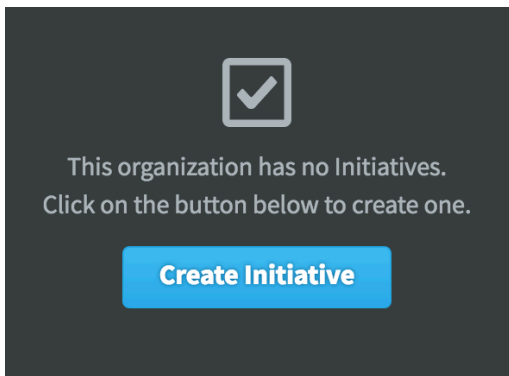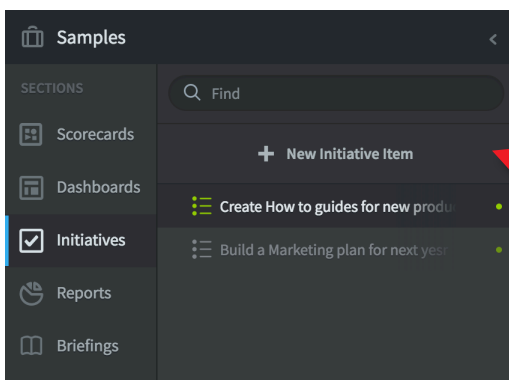Together with Scorecards, Dashboards and Reports **Initiatives** can be added into an Organisation container. First Click on the Briefcase icon and select an Organisation into which you want to add an **Initiative**.

If this is the first Initiative in the Organisation selected, click on the blue Create Initiative button and miss the next step

If this is not the first Initiative in the Organisation selected, then click on **Edit** at the bottom of the menu list.
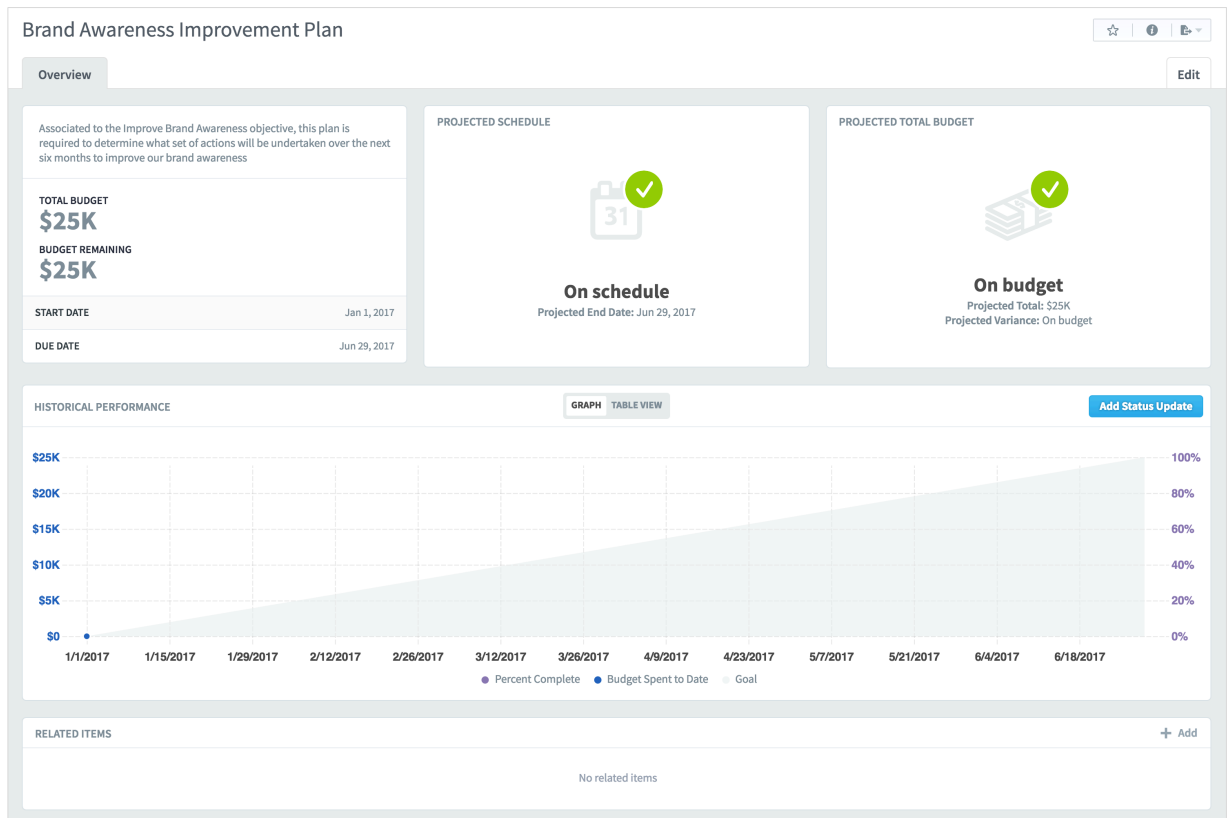
At the top of the menu list click on the **+ New Initiative** button

The **Create Initiative** dialogue will appear. Give the Initiative a name and complete the Initiative overview details. Tasks/milestones are added in the next step. **Remember to click Save**

intrafocus

Click on Overview at the top of the screen to see what you Initiative looks like so far:

To add Tasks and Milestones to this Initiative (this is optional) click on Edit at the bottom of the Menu list and then on the **+ New Initiative Item** button (see previous page). Change the Type to **Task** or **Milestone** and complete the details.

**Remember to click Save after each entry**

Once you Initiative is complete you can start to update the progress by clicking on the **Add Status Update** button in any of the Tasks or Milestones. This data will be automatically rolled up to the top view.

After the Tasks and Milestones and status update data has been added, the final Initiative might look something like this:
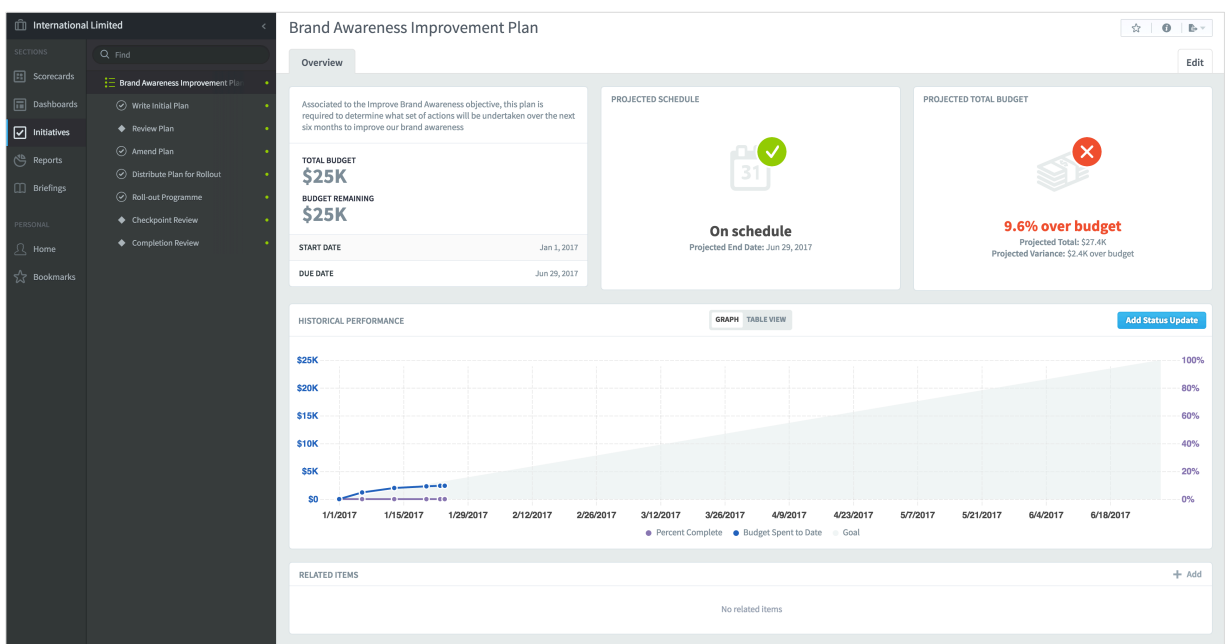
You may have noticed there is a **Related Items** block at the bottom of the page. All objects in the system can be related to each other. This means you can create a link between an Objective or Metric and this Initiative.

This is very useful when you are tracking tasks due to poor performing Metrics or Objectives. Read the **Related Items** guide for more information