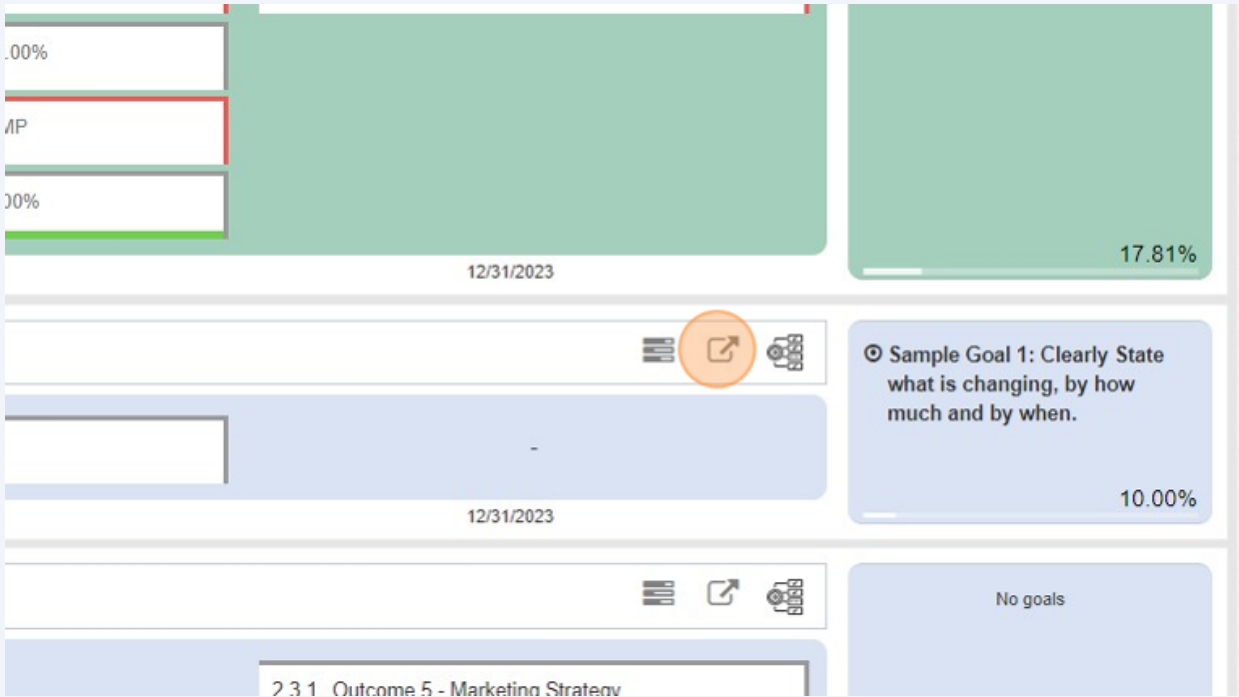


# Accessing Project Details through the VN Chart

This guide provides step-by-step instructions on how to access and edit the strategic initiative project details through the VN Chart View. By following these steps, users will be able to navigate to project details, view project history, and update important information.

**1** Click the highlighted button to open a pop-up box of the project details.



2 On the Information tab, you can edit the title, description, start and due dates.

The screenshot shows the 'Vision Navigation' interface. On the left, a dashboard displays several outcome series: 2.1.1 Linked Outcome Series - MP, 100.00%; 2.1.2 Linked Outcome Series 2 - MP, 50.00%; 2.1.3 Sample Outcome 3 - DC, 10.00%; 2.1.4 Linked Outcome Series 3 - MP; and 2.1.5 Sample Outcome - PP, 100.00%. Below these are dates 06/30/2023 and 09/30/2023. Further down, another outcome series 2.2.1 Outcome 1 - PP, 10.00% is shown with dates 06/30/2023 and 09/30/2023. On the right, an 'Information' modal window is open, showing fields for Title (Sample Strategic Initiative), Description (Insert commentary on the strategic initiative - why is it important, how will it improve your organization and help you reach your vision.), Start Date (Not Specified), Due Date (06/01/2023), and Percentage (10). The Status section shows five icons: a blue circle with a white checkmark, a green circle with a white checkmark, an orange circle with a white checkmark (highlighted by a red circle), a yellow circle with a white exclamation mark, and a red circle with a white exclamation mark. The Owners field is 'Set ownership'. The Attachments section says 'No attachments found, click the add icon to upload attachments.' The Comments section has a text input field 'Leave a comment...' and an 'ADD' button.

3 You can also, update percent complete and status.

This is a close-up of the 'Information' modal window. The Title field contains 'Sample Strategic Initiative'. The Description field contains 'Insert commentary on the strategic initiative - why is it important, how will it improve your organization and help you reach your vision.'. The Start Date field is '01/01/2023', the Due Date field is '06/01/2023', and the Percentage field is '10'. The Status section shows five icons: a blue circle with a white checkmark, a green circle with a white checkmark, an orange circle with a white checkmark (highlighted by a red circle), a yellow circle with a white exclamation mark, and a red circle with a white exclamation mark. The Owners field is 'Set ownership'. The Attachments section says 'No attachments found, click the add icon to upload attachments.' The Comments section has a text input field 'Leave a comment...' and an 'ADD' button.

4

To set or change project owners click in the Owners text box and start typing the owners name, or select from the drop down menu.

The screenshot shows a project management interface with a task list on the left and a pop-up form on the right. The task list includes items like '2.1.2 Linked Outcome Series 2 - MP, 50.00%' and '2.1.3 Sample Outcome 3 - DC, 10.00%'. The pop-up form has a 'Description' field with placeholder text, 'Start Date' (01/01/2023), 'Due Date' (06/01/2023), and 'Percentage' (10). The 'Status' field has several icons. The 'Owners' field is highlighted with a red circle, and a dropdown menu is open showing a list of names: Bill Dann, Chris Dykes, Doug Johnson, Drew Cason, Erin Bellotte, John Gregoire, and Marketing PGS. The 'Comments' field is also visible.

5

Clicking on History will show all the updates made to the project, while clicking on Information will take you back to the project details screen of the pop-up.

The screenshot shows the same project management interface as in the previous image, but with a pop-up form open. The pop-up form has two tabs: 'Information' and 'History'. The 'History' tab is active, and a list of updates is shown. The updates include: 'You assigned Sample Strategic Initiative to Erin Bellotte' (Today), 'You changed Sample Strategic Initiative status from Clear Status to On Track' (Today), 'You set start date for Sample Strategic Initiative to 01/01/2023' (Today), 'You changed Sample Strategic Initiative description from no description to Insert commentary on the strategic initiative - why is it important, how will it improve your ...' (Today), 'You added a task' (01-Jun), and 'You set due date for Sample Strategic Initiative to 06/01/2023' (01-Jun). The 'Information' tab is highlighted with a red circle.

6

Click "x" to close the pop-up box, changes will be automatically saved.

The screenshot shows a software interface with a pop-up dialog box titled "Information" and "History" tabs. The dialog box contains the following fields and options:

- Title:** Sample Strategic Initiative
- Description:** Insert commentary on the strategic initiative - why is it important, how will it improve your organization and help you reach your vision.
- Start Date:** 01/01/2023
- Due Date:** 06/01/2023
- Percentage:** 10
- Status:** A row of five status icons: a grey circle with a checkmark, a green circle with a checkmark, a green circle with a checkmark and a plus sign, a yellow circle with an exclamation mark, and a red circle with an exclamation mark.
- Owners:** Erin Bellotte
- Attachments:** No attachments found, click the add icon to upload attachments. (A blue plus icon is visible on the right).
- Comments:** Leave a comment... (A text input field with a small icon on the right) and an "ADD" button.

In the background, a sidebar menu is visible with items like "come Series 2 - MP, 50.00%", "come 3 - DC, 10.00%", "come Series 3 - MP", and "come - PP, 100.00%". A "2.1.6 Link" is also visible.