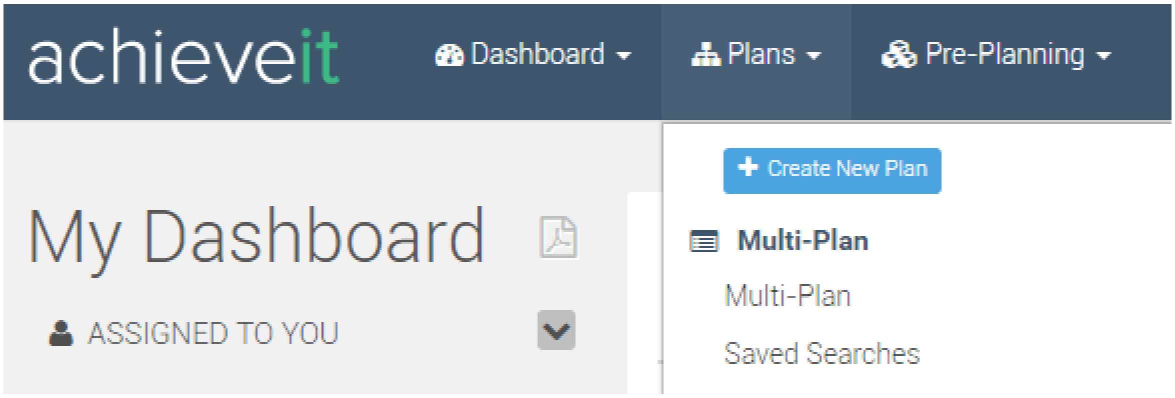
D. To upload users in bulk, download the attached spreadsheet and populate the required fields

  a. Save your list of users and upload the saved file by double clicking the box below the file

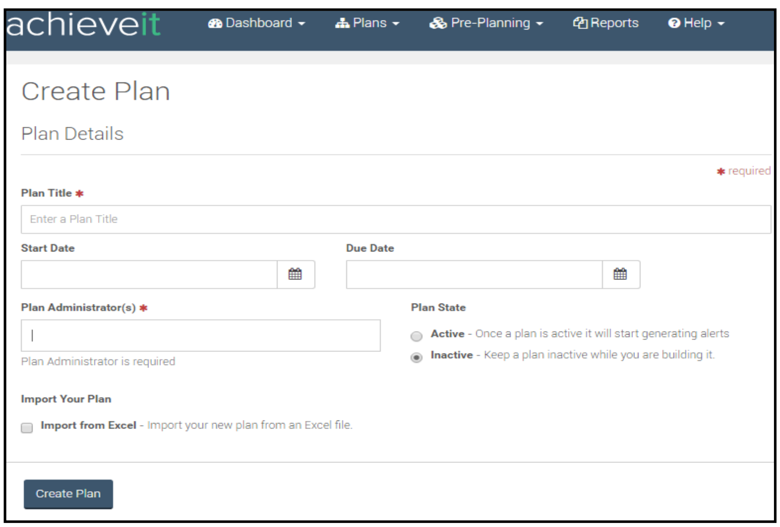
Create a New Plan

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

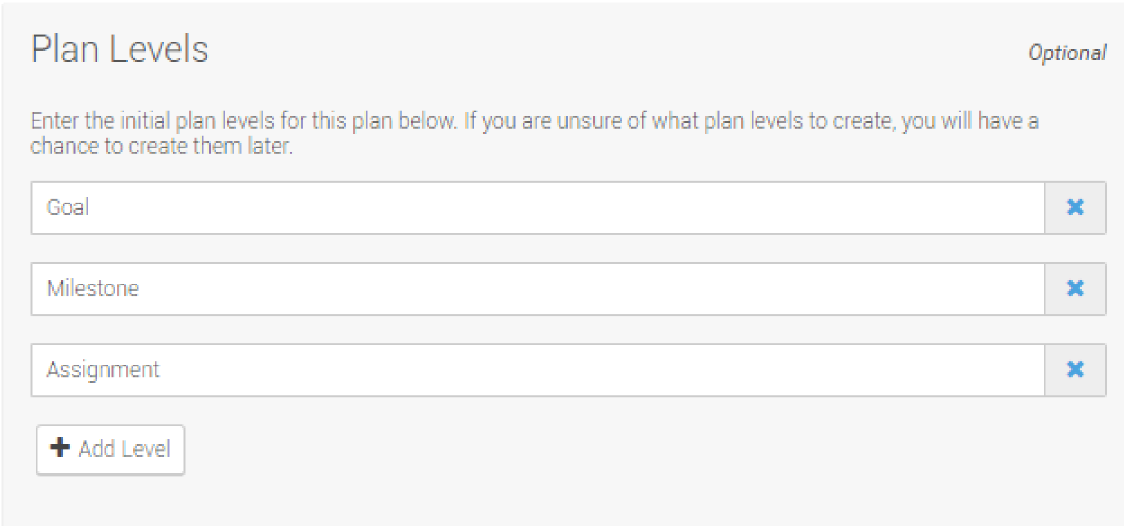


B. Once you have clicked on the 'Create New Plan' button, the 'Create Plan' screen will appear:



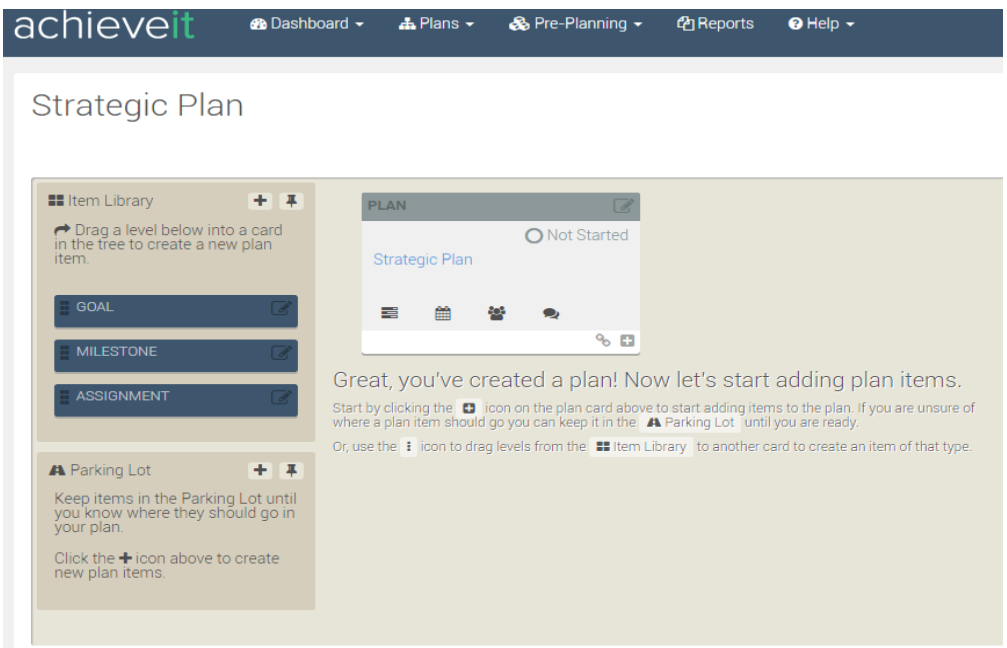
C. Enter your plan information (Required Fields denoted are in bold):
   a. **Title –** plan title you would like displayed on reports and on the screen
   b. Start Date – by either typing the date or by clicking the calendar icon to the right and using the date selector
   c. End Date – you must have both the start date and due date in order to continue
   d. **Plan Administrator(s) –** those users who will be able to add and build content to the plan. Only Full Access users can be administrators
   e. **Plan State**
      i. **Active:** Plans will begin to immediately send out email alerts and notifications to the team members tied to the plan
      ii. **Inactive:** Plans will not yet send out email alerts and notifications
         1. We recommend you keep plans Inactive until they're final or nearly final

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 or as few levels as you like



NOTE: Goal, Milestone, and Assignment 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

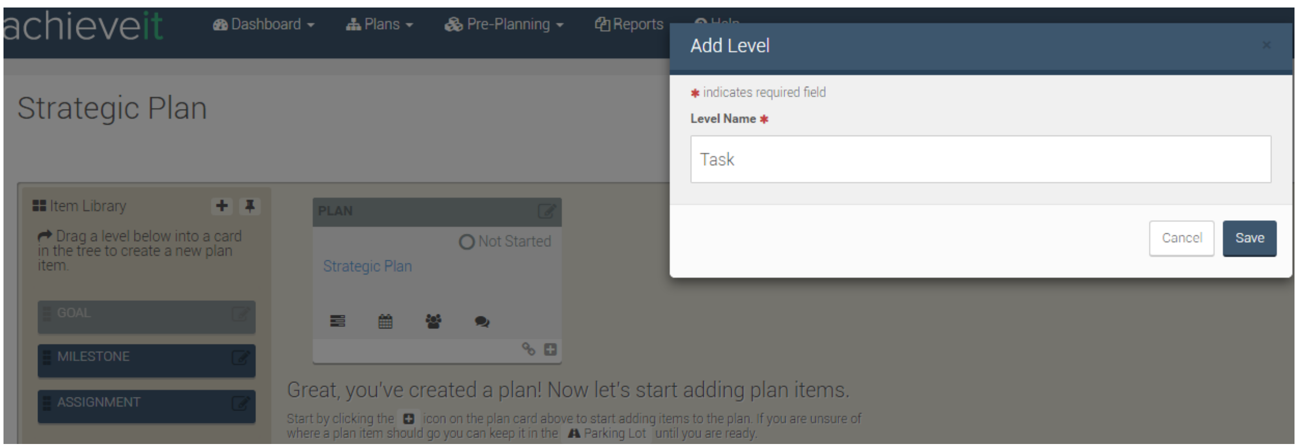


Create Levels in the Item Library

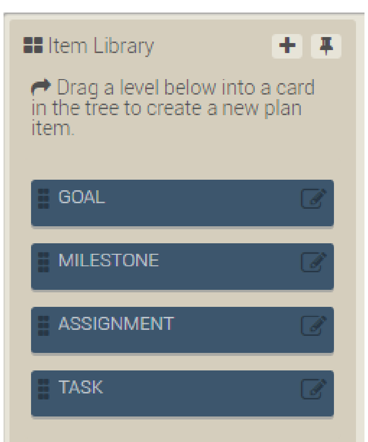
The Item Library visually encourages users to understand the organizational hierarchy of the plan. Every plan can be structured with as many or as few levels as needed and you also customize the terminology to fit your organization. When you are creating your plan in Section 1, you have an opportunity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

A. 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, Assignment

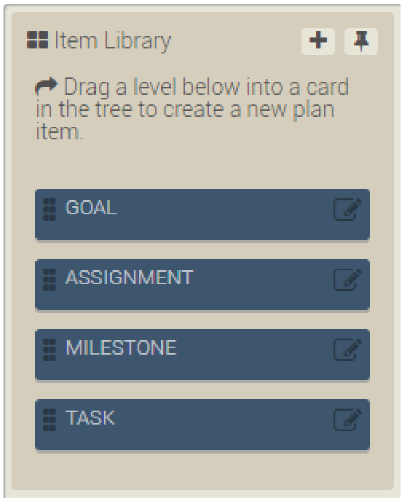
B. After you have clicked the '+' or pencil button, it will direct you to the 'Add Level' pop up window. Enter your custom level name and click save



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.



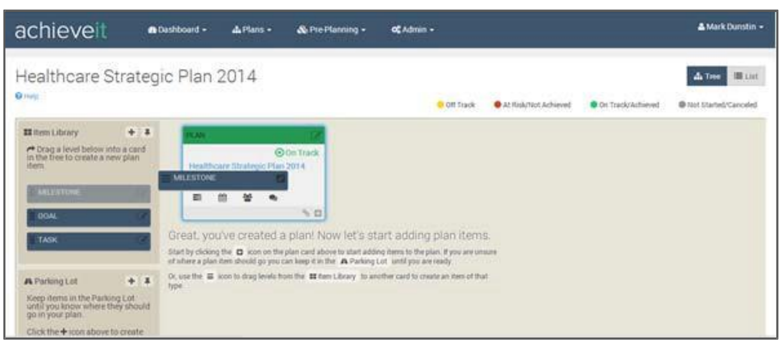
D. If you need to change the sequence, then you can drag and drop the 'Item Level' to the order of your choosing



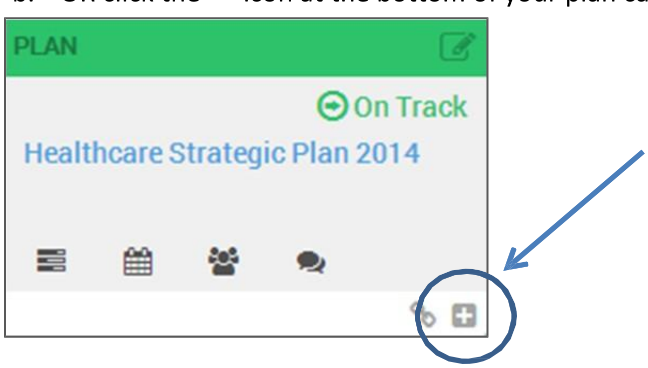
Create and Edit Plan Cards

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

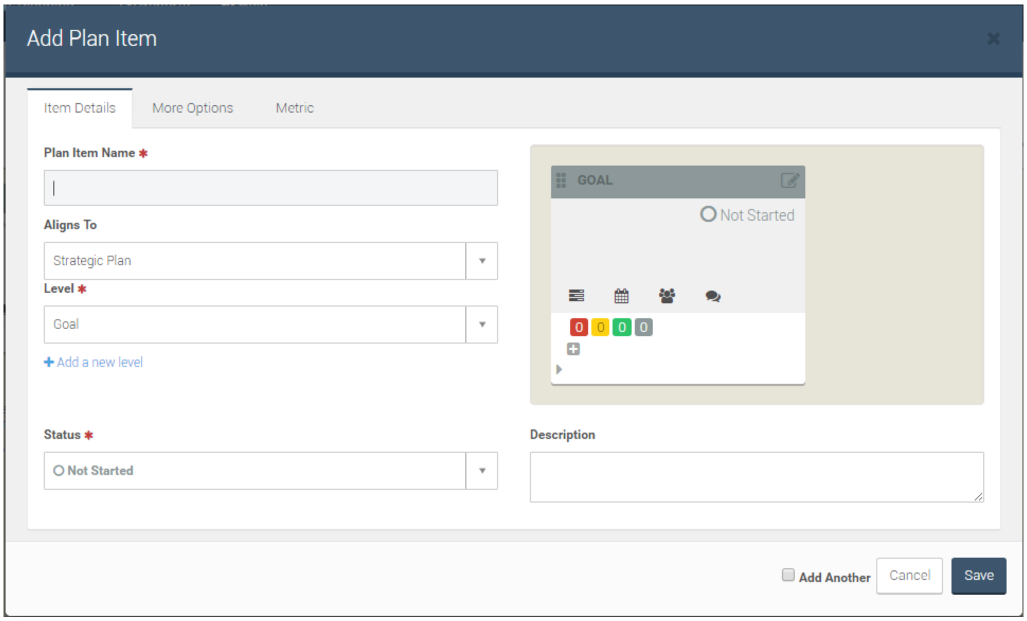
a. Drag and drop a level into the plan



b. OR click the '+' icon at the bottom of your 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 level, the 'Add Plan Item' pop up window will open



Under the 'Item Details' tab, you will need to enter:

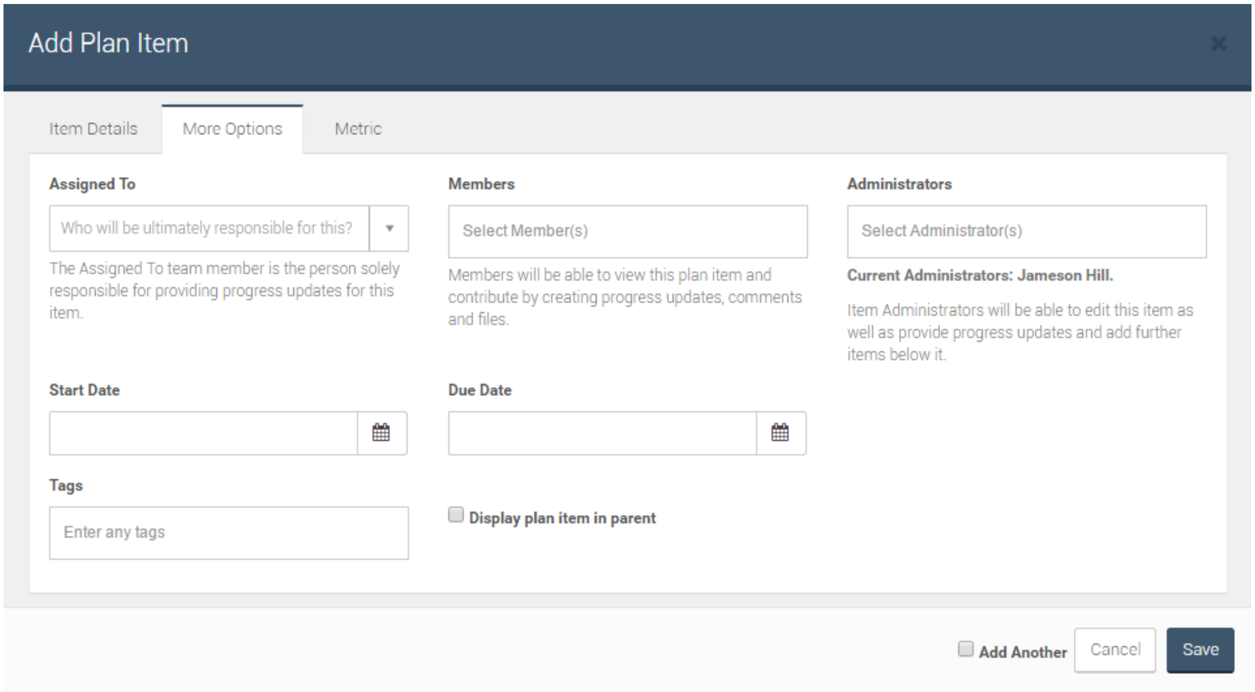
- **Plan Item Name** – Title of the plan item
- Aligns To – this will automatically be populated with the item you are building under

If you need to change the mapping, then select from the drop down list

- **Level** – you wish to map to within the plan
- **Status** – On Track, Off 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** – Additional information about 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.

B. Click the 'More Options' tab to delegate responsibility, set date parameters, and add tags achieveit

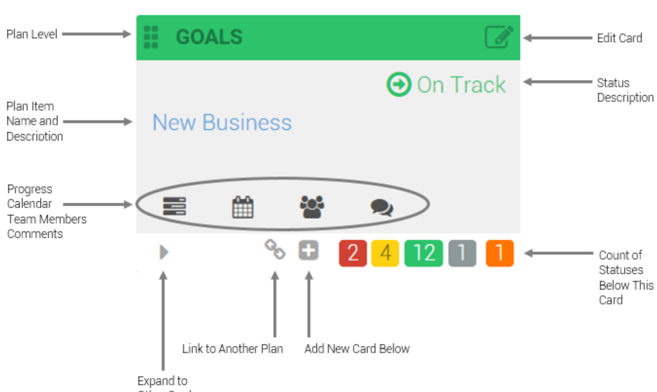


- Assigned To – Name of person you wish to assign to this task. This person is the only one who will receive update emails.
- Members – The members you want to include with the Plan Item. Members can provide status updates, but will NOT receive emails
- Administrators – Full Access users that can edit / create content for this card and all cards below
- ‘Start’ and ‘Due’ dates for the item
- When you select an ‘Assigned To’ users, the ‘Update Frequency’ can be changed to: Updates Not Required, Daily, Weekly, Bi-Weekly, Monthly, or Quarterly

C. After you assign a team member and set an Update Frequency, they will get email notifications asking them to provide updates.

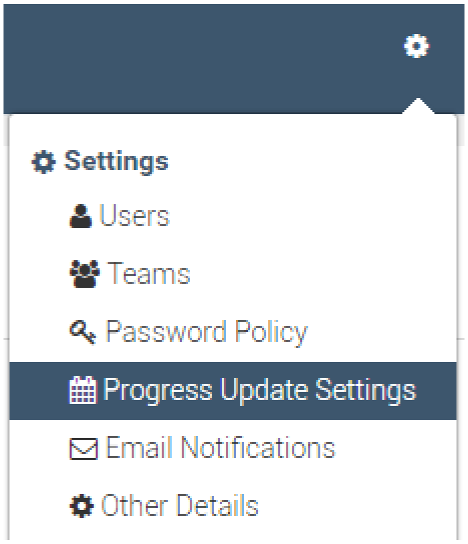
PRO TIP: The best chances of execution occur when organizations choose an *Assigned To* and set an *Update Frequency*. This is <u>HIGHLY</u> recommended.

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



Progress Update Settings

A. In order to customize when you would like each Update Frequency to be delivered, begin by navigating to the ‘Gearwheel’ and select the ‘Progress Update Settings’ tab



B. Begin customizing your options for each of the following frequencies:

- **a.** Weekly: check the boxes for the day(s) of the week you want Weekly items sent
- **b.** Bi-Weekly: check the boxes for the day(s) of the week you want bi-weekly items sent
- **c.** Monthly:
  - **i.** Every week on: select the day(s) of the week
  - **ii.** On the following day(s): which day of the month
  - **iii.** On the following day(s) after the month ends: number of days after the month ends
  - **iv.** On the [First, Second, Third, Last] [Day] of the month
- **d.** Quarterly:
  - **i.** Number of day(s) before / after the end of the Quarter
  - **ii.** On the following day(s) of the Quarter

C. Exceptions When There Are Late Updates

- **a.** Select the day(s) you want users to receive reminders when they have Late Updates

D. After selecting all of the Progress Update Settings, select the ‘Time of Day to Send Emails’ and be sure to click ‘Save Schedule’ achieveit

Implement Your Plan

Step 1: Making Assignments

Begin delegating responsibility to someone within your organization to each plan item

A. Click the '+' in the bottom right hand corner of a plan card item
B. Fill out under the Item Details tab
    a. Plan item name
    b. Choose the appropriate Status (Not Started if you aren't sure)
C. Under the More Options tab:
    a. Pick who the item will be assigned to and any members that will support it
    b. Select Start and Due Dates if known

Step 2: Choose an Email Update Frequency

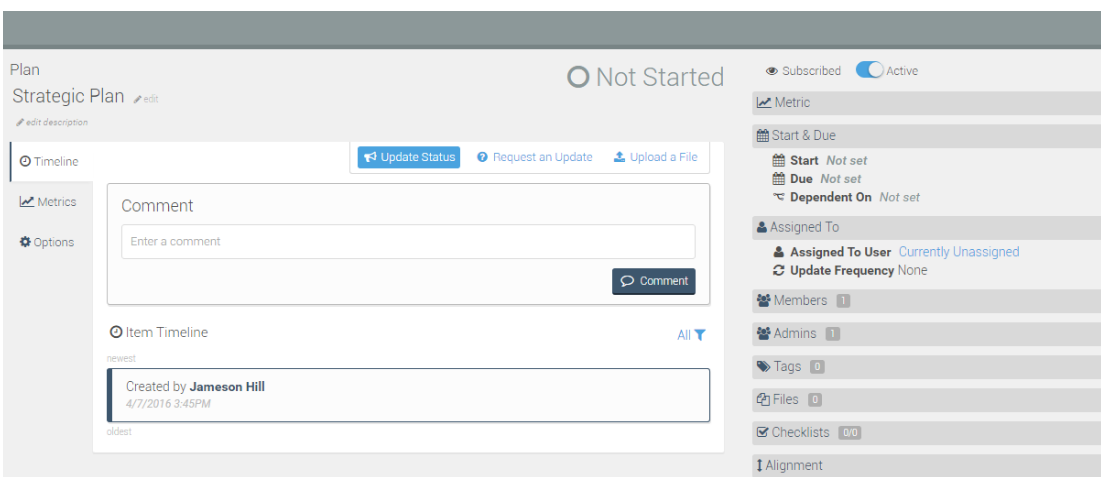
While you are making assignments, make sure you choose an email frequency for updates when you assign a person an item.

A. Under the More Options tab in the plan card item, you have the option to choose from daily, weekly, bi-weekly, monthly, or quarterly once you have picked an Assigned To person
B. Once you have made the plan active, the Assigned To person will start receiving Progress Update email asking them to provide updates

Step 3: Activate Your Plan

Once you have finished building out your plan and have assigned a person, a start and due date, and have chosen an email frequency for each item, it's time to activate the plan.

A. Open the top plan card item
B. Once the card has opened, you will see all of the options to edit a card



C. Just to the right of the status light you will see the plan state. Click the button in the upper right to slide the plan state from 'Inactive' to 'Active'. It will automatically save once you have made the changes

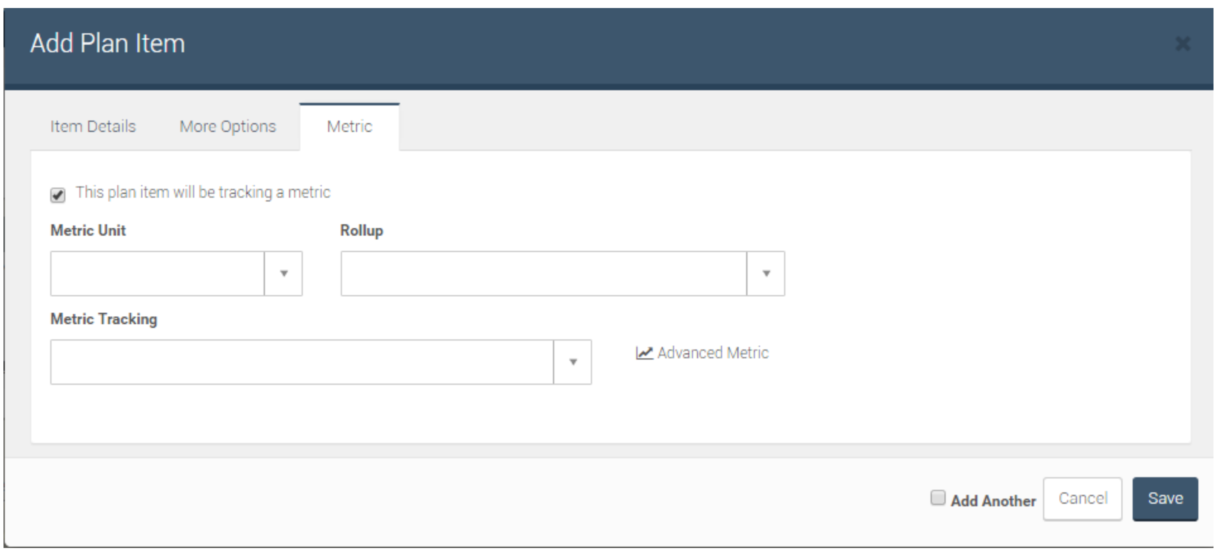
Section 2: Advanced Features

This section of the User Guide walks through the advanced features of the platform. These are additional aspects of the tool that will help maximize your return on investment. We recommend you master the Fundamentals section before venturing into this section.

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, the following options will appear:

   a. **Metric Unit**: a dollar amount, a percentage, or a number

   b. **Rollup** (how it will be updated): “To be updated directly”, “To be the sum of its supporting items’ values”, or “To be the average of its supporting items’ values”

      i. **“To be updated directly”** means the Assigned To or Member users will enter the Current Value manually each time a progress update is given

      ii. **“To be the sum of its supporting items’ values”** means that any Current Values from metric cards built beneath the current card will be added together to provide the new Current Value

      iii. **“To be the average of its supporting items’ values”** means that any Current Value from the metric cards built below the current card will be averaged together to provide the new Current Value

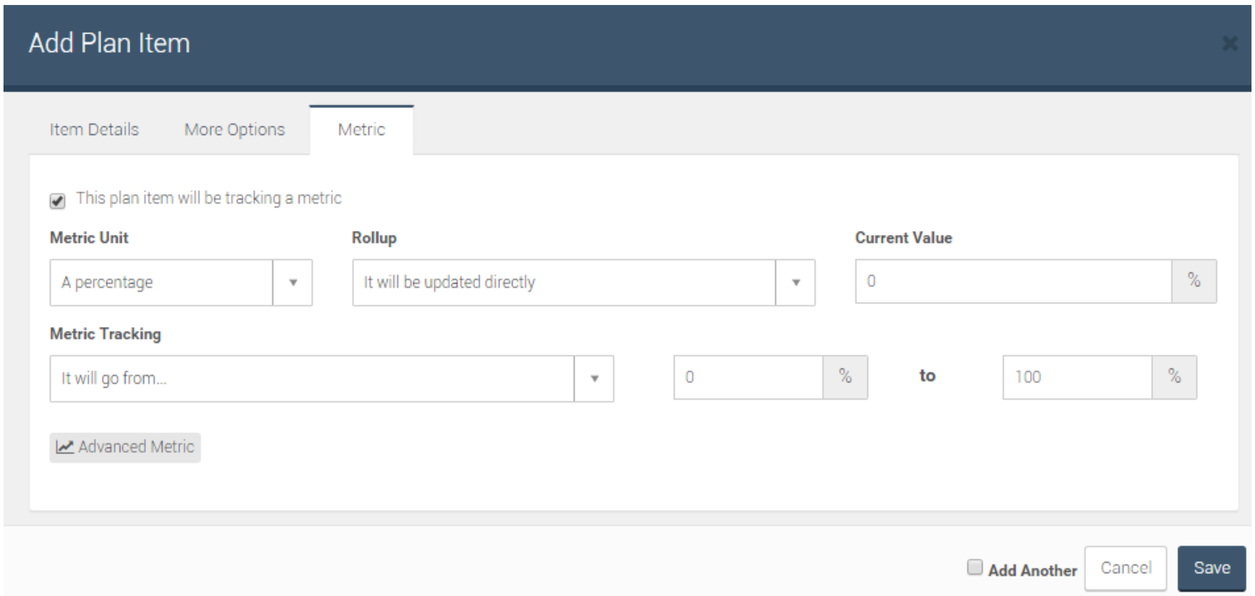
   c. **Current Value**: enter the Current Value status to the appropriate figure, or to zero if you do not know the Current Value

   d. **Metric Tracking**:

      i. It will go from… X to Y

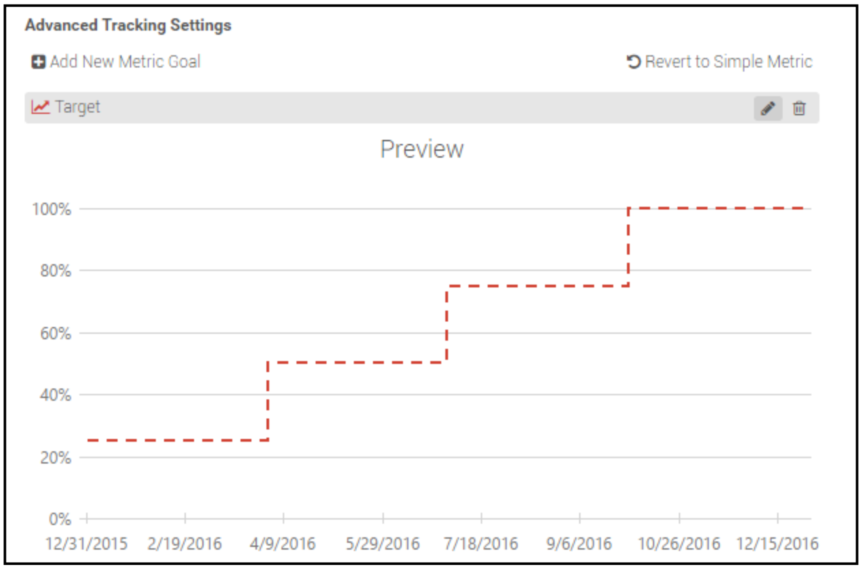
ii. It will be maintained between… X and Y
iii. It will be above… X
iv. It will be below… X

C. **Advanced Metrics:** Every Metric has the ability to have advanced metrics or metric targets. To track an advanced metric, click the 'Advanced Metric' button below the Metric Tracking drop down.



- Select **'Add New Metric Goal'**
- **Goal Name**: name you would like to appear on the graph key
- **Line Style**: select the color you would like your line to appear on your graphs
- **Start Date**: select the month and year you would like the target to begin
    - The month is typically aligned with a company's fiscal year or just the calendar year
- **Update Frequency** (how often does the goal change): Annually, Semi-Annually, Quarterly, Monthly
- **Period:** number of years the goal continues (up to four years)

- After you save the parameters, your Advanced Metric line will populate on a graph preview



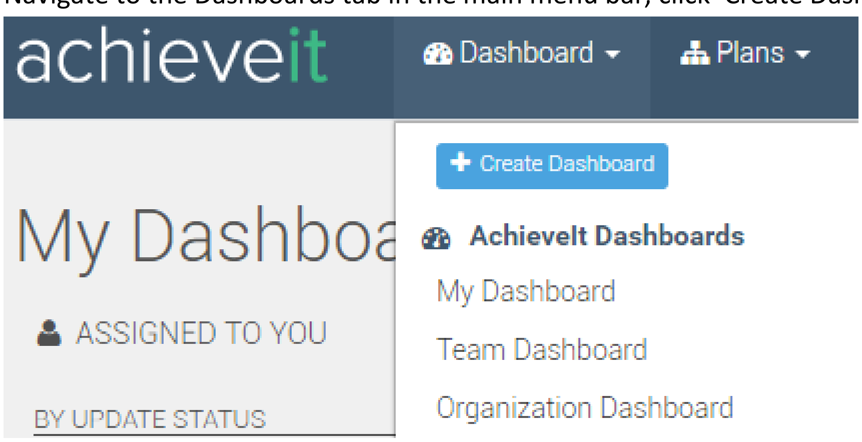
- Click save one final time to finalize you card item details

PRO TIP: If you want to add another item in the same level of a 'Plan Card', check the 'Add Another' box at the bottom. To replicate the metric parameters and 'Assigned To' field, select 'Keep Previous Values'. When you're finished, click 'Save".

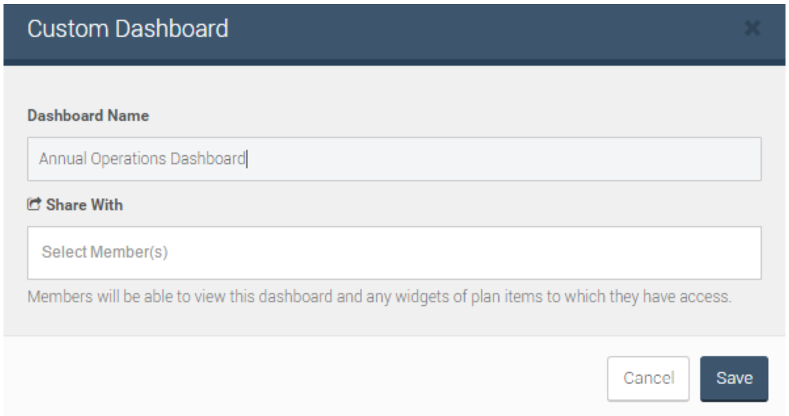
Creating Custom Dashboards

Full Access users have the ability to create their own custom dashboards by adding any number of various widgets including: line graphs, bar charts, gauges, labels, and pie charts. Users can export the dashboard to PDF, as well as schedule a PDF rendering of custom dashboards to be emailed.

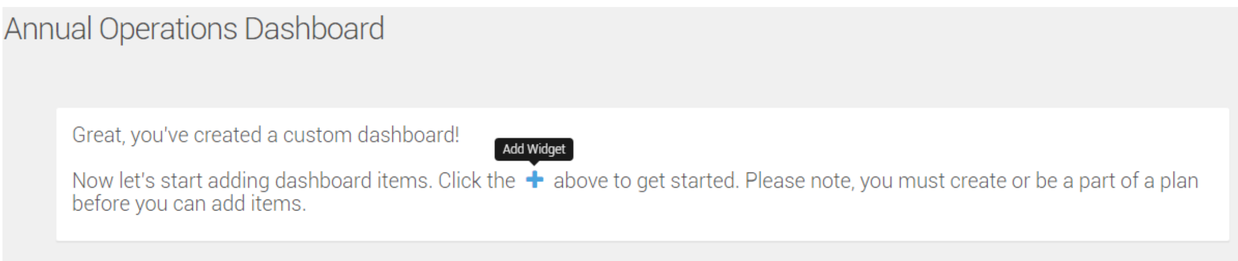
A. Navigate to the Dashboards tab in the main menu bar, click 'Create Dashboard'



B. The custom dashboard pop-up will appear. For this example, we will name it the 'Annual Operations' dashboard.



C. Once you have named your dashboard, the menu will direct you on how to add widgets. Start by clicking the + button near the middle of the dashboard.



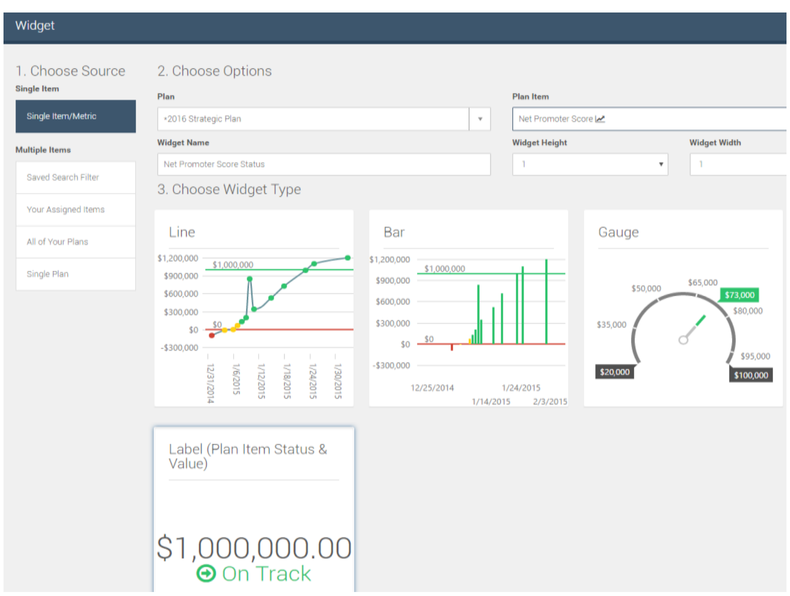
D. Once you click on the '+' to add widgets, the widgets option menu will appear. More option include:

  a. Choose the Source: Single Item Metric, Your Assigned Items, Single Plan, All Plans, or Saved Search Filter

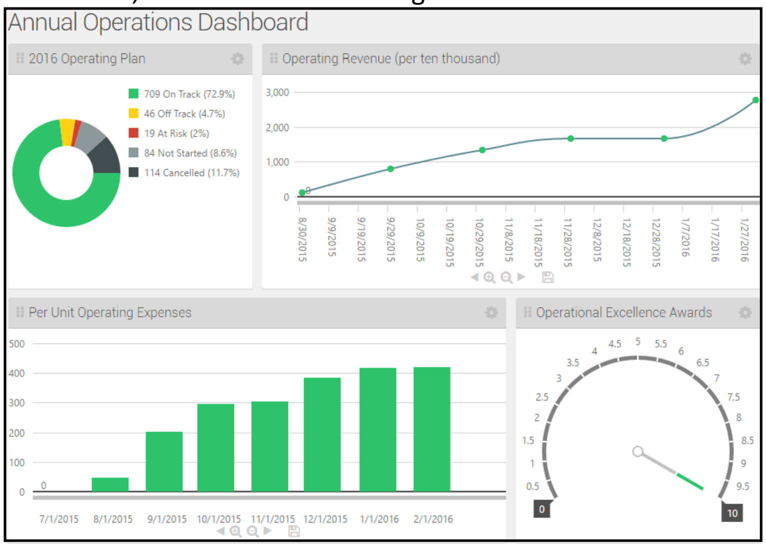
    i. Select the Plan, then the item (if appropriate)

  b. Widget name: You can personalize the name of each widget

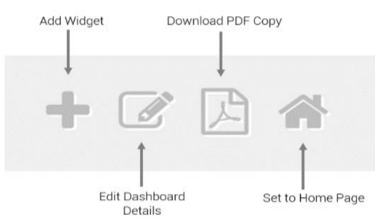
  c. Widget type: Line, Bar, Gauge, Label



E. After you have chosen which types of widgets you like for the different items within the dashboard, it could look something like this:



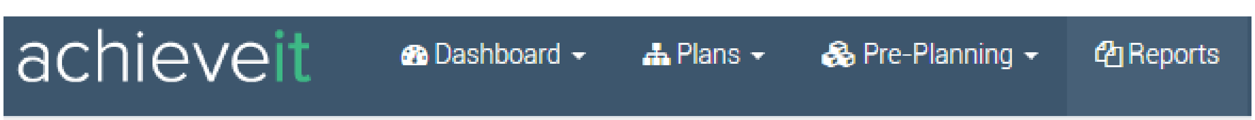
F. Additional Icons
   a. Add widget
   b. Edit dashboard details, such as changing the name or deleting it
   c. Download PDF copy
   d. Set to home page



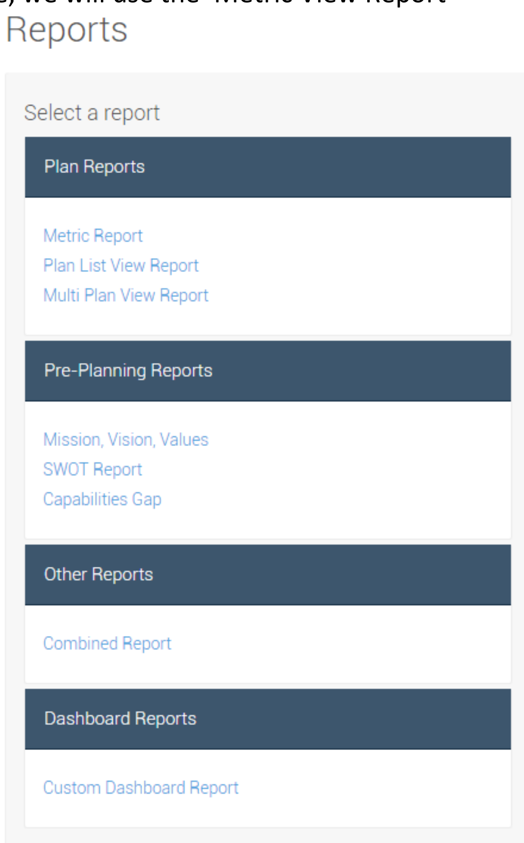
Scheduling Reports

You have created great plans that will help your organization achieve results at unprecedented levels. However, **keeping everyone in the loop** is the key to success. In just a few clicks of the mouse, you will be able to **schedule your progress updates** quickly and easily, as well as **schedule when you send reports** to other stakeholders. Scheduling a report is easier than ever. If you like to receive report emails on a certain time or date, follow these simple steps:

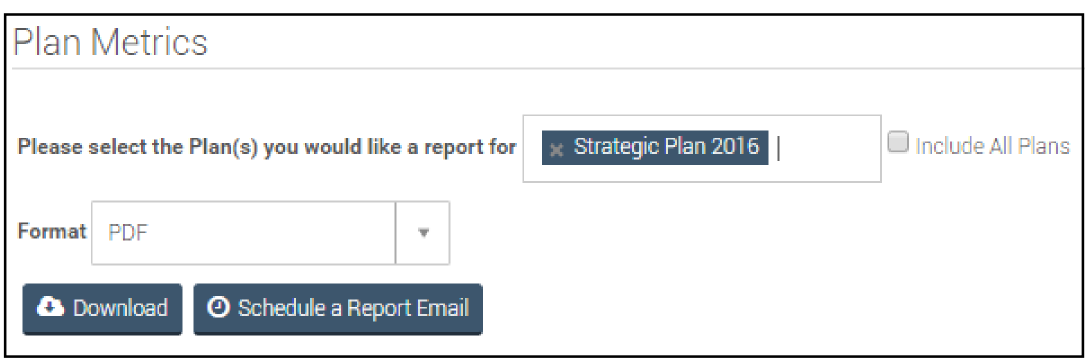
A. Navigate to the ‘Reports’ tab in the top menu



B. Once you are in the 'Reports' screen, select the report type you would like to schedule. For this example, we will use the 'Metric View Report'



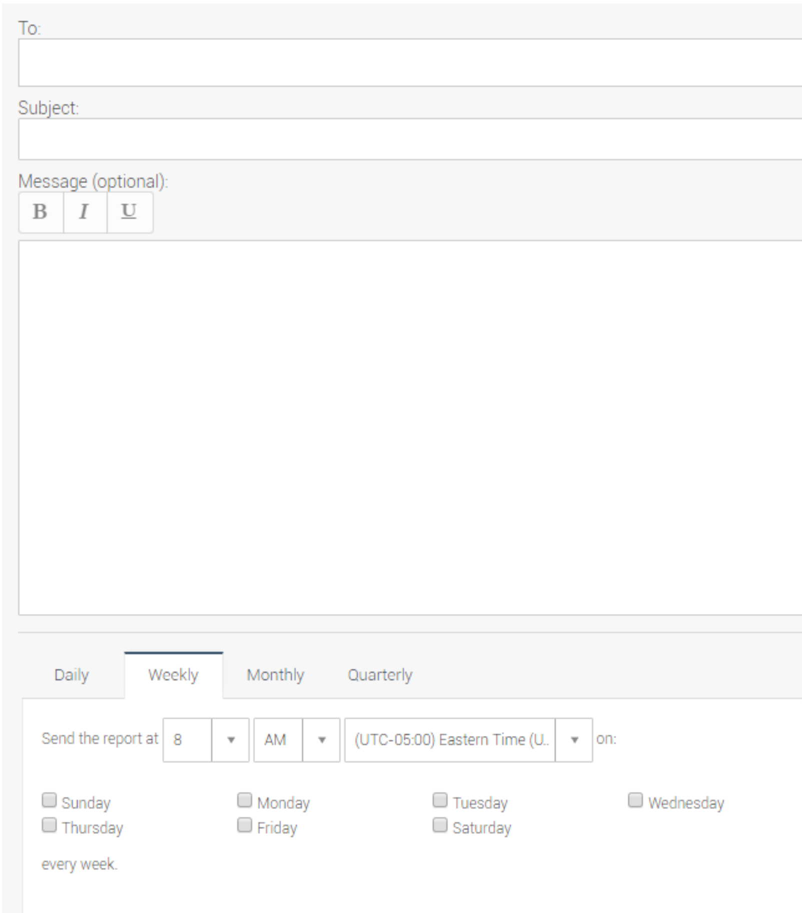
C. Under the Metric View Report, you can select the plan(s) whose metrics you would like to report, then click 'Schedule a Report Email'



D. Once you have selected 'Schedule a Report Email', the following delivery options will appear:

a. The users you wish to send the email to

b. The subject line
c. A message (optional)
d. The frequency you wish the reports to be delivered (Daily, Weekly, Monthly, Quarterly)
e. What time of day you would like the email to be sent



E. For ‘Weekly’ reports, you will have to choose the specific day(s) of the week you want it sent out. For example, you can have it sent out on Monday and Thursday of every week.
F. For ‘Monthly’ reports, you will have to choose the specific date(s) of the month you want it sent out.
G. For ‘Quarterly’ reports, you will have to choose which day, after the start or before the end, of the quarter you would like the report to be sent out.

Creating Teams

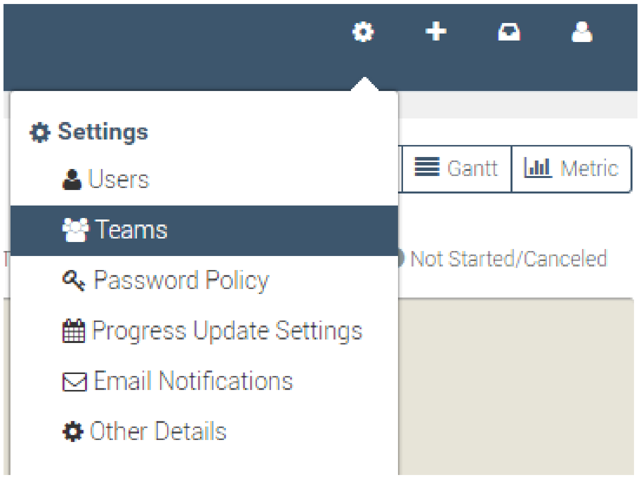
Often, you have functional teams that are tied to elements of your strategic or operational plans. Before you start building your plans and assignments, let’s take a moment and review the steps to create teams in the software.

Teams serve a variety of functions:

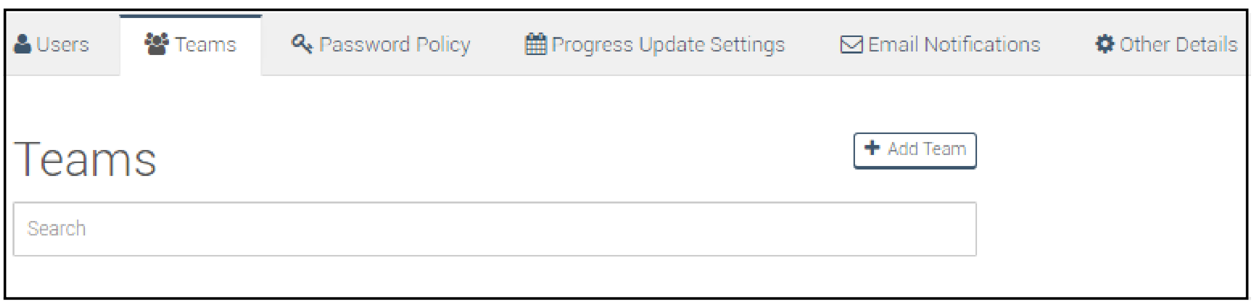
- Teams serve an as easy way to gain visibly into the current performance of a group

- Teams allow for easy sorting within the List View filters
- Teams create alignment around organizational goals

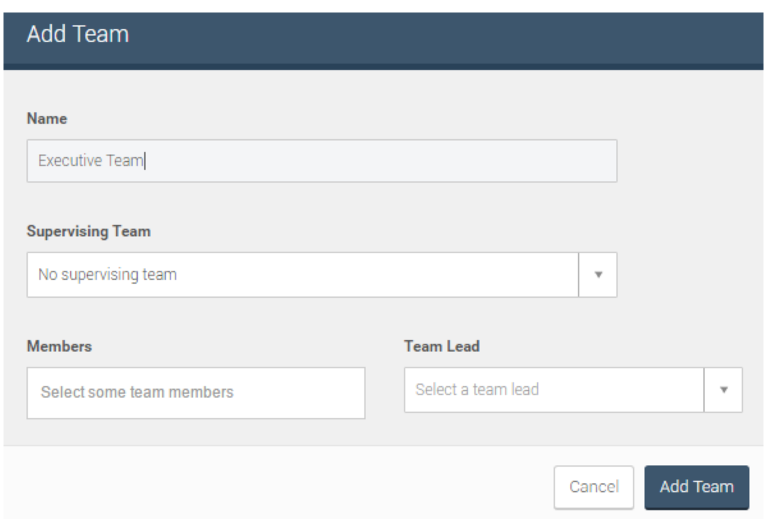
A. Click the 'Admin' icon and select the teams tab



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



C. Create a team name, identify all members of the team and designate a team leader by clicking on the 'Members' and 'Team Lead' boxes.



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

- Teams can be assigned as Members to a Plan Card item.