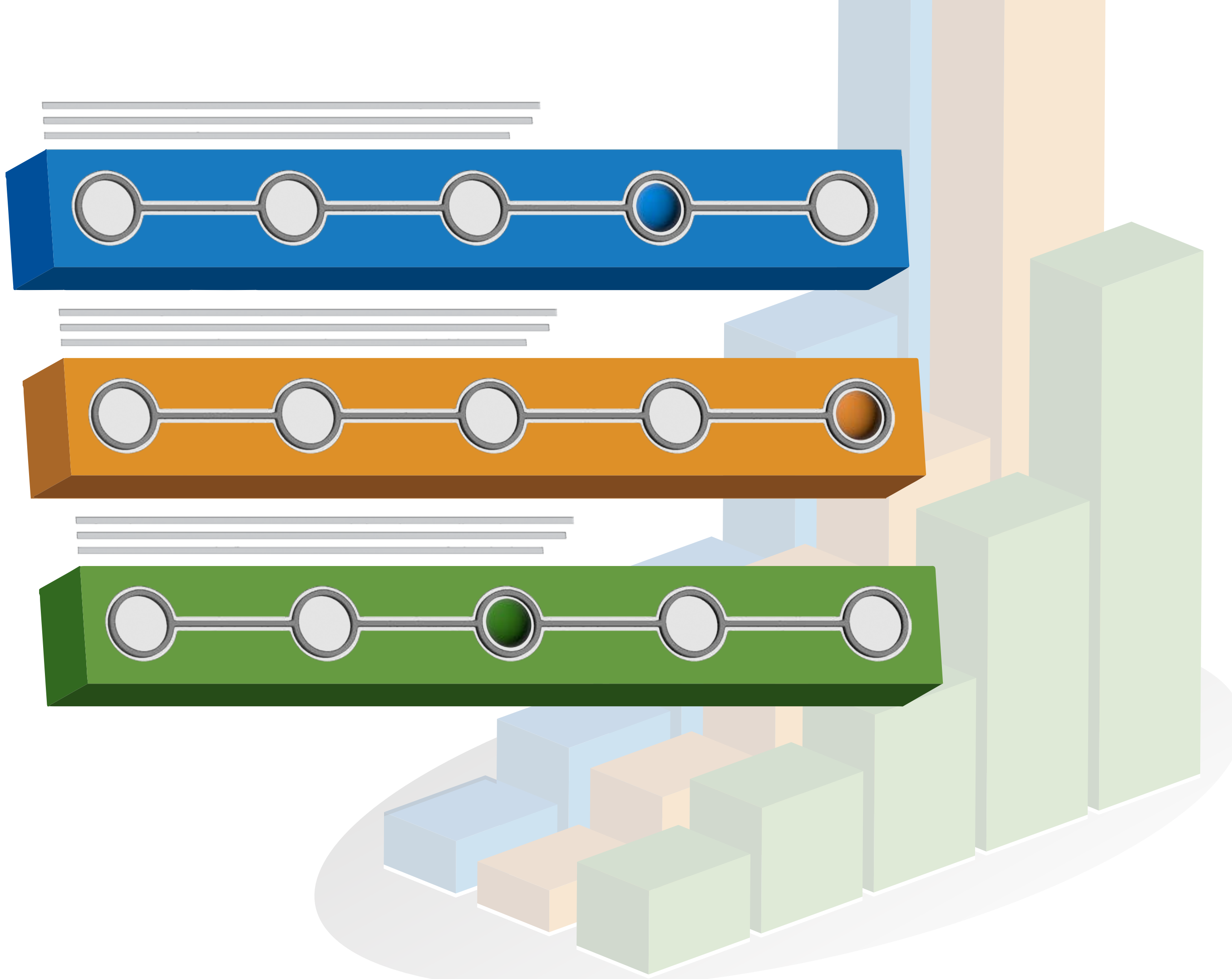
Oklahoma State Employee Engagement

Action Plan Dashboard User Guide



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Action Plan Dashboard User Guide

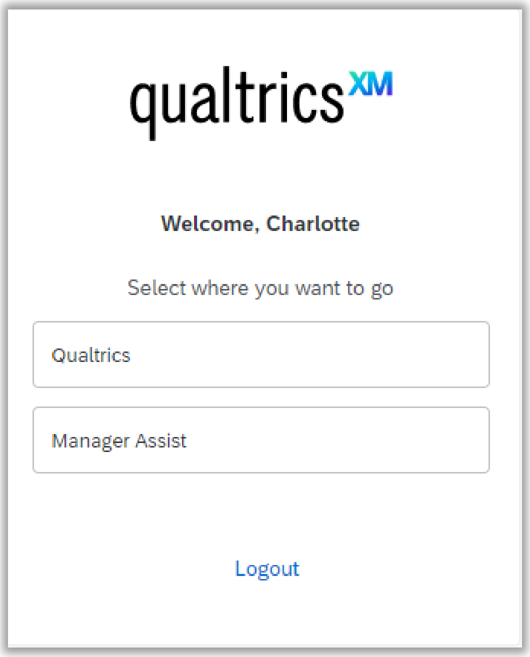
Contents

Purpose

This guide will demonstrate how designated action planners can view/edit previously submitted action plans and create new action plans.

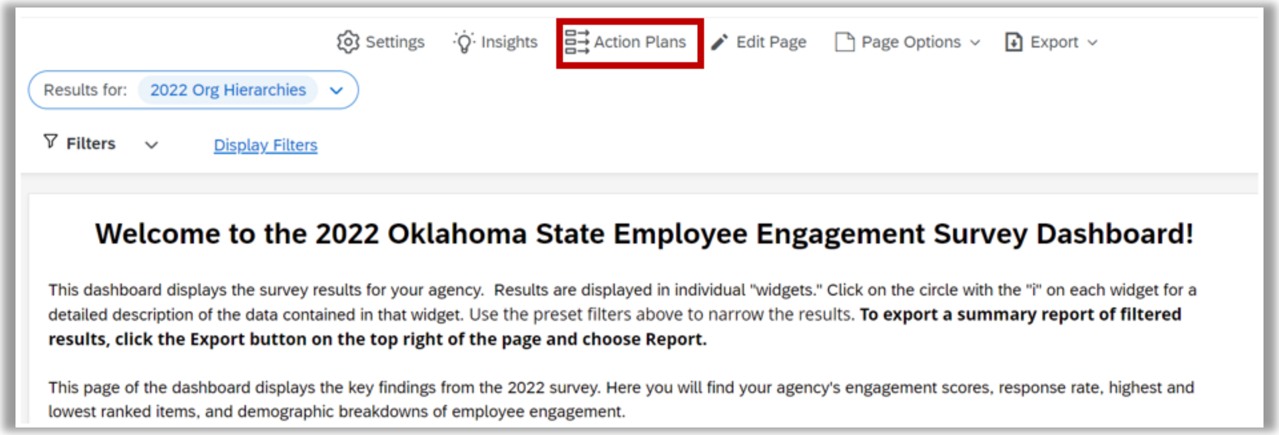
Log into Qualtrics/Manager Assist

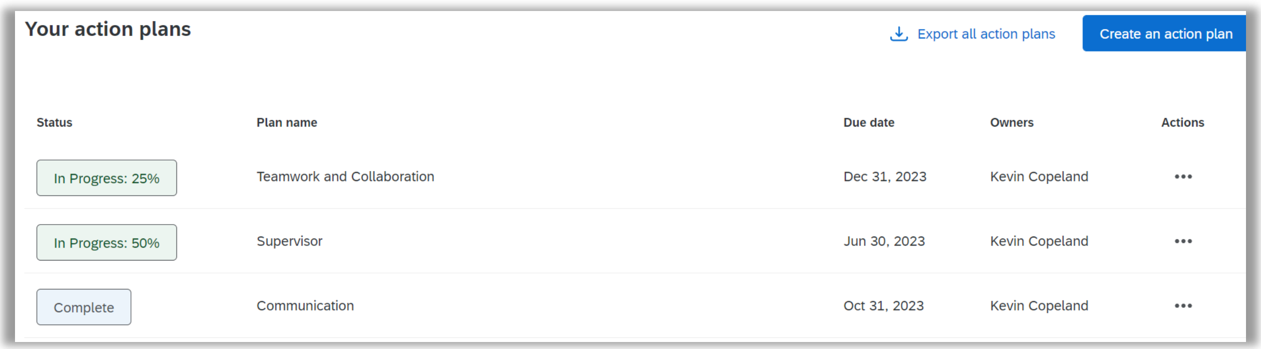
- When you first log in, you will be prompted to select where you want to go. You can access your agency action plans from either application (Qualtrics or Manager Assist).
- The instructions below show you how to access, create and modify action plans in both applications (via Qualtrics or Manager Assist).



Access action plans via Qualtrics

- Use this link or follow the steps below to access the desired Oklahoma State Employee Engagement Survey (OKSEES) dashboard. Use the drop-down menu on the left side of the toolbar to navigate between dashboards.
- Select the **Action Plans** icon in the toolbar. Please email OMES Workforce Planning at workforceplanning@omes.ok.gov if you do not see the **Action Plans** icon in the OKSEES dashboard toolbar.
- Your agency's submitted action plans will now be displayed.





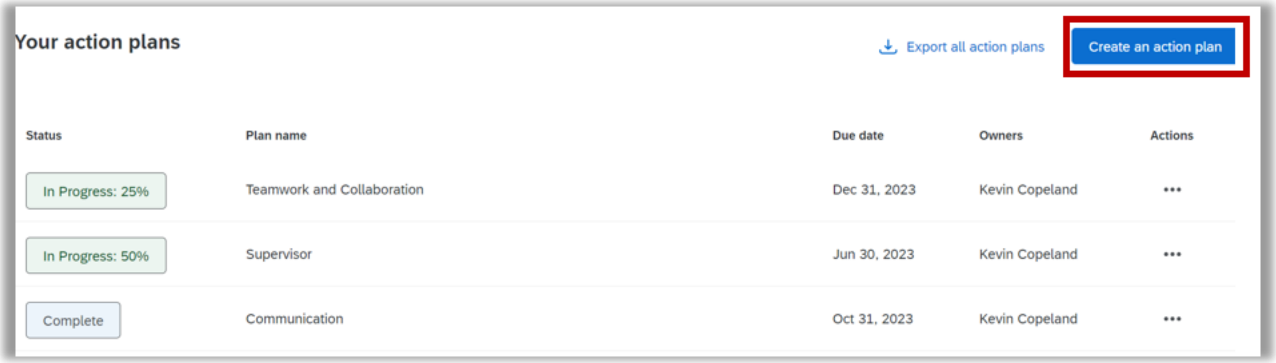
Access action plans via Manager Assist

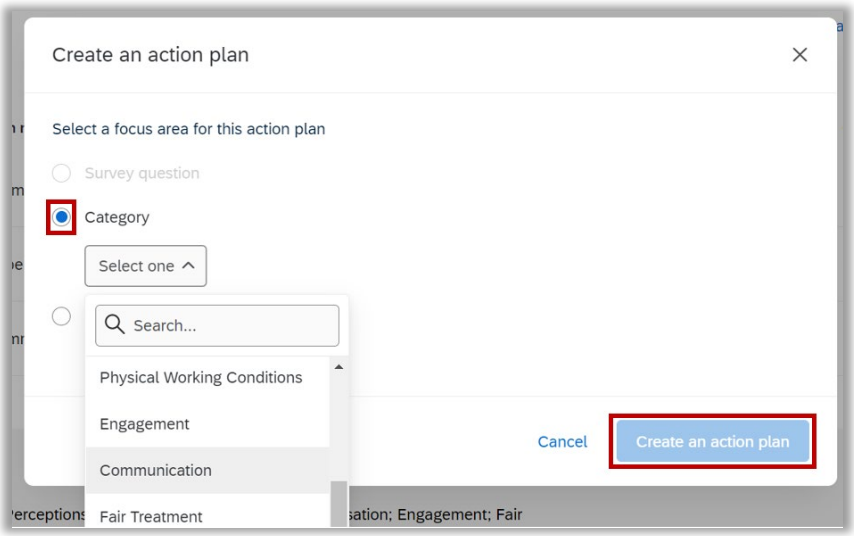
- After selecting Manager Assist at login, select the **Plan of action** icon in the toolbar on the left side of the screen. Please email OMES Workforce Planning at workforceplanning@omes.ok.gov if you do not see the **Plan of action** icon in the toolbar.
- Your submitted action plans will now be displayed.

Create an action plan via Qualtrics

- After accessing the **Action Plans** from the [OKSEES dashboard]() select **Create an action plan**.
- Under the focus area drop-down, select **Categories**. A full list of OKSEES survey questions and categories can be found on the [Employee Engagement Action Planning Guide]().

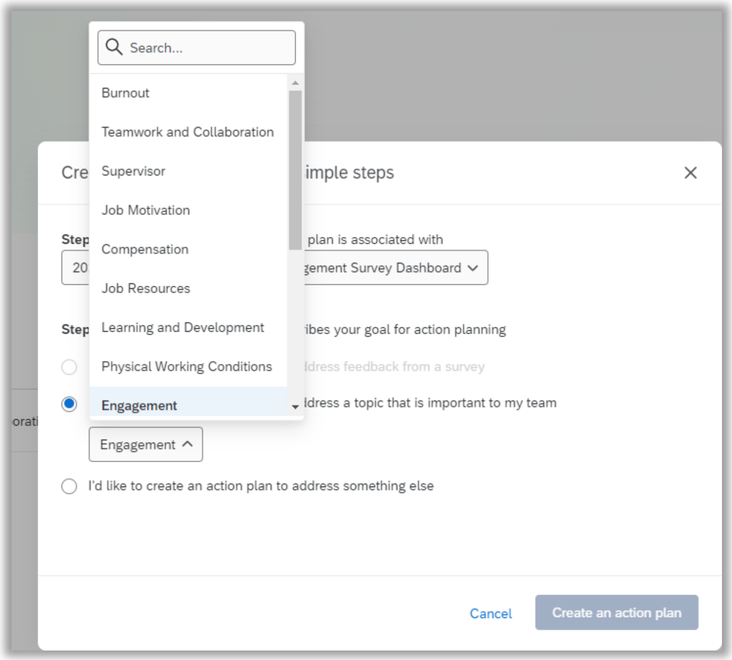
- Select **Category**, then choose the desired action plan category. (These overarching categories correspond to the questions in the OKSEES survey.)
- Select **Create an action plan.**
- Note: all changes are saved automatically.





Create an action plan via Manager Assist

- After accessing the **Plan of action** from the Manager Assist homepage, select **Create an action plan**.
- Step 1: Select a dashboard for which you would like to create an action plan (only the dashboards you have access to will appear in the drop-down menu).
- Step 2: Select your goal for action planning from the list. (If you choose "I'd like to create an action plan to address a topic that is important to my team," a list of OKSEES categories will appear in the drop-down menu).
- Select **Create an action plan** at the bottom right of the screen.
- Note: all changes are saved automatically.



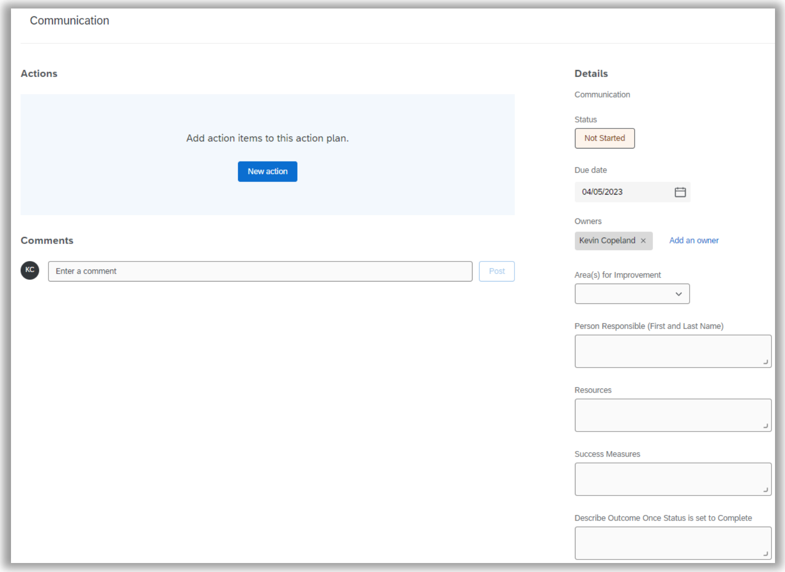
Define an action plan via Qualtrics and Manager Assist

Details

The **Details** section displays the overall action plan status. The chosen category will appear at the top of the page.

- **Status** should be set when first creating the action plan. When the status is set to **In Progress**, the overall progress percentage will update when individual actions are marked as complete. (Refer to the Action section below for more details.)
  - **Not Started**: Action plan has been created but not yet started.
  - **On Hold**: Action plan has begun but has been placed on a temporary hold.
  - **In Progress**: Action plan is actively in progress.
  - **Complete**: All items in the action plan are complete.
  - **Cancelled**: Action plan was created, but business needs have changed, requiring this action plan to be cancelled. Please leave a comment explaining why this action plan was cancelled.
- **Due Date** is the date all action(s) will be completed.
- **Owners** should list the agency leader (agency head, HR representative, etc.) with 2022 OKSEES Dashboard access who is responsible for maintaining action plans. Since owners are not automatically notified of the status, action planners should ensure their team members are made aware when they are listed as an action plan owner.
- Using the **Area(s) for Improvement** drop-down, select the designated OKSEES survey question(s) the action plan is addressing. The question(s) selected must fall under the designated OKSEES survey category. A complete list of OKSEES categories can be found on the homepage of the Action Plan Dashboard.
- The **Person Responsible** text box should list the first and last name(s) of the responsible parties. The person responsible is not required to have access to the Action Plan Dashboard.
- List relevant tools, metrics, events, etc. in the **Resources** text box.
- List quantifiable and/or identifiable key metrics in the **Success Measures** text box.

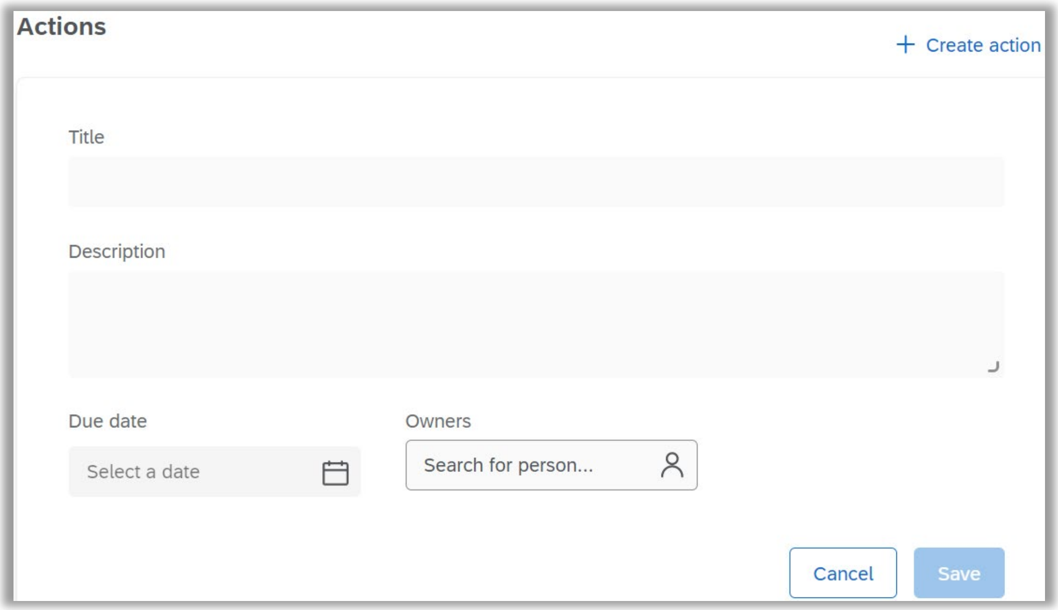
- **Describe Outcome Once Status is set to Complete** should detail the outcomes of the action plan once the action plan is completed. Document the relevant wins and opportunities related to the action plan.

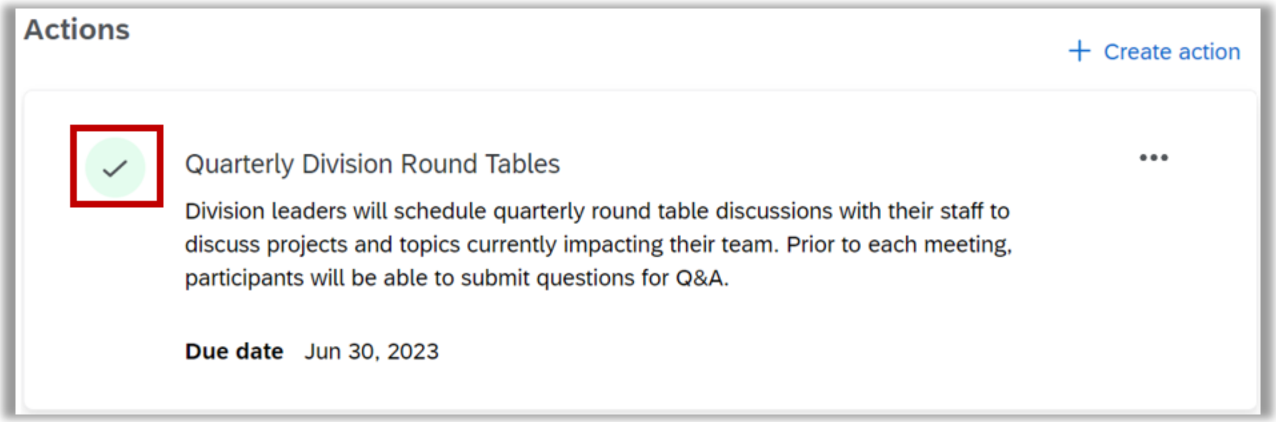


Actions

The **Actions** section displays the individual tasks required to complete the action plan.

- To add additional actions to the action plan, select **New Action**, and then **+ Create action**.
- Update the **Title** of the action (a title is required to save each action).
- Use the **Description** dialogue box to list specific steps and notes for each action.
- The due date for each action can be specified at the bottom of the Actions box using **Select a date**.
- You may specify the team members responsible for an action using the **Owners** search feature.
- Once an individual action is complete, select the gray checkmark next to the action's title to change the checkmark's color from gray to green. Once an individual action is completed, the overall action plan status will automatically update.

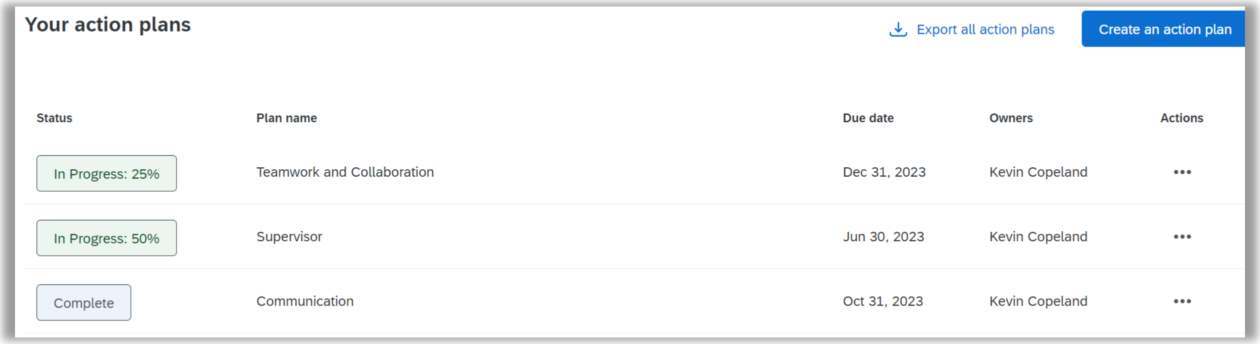




Modify action plans via Qualtrics

- From the [OKSEES dashboard](), select the **Action Plans** icon in the toolbar.
- To edit an existing action plan, hover and select the action plan. Changes are saved automatically.
- To copy or delete an existing action plan, select the ellipsis under the **Actions** column and select **Copy action plan** or **Delete action plan**. Note: unless an action plan was created by mistake, it is not advised to delete action plans, as the content and details within that plan cannot be recovered.

Edit existing action plans

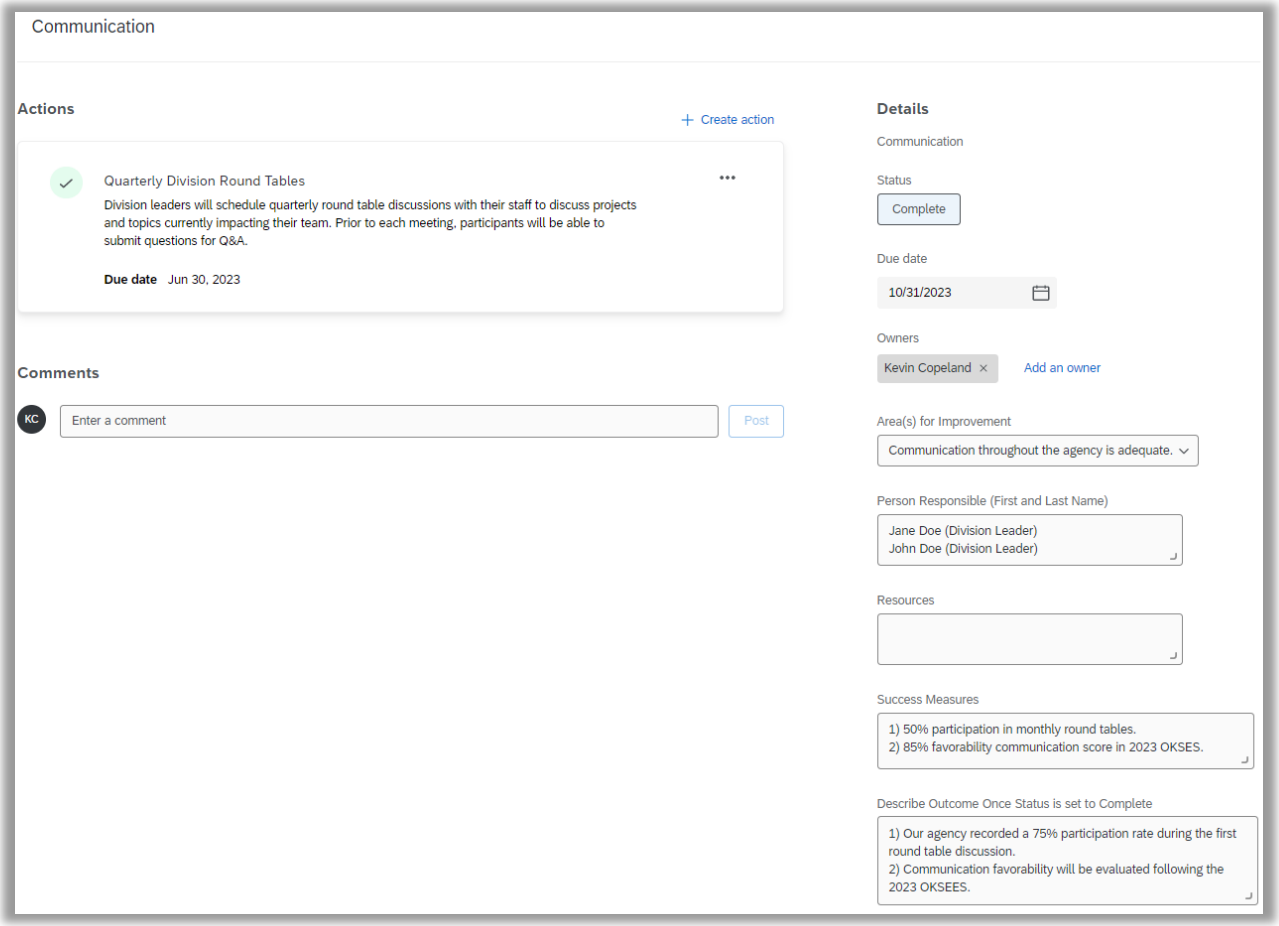


Copy or delete action plans

Modify action plans via Manager Assist

- From the Manager Assist homepage, select the **Plan of action** icon in the toolbar.
- To edit an existing action plan, hover and select the action plan. Changes are saved automatically.
- To copy, export or delete an existing action plan, select the ellipsis under the **Actions** column and choose **Copy Action Plan**, **Export action plan** or **Delete action plan**. Note: unless an action plan was created by mistake, it is not advised to delete action plans, as the content and details within that plan cannot be recovered.

Example of created action plan



Notes

- Link to Qualtrics dashboards: https://omes.co1.qualtrics.com/login?brandId=omes&dashboardId=5bfc22aa046960000da9905f&path=%2Fee%2Fdashboards.
- Link to the Employee Engagement Action Planning Guide: https://app.powerbigov.us/view?r=eyJrIjoiYTRiODg4N2EtYzUwOS00YzkxLThlZTMtNGQ4YjE0ODEwOWQ3IiwidCI6IjlhMzA3ODY0LTNlOTgtNGYwOC1iOTBhLTcyOGI2MmNmMzJjNSJ9.
- The action planning tool is available in OKSEES dashboards beginning in 2021. Use the drop-down bar on the left side of the toolbar to navigate between dashboards.
- All changes made to action plans are saved automatically – there is no save button. Changes cannot be undone; however, they can be edited, copied and deleted.
- Once an action plan is deleted it cannot be recovered.