

Adding A Strategic Initiative or Internal Improvement

From the chart view, you can add additional strategic initiatives or internal improvement projects

- 1 Click on the Edit button in the top left corner of the chart.

The screenshot displays a software interface for managing vision navigation. On the left is a dark blue sidebar with the following menu items: 'PGS Vision Navigation Sample', 'Workspace' (containing 'Sample VN', 'Vision Navigation Chart', 'My Plan', 'Team Plans', 'Toolbox', 'Scoreboard'), and 'Personal Tools' (containing 'My Profile', 'My Tasks', 'Professional Development', 'Roles & Responsibilities'). The main content area is titled 'Showing vision chart for 2022' and features a '1.0 Internal Improvements' section highlighted with a yellow circle. Below this, there is a '1.1 Customer Ordering System - JG' section. A chart area shows a green bar for '1.1.1 Employees surveyed re. strengths & weaknesses of customer ordering system - BD, 25.00%' with a date of '03/31/2022'. To the right, a list of items includes '1.1.2 Target markets for markets defined - I', '1.1.3 Customers surveyed re. needs & wan ordering system - BD', and '1.1.4 A model ordering system(s) reviewed performance defined - BD', with a date of '06/30/2022'.

2 Click "Add Project"

The screenshot shows the PGS Vision Navigation interface. On the left is a dark blue sidebar with a menu including 'Workspace', 'Sample VN', 'Vision Navigation Chart', 'My Plan', 'Team Plans', 'Toolbox', 'Scoreboard', 'Personal Tools', 'My Profile', 'My Tasks', 'Professional Development', and 'Roles & Responsibilities'. The main content area is titled 'Showing vision chart for 2022' and displays a 'Customer Ordering System - JG' chart. A yellow callout bubble with a plus sign and the text '+ Add Project' is positioned over the chart area. The chart itself is divided into sections: 1.1.1 (Employees surveyed re. strengths & weaknesses of customer ordering system - BD, 25.00%), 1.1.2 (Target markets for markets defined - BD), 1.1.3 (Customers surveyed re. needs & wants of customer ordering system - BD), and 1.1.4 (A model ordering system(s) reviewed performance defined - BD). The x-axis shows dates 03/31/2022 and 06/30/2022.

3 Enter the name of the Strategic Initiative or Internal Improvement Plan.

The screenshot shows the same PGS Vision Navigation interface as in step 2, but with a 'Project Name' dialog box open. The dialog box has a title bar 'Vision Navigation ®' and a close button 'X'. It contains a text input field for 'Project Name:' and an 'ADD' button. The background chart is partially visible, showing the same sections as in step 2. The x-axis shows dates 03/31/2022, 06/30/2022, and 09/30/2022.

4 Click "ADD"

The screenshot shows the 'Vision Navigation' interface. A modal dialog box is open, titled 'Vision Navigation' with a close button (X). The dialog contains a 'Project Name:' label and a text input field containing 'Sample Strategic Initiative'. An orange circular callout with the word 'ADD' is positioned over the 'ADD' button in the dialog. Below the dialog, the main interface shows a grid of task cards. The first column is for the quarter ending 06/30/2022 and contains three cards: 1.1.2 Target markets for markets defined - BD, 1.1.3 Customers surveyed re. needs & wants of customer ordering system - BD, and 1.1.4 A model ordering system(s) reviewed & benchmark performance defined - BD. The second column is for the quarter ending 09/30/2022 and contains three cards: 1.1.5 A model ordering system to meet needs, wants & benchmark defined - BD, 1.1.6 PGS ordering system designed - BD, and 1.1.7 PGS ordering system tested - BD. A third column is partially visible on the right with cards 1.1.8, 1.1.9, and 1.1.10.

5 To start adding Outcomes to your project, click on the New Outcome that automatically populated in the Quarter you are currently in.

The screenshot shows the 'Vision Navigation' interface. At the top, there is a navigation bar with 'Vision Navigation' and a close button. Below it, there is a section for '2023' with left and right navigation arrows. The main content area is titled 'Operational Improvements' and shows a 'Sample Strategic Initiative'. Below this, there is a grid of task cards for the quarter ending 06/30/2023. The first card on the left says 'No tasks for the quarter' and is for the quarter ending 03/31/2023. The middle card is for the quarter ending 06/30/2023 and contains a single card labeled '1.1.1 New Outcome', which is highlighted with an orange circular callout. The third card on the right says 'No tasks for the quarter' and is for the quarter ending 09/30/2023.

6

Edit your outcome information in the popup box with title, description, dates, and owner.

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains navigation elements like '2023', 'movements', 'gic Initiative', and 'tasks for the quarter'. The main content area is a popup box titled 'Information' with tabs for 'Information', 'Tasks', and 'History'. The 'Information' tab is active, showing a form for editing an outcome. The form includes fields for 'Title' (containing 'New OutCome'), 'Description' (containing 'Add a description'), 'Start Date' (empty), 'Due Date' (06/01/2023), and 'Percentage' (Not Specified). There is a 'Status' section with five icons: a blue circle with a white checkmark, a green checkmark, a green checkmark, a yellow warning triangle, and a red exclamation mark. Below the status icons is an 'Owners' field with the text 'Set ownership'. There is also an 'Attachments' section with the text 'No attachments found, click the add icon to upload attachments.' and a 'Comments' section with a text input field.

7

When you have finished updating your Outcome, click "ADD."

This is a close-up screenshot of the bottom right corner of the 'Information' popup box. It shows the 'Status' icons (green checkmarks, yellow warning, red exclamation mark), the 'Owners' field with the text 'ownership', and the 'Attachments' section with the text 'No attachments found, click the add icon to upload attachments.' and a blue plus icon. At the bottom, there is a text input field with the placeholder text 'save a comment...' and a large, prominent orange circular button with the text 'ADD' in white capital letters.

8 Click "x" to close out of the Outcome Box.

