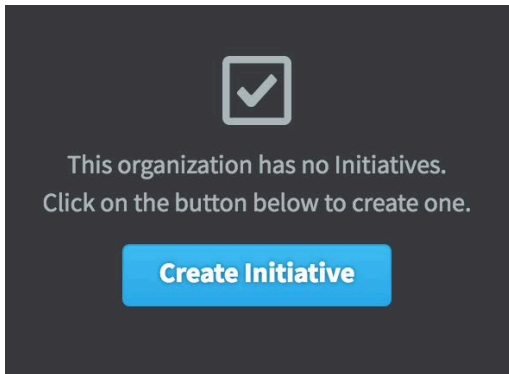


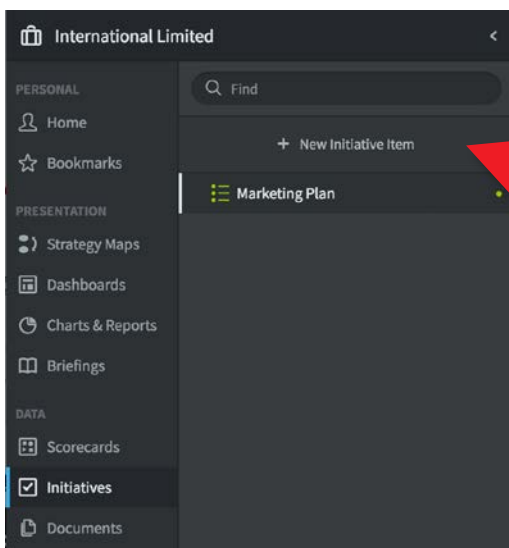


Initiatives - 1

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



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



If this is not the first Initiative in the Organization selected, then click on **+ New Initiative Item**.

The **Create New Initiative** dialogue will appear:

Name	<input type="text"/>		
Description	<input type="text"/>		
Type	Initiative		
Start Date	<input type="text"/>	Due Date	<input type="text"/>
Currency	Default	Total Budget	<input type="text"/>
Advanced Options			



Initiatives - 2

Add as many details to your initiative as you can. The more information you provide, the better you will be able to track your activities.

Reduce Energy Consumption Project

Overview Timeline Edit

Name Reduce Energy Consumption Project	Type Initiative	
Description Create and implement a plan to incrementally reduce our factory and head office energy consumption by 5% over the next six months	Start Date 1/3/2018	Due Date 31/8/2018
	Currency Default	Total Budget 5,500 £

[Advanced Options](#)

ASSIGNED USERS AND GROUPS

Lee Child	
Add User or Group...	

Notify Assigned Users and Groups of Changes

[Move](#) [Copy](#) [Delete](#) [Cancel](#) [Save](#)

- **Name:** Give the Initiative a recognisable and unique name.
- **Type:** Initiatives appear at the highest level. These can be broken down to Tasks and Milestones. If you add tasks and milestones, when they are updated, the updated values roll up to the initiative.
- **Description:** It is always good practice to provide a description.
- **Start Date/End Date:** of the overall initiative.
- **Currency:** Normally the default, an alternative currency can be selected.
- **Budget:** by adding a budget you can visually track cost over time.
- **Assigned Users:** It is good practice to assign an owner.



Initiatives - 3

Click **Save** and then the **Overview** tab at the top of the screen to see what your Initiative looks like so far:

Reduce Energy Consumption Project


☆ | 📄 | ⓘ | ⌚

Overview | Timeline | Edit


Create and implement a plan to incrementally reduce our factory and head office energy consumption by 5% over the next six months

TOTAL BUDGET	£5,500
BUDGET REMAINING	£5,500
START DATE	1 Mar 2018
DUE DATE	31 Aug 2018
% TIME ELAPSED	41.8%

PROJECTED SCHEDULE



On schedule
Projected End Date: 31 Aug 2018

PROJECTED TOTAL BUDGET


On budget
Projected Total: £5,500
Projected Variance: On budget

HISTORICAL PERFORMANCE

GRAPH | STATUS UPDATES | Add Status Update



Legend: ● Percent Complete ● Budget Spent to Date □ Goal

Date	Budget Spent to Date	Goal
Mar 1 2018	£0	£0
Mar 22 2018	~£1,000	~£1,000
Apr 12 2018	~£2,000	~£2,000
May 3 2018	~£3,000	~£3,000
May 24 2018	~£4,000	~£4,000
Jun 14 2018	~£5,000	~£5,000
Jul 5 2018	~£5,500	~£5,500
Jul 26 2018	~£5,500	~£5,500
Aug 16 2018	~£5,500	~£5,500

RELATED ITEMS

+ Add

No related items

Show Notes (0)

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.



Initiatives - 4

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

HISTORICAL PERFORMANCE			GRAPH	STATUS UPDATES
DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE		
1 Mar 2018	5%	£500		
22 Mar 2018	10%	£1,250		
12 Apr 2018	30%	£2,135		
3 May 2018	40%	£2,435		
+ Add Status Update...				



After a status update the Initiative should look something like this:

Reduce Energy Consumption Project

Overview | Timeline | Edit

Create and implement a plan to incrementally reduce our factory and head office energy consumption by 5% over the next six months

TOTAL BUDGET	£5,500
BUDGET REMAINING	£3,065
START DATE	1 Mar 2018
DUE DATE	31 Aug 2018
% TIME ELAPSED	41.8%

PROJECTED SCHEDULE

10 days early
Projected End Date: 21 Aug 2018

PROJECTED TOTAL BUDGET

4.3% over budget
Projected Total: £5,735
Projected Variance: £235 over budget

HISTORICAL PERFORMANCE | GRAPH | STATUS UPDATES | **Add Status Update**

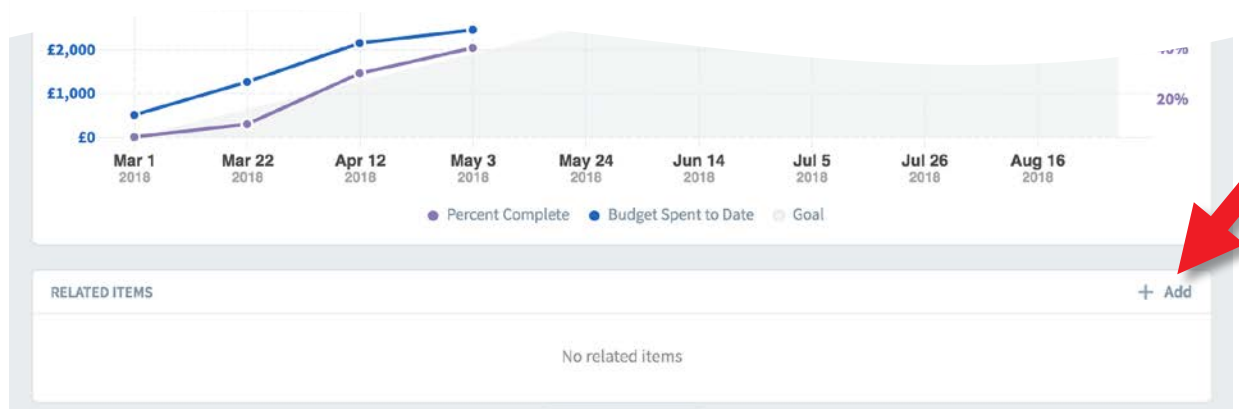
Legend: ● Percent Complete ● Budget Spent to Date ○ Goal



Initiatives - 5

There is a **Related Items** box at the bottom of the screen. All objects in the system can be related to each other. This means you can create a link between an Objective or KPI/Measure and this Initiative.

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



Click on the **+ Add** button in the Related Items box and select the object you want this Initiative to be related to. A link will be created. The application will also create a return link in the Related Items box of the destination object.