

# Working with Actions

08/08/2023 8:24 am CDT

## Overview



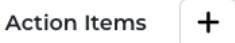
- Actions are related to specific Agile Outcomes or Agile Capabilities
- Actions are used to track impediments as well as improvement items
- Action items can be created and viewed from multiple locations with P2A Navigator

## Key User Interface Elements

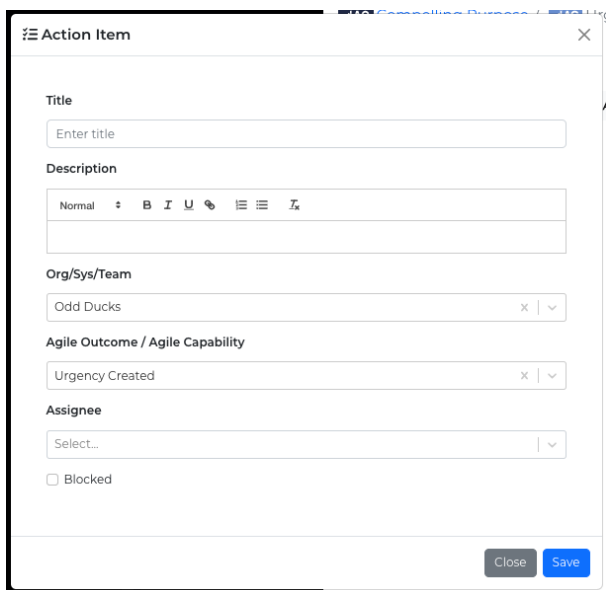
### Creating Action Items

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 (X) button.
- Agile Outcome / Agile Capability**: A dropdown menu with "Urgency Created" selected and a close (X) button.
- Assignee**: A dropdown menu with "Select..." selected and a close (X) button.
- 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




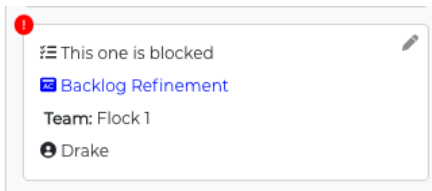
In Progress (1)



- 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

## 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!

## Actions

Track the impediments and improvements identified across all teams to monitor progress.

Org/Sys/Team: Select... Assignee: Select... Agile Outcomes / Agile Capabilities: Select... Export to CSV

- Backlog (16)**
  - Flock Item
  - Team Formed
  - Team: Flock 1
  - Drake
- Ready (1)**
  - View current Product / Project Funding w Mr. Small, Ms. Dollars.
  - Compelling Purpose
  - Team: Flock 1
- In Progress (4)**
  - An orphan work item
  - Drake
  - Added from Map view
- Done (4)**
  - Flocks
  - Roles Fulfilled
  - Team: Flock 1

Based on the current filters, export the displayed Action Items to a CSV file.

# 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 view** 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
	<a href="#">Something from progress view</a>	Clear Team Purpose		BACKLOG
	<a href="#">articulate the value their team is chartered to provide number 2</a>	Clear Team Purpose		BACKLOG
	<a href="#">Added via map</a>	Clear Team Purpose		READY
!	<a href="#">Stakeholder Quadrant Update</a>	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

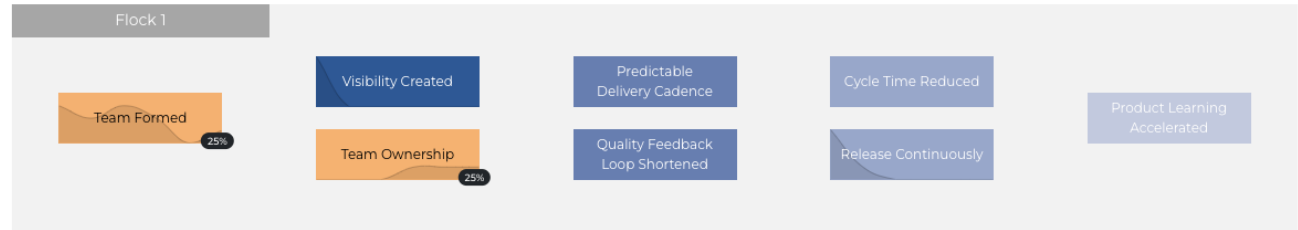
Manage Team

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.

1

Added from Map view

[Product Prioritization](#)

1

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

