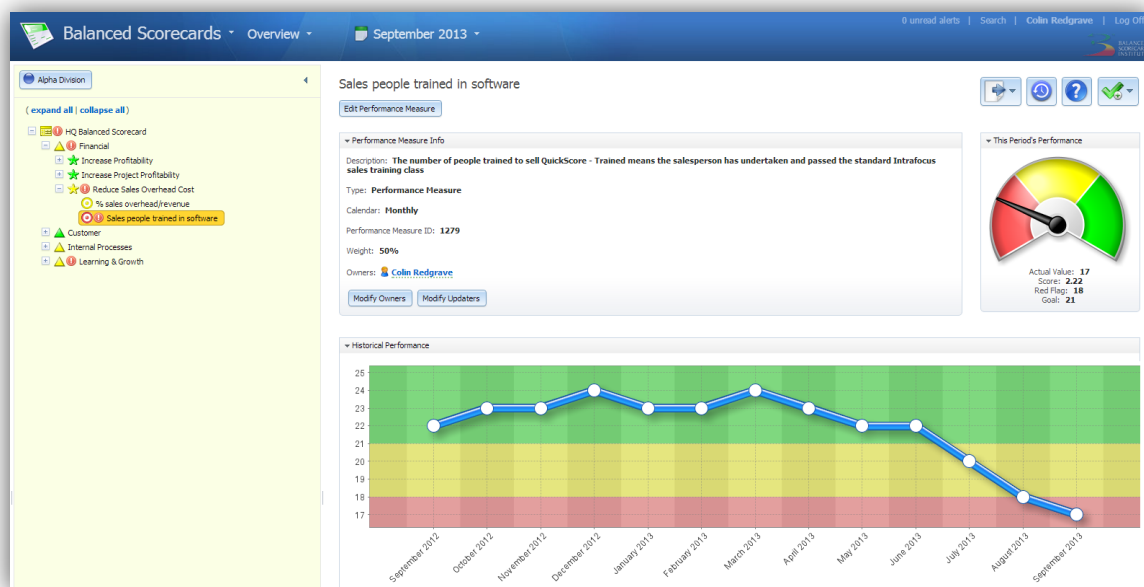


## Initiatives and Actions

There will often be times when an Initiative or Action needs to be assigned to an Objective or Performance Measure. Typically, we may find that the Performance Measure has taken a downward turn and an Action needs to be put in place. Or an Objective has been set and an Initiative needs to be put in place to kick-start or move things forward. The application has the facility to link Initiatives and Actions to Objectives or Performance Measures.

**Important Note:** It must be stressed that the Initiative/Action manager in QuickScore is not a 'Project' manager. It is a 'Task' manager and designed to monitor tasks at a high level.

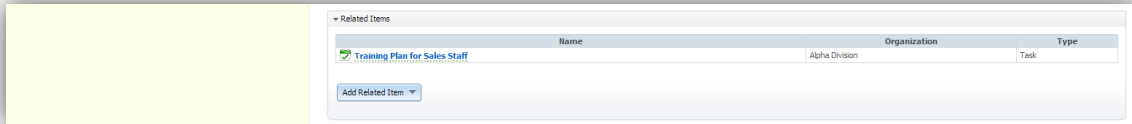
The example below will look at how to relate an Initiative to a failing Performance Measure. First go to the Overview of the Performance Measure under consideration, you should be looking at a screen something like this:



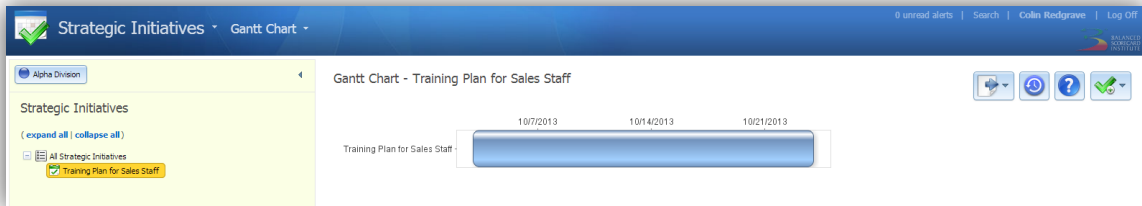
Clearly there is something wrong with this performance measure. It was healthy for some time and has suddenly got worse. A Task needs to be put in place to try and remedy the situation. In the top left hand corner there is an icon with a green tick mark. Click on this, you will see options to create a Strategic Initiative, Task or Milestone. Click on 'Task'. The following dialogue box will require you to add some details about the task you are about to start. Fill in as many details as you can and click Next. Another dialogue box will appear asking you to assign a user or group to the task.

**Important Note:** Tasks do not complete themselves, unless someone is assigned, it will not get done. Although the application allows you to assign the task to a group, best practice dictates that it should be assigned to an individual. Click Finished.

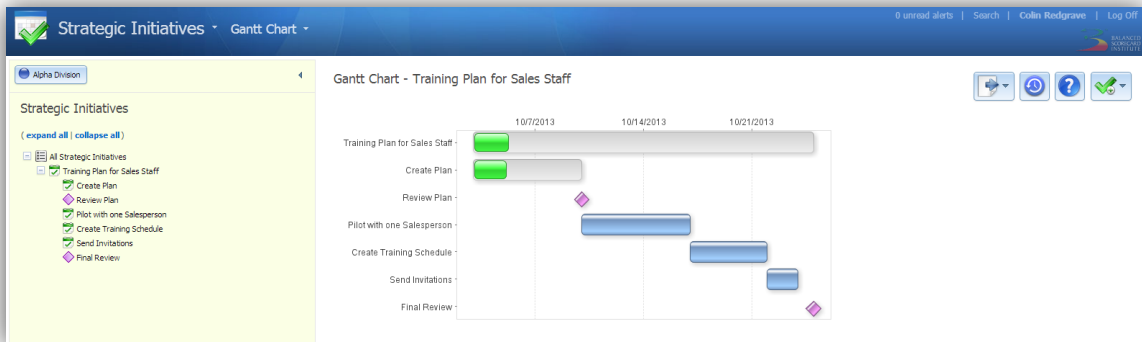
Scroll down the page to the section called Related Items and open it, it looks like this:



The Task appears as a hyper-link, click on it to go to the task. You will be taken to the Strategic Initiatives module. Check that the sub-menu is Gantt Chart and you will see a screen like this:



Right click on the object name on the left hand side and a menu will appear allowing you to add additional tasks and milestones. You can also select Update on existing tasks and milestones to update them. A typical Initiative/Action might end up looking like this:



Finally, to get back to the Object this Task is related to (in this case a Performance Measure) go to the sub-men and select 'Related Items'. A list of related items will appear, click on the link an it will take you back to the Task source:

