Actions

08/21/2024 2:08 pm CDT

Overview

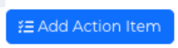
- Actions are related to specific Agile Outcomes or Agile Capabilities
- Actions are used to track impediments as well as improvement items
- Action items can be created and viewed from multiple locations with P2A Navigator

Key User Interface Elements

Creating Action Items

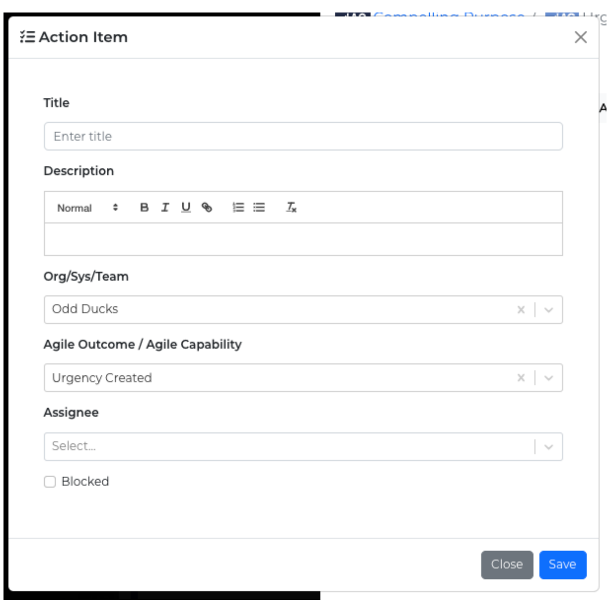
Action items can be created from multiple locations within P2ANav (e.g., Prioritization, Capabilities, Map, Dashboard).

Look for the following user interface element:

- The add Action Item **icon**:
- The add Action Item **button**: 

- The "+" button: 

FIll out the fields in the **Action Item** pop-up and click Save.



Note:

- The only required field is **Title**.
- All other fields are optional and can be added or edited later.
- P2ANav will pre-populate fields with data if it is known based on where you launched the "add

action item" (e.g., Team name, Outcome, Capability).
- **Assignee** can be added from existing names via the drop-down menu; new assignees can be created on the fly by simply typing out a name; the assignee field will accept multiple names.
- Check **Blocked** to turn on a visual indicator on the Action Items board.

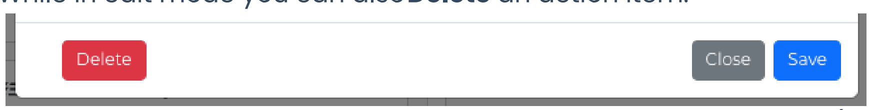
Managing Action Items

Action Kanban

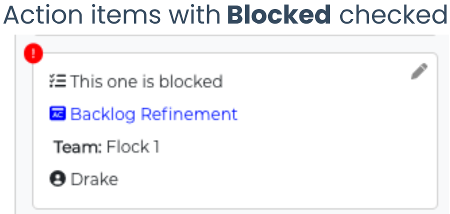
Click the **Actions** menu link to access P2ANav's visual board (kanban).
- **Filter** the kanban board by selecting one or more criteria:

- Column titles will reflect the number of items in that workflow status, based on the filtered display

- View/Edit details of an action item card by clicking the pencil icon.
  - Clicking on the pencil icon also puts you in action item edit mode
  - Click **Save** to keep changes,
  - **Close** will discard changes.
  - While in edit mode you can also **Delete** an action item.



- Drag and drop action items horizontally to change the workflow stage (Backlog, Ready, In Progress, Done).
- Drag and drop action items vertically to change the stack ranking (priority) in a particular workflow column.
- Action items with **Blocked** checked will display with an indicator

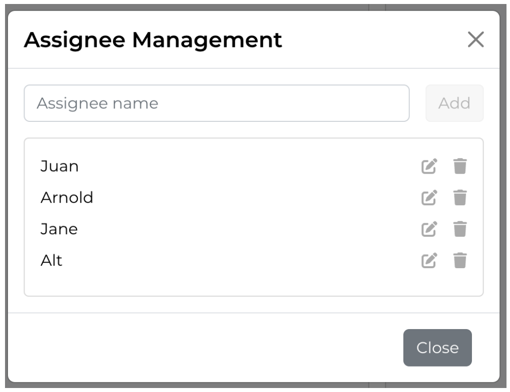


- To block/unblock, click the pencil icon, update the checkbox, and then **Save**

Managing Defined Assignees

The list of assignees defined can be configured by clicking the icon next to the Assignee title in the filters section of the Actions board.

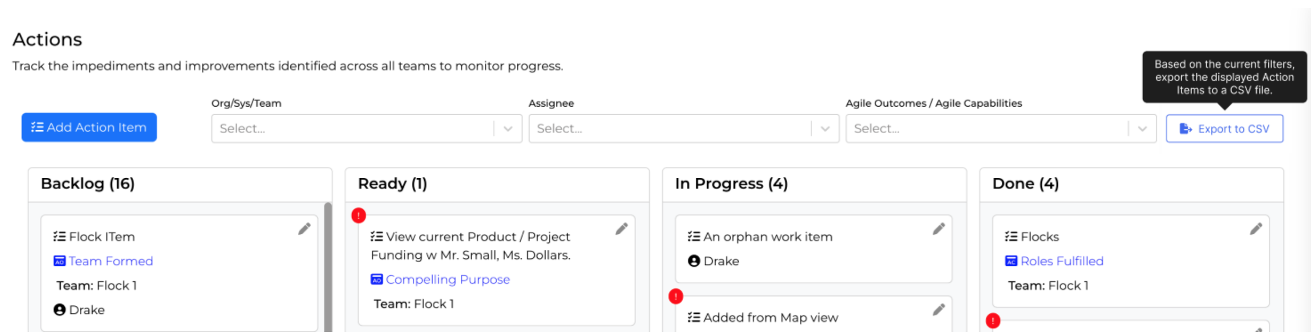
This will open a modal that provides access to adding, renaming, and deleting assignees.



Exporting Action Items

Use the **Export to CSV** button to generate and download action item data based using your current filter settings.

You can then use the CSV to sort, pivot, and more!

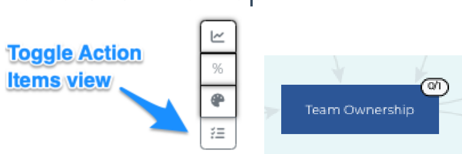


Accessing Action Backlogs from other P2A Screens

Map View of Action Items

P2ANav's Map view can be used to display and access Action Items associated with Agile Outcomes and Agile Capabilities.

- Click the Toggle Action Items setting at the right of the map to display the action item bubble indicator on the map:



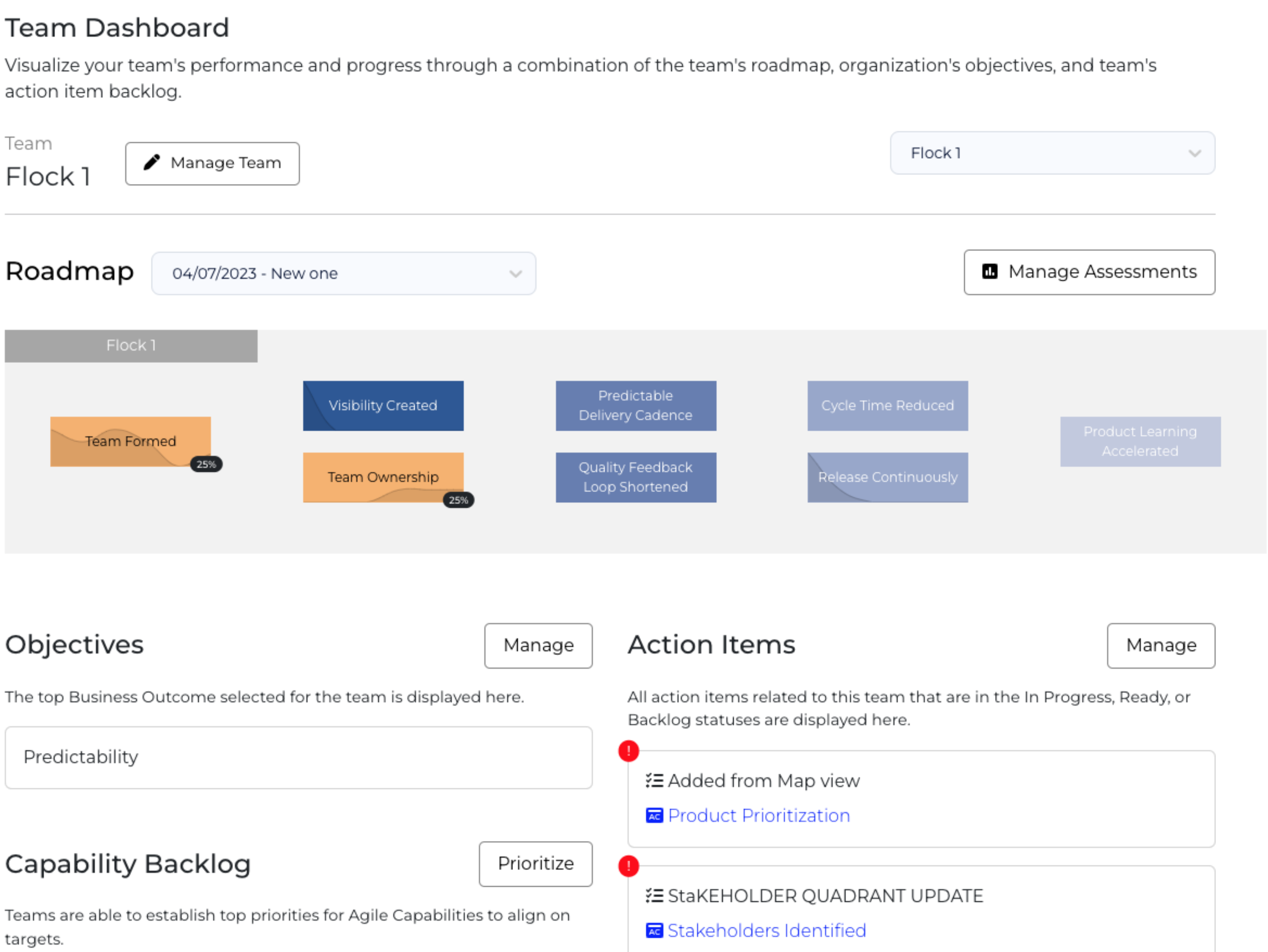
- Then click on a "bubble" to access a side bar of associated Action Items.

!	Work Item	Agile Capability	Assignee	Status
	Something from progress view	Clear Team Purpose		BACKLOG
	articulate the value their team is chartered to provide number 2	Clear Team Purpose		BACKLOG
	Added via map	Clear Team Purpose		READY
!	StaKEHOLDER QUADRANT UPDATE	Stakeholders Identified		READY

- From the action sidebar, you can:
    - Update status (workflow state)
    - Click on an action item to view/edit details

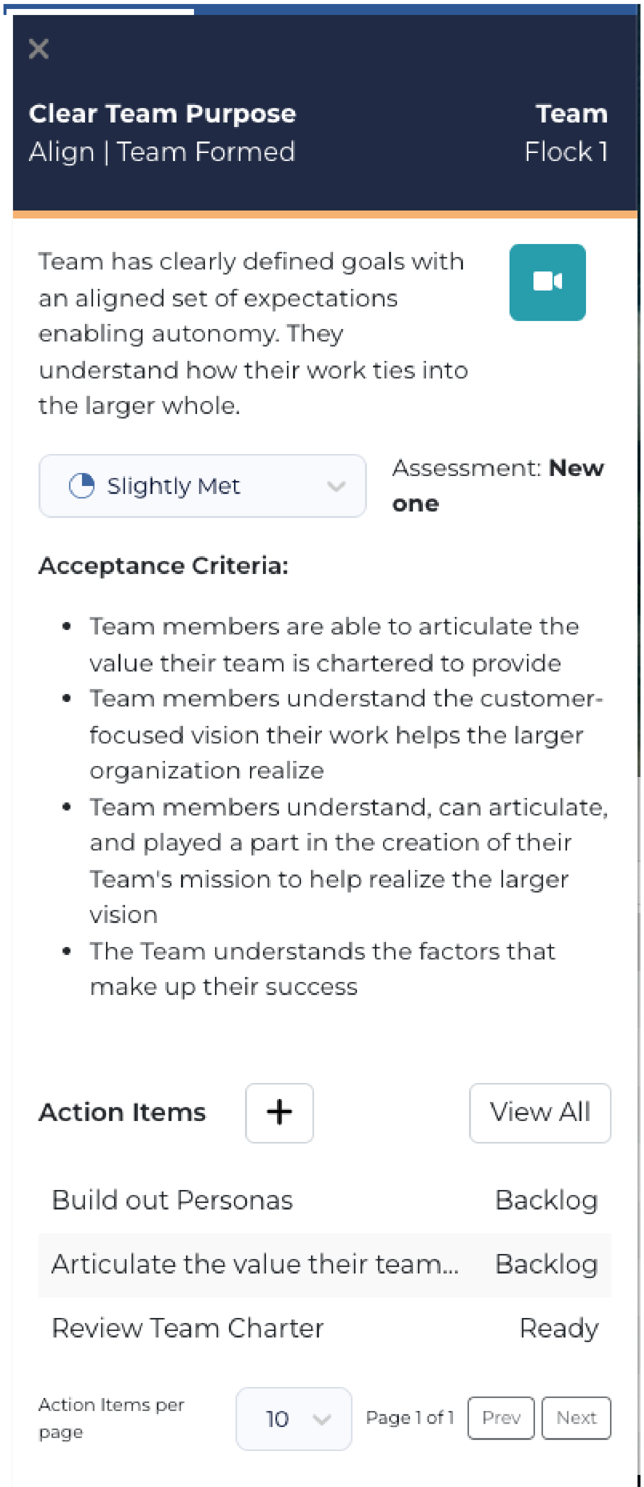
Dashboard View of Action Items

The Dashboard provides a summary of an action item backlog based on the selected view: Org, Sys, Team:



Prioritization and Capabilities Heat Map Views of Action Items

Clicking on an Agile Capability from the Prioritization and Capabilites views will open a sidebar that displays the action items associated with that capability.



Note: Due to software updates over time, there may be variations between screenshots, icons, buttons, and navigational elements in our online support documents and the Path the Agility Navigator platform

