

Working with Actions

08/08/2023 8:24 am 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

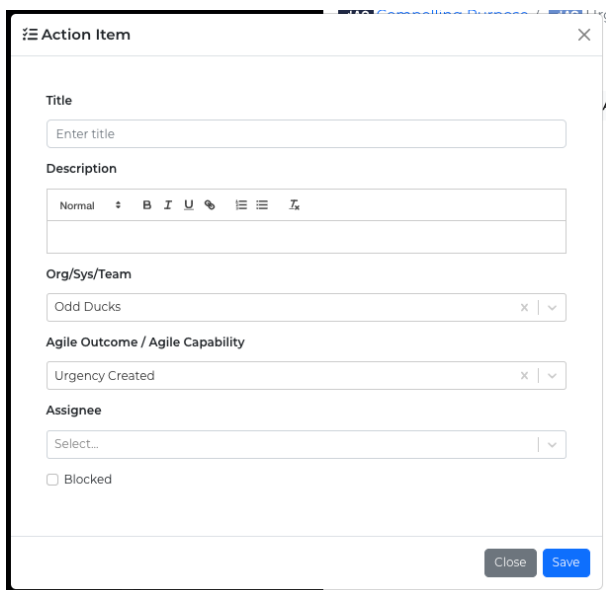
Creating Action Items

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.



The screenshot shows a pop-up window titled "Action Item" with a close button (X) in the top right corner. The form contains the following fields and options:

- Title**: A text input field with the placeholder "Enter title".
- Description**: A rich text editor with a toolbar containing "Normal", "B", "I", "U", "Link", "List", and "Image" icons.
- Org/Sys/Team**: A dropdown menu with "Odd Ducks" selected and a close button (X).
- Agile Outcome / Agile Capability**: A dropdown menu with "Urgency Created" selected and a close button (X).
- Assignee**: A dropdown menu with "Select..." selected and a close button (X).
- Blocked**: A checkbox labeled "Blocked".

At the bottom right of the form, there are two buttons: "Close" and "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:




Org/Sys/Team Assignee  Agile Outcomes / Agile Capabilities

Select... Select... Select...

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




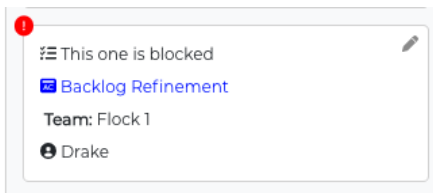
In Progress (1)



- 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.



Delete Close Save


- 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 



 This one is blocked 

Backlog Refinement

Team: Flock 1

 Drake

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

Managing Defined Assignees

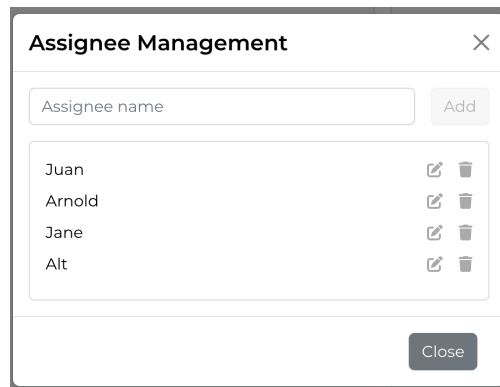
The list of assignees defined can be configured by clicking the icon next to the Assignee title in the filters section of the Actions board.



Assignee 

Select... 

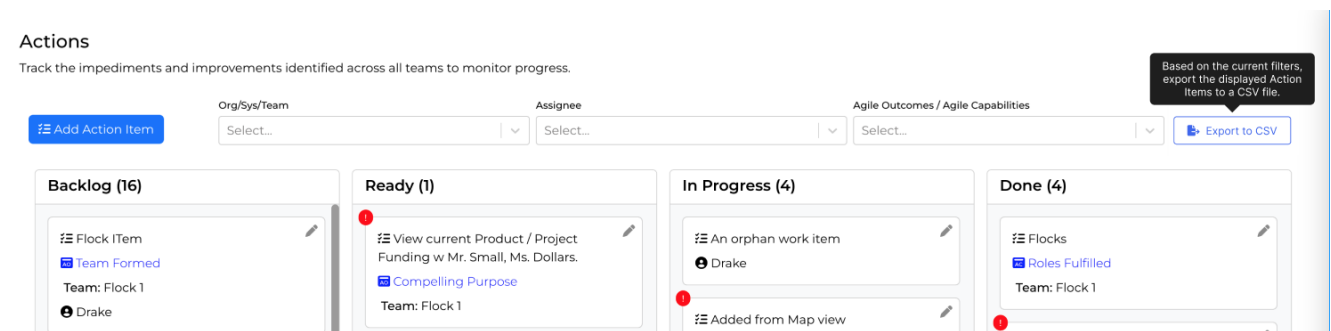
This will open a modal that provides access to adding, renaming, and deleting assignees.



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!

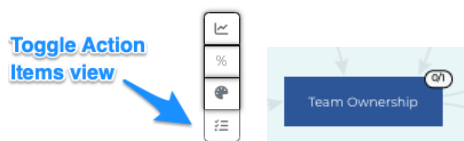


Accessing Action Backlogs from other P2A Screens

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

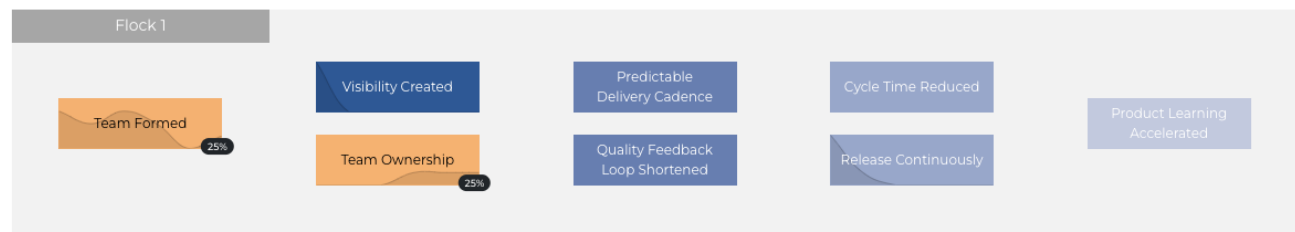
The [Dashboard](#) provides a summary of an action item backlog based on the selected view: Org, Sys, Team:

Team Dashboard

Visualize your team's performance and progress through a combination of the team's roadmap, organization's objectives, and team's action item backlog.

Team
Flock 1 Manage Team Flock 1 ▾

Roadmap 04/07/2023 - New one ▾ Manage Assessments



Objectives

Manage

The top Business Outcome selected for the team is displayed here.

Predictability

Action Items

Manage

All action items related to this team that are in the In Progress, Ready, or Backlog statuses are displayed here.

! [Added from Map view](#)
[Product Prioritization](#)

Capability Backlog

Prioritize

Teams are able to establish top priorities for Agile Capabilities to align on targets.

! [StakeHOLDER QUADRANT UPDATE](#)
[Stakeholders Identified](#)

Prioritization and Capabilities Heat Map Views of Action Items

Clicking on an Agile Capability from the [Prioritization](#) and [Capabilities](#) views will open a sidebar that displays the action items associated with that capability.


✕

Clear Team Purpose

Align | Team Formed

Team
Flock 1

Team has clearly defined goals with an aligned set of expectations enabling autonomy. They understand how their work ties into the larger whole.



Slightly Met Assessment: **New one**


Acceptance Criteria:

- Team members are able to articulate the value their team is chartered to provide
- Team members understand the customer-focused vision their work helps the larger organization realize
- Team members understand, can articulate, and played a part in the creation of their Team's mission to help realize the larger vision
- The Team understands the factors that make up their success

Action Items + View All

Build out Personas	Backlog
Articulate the value their team...	Backlog
Review Team Charter	Ready

Action Items per page 10 Page 1 of 1 Prev Next

 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
