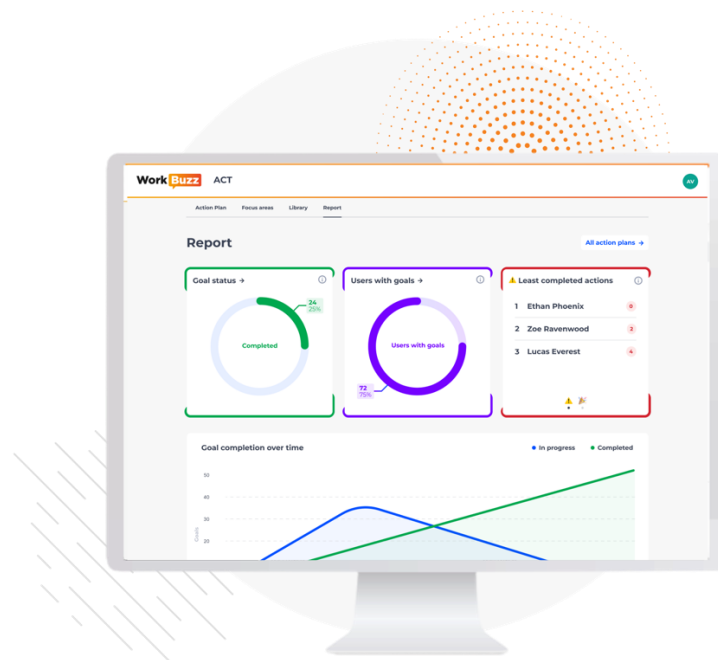


ACT Dashboard & Report

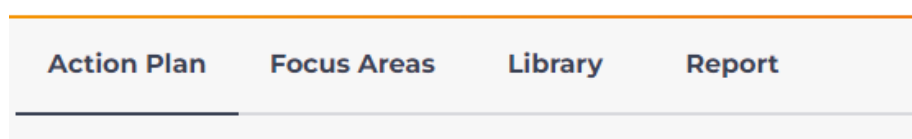
User Guide



There are 4 key areas we will cover on the ACT Dashboard:

1. **Action Plan** – This is where you will build your goals and actions and track progress.
2. **Focus Areas** – This is where the system will recommend you the 3 key focus areas based on your latest survey results.
3. **Library** – This is where our library of actions are stored which will give you some suggestions on what actions you could adopt to achieve your goals.
4. **Report** – This is where you can view the action plans and progress of all managers who have access to ACT.

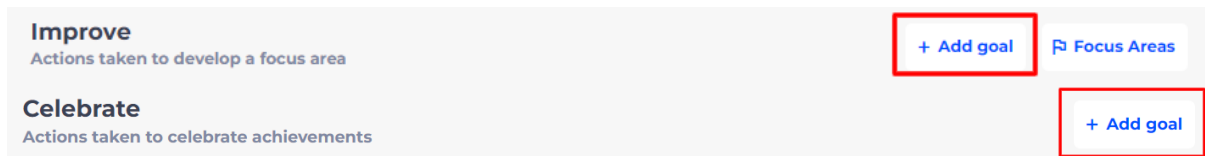
ACT



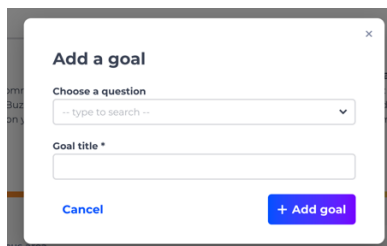
1. Action plan

Adding a goal

To add a goal, to the right of the Improve or Celebrate section, you can click on the “Add goal” button.



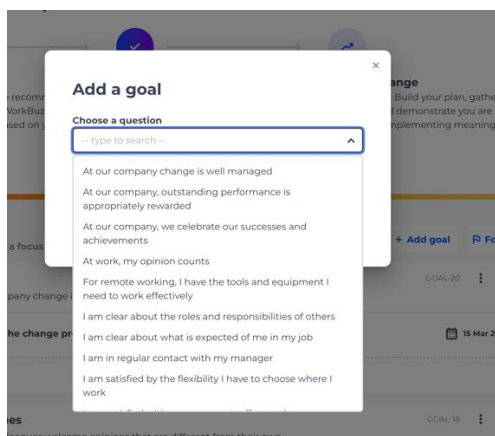
This will open up the modal below.



Click on the dropdown, you can find a list of questions from your last closed Pulse survey.

To add a goal, you can select the question to which the goal will be attached to.

You can also search for the question or by using key words, to filter the relevant question you want the goal assigned to.

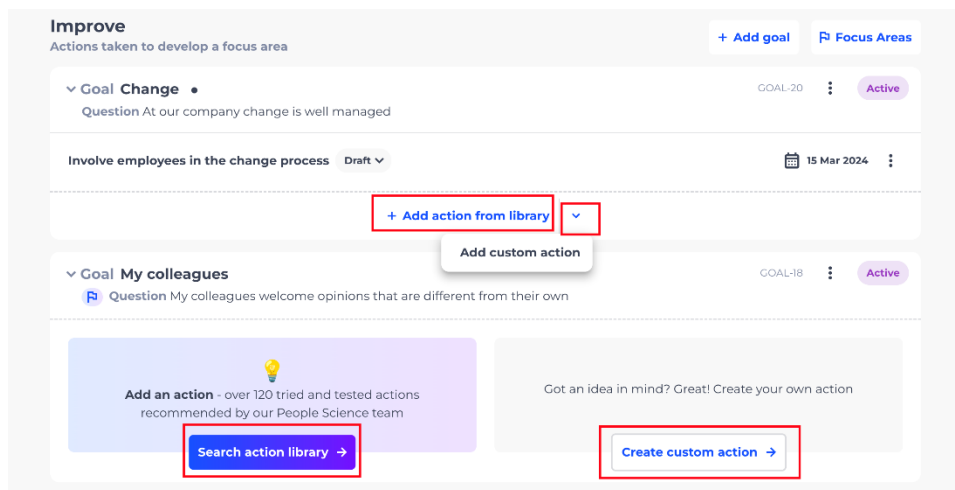


Please note that attaching a question to the goal is not obligatory, but you are required to add a goal title.

Click 'Add' to save goal which you can then view on the Action Plan page.

Adding an action

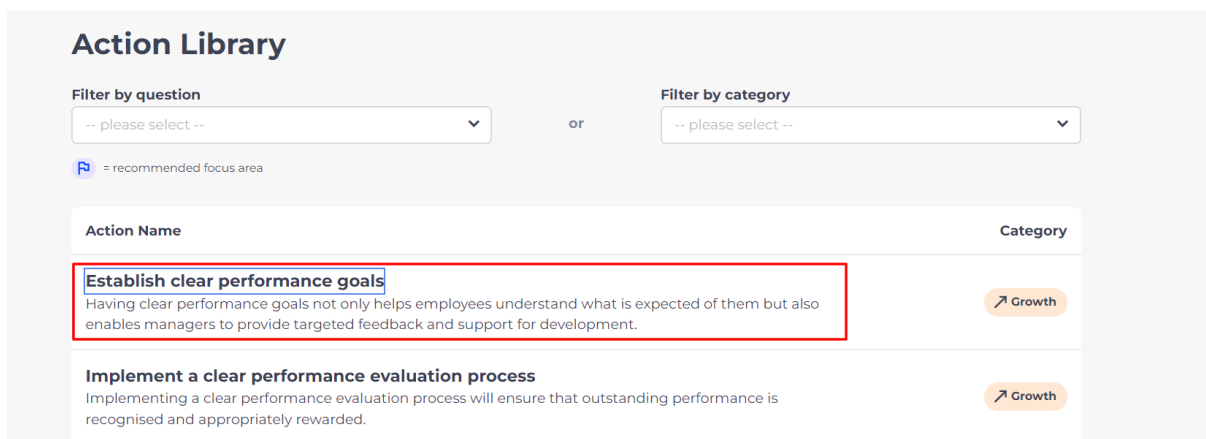
Adding an action is possible from multiple areas on the Action Plan page. Please note that actions can only be added and assigned once a goal has been created.



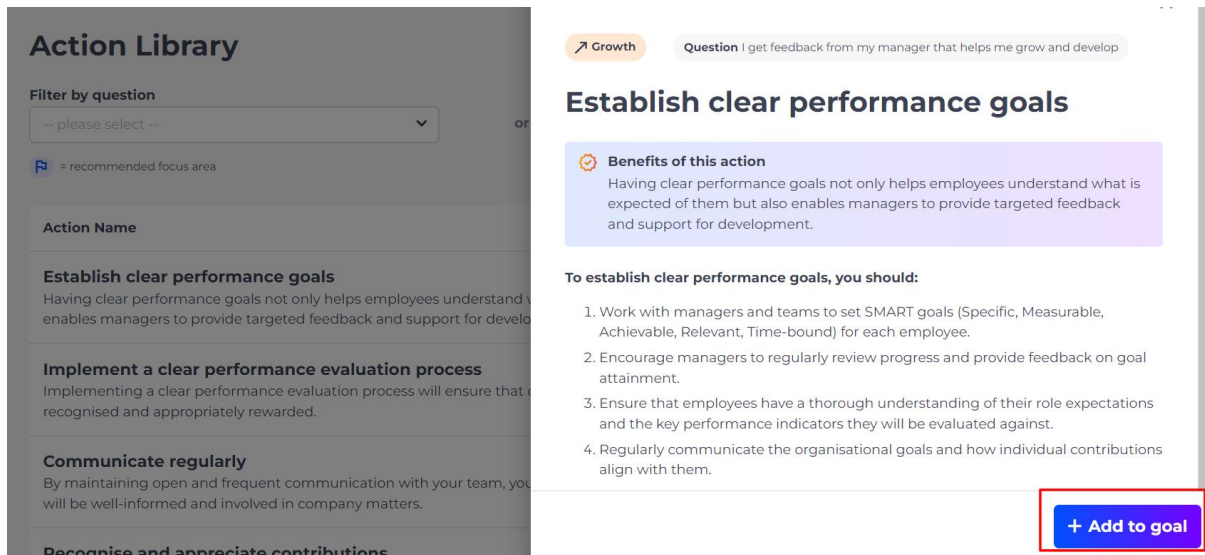
If you have a goal without actions, you will see two options, the “Search action library” and “Create custom action” buttons.

If you use the ‘Search action library’ button beneath the goal, it will take you to the library page with relevant actions already filtered out based on the question the goal is assigned to.

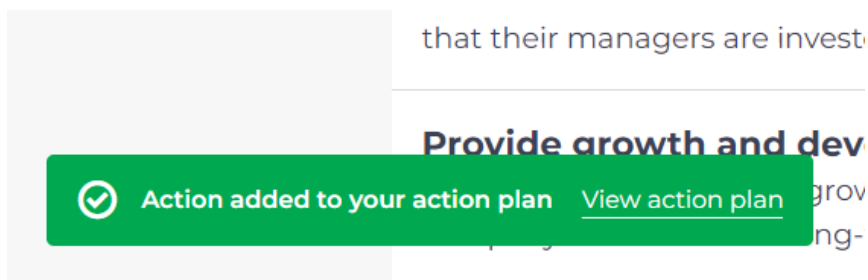
Chose relevant action and a side bar will appear detailing the action.



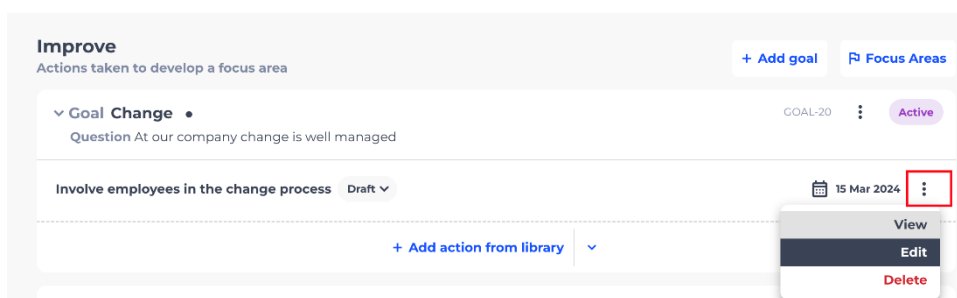
To add the action to the goal, click on the ‘Add to goal’ button, which will assign it to goal. You can now go back to the Action Planning Tab to view the newly added action.



Once successfully added you will get confirmation via a green pop-up message on the bottom left hand corner of the screen.

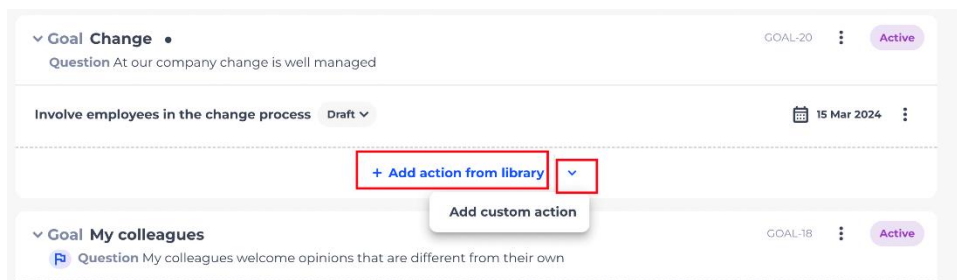


You can edit and adjust the content of the action via the “three dots” menu, and click ‘edit’, as presented below:



The alternative to creating an action via the Action Library is to select the second option which is the “Create custom action” button. This will open a side panel with a blank form for you to complete – such as the due date, action title and the description of the action you want to take.

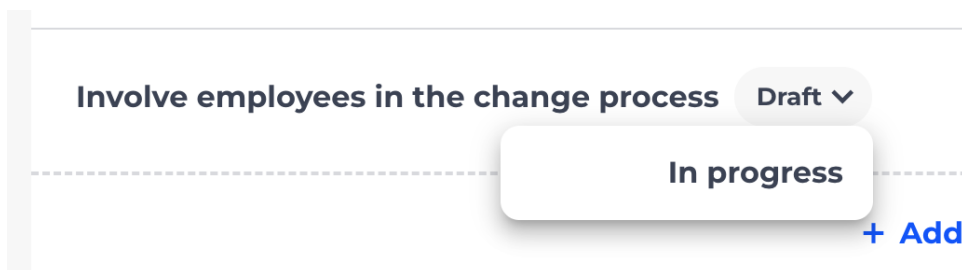
If you already have a goal created, you can add an action beneath the goals, where it says ‘Add action from library’ or click on the drop down beside it and create a custom action.



You will go through the same process when adding action as previously described.

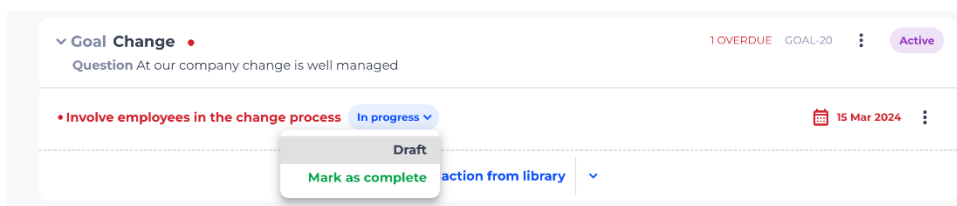
Action statuses

Newly created actions will be added and initially assigned a 'Draft' status. You can change the stage of progress via the drop down, moving it from 'Draft' to 'In Progress'.



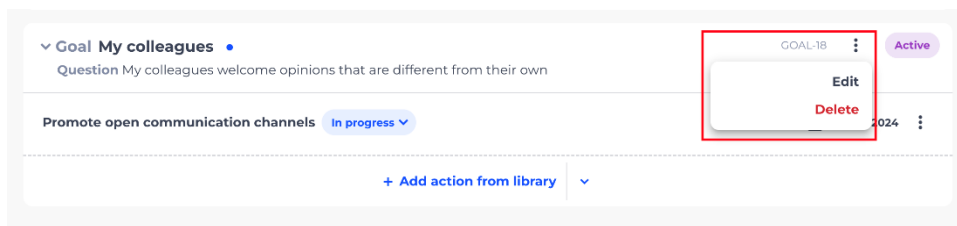
If action is already in progress status, you will then be able to see a new status available for selection which is the 'Mark as complete' status.

If a due date has passed, the action will be highlighted in red and will be marked as overdue.

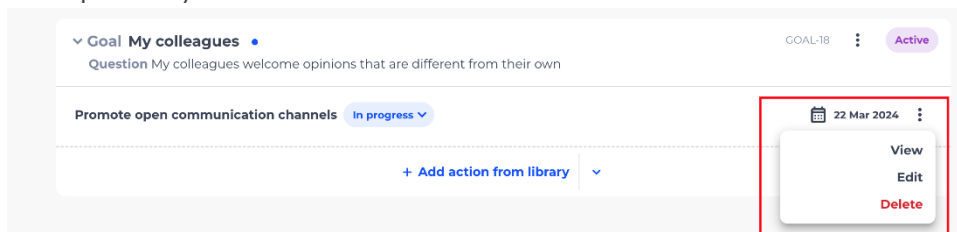


Editing Goals and actions

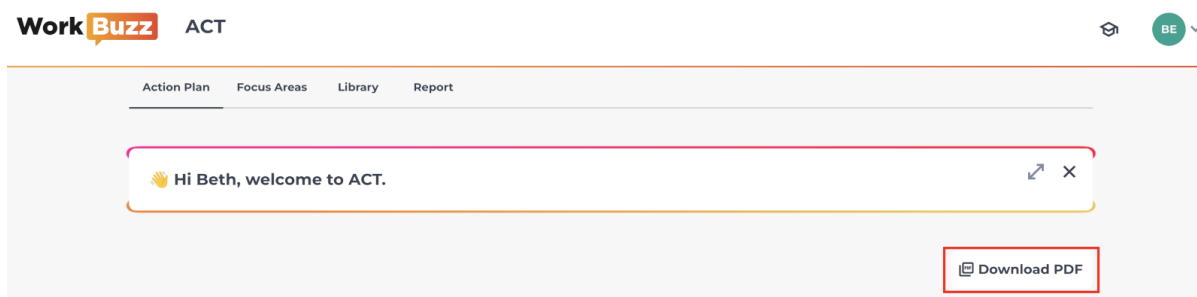
When you need to edit a goal, click on the three dots menu on the right side. You will be able to edit the title of the goal or delete it (if it is not completed)



If you need to edit your actions, click on three dots again and you can select view the details of your action, edit it or delete (if it wasn't completed)



Exporting action plan



When you need to share your action plan or use it in a company presentation, use 'Download PDF' button to generate your goals and actions in one pdf file.

2. Focus area

Work Buzz ACT

Action Plan Focus Areas Library Report

Focus Areas to improve

People Science backed focus areas from your most recently closed Pulse Survey.

Top recommendation

- 1 I receive recognition for good work
+ Add goal
- 2 I understand our company's overall goals
+ Add goal
- 3 ABC will act on the results of this survey to make it a better place to work
+ Add goal

Action Planning with WorkBuzz

What is Action Planning? Work Buzz

About focus areas

Your personalised focus areas are generated by WorkBuzz's People Science algorithms based on high impact, low scoring survey questions and trends vs previous scores.

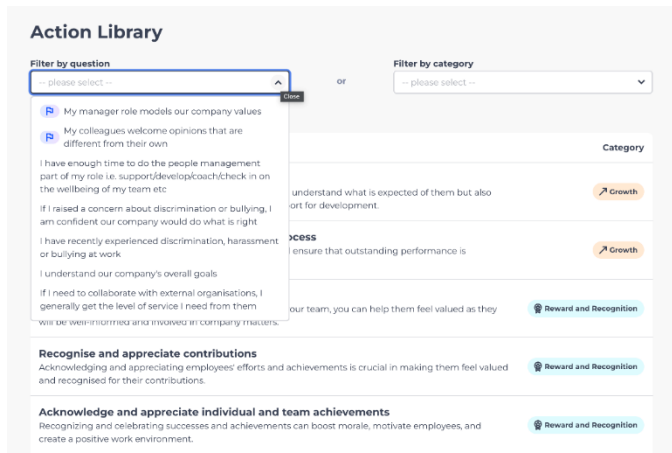
To understand more about why WorkBuzz has made these recommendations please [visit your dashboard](#) and look at the scores for each question.

[How focus areas are generated](#)

On the focus area page, you will find top suggestions given by WorkBuzz, which will lead you to most impactful questions which scored below average. You will find link to deeper explanation how focus areas are calculated.

If you are matrix manager having access to different departments, we won't provide focus area in the system. Reach out your Customer Success Manager to get in separate file, focus area for each department you have access to.

3. Library



On Library page you can search the library to inspire some of the possible actions you may wish to adopt for your own goals.

You can filter by questions (those top marked by a flag, are you focus areas) or you can search by category.

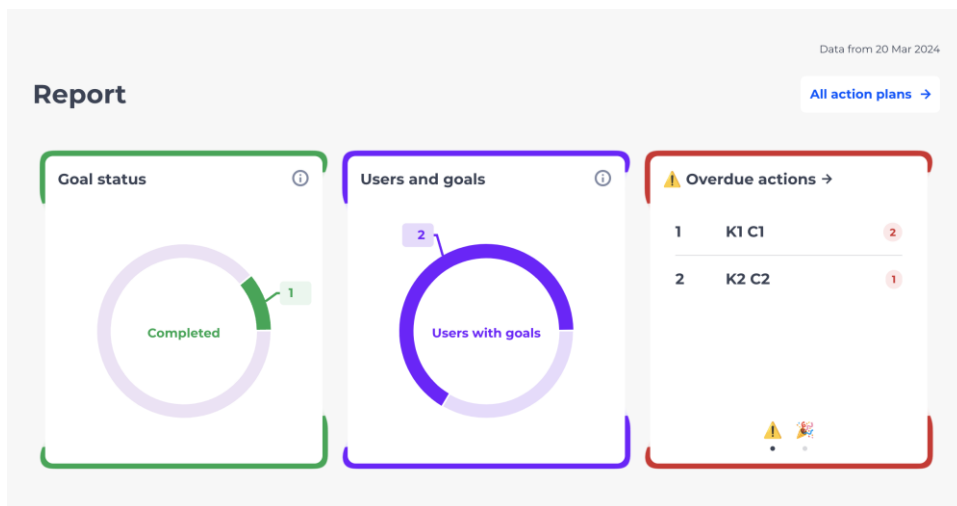
As described previously, you can edit these library action templates once added or you can revert to creating custom actions.

4.Report

On the main page you can see widgets, which will tell you what the progress of Goals completion in your organisation is. Clicking on pie chart you can see numbers of active or completed goals. Goal become active as soon as it is created.

On second widget you see number of managers with goals created or without any goals yet.

Overdue actions widget presents the list of managers who have most overdue or completed actions.



By clicking on 'All action plans' button you will be navigated to a page with table of all managers who have access to ACT and be able to see and overview of goals created and completed and the progress of the actions.

All action plans

A full breakdown of goals and actions for each action plan. Overdue actions are not counted towards the total count.

[Download \(CSV\)](#)

Action Plan	Goals		Actions				Total
	• Active ↓	• Completed	• Draft	• In progress	• Overdue	• Completed	
Angela Tilly R	3	1	1	0	2	2	5
Beth Elfreda R	2	1	1	1	2	2	6
Dawn Smedley	2	0	0	0	1	1	2
Emma Britton	1	0	1	0	0	0	1
Esther Chee	1	0	0	1	0	0	1
Hayley Hambidge	1	2	0	0	0	2	2
Joel Xavier	1	0	0	0	0	1	1
Rick Leixe R	1	1	0	0	3	2	5

You can filter by clicking on the title columns for example you can filter by Alphabetical order, or by the highest numbers of goals created.

Action Plan	Goals		Actions				Total
	• Created ↑	• Completed	• Draft	• In progress	• Overdue	• Completed	
Amber Sherrock	0	0	0	0	0	0	0
Artur Rachwal	49	12	16	1	4	16	37

Action Plan	Goals		Actions				Total
	• Created ↓	• Completed	• Draft	• In progress	• Overdue	• Completed	
Jan 4armed	141	1	1	0	0	1	2
Artur Rachwal	49	12	16	1	4	16	37

Viewing Manager's Goals and Actions

Click on the name of a manager highlighted in blue.

[Action Plan](#) [Focus Areas](#) [Library](#) **[Report](#)**

[← Report / All action plans](#) Last updated: 20 May 2024.

All action plans

A full breakdown of goals and actions for each action plan. Overdue actions are not counted towards the total count. [Download \(CSV\)](#)

Action Plan	Goals		Actions				
	• Active ↓	• Completed	• Draft	• In progress	• Overdue	• Completed	Total
Angela Tilly R	3	1	1	0	2	2	5
Beth Elfreda R	2	1	1	1	2	2	6
Dawn Smedley	2	0	0	0	1	1	2
Emma Britton	1	0	1	0	0	0	1
Esther Chee	1	0	0	1	0	0	1
Hayley Hambidge	1	2	0	0	0	2	2
Joel Xavier	1	0	0	0	0	1	1
Rick Leixe R	1	1	0	0	3	2	5

This will take you onto a new page where you can see the goals and actions of the Manager.

You can close down the panel by clicking close at the top.

Viewing David Ball's action plan Close

Improve
Actions taken to develop a focus area [View focus areas](#)

▼ **Goal Improve Recognition** GOAL-200

[Question](#) I receive recognition for good work

Implement a Recognition Program Completed 29 Feb 2024

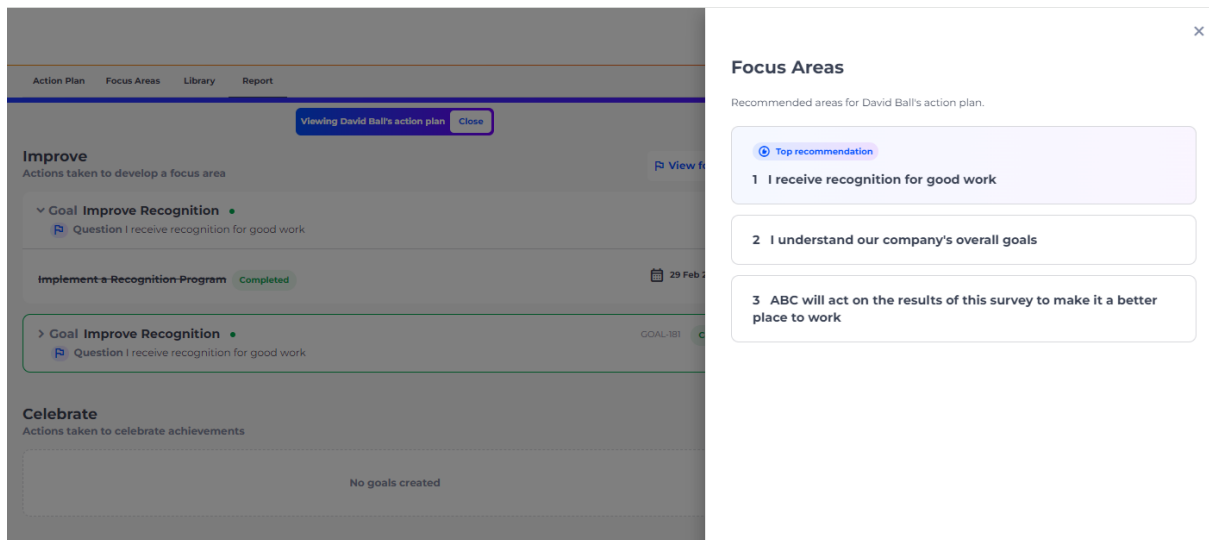
> **Goal Improve Recognition** GOAL-181 Completed

[Question](#) I receive recognition for good work

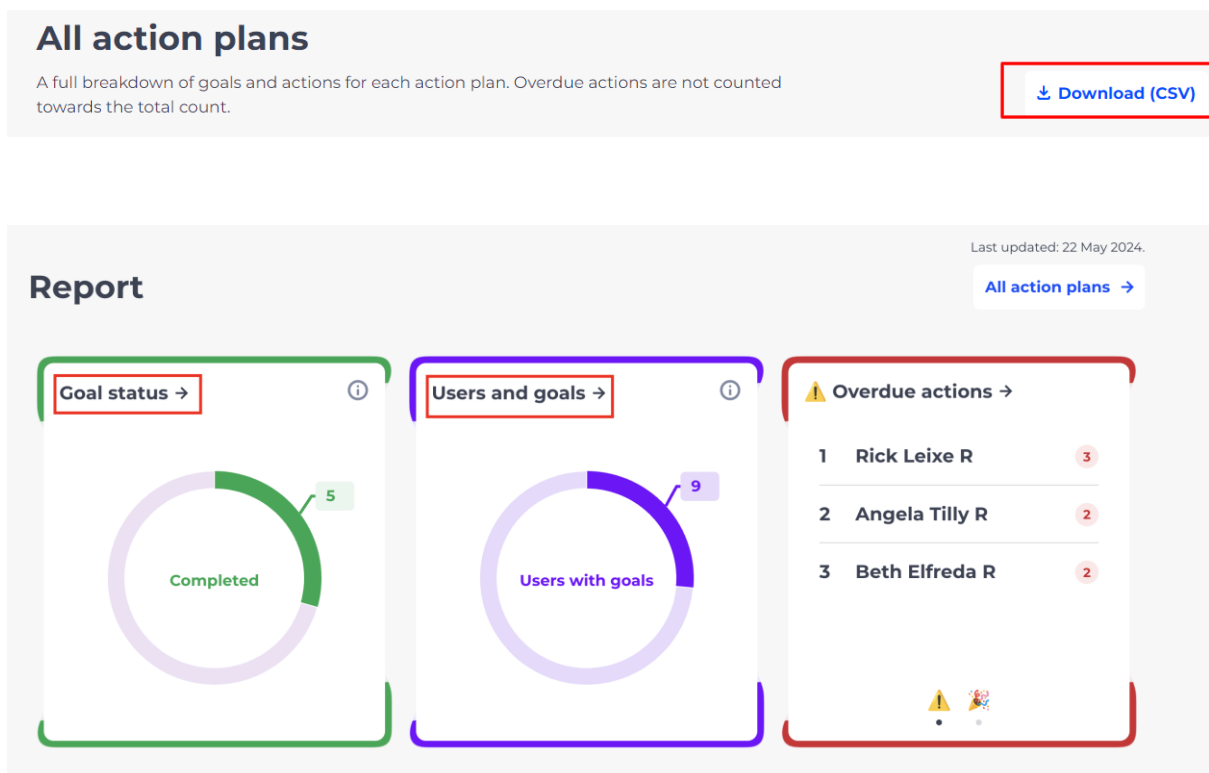
Celebrate
Actions taken to celebrate achievements

No goals created

You can view the focus area but clicking on the top right 'View Focus Area' and this will open a side panel where you can view the Focus area for that manager.



You can download a CSV file from the report page on the top right-hand side if you need the information via excel.



When you click on the Goal status or Users and goals widget title you will be navigated to page with list of all action plans with completion details. You can find here active, completed goals and percentage of completion for every action plan. Page details may also be exported to CSV file.

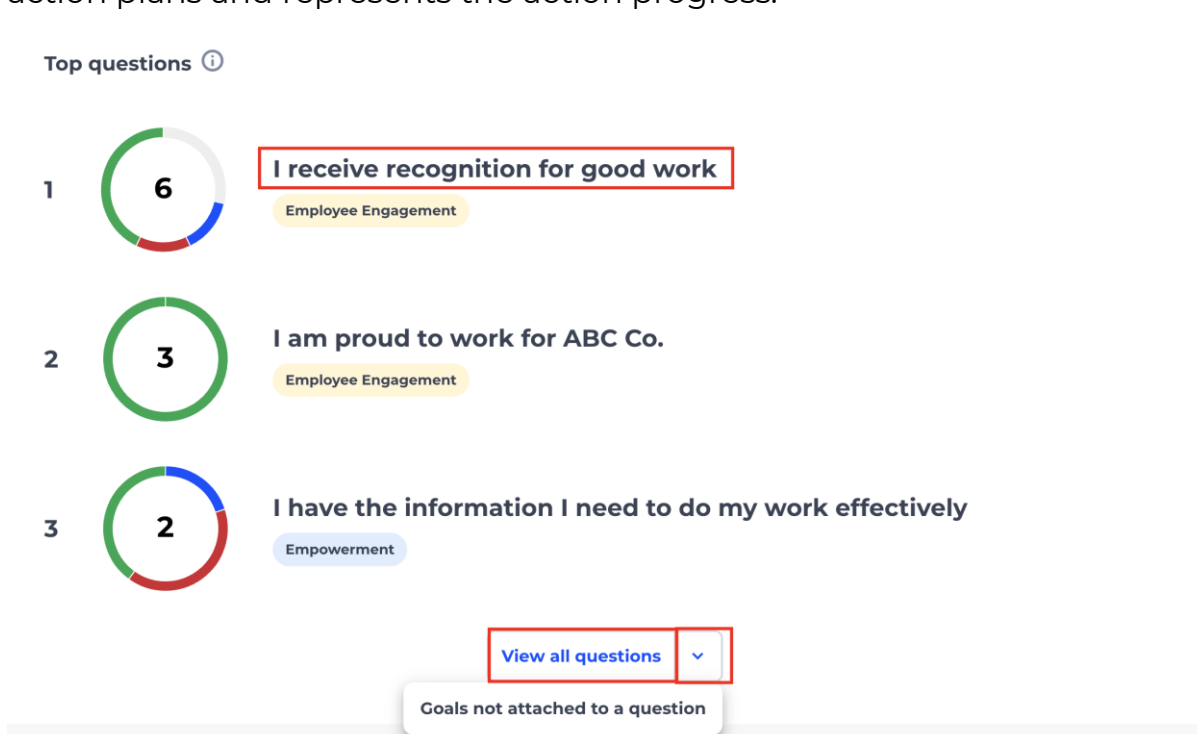
[Action Plan](#)
[Focus Areas](#)
[Library](#)
[Report](#)

[← Report / Goal status](#)
Last updated: 22 May 2024.

Goal status [Download \(CSV\)](#)

Action plan	Active goals	Goals completed	Goal count	% goals completed ↓
Joel Xavier User	0	1	1	100%
Kate Rad Cor	0	1	1	100%
David Ball	1	1	2	50%

On the bottom part of the Report page you can find Top questions widget. This section highlights the most popular question which is being worked on. The circle on the side shows number of times a question appears across action plans and represents the action progress.



If you are interested in broader view, click on 'View all questions' button on the bottom to open 'All questions' page.

[Action Plan](#)
[Focus Areas](#)
[Library](#)
[Report](#)

[← Report](#) / All questions
 Last updated: 20 May 2024.

All questions

[Download \(CSV\)](#)

Question	Category	Count	% goals completed
I receive recognition for good work	Employee Engagement	6	34%
I am proud to work for ABC Co.	Employee Engagement	3	34%
I have the information I need to do my work effectively	Empowerment	2	50%
I understand our company's overall goals	Leadership	1	0%
I would recommend ABC Co. as a great place to work	Employee Engagement	1	0%
I am motivated to do my best work	Employee Engagement	1	100%
My manager helps me to understand how change affects me	Manager	1	0%
ABC will act on the results of this survey to make it a better place to work	Leadership	1	0%
I understand our company values	Purpose	1	0%

On this page you can see more details about all your active questions. You can export data to CSV file. By clicking on 'Report' you will be navigated to the previous main Report page.

When clicking on question name from Report page or in 'Top questions' widget you will be navigated to 'Question details' page.

Top questions ⓘ



[Action Plan](#)
[Focus Areas](#)
[Library](#)
[Report](#)

[← Report / All questions](#)
Last updated: 20 May 2024.

All questions

[Download \(CSV\)](#)

Question	Category	Count ↓	% goals completed
I receive recognition for good work	Employee Engagement	6	34%
I am proud to work for ABC Co.	Employee Engagement	3	34%

Question details page will show you all action plans where goals with the question attached was created. You can track the actions progress or export data to CSV file.

[Action Plan](#)
[Focus Areas](#)
[Library](#)
[Report](#)

[← Report / Action Plans by question](#)
Last updated: 20 May 2024.

I receive recognition for good work Employee Engagement

[Download \(CSV\)](#)

Action Plan ↑	Goal	Goal Status	Action Statuses
Dawn Smedley	Implement Thank you Fridays	Active	<div style="width: 50%;"><div style="width: 50%;"></div></div> Overdue - 50% (1/2)
Emma Britton	Set up recognition platform	Active	<div style="width: 0%;"></div>
Esther Chee	Improving team recognition	Active	<div style="width: 0%;"></div>
Hayley Hambidge	Good Work	Completed	<div style="width: 100%;"></div>
Hayley Hambidge	Improve Regognition across the team	Completed	<div style="width: 100%;"></div>
Ross Duncan	recognise team more	Active	<div style="width: 0%;"></div>

Action Plan	Goal Title	Goal Completed	Actions Draft	Actions In Progress	Actions Completed	Actions Overdue	Actions Total
Dawn Smedley	Implement Thank you Fridays	No	0	0	1	1	2
Ross Duncan	recognise team more	No	1	0	0	0	1
Esther Chee	Improving team recognition	No	0	1	0	0	1
Hayley Hambidge	Good Work	Yes	0	0	1	0	1
Emma Britton	Set up recognition platform	No	1	0	0	0	1
Hayley Hambidge	Improve Regognition across the team	Yes	0	0	1	0	1

If you are looking for the goals without any question attached to, chose dropdown on 'View all questions' button and you will be navigated to the proper page.

3



I have the information I need to do my work effectively

Empowerment

[View all questions](#)

Goals not attached to a question

