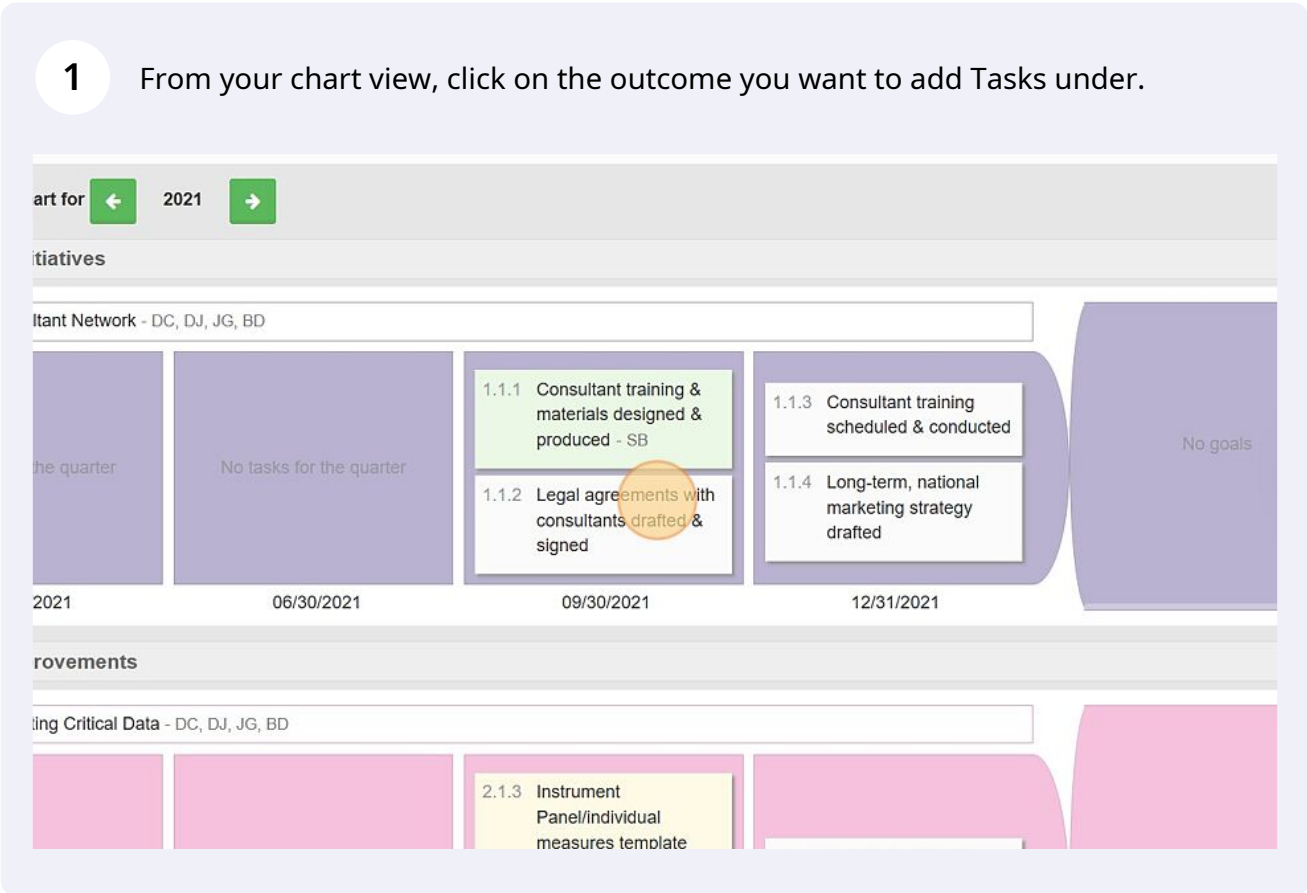


Adding a Task to an Outcome in the Chart View

1 From your chart view, click on the outcome you want to add Tasks under.



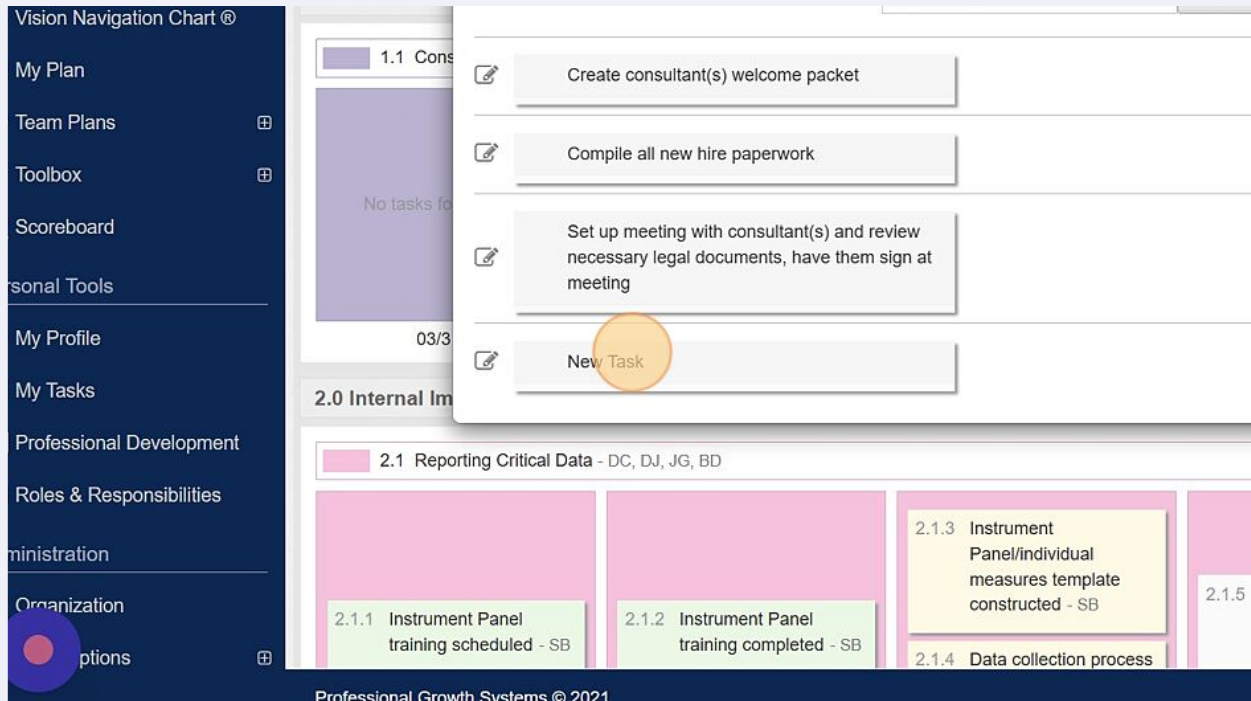
2 Click "Tasks"

The screenshot shows the 'Vision Navigation' application interface. A modal window titled 'Vision Navigation ®' is open, displaying the 'Tasks' tab. The modal has three tabs: 'Information', 'Tasks', and 'History'. The 'Tasks' tab is active and shows a task titled 'Legal agreements with consultants drafted & signed'. The task details include a description field with the placeholder 'Add a description', a start date of 'Not Specified', a due date of '09/30/2021', and a percentage of '0'. The status is indicated by five icons: a blue circle with a checkmark, two green checkmarks, a yellow warning triangle, and a red exclamation mark. The owners field is labeled 'Set ownership' and the attachments section shows 'No attachments found, click the add icon to upload attachments.' The background shows a navigation menu on the left and a main content area with a 'Showing vision c...' header and a '1.0 Strategic I...' section.

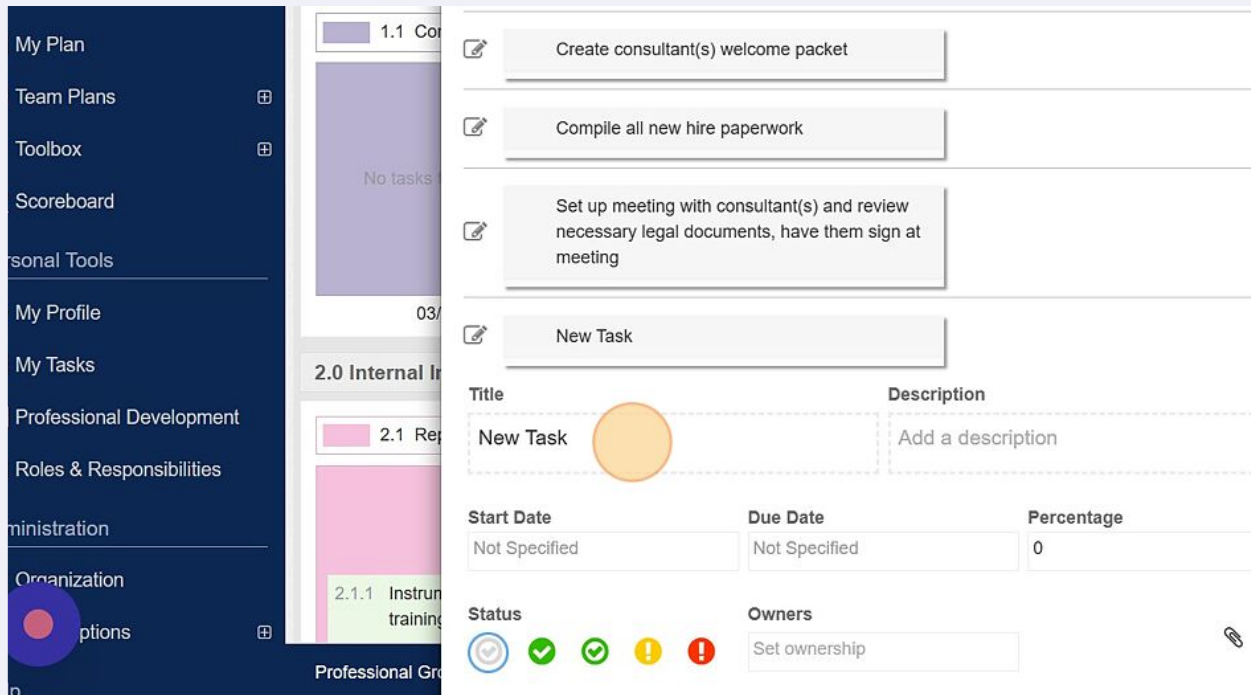
3 Click "Add Task"

The screenshot shows the 'Vision Navigation' application interface. A modal window titled 'Vision Navigation ®' is open, displaying the 'Tasks' tab. The modal has three tabs: 'Information', 'Tasks', and 'History'. The 'Tasks' tab is active and shows a list of tasks. The first task is 'Create consultant(s) welcome packet'. The second task is 'Compile all new hire paperwork'. The third task is 'Set up meeting with consultant(s) and review necessary legal documents, have them sign at meeting'. The modal also features a 'New Task' input field and a '+ Add Task' button. The background shows a navigation menu on the left and a main content area with a 'PGS Production' header and a 'No goals' section.

4 A "New Task" box will be added, click on the box to edit.



5 Edit your task information with title, description, start / due dates and percent complete.



6

Review your information, and then determine status: Completed, On Track, Needs Attention, Outside Timelines.

The screenshot shows a software interface with a dark blue sidebar on the left containing navigation options: My Plan, Team Plans, Toolbox, Scoreboard, Personal Tools, My Profile, My Tasks, Professional Development, Roles & Responsibilities, Administration, Organization, and Options. The main area displays a task list with a modal window open for editing a task. The task list includes:

- 1.1 Co... (No tasks)
- 2.0 Internal I...
- 2.1 Re...
- 2.1.1 Instru... training

The modal window shows the following details for a task:

- Title: Follow up with consultants at 30 days for onboarding.
- Description: Ensure that consultants are working through necessary training.
- Start Date: 07/10/2023
- Due Date: 08/11/2023
- Percentage: 5
- Status: A row of five status icons (blue, green, orange, yellow, red).
- Owners: Set ownership

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7

When you are finished adding tasks, click the "X" button, all edits will be saved automatically in the system.

The screenshot shows a software interface with a top bar containing "Vision Navigation ®" and "PGS Production" with various icons. The main area displays a task list with a modal window open for adding tasks. The task list includes:

- ate consultant(s) welcome packet
- pile all new hire paperwork
- up meeting with consultant(s) and review ssary legal documents, have them sign at ting
- ow up with consultants at 30 days for arding., 5%

The modal window shows the following details for a task:

- Title: Follow up with consultants at 30 days for onboarding.
- Description: Ensure that consultants are working through necessary training.

The modal window also features a "Reveal" button and a close button (X).