

# User Reference Guide

2025

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[www.visionsync.com](http://www.visionsync.com)

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## 1. Single Sign On

### 1.1 Sign in Using SSO

#### 1.1.1 About feature

Single Sign-On (SSO) using Active Directory in VisionSync allows users to log in to VisionSync using their Active Directory credentials. This means that users do not have to remember another username and password to access VisionSync, as their Active Directory credentials can be used to authenticate them in VisionSync. Active Directory is a directory service from Microsoft that provides a centralized way to manage user accounts, computers, and other resources in an organization.

#### 1.1.2 Screen explanation

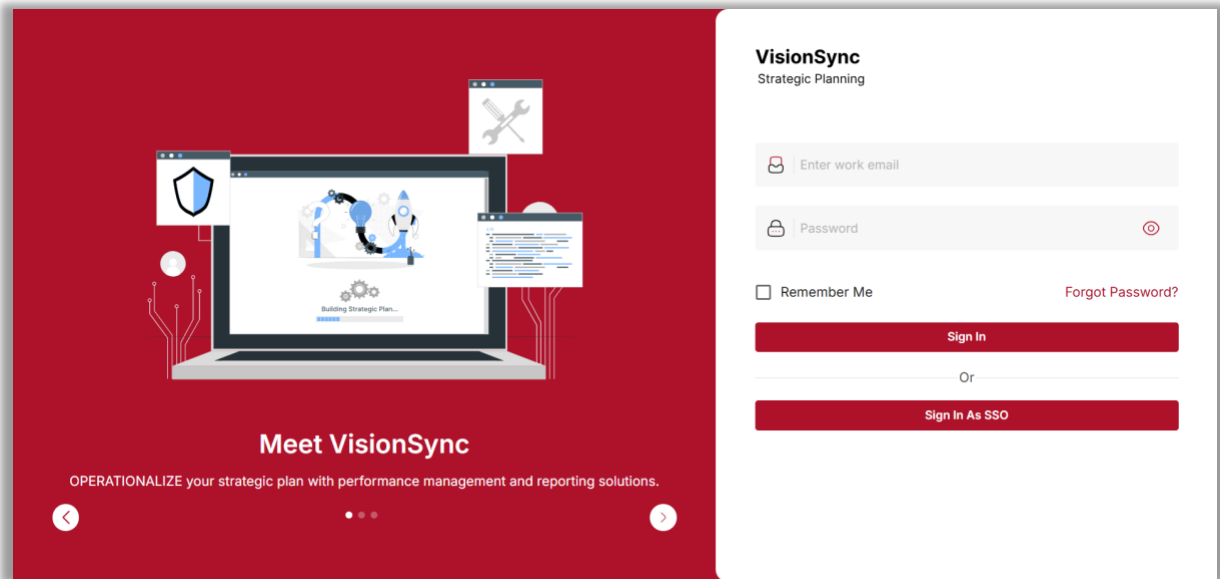
The “Login” screen contains “Sign In as SSO” button which redirects user to the SSO screen.

The “SSO” screen contains the following elements.

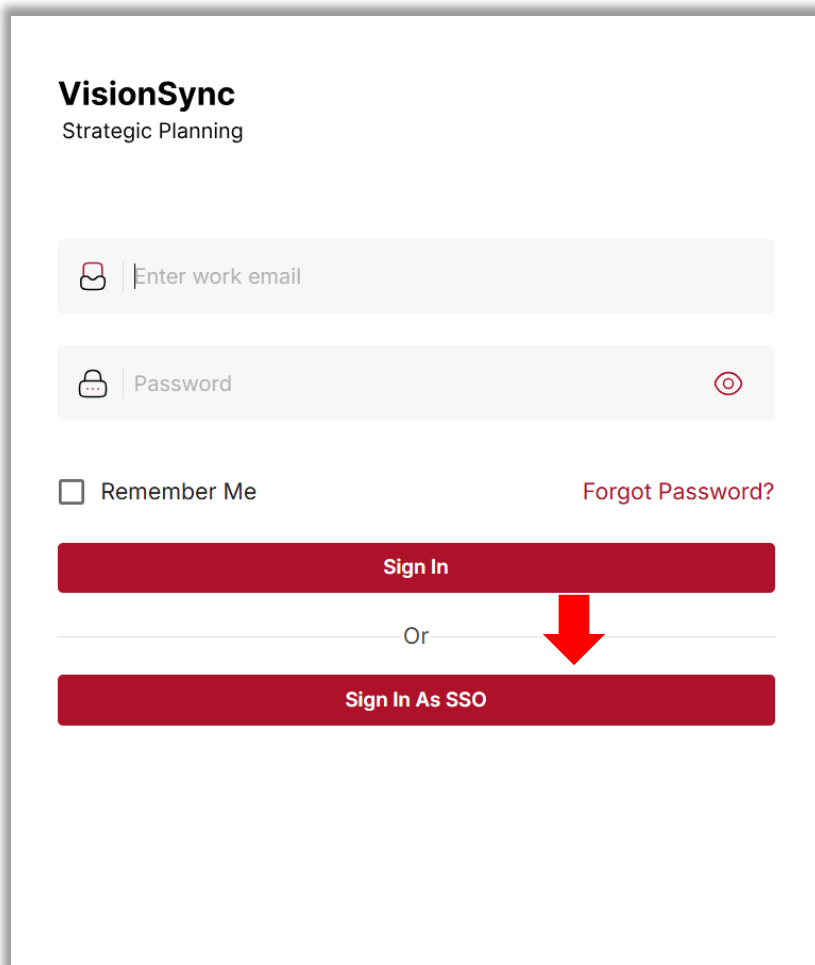
- a. Work Email (Required): This field requires the registered work email of the user.
- b. Continue Button: This button allows the user to proceed with the authentication process after they have entered their credentials. When a user clicks on the "Continue" button, the SSO system will verify their credentials and check if they are authorized to access the application.

#### 1.2.3 How to perform this feature/functionality?

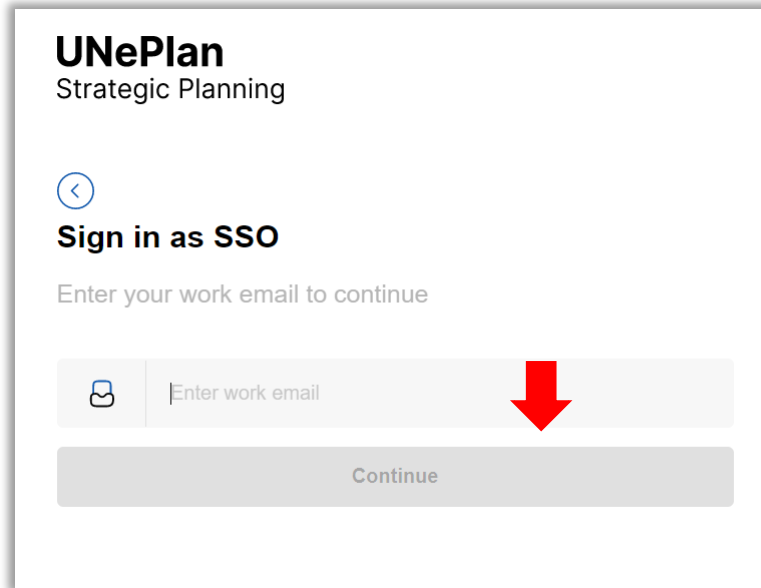
- a. Go to the VisionSync login page.



b. Click on the Sign In as SSO button and you will be redirected to the SSO screen.



c. Enter your Active Directory username and click Continue.




**UNePlan**  
Strategic Planning

<

**Sign in as SSO**

Enter your work email to continue

 Enter work email

Continue

d. Once you enter your credentials, VisionSync will use your Active Directory account to authenticate you and log you in.

#### 1.1.4 Expected Result

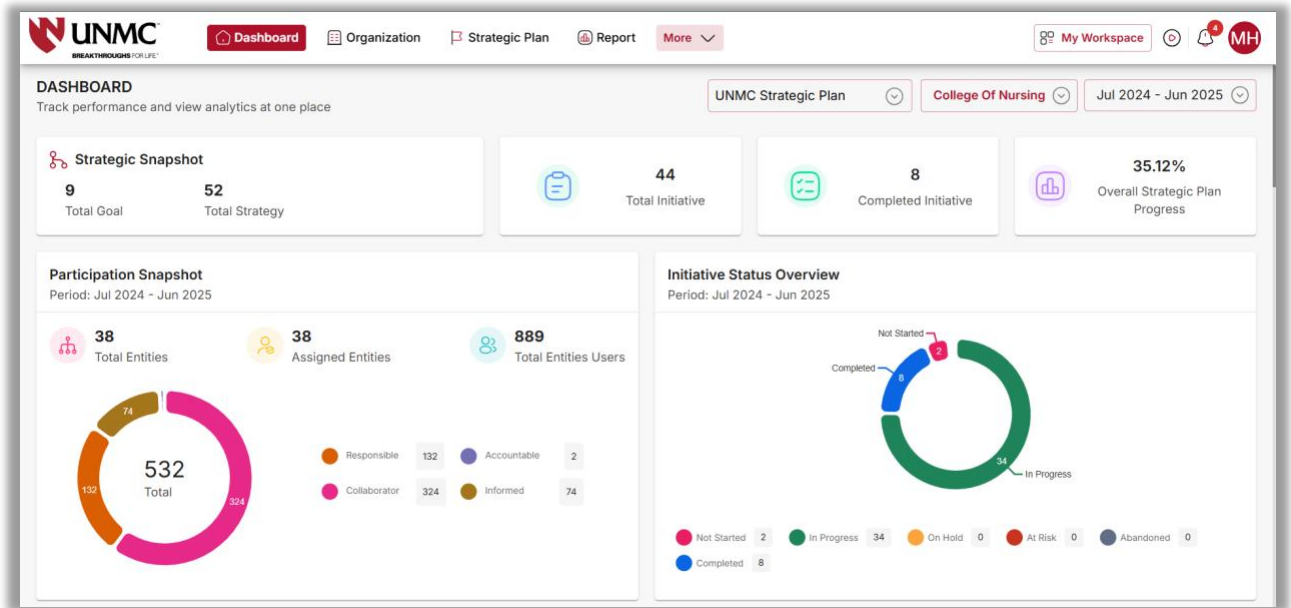
After completing the SSO authentication process using Active Directory, you should be redirected back to VisionSync and logged in automatically. You should be able to access all the features and functionalities of VisionSync without having to enter your login credentials again.

#### 1.1.4 Dependency and Restrictions

Users whose organization are already onboarded and SSO is configured will be the only ones that can login via SSO.

## 2. Navigation and Basic Screen Skeleton Explanation (profile, notification, change password)

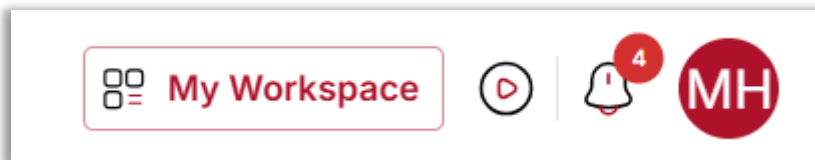
Once you have logged in, you will be redirected to the VisionSync dashboard.



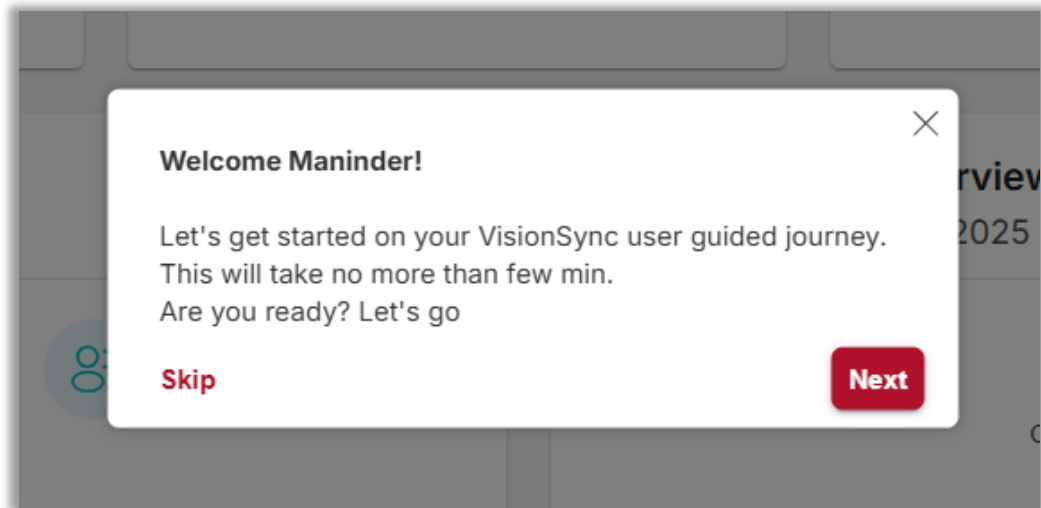
The basic skeleton of the page is:- a Top-Navigation Bar and a middle section.

The Top-Navigation Bar of the screen contains several options from which users can navigate to different screens and perform different actions. It has two parts:-

The right side of the Top-Navigation Bar contains icons for Profile, Notifications, Launch Tour, and My Workspace.

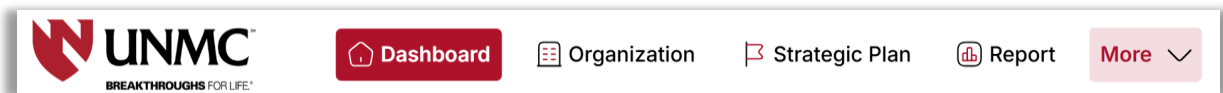


- The Profile icon includes a dropdown menu enabling users to access different settings screens.
- The Notifications icon displays in-app notifications.
- The Launch Tour icon activates a step-by-step guided tour, helping users navigate and utilize the platform efficiently. Users can progress through the tour at their own pace, using the "Next" button to advance or the "Skip" button to bypass specific steps. Additionally, the option to exit the guided tour at any time with the "Cross" button allows users to explore the platform independently or review the instructions whenever needed. This interactive and customizable learning experience ensures users can maximize their understanding and proficiency in using VisionSync's functionalities.

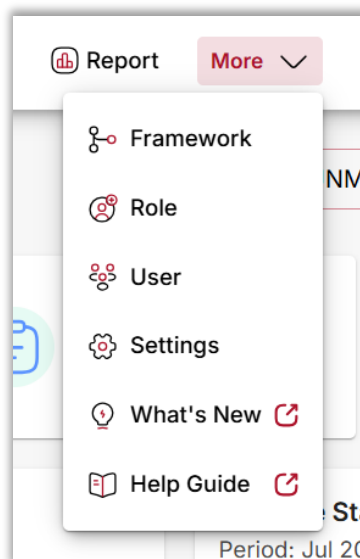


- My Workspace icon helps you view and manage your assigned, pending, declined, and preferred strategic action items. Also, you can track your watchlists and respond to invitations.

The left side of the Top-Navigation Bar contains buttons for Dashboard, Organization, Strategic Plan, Report, and a dropdown button - More.



- The 'More' dropdown expands to reveal additional options, including Framework, Role, User, Settings, What's New, and Help Guide.





- The help icon redirects users to a help guide. The What's New icon provides information about new features, releases, and enhancements.

The middle section dynamically updates based on the selected navigation item, displaying relevant content and tools.

## 2.1 Profile Setting

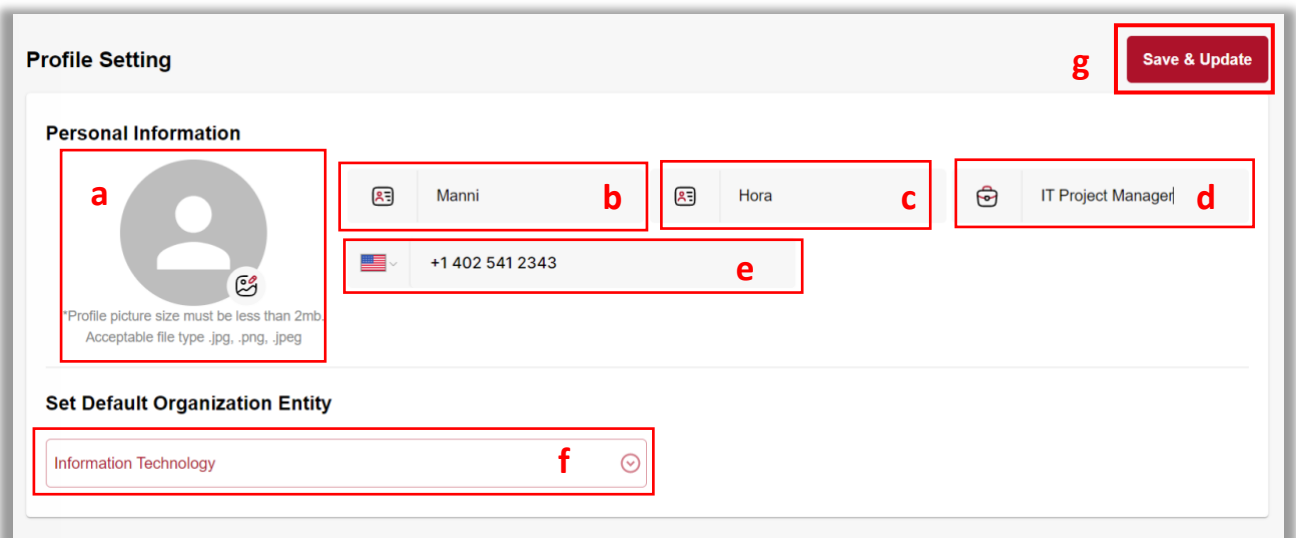
### 2.1.1 About feature

The Profile Settings feature in VisionSync allows users to manage their personal information and settings. This feature is useful for individuals who need to update their contact information.

### 2.1.2 Screen explanation


The profile setting page contains the following elements.

- Profile picture: This allows users to upload their profile picture. There are file type and size limitations displayed on the screen. Users should follow the guidelines while uploading the profile picture.
- First Name (Required): This field allows users to edit their first name.
- Last Name (Required): This field allows users to edit their last name.
- Job Title (Required): This field allows users to edit their job title.
- Work Phone: This field allows users to edit their work phone number.
- Set Default Organization Entity: This is a dropdown field which allows users to set their default organization entity in VisionSync.
- Save and Update Button: This button saves the profile changes.



**Profile Setting** g **Save & Update**

**Personal Information**

a  \*Profile picture size must be less than 2mb  
Acceptable file type .jpg, .png, .jpeg

b  c  d

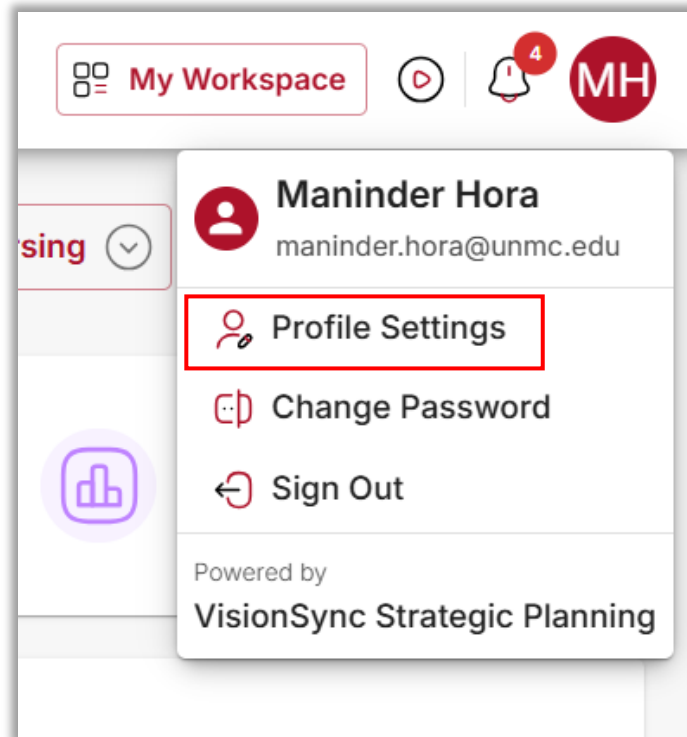
e

**Set Default Organization Entity**

f

### 2.1.3 How to perform this feature/functionality?

- a. Click on the Profile icon located on the top right corner of the screen and select the "Profile Setting" option.




- b. You can now edit your personal information, including your first name, last name, job title, phone number, and profile picture.

Profile Setting

Save & Update

Personal Information



\*Profile picture size must be less than 2mb.  
Acceptable file type .jpg, .png, .jpeg

Manni

Hora

IT Project Manager

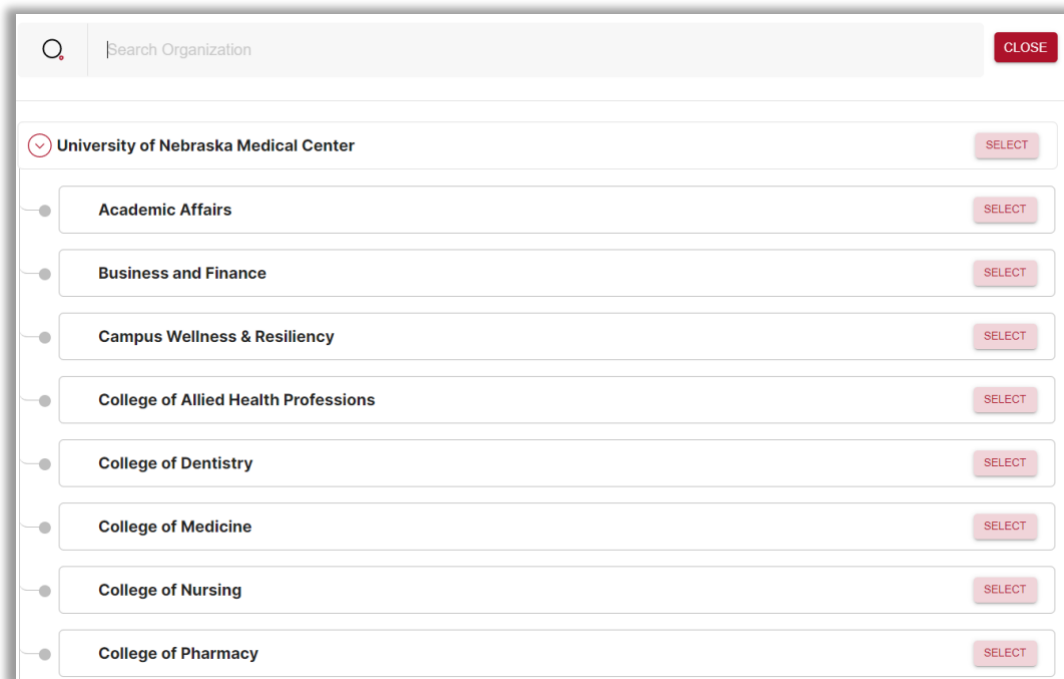
+1 402 541 2343

- c. You can also set your default organization entity from the organization entity dropdown.

#### Set Default Organization Entity

Information Technology





c. Once you have made the necessary changes, click on the "Save and Update" button to update your profile.



## 2.1.4 Expected Result

The profile is updated with accurate and current information, which can help improve communication and collaboration with other VisionSync users and stakeholders.

## 2.1.5 Dependency or Restriction

a. Users signed up using single-sign-on will not be able to update the profile in VisionSync too. They will have to update the profile on the organization's account page.

## 2.2 Change Password

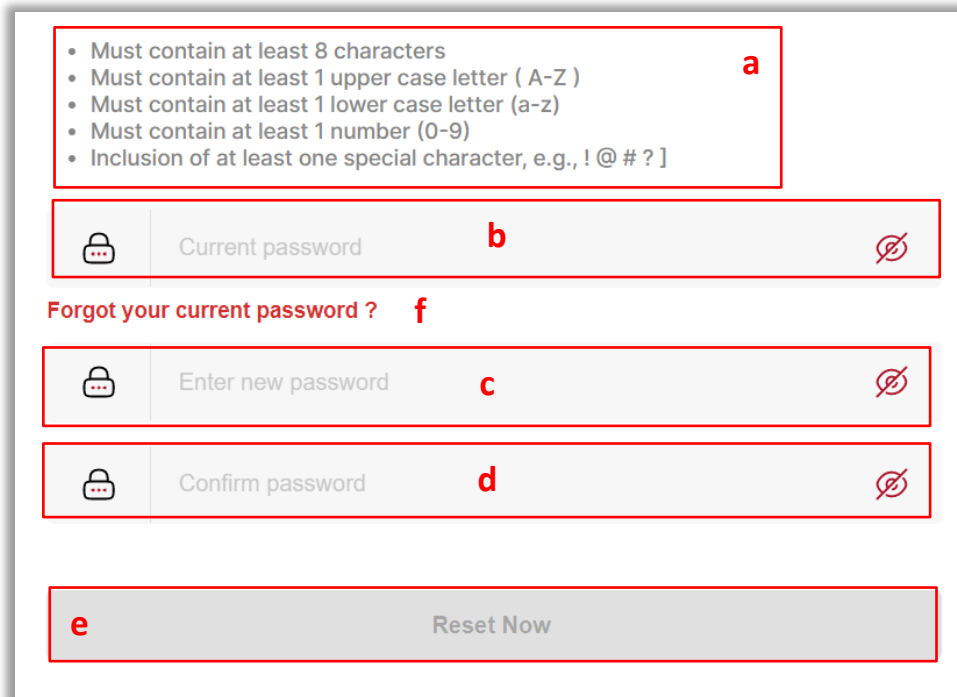
### 2.2.1 About feature

Changing your password in VisionSync is an important security measure to protect your account from unauthorized access. This feature allows users to update passwords in a few simple steps.

### 2.2.2 Screen explanation

The change password page contains the following elements.

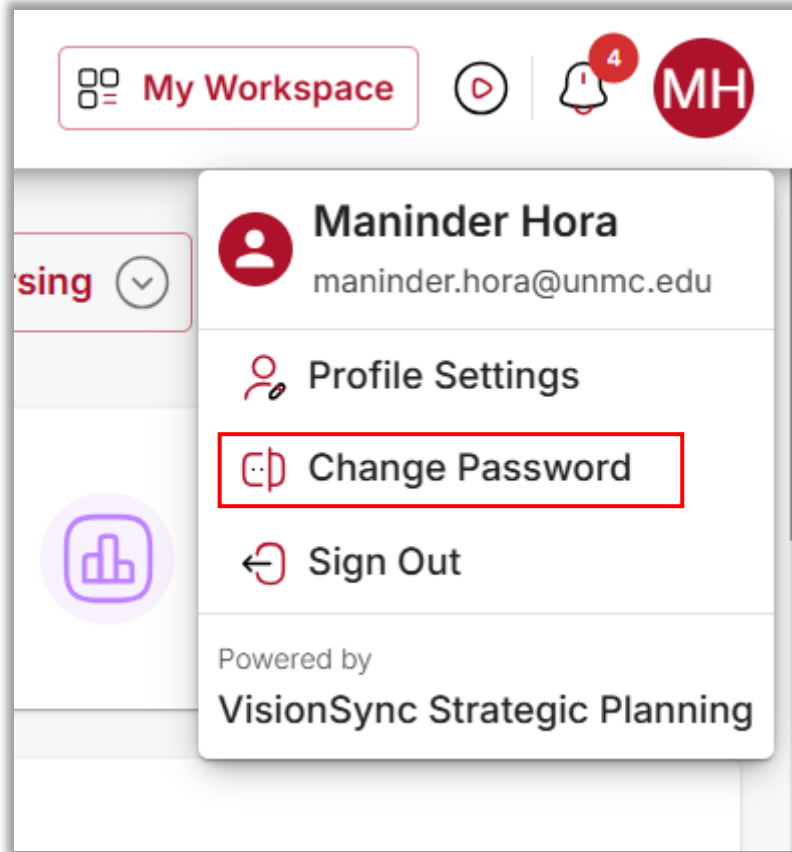
- a. Password Instructions: User must follow these instructions while setting a new password.
- b. Current Password (Required): This field requires the current password of the user.
- c. New Password (Required): This field requires the new password of the user.
- d. Confirm Password (Required): This field requires the user to re-enter the new password.
- e. Reset Now: This button saves the password changes to the user profile.
- f. Forgot Password Link: Use this link if you do not remember your password.



The screenshot shows the 'Change Password' interface. At the top, a box labeled 'a' contains password requirements: 'Must contain at least 8 characters', 'Must contain at least 1 upper case letter ( A-Z )', 'Must contain at least 1 lower case letter (a-z)', 'Must contain at least 1 number (0-9)', and 'Inclusion of at least one special character, e.g., ! @ # ? ]'. Below this are three password input fields: 'Current password' (labeled 'b'), 'Enter new password' (labeled 'c'), and 'Confirm password' (labeled 'd'). Each field has a lock icon on the left and a 'show/hide' icon on the right. Between the 'Current password' and 'Enter new password' fields is a link labeled 'f' that says 'Forgot your current password ?'. At the bottom is a large button labeled 'e' that says 'Reset Now'.

### 2.2.3 How to perform this feature/functionality?

- a. Click on the "Profile" icon located on the top right corner of the screen and select the "Change Password" option.



b. Enter your current password in the "Current Password" field.

### Create New Password

- Must contain at least 8 characters
- Must contain at least 1 upper case letter ( A-Z )
- Must contain at least 1 lower case letter (a-z)
- Must contain at least 1 number (0-9)
- Inclusion of at least one special character, e.g., ! @ # ? ]

☐

Forgot your current password ?

☐

☐


Reset Now

c. Enter your new password in the "New Password" field. Follow the instructions written on the top of the page while setting a new password.


d. Confirm your new password by entering it again in the "Confirm Password" field.

e. Click on the "Reset Now" button to save your new password.


- Must contain at least 8 characters
- Must contain at least 1 upper case letter ( A-Z )
- Must contain at least 1 lower case letter (a-z)
- Must contain at least 1 number (0-9)
- Inclusion of at least one special character, e.g., ! @ # ? ]




.....




Forgot your current password ?




.....





.....|



Reset Now

#### 2.2.4 Expected Result

Your password is updated in the VisionSync system. The next time you log in to your account, you will need to use your new password to access the system.

#### 2.2.5 Dependency or Restriction

- a. Users signed up using single-sign-on will not be able to update their password in VisionSync. They will have to update the password on the organization's account page.

### 2.3 Notifications

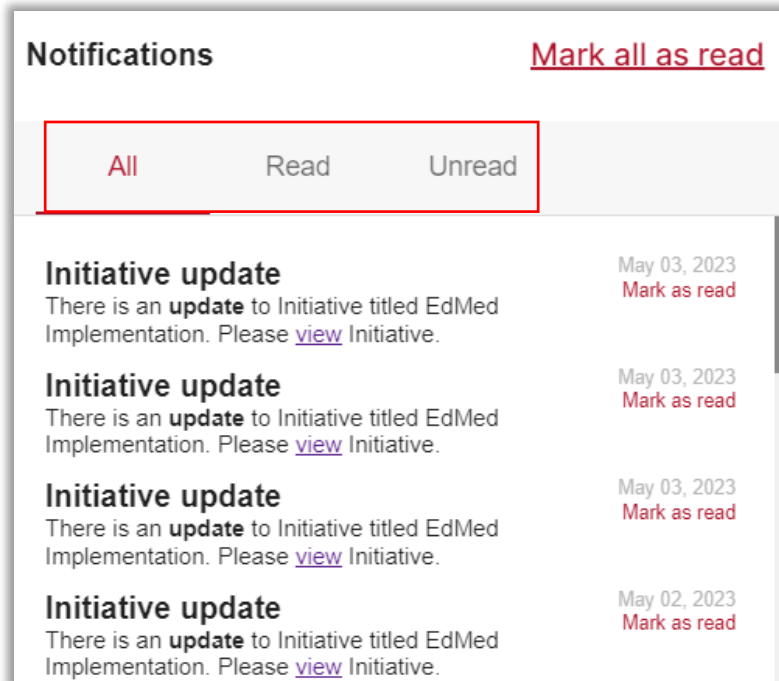
#### 2.3.1 About feature

Notifications in VisionSync are designed to keep users informed about important updates, and activities related to their projects and tasks. With this feature, you can receive in-app alerts.

### 2.3.2 Screen explanation

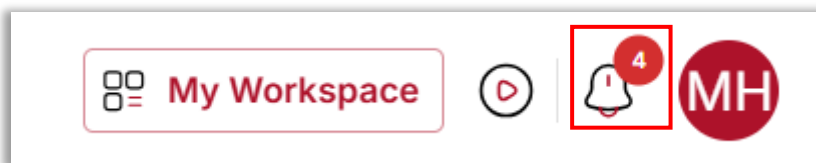
To manage your notifications in VisionSync, you need to access the "Notifications" section of the dashboard. From there, you can view your notification history, and mark notifications as read or unread.

The Notifications panel contains three segregations "All", "Read", "Unread".

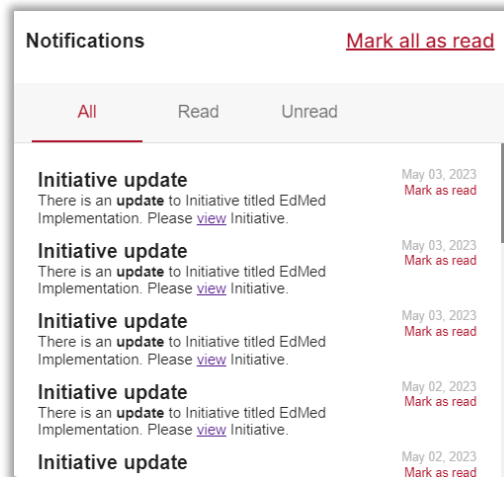


### 2.3.3 How to perform this feature/functionality?

- Click on the "Notifications" button located on the top right corner of the screen.

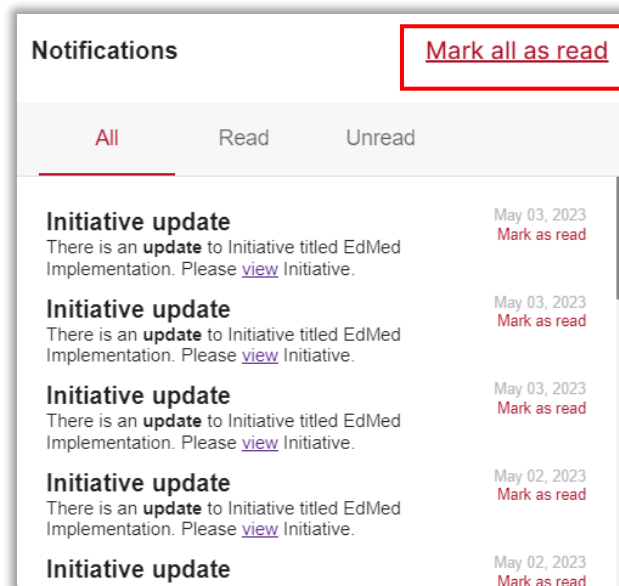


- View your notification history by scrolling through the list of notifications. You can view notifications under different sections "All", "Read", "Unread".



c. Click on the notification link to view the activity.

d. You can mark your all notifications under read by clicking the link “Mark all as read”.



### 2.3.4 Expected Result

You should receive regular notifications. By using the notifications feature, you can ensure that you are always informed about the latest updates, and can take action quickly and efficiently.

## 3. Build Plan

Once the strategic plan is created and assigned, all users can either participate in the strategic plan based on their roles or view the strategic plans.



## 3.1 Plan Views

### 3.1.1 About feature

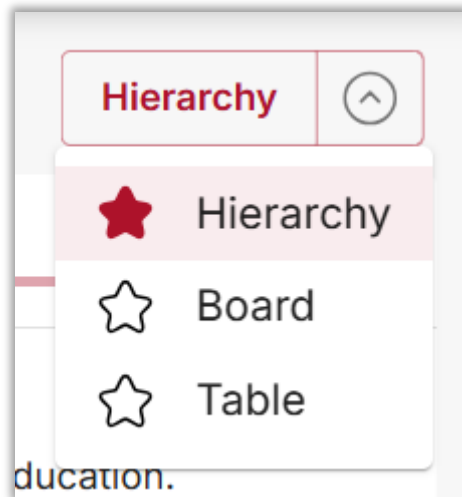
The strategic plan details feature in VisionSync allows users to view the details of a specific strategic plan or participate in it. This feature provides users with a comprehensive overview of the plan, including its progress and individual team members working on strategic action items (initiative). Lots of elements on this screen will show up as a result of creating a strategic framework, strategic framework, settings, strategic plan, strategic plan assignment, and labels.

Users can choose from three different views when accessing the strategic plan after clicking on the "Build Plan" option. These views—Hierarchical View, Board View, and Table View—allow users to interact with the strategic plan in different ways based on their preferences and requirements. Each view provides a structured representation of the strategic framework, enabling users to navigate and manage elements efficiently.

### 3.1.2 Screen explanation

Users can select their preferred view—Hierarchical, Board, or Table—using the toggle in the top-right corner of the Build Plan screen.

By default, the view set as the default will be displayed when you open the Build Plan screen. However, you can switch between Hierarchical, Board, and Table views using the toggle in the top-right corner. You can also set a new default view by clicking the star icon beside each view in the toggle.

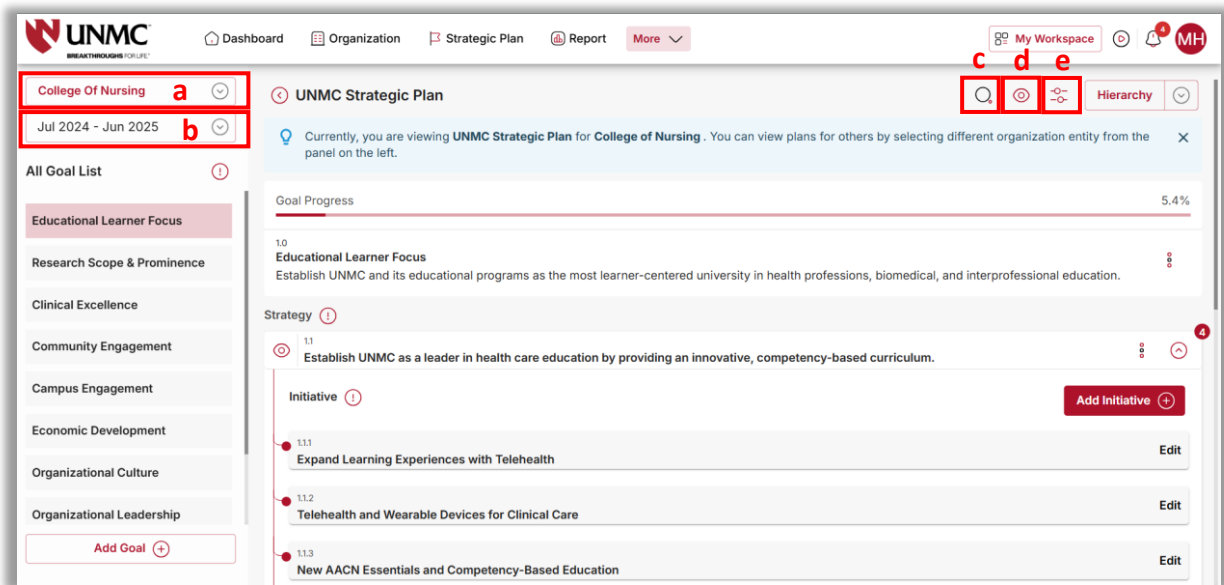


The following selections are common across all views—Hierarchical, Board, and Table—ensuring a consistent experience when accessing the Build Plan screen:

- a) **Select Organization Entity (Required):** This allows users to select the organization entity they belong to, which has been assigned to a strategic plan by the administrator. Selecting the organization entity enables users to load and view the strategic plan specific to their organization. By default, it selects the parent organization when viewing the strategic plan.
- b) **Select Review Period (Required):** This allows users to select the review period, which is generated based on the timeframe of the strategic plan and its review period

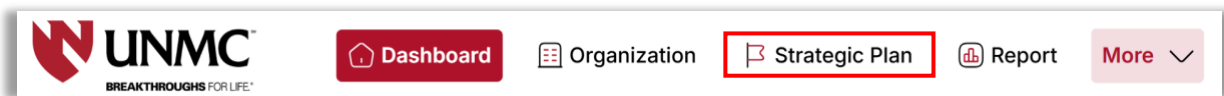
frequency. By selecting different review periods, users can view both the current and historical versions of the strategic plan.

- c) Search: This allows users to search for keywords within several elements of the strategic plan.
- d) Preview: This button allows users to see a preview of the entire strategic plan, including the organization entity statements (mission, vision, values) and the content for all strategic framework levels. Users can also download the plan as a PDF for printing.
- e) Filter: This button allows users to perform advanced searches for different elements within the strategic plan using filters.

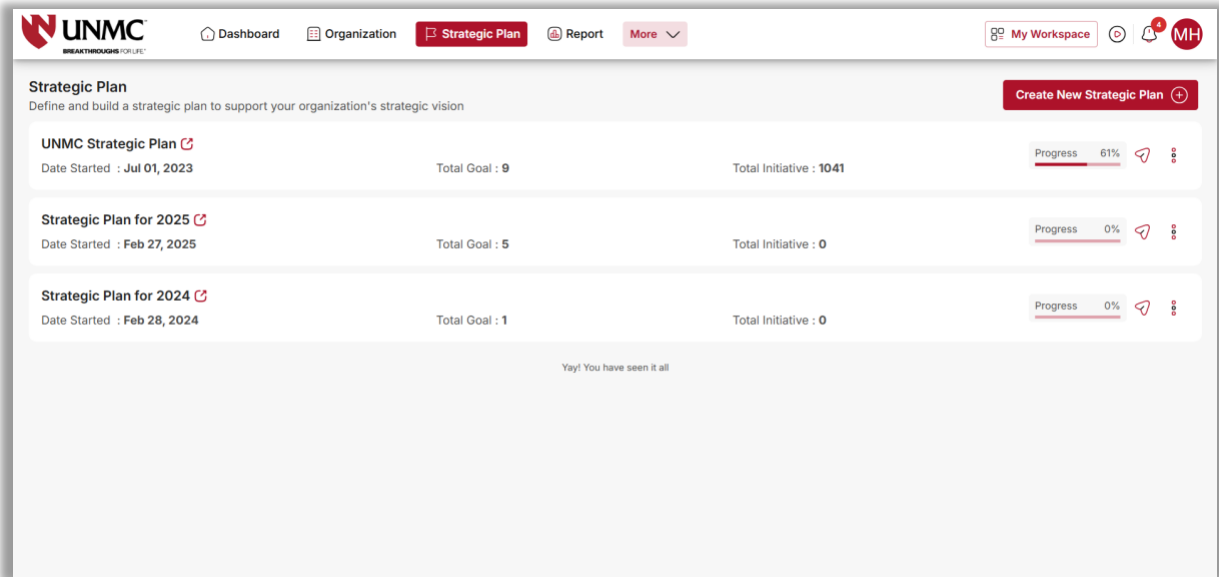


### 3.1.3 How to perform this feature/functionality?

- a. Log in to your VisionSync account using your credentials.
- b. From the Top-Navigation Bar, select "Strategic Plan."



- c. The Strategic Plan screen will open, displaying a list of all the strategic plans created within your organization.



**Strategic Plan**  
Define and build a strategic plan to support your organization's strategic vision

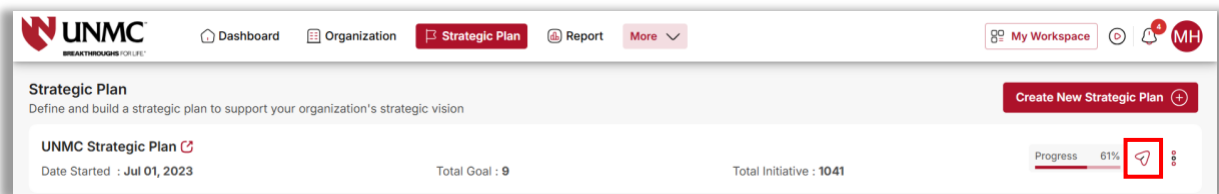
**UNMC Strategic Plan** [🔗](#)  
Date Started : Jul 01, 2023      Total Goal : 9      Total Initiative : 1041      Progress: 61% [🔗](#) [⋮](#)

**Strategic Plan for 2025** [🔗](#)  
Date Started : Feb 27, 2025      Total Goal : 5      Total Initiative : 0      Progress: 0% [🔗](#) [⋮](#)

**Strategic Plan for 2024** [🔗](#)  
Date Started : Feb 28, 2024      Total Goal : 1      Total Initiative : 0      Progress: 0% [🔗](#) [⋮](#)

Yay! You have seen it all

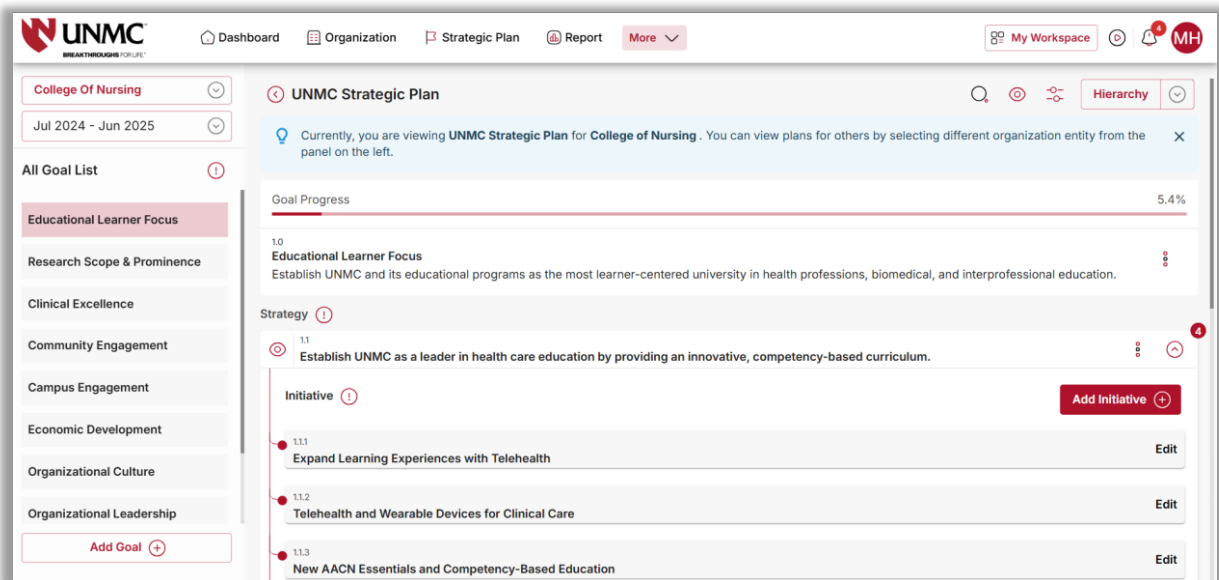
d. Click on the “Build Plan” option against the plan.



**Strategic Plan**  
Define and build a strategic plan to support your organization's strategic vision

**UNMC Strategic Plan** [🔗](#)  
Date Started : Jul 01, 2023      Total Goal : 9      Total Initiative : 1041      Progress: 61% [🔗](#) [⋮](#)

e. The Build Plan screen will open, displaying the strategic plan details.



**UNMC Strategic Plan** [🔗](#) [🔍](#) [🔄](#) [📊](#) [📅](#) [🔗](#) [⋮](#)

Currently, you are viewing **UNMC Strategic Plan** for **College of Nursing**. You can view plans for others by selecting different organization entity from the panel on the left.

**Goal Progress** 5.4%

**1.0 Educational Learner Focus**  
Establish UNMC and its educational programs as the most learner-centered university in health professions, biomedical, and interprofessional education.

**Strategy** [🔗](#) [⋮](#)

**1.1 Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum.** [🔗](#) [⋮](#) [🔄](#)

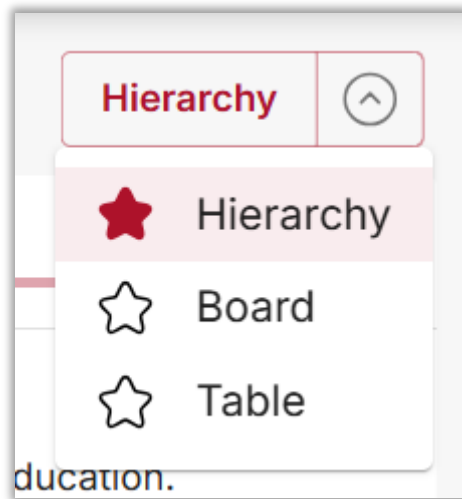
**Initiative** [🔗](#) [⋮](#) [+](#)

**11.1 Expand Learning Experiences with Telehealth** [Edit](#)

**11.2 Telehealth and Wearable Devices for Clinical Care** [Edit](#)

**11.3 New AACN Essentials and Competency-Based Education** [Edit](#)

f. By default, the view set as your default will be displayed. To switch views, use the View Toggle in the top right corner and choose between Hierarchical View, Table View, or Board View based on your preference.



- g. To set a preferred default view, click on the star icon next to a view in the toggle. The selected view will now load automatically whenever you open the Build Plan screen.
- h. Once inside your selected view, you can interact with different elements based on the functionalities provided for that specific view.
- i. Additional options like Search, Filter, Rearrange, and Preview remain available across all views to help you navigate and manage your strategic plan effectively.

#### 3.1.4 Expected Result

After following the above steps, the user should be able to select and view the strategic plan in their preferred view (Hierarchical, Table, or Board). If a new default view is set, it will automatically load the next time the Build Plan screen is opened.

#### 3.1.5 Dependency or Restriction

- a. The option to view the strategic plan will be available to whosoever has the permission to view the strategic plan.
- b. The strategic framework, strategic framework settings, strategic plan and its assignment are the must haves to view or participate in a strategic plan.

## 3.2 Hierarchical View

### 3.2.1 About Feature

The Hierarchical View provides a structured, tree-like representation of the strategic plan, displaying the parent-child relationship between goals, strategies, and initiatives. Users can expand or collapse different levels to navigate through the strategic framework easily. This view helps in understanding dependencies and provides a clear breakdown of the plan's structure.

### 3.2.2 Screen Explanation

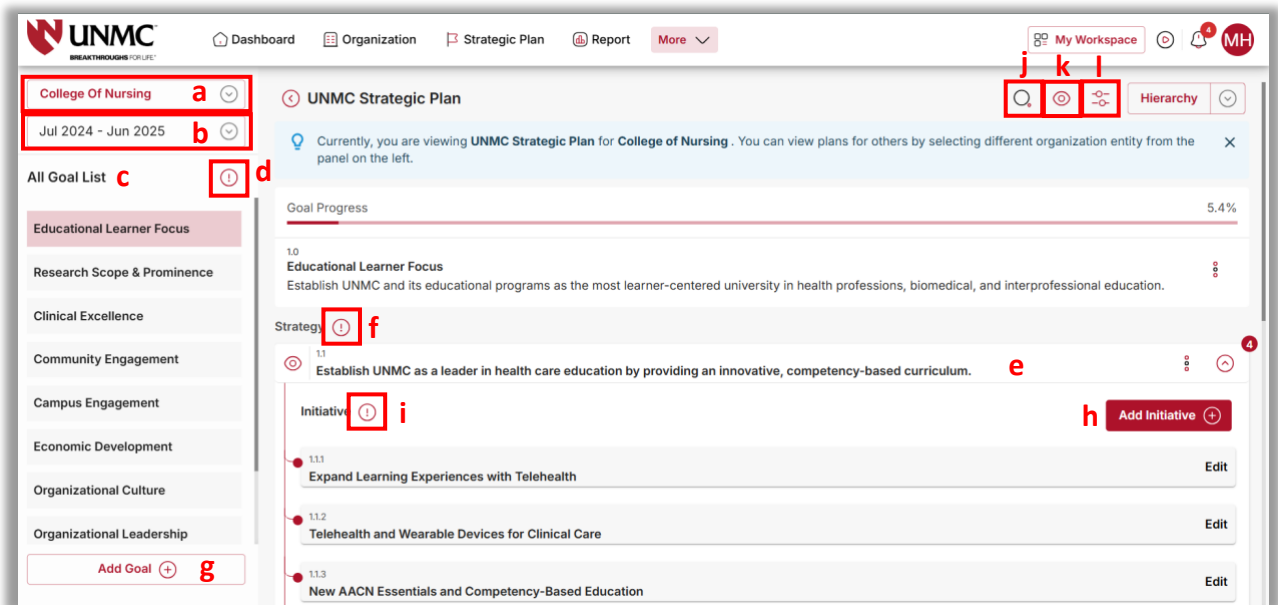
The “Hierarchical View” screen contains the following elements.

- a. **Select Organization Entity (Required):** This allows users to select the organization entity they belong to, which is assigned to a strategic plan by the administrator. Selecting the organization entity will allow users to load and view the strategic plan specific to their organization entity. By default, it selects the parent organization when you are viewing the strategic plan.
- b. **Select Review Period (Required):** This allows users to select the review period that is generated based on the timeframe of the strategic plan and its review period frequency. By selecting the different review periods in the strategic plan users can view the current version of the plan along with the historical version.
- c. **Strategic Framework Top Level (i.e. “Goal”):** This section displays the top level of the strategic plan based on the levels defined in the strategic framework. For example - if your strategic framework has two levels - Goal and Strategy. The top level is the goal and it will show up below the review period dropdown.
- d. **Strategic Framework Top Level Information Icon:** When a user hovers over the icon, a tooltip or popup containing explanatory text appears, providing the user with additional information or clarification. That additional information is the hint text that was added against the top level during the creation of the Strategic framework.
- e. **Strategic Framework Other Level (i.e. “Strategy”):** This section displays all other levels of the strategic plan based on the levels defined in the strategic framework. For example - if your strategic framework has two levels - Goal and Strategy. The other level is strategy and it will show up on the right side of the screen with an icon to open it further. Another example: let's say your strategic framework has three levels - Goal, Strategy, and Objective. The top level is always displayed on the left but the other two levels, strategy and objective, will show up on the right of the screen as a tree structure. You will click the drop icon in the strategy to view all the objectives of that strategy and so on.

**NOTE:** You will see that you can add content for the different levels of the strategic framework and it is like a tree structure. Parent top node (goal) is on the left of the screen. Parent top nodes can have multiple children (strategy). These children (strategy) will display on the right. Each strategy can have multiple sub-children and so on. These sub child will be visible when the user clicks the drop icon on a child level

- f. **Strategic Framework Other Level Information Icon:** When a user hovers over the icon, a tooltip or popup containing explanatory text appears, providing the user with additional information or clarification. That additional information is the hint text that was added against this level during the creation of the Strategic framework.
- g. **Add Strategic Framework Level Content:** This button allows users to add content in the strategic framework level against the strategic plan for the selected organization entity in the selected review period. Example - Let's say the strategic framework has two levels - goal and strategy. Users should be seeing two buttons - “Add goal” and “Add strategy”. These buttons will allow the user to add the content at the respective strategic framework level in a strategic plan for the organization entity.

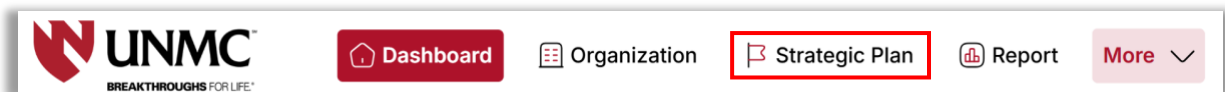
- h. **Add Strategic Action Item (Initiative)** - This is the last level in the strategic framework and will be displayed on the strategic plan screen too. Once you open the second last level on the screen you will see a button to add initiative. For example - Let's say the strategic framework has two levels - goal and strategy. Users should see two buttons - "Add goal" and "Add strategy". These buttons will allow the user to add the content at the respective strategic framework level in a strategic plan for the organization entity. However, when the user opens the second last level (strategy), a button to add a strategic action item (initiative) also appears.
- i. **Strategic Action Item Information Icon:** When a user hovers over the icon, a tooltip or popup containing explanatory text appears, providing the user with additional information or clarification. That additional information is the hint text that was added against strategic action items during the creation of the Strategic framework.
- j. **Search:** This allows users to search keywords inside several elements of the strategic plan.
- k. **Preview:** This button allows the user to see the preview of the whole plan including the organization entity statements (mission, vision, value) and the content for all the strategic framework levels added to the strategic plan. Users can also download the PDF to print.
- l. **Filter:** This button allows users to do advanced searches for different elements in the strategic plan using filters.



The screenshot displays the UNMC VisionSync Strategic Plan interface. The top navigation bar includes 'Dashboard', 'Organization', 'Strategic Plan' (highlighted with a red box), 'Report', and 'More'. The left sidebar shows the 'All Goal List' with categories like 'Educational Learner Focus', 'Research Scope & Prominence', 'Clinical Excellence', 'Community Engagement', 'Campus Engagement', 'Economic Development', 'Organizational Culture', and 'Organizational Leadership'. The main content area shows the 'UNMC Strategic Plan' for 'College of Nursing' for the period 'Jul 2024 - Jun 2025'. It displays a 'Goal Progress' bar at 5.4% and a list of strategic goals. The first goal is 'Educational Learner Focus' (1.0), which includes a strategy 'Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum' (1.1). Under this strategy, there are three initiatives: 'Expand Learning Experiences with Telehealth' (1.1.1), 'Telehealth and Wearable Devices for Clinical Care' (1.1.2), and 'New AACN Essentials and Competency-Based Education' (1.1.3). Each initiative has an 'Add Initiative' button. Annotations a-l are placed on the interface: 'a' and 'b' are on the left sidebar; 'c' is on the 'All Goal List' header; 'd' is on the 'Add Goal' button; 'e' is on the strategy text; 'f' is on the strategy icon; 'g' is on the 'Add Goal' button; 'h' is on the 'Add Initiative' button; 'i' is on the initiative icon; 'j' is on the search icon; 'k' is on the preview icon; and 'l' is on the filter icon.

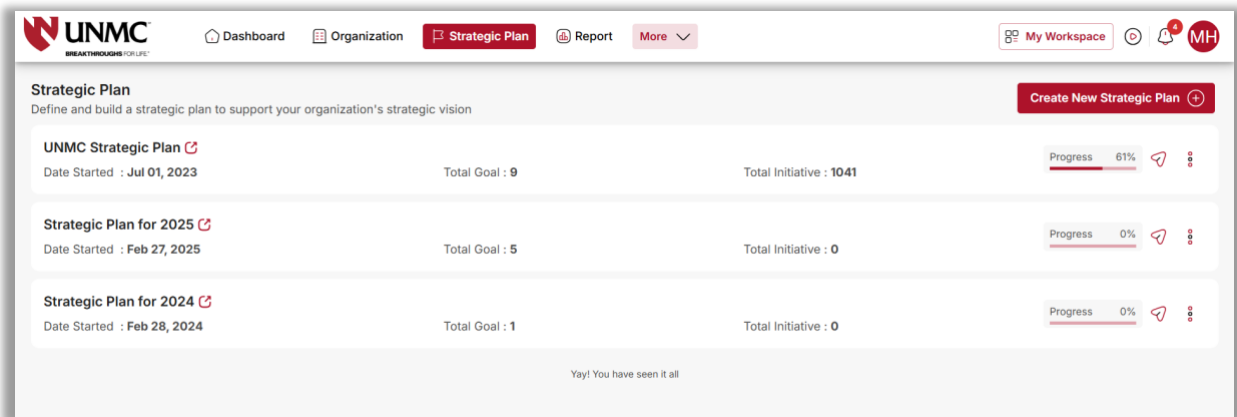
### 3.2.3 How to perform this feature/functionality?

- a. Log in to your VisionSync account using your credentials.
- b. From the Top-Navigation Bar, select "Strategic Plan".

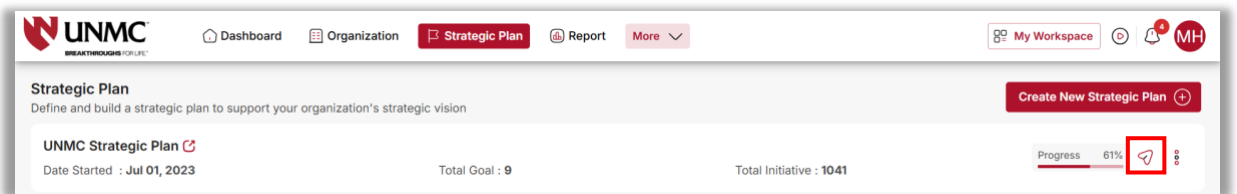


The screenshot shows the top navigation bar of the UNMC VisionSync interface. It includes the UNMC logo, a 'Dashboard' button, and a list of navigation items: 'Organization', 'Strategic Plan' (highlighted with a red box), 'Report', and a 'More' dropdown menu.

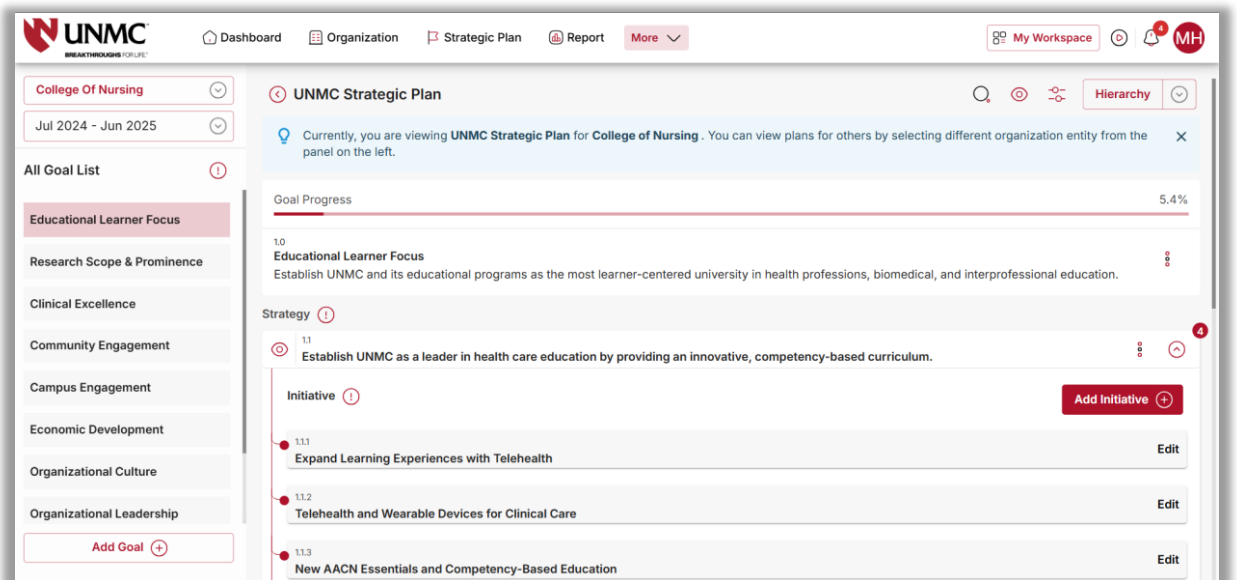
- c. The Strategic Plan screen will open, displaying a list of all the strategic plans created within your organization.



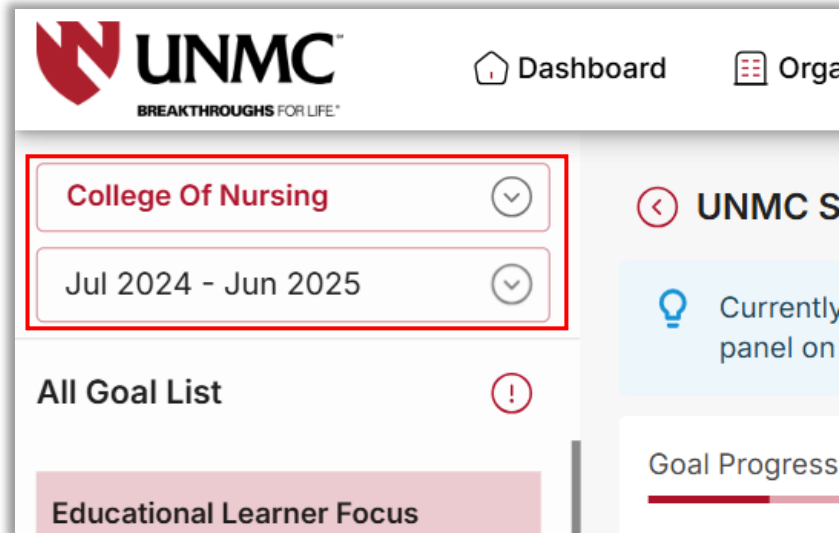
- d. Click on the "Build Plan" option against the plan.



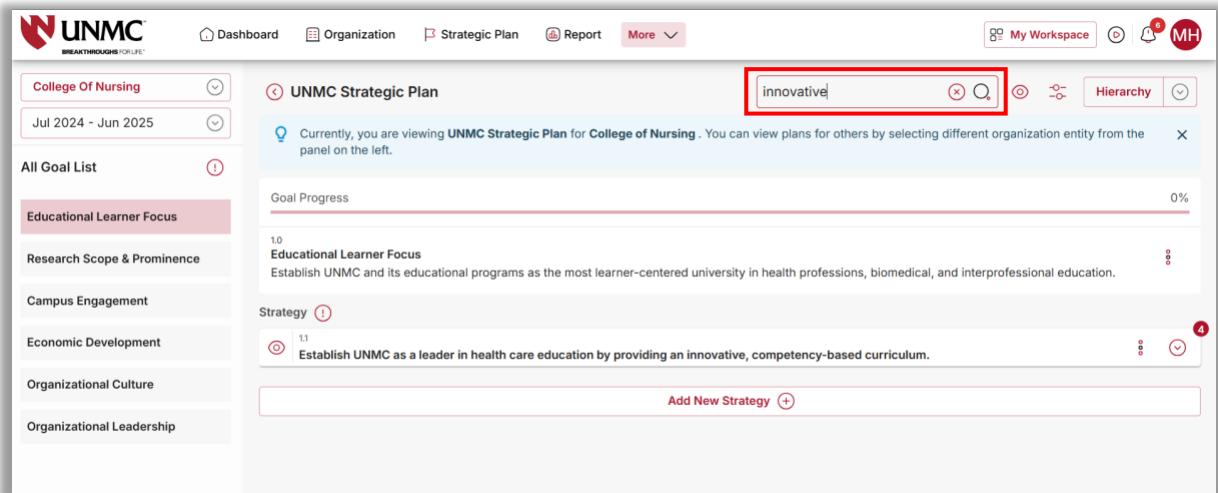
- e. A new screen will open containing the strategic plan details like assigned organization entities, review period, and strategic framework levels (goals, strategy, etc.)



- f. Select the organization entity for which you want to view the plan and select the review period of the strategic plan. By default, your default organization entity and current year are selected.



- g. You can also see an information message in blue color on the Build Plan screen indicating the current selected organization.
- h. To view all elements of the strategic plan, click on any strategic framework level to load the content of its child levels. Example - Let's say the strategic framework has two levels - goal and strategy. If you click on a goal, it will load up all the child strategies of that goal. If you click on the drop icon on a strategy, it will load all the strategic action items (initiative) of the strategy.
- i. To search inside the strategic plan, click on the Search icon and type the keyword in the search bar.



- j. To filter the elements in the strategic plan, click on the Filter button and apply filters for advanced search.



Filter

Reset

Select Plan Visibility

Select Plan Status

Progress Measurement

Progress Status

Initiative Status

Search user

Select labels

Select Progress Percent

Back

Apply

- k. To see the whole strategic plan for an organization entity on one page, click on the Preview button and then the user can download a PDF too.

UNMC Strategic Plan - College of Nursing

Collapse All

Mission

University of Nebraska Medical Center - Mission

We are Nebraska Medicine & UNMC.

Our mission is to lead the world in transforming lives to create a healthy future for all individuals and communities through premier educational programs, innovative research, and extraordinary patient care.

Vision

University of Nebraska Medical Center - Vision

The partnership of UNMC and Nebraska Medicine will be a world-renowned health sciences center that:

- Delivers state-of-the-art health care;
- Prepares the best-educated health professionals and scientists;
- Ranks among the leading research centers;
- Advances our historic commitment to community health;
- Embraces the richness of diversity to build unity;
- Creates economic growth in Nebraska.

Back

Download PDF

## 4. Strategic Action Item (Initiative)

This is the last level of the strategic framework. The actionable items are the elements of the strategic plan where actual work on the strategic plan. Each actionable item in turn contributes to the upper elements of the strategic plan based on the strategic framework levels.

### 4.1 Manage Strategic Action Items (Initiative)

#### 4.1.1 About feature

This feature enables users to add, edit, and delete strategic action items within the strategic plan. Users can create new action items to align with organizational goals, update details as needed to reflect progress, and remove items that are no longer relevant, ensuring an organized and up-to-date strategic execution.

#### 4.1.2 Screen explanation

The “Add Strategic Action Item (Initiative)” screen contains the following elements.

- a. Strategic Action Item (Initiative) Title (Required): This field requires the title of the strategic action item (Initiative).
- b. Description (Required): This field requires the description of the strategic action item (Initiative).
- c. Select Status (Required): This is to select the status of the strategic action item (Initiative). The status options were described during the strategic framework.
- d. Start and End Date (Required): This is to set the duration of the strategic action item (Initiative). The duration of the strategic action (initiative) item is independent of the review periods of the strategic plan but it can not go beyond the overall timeframe of the strategic plan.
- e. Select Measurement (Required): This is to select the measurement option that will be used to measure the progress of the strategic action item (Initiative). These measurement options were defined in the strategic framework. A hint text will also be displayed below each measurement option if added to the strategic framework.
- f. Overall Target (Required): This field requires the overall target value in the selected measurement for the strategic action item (Initiative).
- g. Review Period Target Estimates (Required): The section displays year cycles within the selected timeframe. For example, if the start date is “04/03/2023” and the end date is “01/01/2026” then the section would display four yearly cycles/review periods as below

By Jan 2023 - Dec 2023

By Jan 2024 - Dec 2024

By Jan 2025 - Dec 2025

By Jan 2026 - Dec 2026

Users need to enter the target estimate against each review period in such a way that each review period's target should be a whole number, and the sum of all review period targets must equal the Initiative overall measurement target.

Example -

A company aims to reduce its carbon footprint by 100% over two years by implementing eco-friendly policies, optimizing energy consumption, and adopting sustainable practices. The targets and actual progress for each year could be:

#### By year targets

- Year 1 - 50%
- Year 2 - 50%
- On adding each review period targets it reaches to overall measurement target i.e, 100 Percent (%) in this case.

#### By year progress

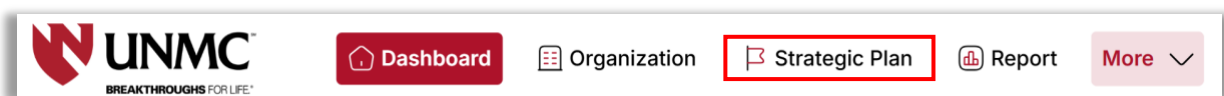
- Year 1 - 20%
- Year 2 - 80%
- On adding each review period progress it reaches the overall measurement target i.e, 100 Percent (%) in this case.

h. Add Labels: This is to add labels for the categorization of strategic action items (Initiative). The labels were defined in the strategic plan.

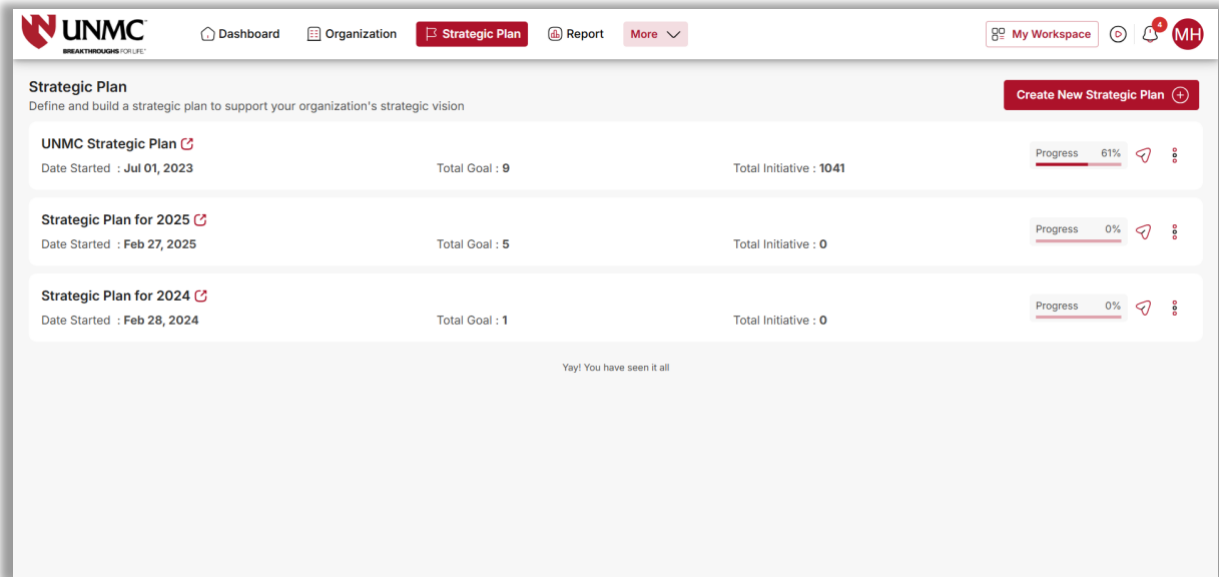
i. Hierarchy: This option at the top left of the screen displays the hierarchy of levels within the strategic plan, including Goals and Strategies, along with their corresponding content for each actionable item (initiative) screen.

### 3. How to perform this feature/functionality?

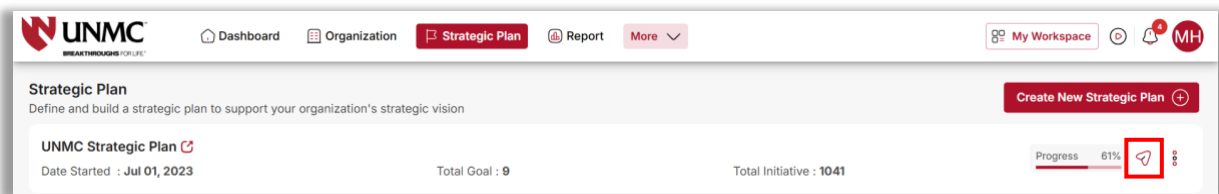
- a. Log in to your VisionSync account using your credentials.
- b. From the Top Navigation Bar, select "Strategic Plan".



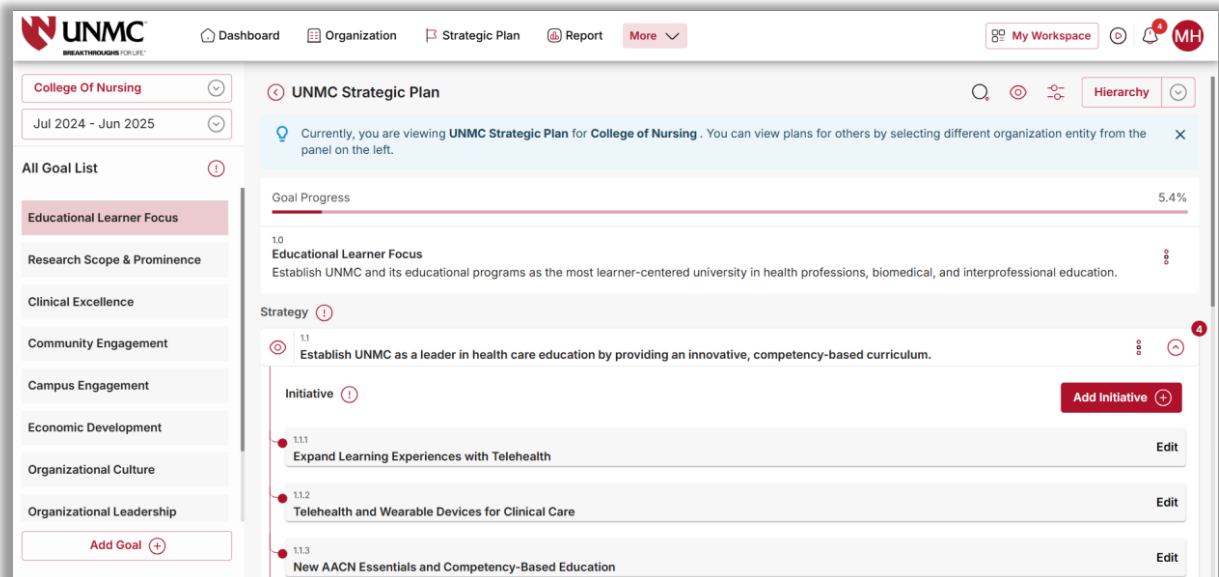
- c. The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



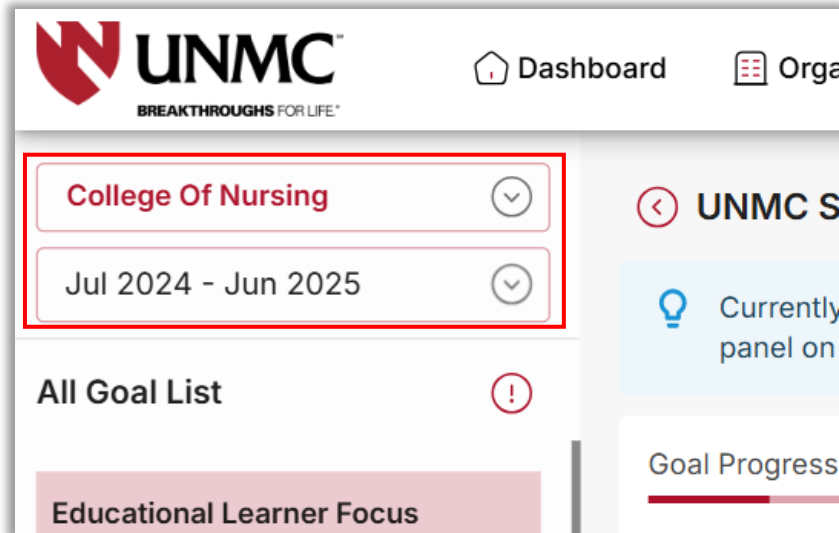
d. Click on the "Build Plan" option against the relevant plan.



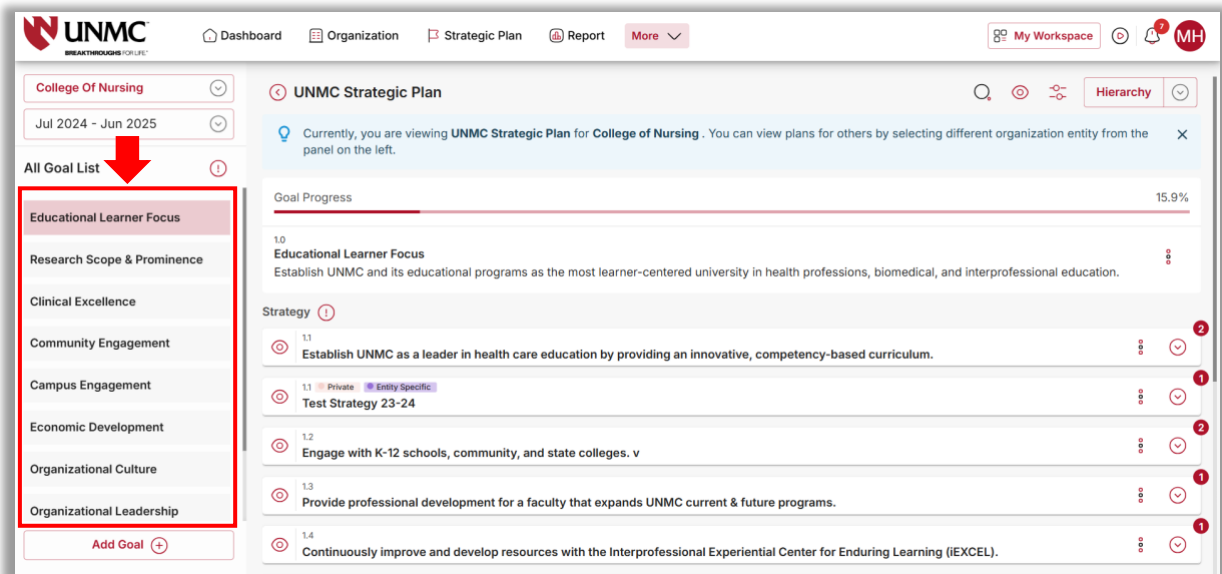
e. A new screen will open containing strategic plan details such as assigned organization entities, review period, and strategic framework levels (Goals, Strategies, etc.).



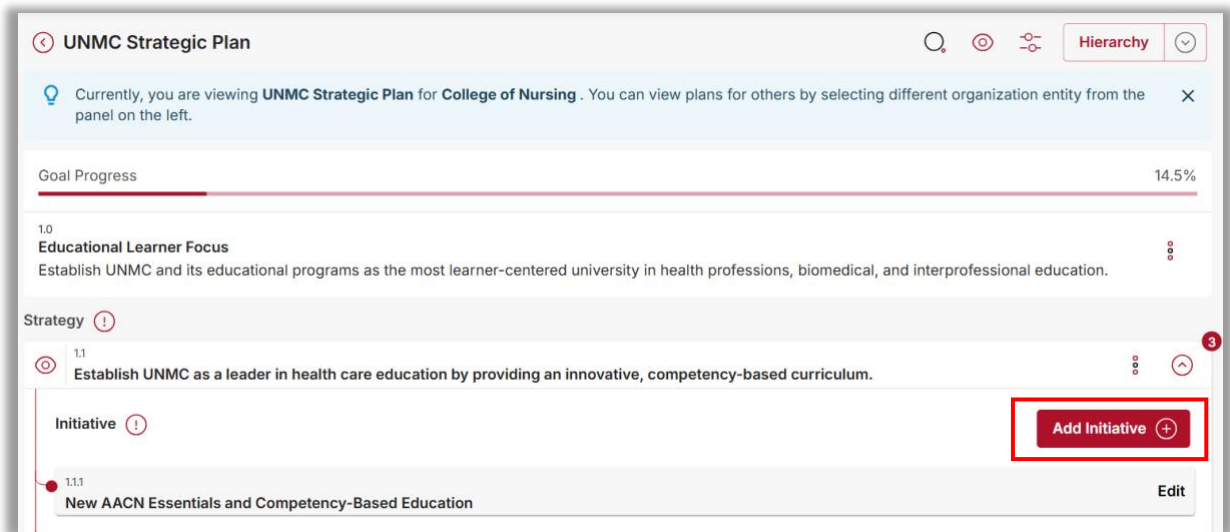
f. Select the organization entity from the top and choose the review period of the strategic plan. By default, your assigned organization entity and the current year are selected.



g. Select the strategic plan element (Goal, Strategy, etc.) where you want to add, edit, or delete a strategic action item (Initiative).




- I. To Add a Strategic Action Item (Initiative):
  - h. Click on the "Add Strategic Action Item (Initiative)" button.




- i. Enter the details such as Title, Description, Status, Measurement, etc. in the form.



### Add Initiative

Enter initiative for a strategy, add users, and track its progress


 Initiative Title

Description

Select status 

 Start (mm/dd/yyyy) to  End (mm/dd/yyyy)


Overall Target

Select Measurement 

Measurement Target

[Back](#) [Save Initiative](#)


- j. Select labels for categorization as defined in the strategic plan.
    - k. Click "Save Strategic Action Item (Initiative)" to add it to the strategic plan.


**NU 5-Year Strategy**

☐ Access, Affordability and Attainment
 ☐ Talent Development


☐ Engagement
 ☐ Partnerships
 ☐ Efficiency and Effectiveness

☐ Not Applicable


**Blueprint Nebraska**

☐ Powering our economy with people
 ☐ Reimagining and connecting our places
 ☐ Building an efficient, effective government
 ☐ Growing promising industry sectors
 ☐ Not Applicable

Back



Save Initiative

## II. To Edit a Strategic Action Item (Initiative):

h. Click on the Edit (pencil) icon against the desired action item.

1.0

Educational Learner Focus

Establish UNMC and its educational programs as the most learner-centered university in health professions, biomedical, and interprofessional education.

Strategy


1.1

Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum.

Initiative

1.1.1

New AACN Essentials and Competency-Based Education



Add Initiative +

i. Update the necessary details such as Title, Description, Status, Measurement, etc.

j. Modify the labels as required.

k. Click "Save Strategic Action Item (Initiative)" to apply the changes.

## III. To Delete a Strategic Action Item (Initiative):

h. Click on the kebab menu (three dots icon) next to the action item.

Strategy


1.1

Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum.

Initiative

1.1.1

New AACN Essentials and Competency-Based Education



1.1.2

Learning Outcomes Following COVID


1.1


Private


Entity Specific


Test Strategy 23-24

Add Initiative +

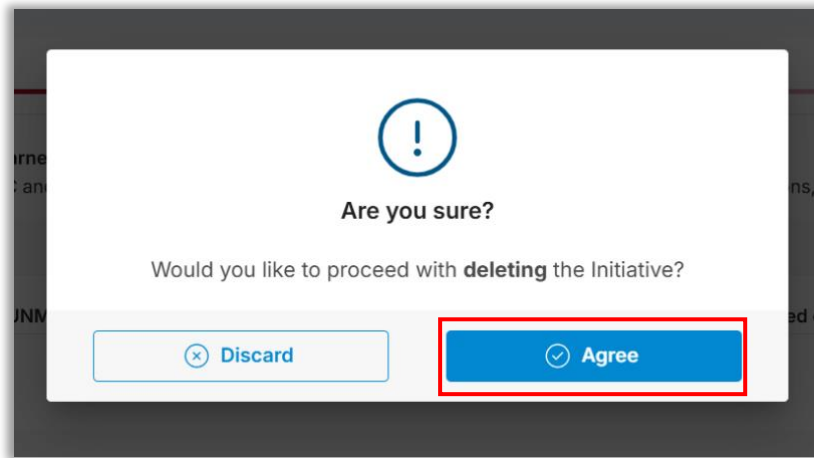

Edit


Copy


Delete


Watchlist

- i. Select the "Delete" option from the dropdown menu.
- j. A confirmation window will appear. Click "Agree" to confirm the deletion.



## 4.2 Add Users in Strategic Action Item (Initiative)

### 4.2.1 About feature


The "Add Users in Actionable Item" feature in VisionSync enables you to assign a user or multiple users to an actionable item. This feature promotes collaboration, accountability, and effective task management within VisionSync.

### 4.2.2 Screen explanation


The "Users" tab of the Strategic Action Item (Initiative) screen contains the following elements.



- a. Search User: This feature allows searching for users who are part of your organization in VisionSync to assign them to the strategic action item.
- b. Select Role: This is to select the roles of the assigned users to strategic action items (Initiative).
- c. Team List: This displays the list of team members who have been added to the strategic action item along with the status of the invitation (pending, declined, accepted).




 **Add Initiative**  
Enter initiative for a strategy, add users, and track its progress

< INITIATIVE **USERS** PROGRESS TASK COMMEI >

 Add users and roles, then hit **Save and Send Invite**. Invited users will receive an email to accept or deny the invitation. Add yourself to instantly join the team, no invite needed. Use 'accepted' filter to view all the members.

Search user  Select Role 

Team (1) Accepted Pending Declined

 **Maninder Hora (maninder.hora@unmc.edu)**  
IT Project Manager (Role: Responsible)

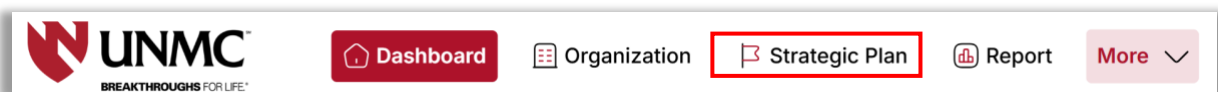
Invited By	Invitation Date	Status	Accepted Date	
Maninder Hora	Mar 04, 2025	Accepted	Mar 04, 2025	<span>Remove</span>

Yay! You have seen it all

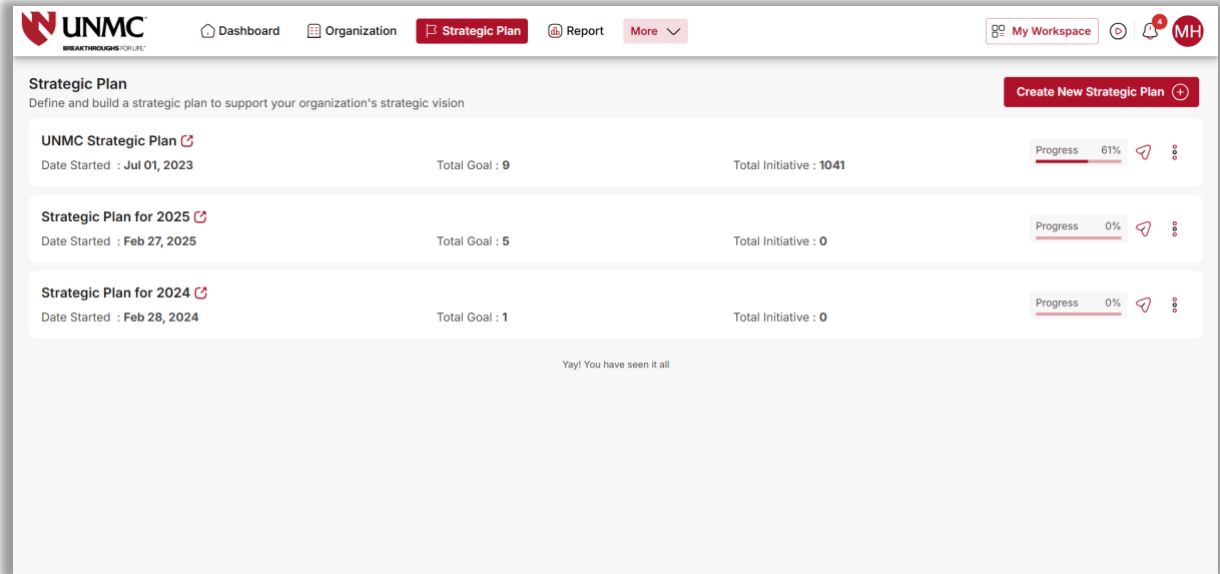
Back Save And Send Invite

#### 4.2.3 How to perform this feature/functionality?

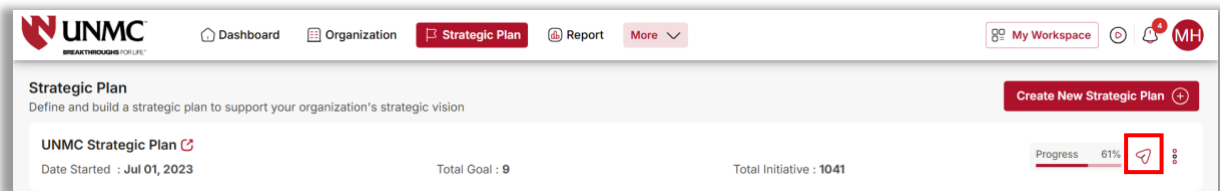
- Log in to your VisionSync account using your credentials.
- From the Top-Navigation Bar, select "Strategic Plan".



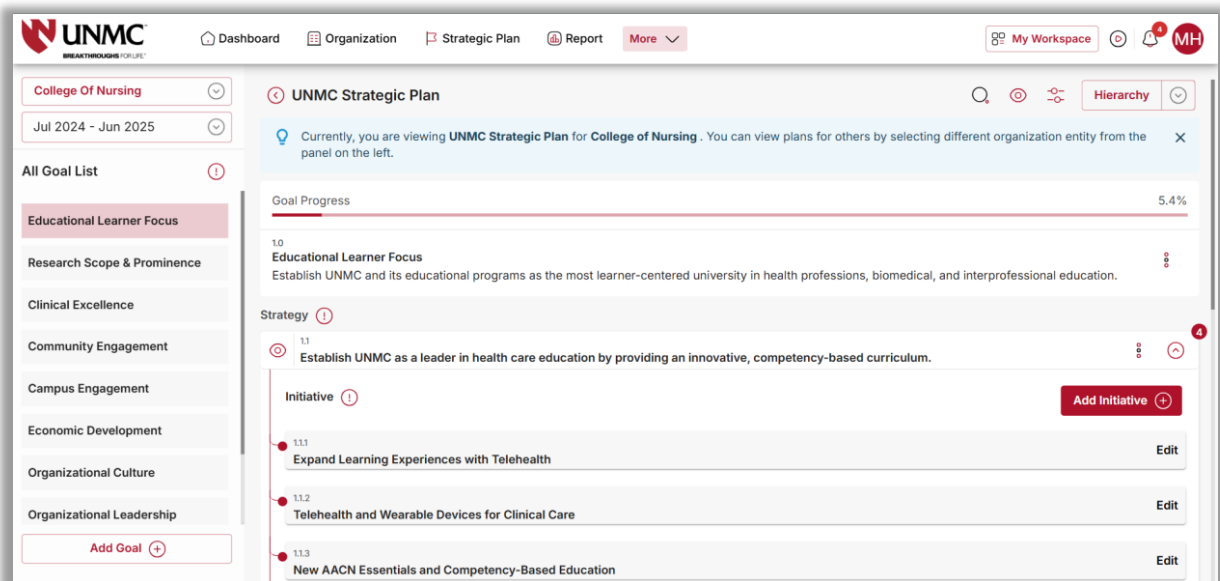
- The Strategic Plan screen will open, displaying a list of all the strategic plans created within your organization.



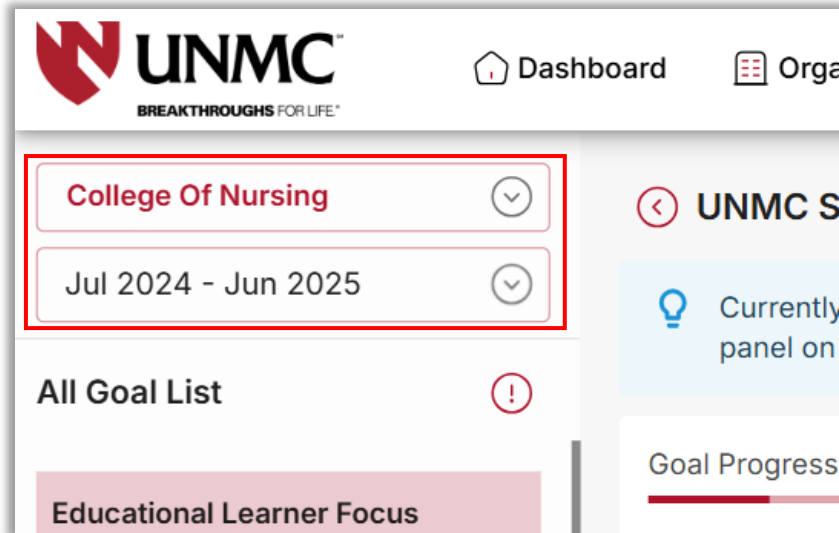
d. Click on the “Build Plan” option against the plan.



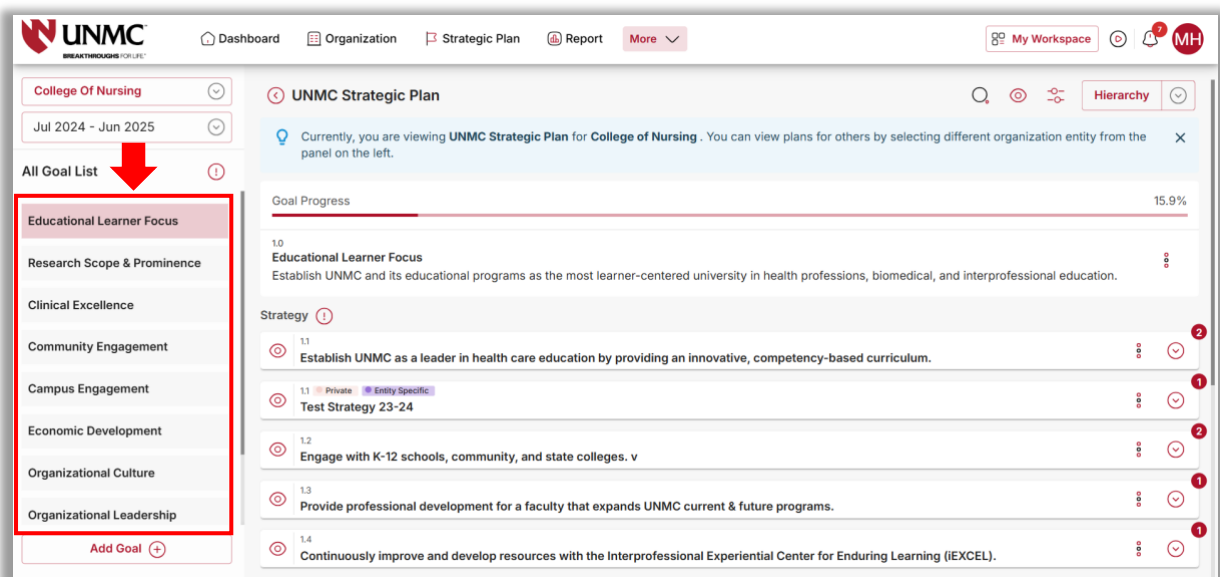
e. A new screen will open containing the strategic plan details like assigned organization entities, review period and strategic framework levels (goals, strategy, etc.)



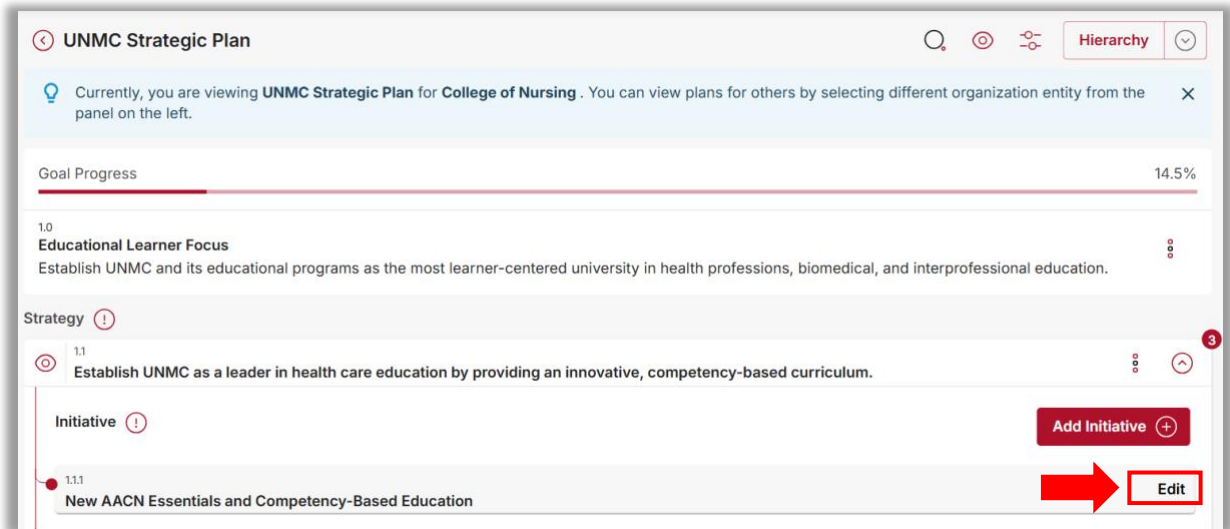
f. Select the organization entity from the top and select the review period of the strategic plan. By default, your default organization entity and current year are selected.



- g. Select the strategic plan element (goal, strategy, etc) against which you want to edit strategic action items (initiative) for your organization entity.



- h. To add users against a strategic action item (Initiative), click on the “Edit” button against it and go to the “User” tab.



UNMC Strategic Plan

Currently, you are viewing **UNMC Strategic Plan** for **College of Nursing**. You can view plans for others by selecting different organization entity from the panel on the left.

Goal Progress 14.5%

1.0 Educational Learner Focus  
Establish UNMC and its educational programs as the most learner-centered university in health professions, biomedical, and interprofessional education.

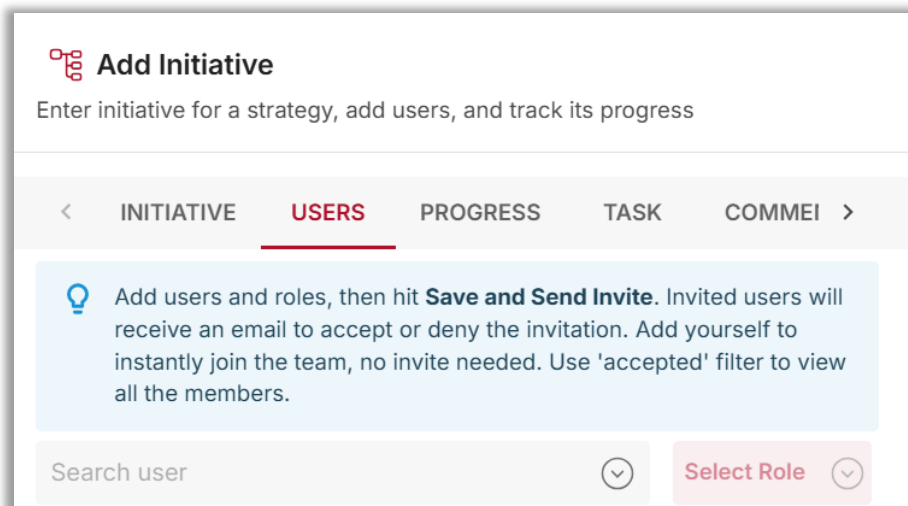
Strategy 1.1  
Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum.

Initiative 1.1.1  
New AACN Essentials and Competency-Based Education

Add Initiative +

Edit

- i. Fill in the details like name and user role.



**Add Initiative**

Enter initiative for a strategy, add users, and track its progress


< INITIATIVE **USERS** PROGRESS TASK COMMEI >

Add users and roles, then hit **Save and Send Invite**. Invited users will receive an email to accept or deny the invitation. Add yourself to instantly join the team, no invite needed. Use 'accepted' filter to view all the members.


Search user



Select Role

- j. Click on “Save and Send Invite” to add users in the strategic action item (Initiative). Once added, the invitation will be sent to the corresponding users.


 **Add Initiative**  
Enter initiative for a strategy, add users, and track its progress

< INITIATIVE **USERS** PROGRESS TASK COMMEI >

 Add users and roles, then hit **Save and Send Invite**. Invited users will receive an email to accept or deny the invitation. Add yourself to instantly join the team, no invite needed. Use 'accepted' filter to view all the members.


 Select Role 

**Team (1)** **Accepted** **Pending** **Declined**

 **Maninder Hora (maninder.hora@unmc.edu)**  
IT Project Manager (Role: Responsible)


Invited By	Invitation Date	Status	Accepted Date	
Maninder Hora	Mar 04, 2025	Accepted	Mar 04, 2025	<b>Remove</b>

Yay! You have seen it all

Back  Save And Send Invite

- k. Users with outstanding invitations will continuously receive reminder emails until each respective invitation is acknowledged and accepted.
- l. If you decide to add yourself to the strategic action item (initiative), the system will automatically recognize and add you, removing the need for a separate invitation.
- m. You can view the list of added users in the Team section.

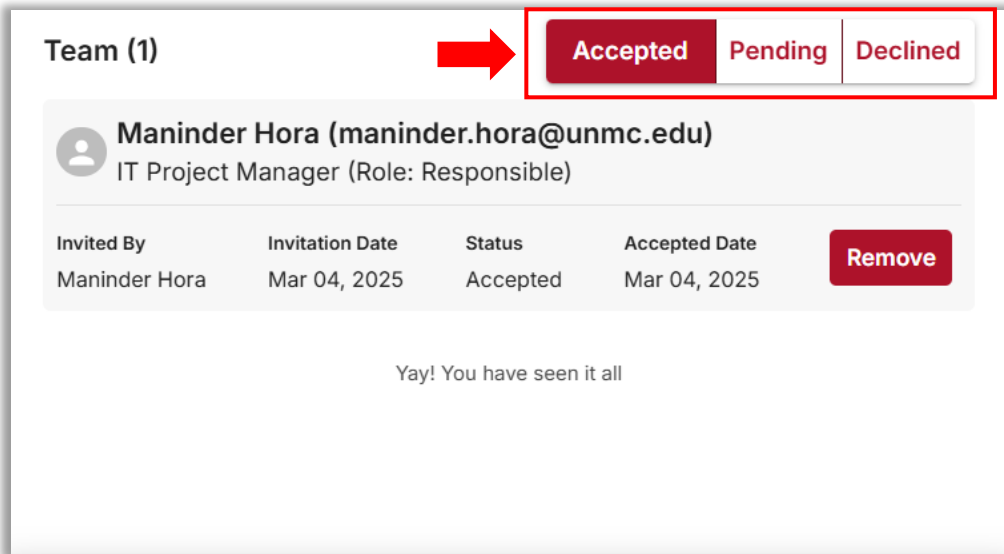
**Team (1)** **Accepted** **Pending** **Declined**

 **Maninder Hora (maninder.hora@unmc.edu)**  
IT Project Manager (Role: Responsible)

Invited By	Invitation Date	Status	Accepted Date	
Maninder Hora	Mar 04, 2025	Accepted	Mar 04, 2025	<b>Remove</b>


Yay! You have seen it all

- n. To filter the list of users by invitation status, apply the desired filter (Pending, Declined, Accepted) from the top right of the Team section.



**Team (1)**

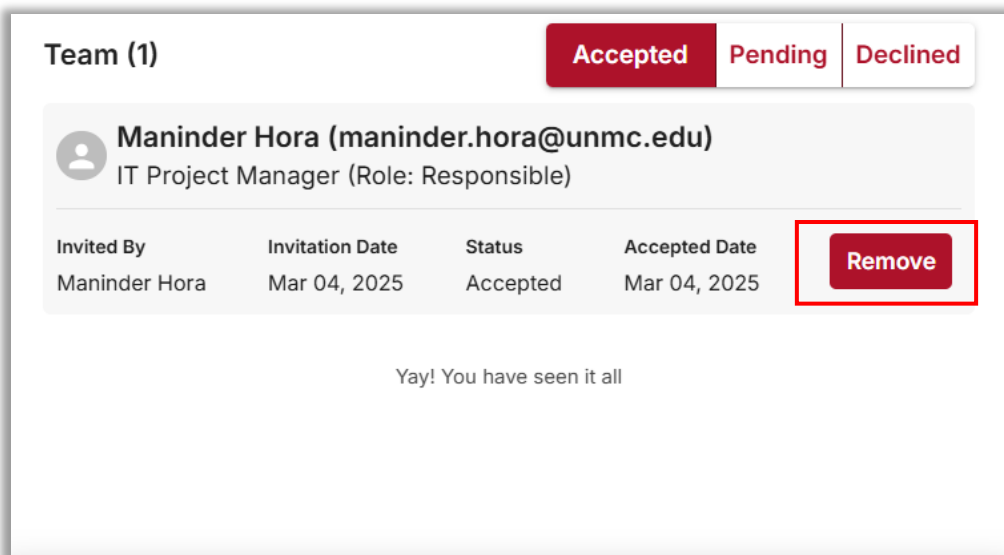
**Accepted** Pending Declined

 **Maninder Hora (maninder.hora@unmc.edu)**  
IT Project Manager (Role: Responsible)

Invited By	Invitation Date	Status	Accepted Date	
Maninder Hora	Mar 04, 2025	Accepted	Mar 04, 2025	<b>Remove</b>


Yay! You have seen it all

- o. You can also see the additional details against each member like Invitation by, Invitation date, and invitation status.
- p. You can also resend or withdraw the invitation by clicking on the respective option.
- q. To remove the user, select the “Accepted” filter from the Team section and click the “Remove” button against the user you want.



**Team (1)**

**Accepted** Pending Declined

 **Maninder Hora (maninder.hora@unmc.edu)**  
IT Project Manager (Role: Responsible)

Invited By	Invitation Date	Status	Accepted Date	
Maninder Hora	Mar 04, 2025	Accepted	Mar 04, 2025	<b>Remove</b>

Yay! You have seen it all

#### 4.2.4 Expected Result

Once you have added users to the strategic action item, they will receive a notification of the invitation and will be associated with that strategic action item upon accepting the invitation. You will be notified once they accept or decline the invitation. The user then follows the steps to accept or decline the invitation.

#### 4.4.5 Dependency & Restrictions

- a. Add users in strategic action items (initiatives) is available to only the users who have permission to do it for their organization entity.
- b. Users will only be associated with any strategic action item if they accept the invitation to that strategic action item (Initiative).

## 5. Strategic Action Item (Initiative) Progress

### 5.1 Add and Update Progress

#### 5.1.1 About feature

Tracking and updating progress against strategic action items (Initiatives) in VisionSync is crucial for monitoring the execution of the strategic plan. By adding or updating progress, users can track the status of a strategic action item, identify delays, and take necessary corrective actions to ensure alignment with organizational goals.

#### 5.1.2 Screen explanation

The “Progress” tab of the Strategic Action Item (Initiative) screen contains the following elements:

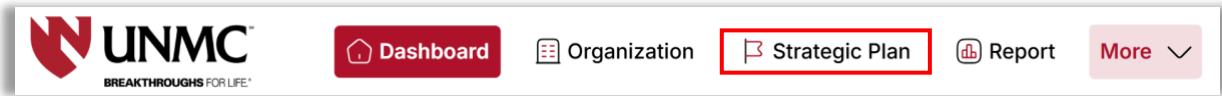
- a) Cumulative Progress: Displays the overall progress of a strategic action item (Initiative) towards the target and allows access to progress tracking for different periods.
- b) Select Progress Tracking Period: Enables selection of the tracking period for saving progress.
- c) Progress Measurement Value: Requires the current progress value against the measurement target estimate.
- d) Select Status: Defines the progress status of the strategic action item (Initiative) based on the strategic framework. If configured, a hint text will be displayed below each status option.
- e) Progress Comments: Allows users to add comments related to progress updates.
- f) Progress Overview: Shows all progress updates added for a strategic action item, including timestamps and the user who updated the progress.

When progress tracking per review period is enabled, this section displays progress against each review period. For example, if the target estimate for Period 1 is 10% and the progress value is 5%, it will show the progress as 50% completed.

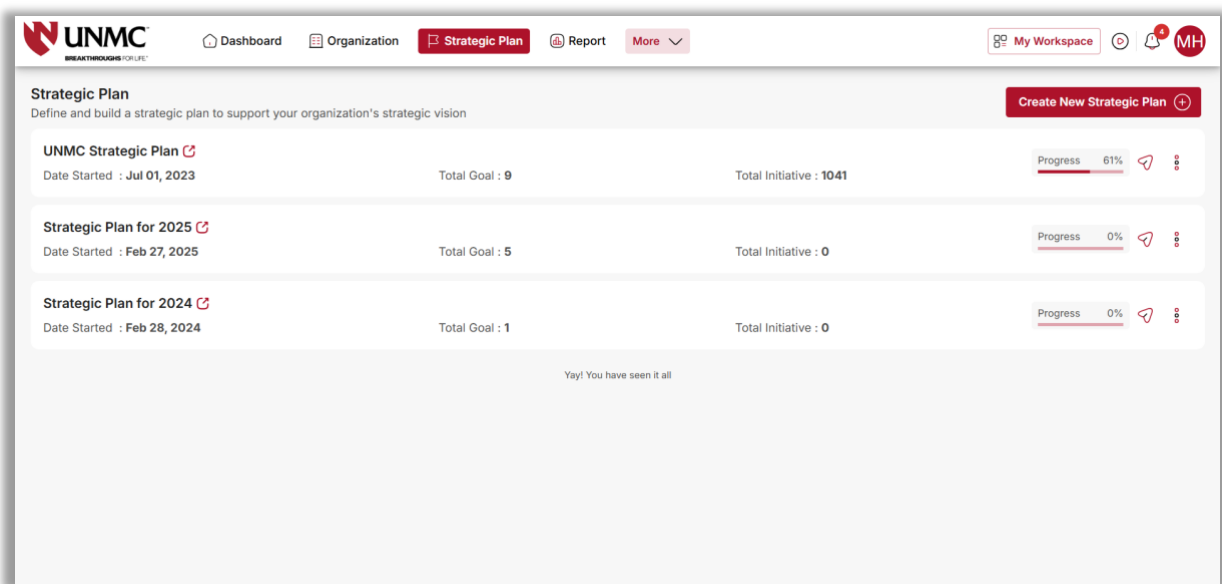
### 5.1.3 How to perform this feature/functionality?

#### Adding or Updating Progress

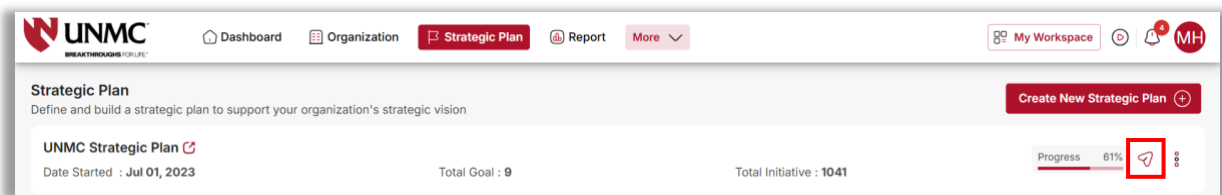
- a) Log in to your VisionSync account using your credentials.
- b) From the Top-Navigation Bar, select "Strategic Plan".



- c) The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.

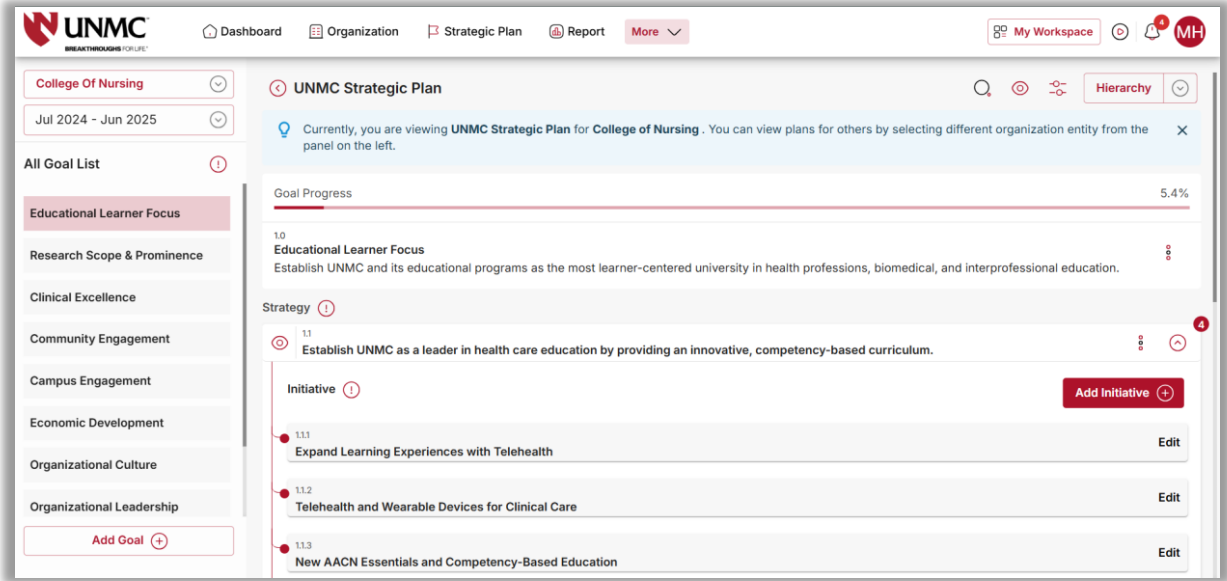


- d) Click on the "Build Plan" option for the respective plan.

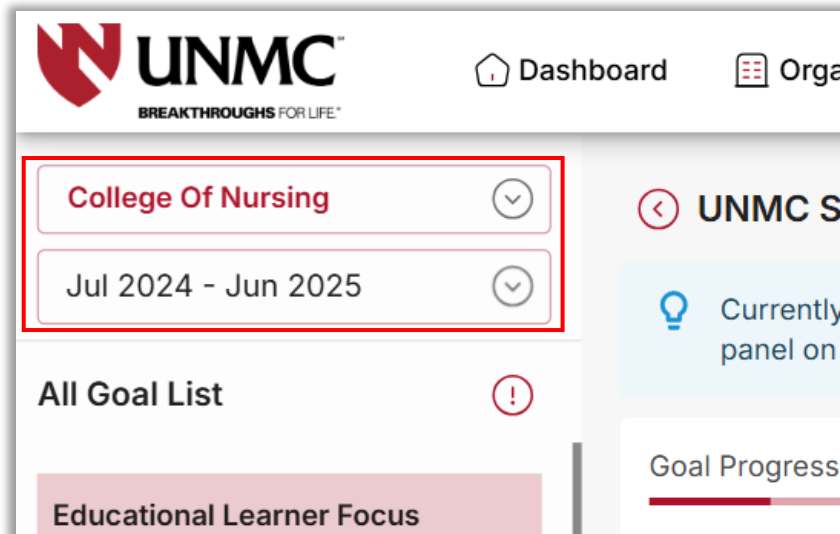


- e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).

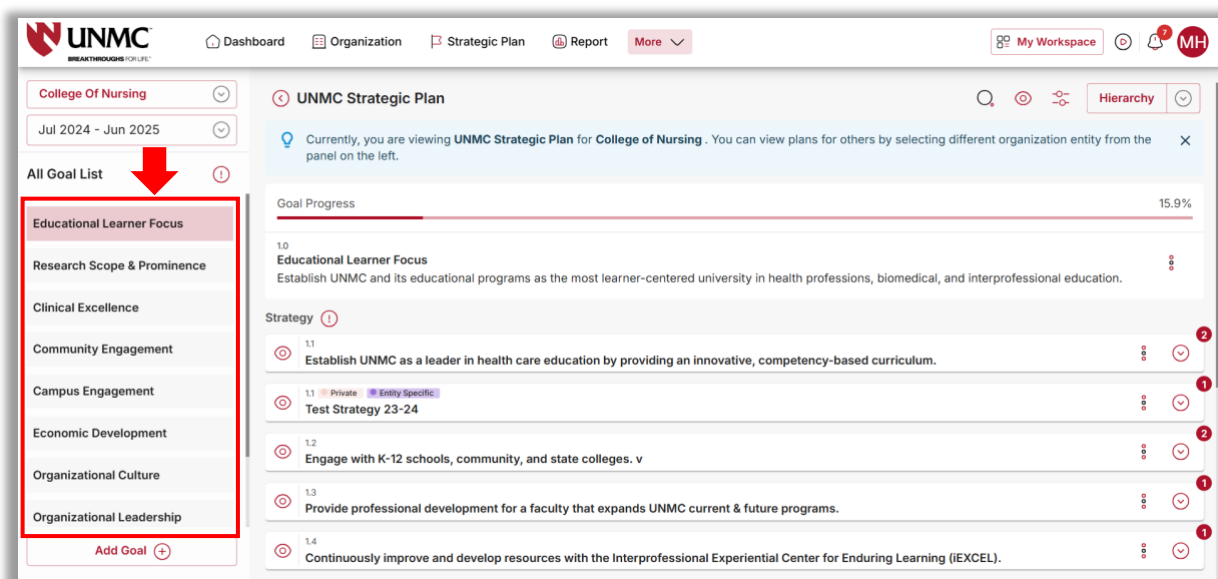




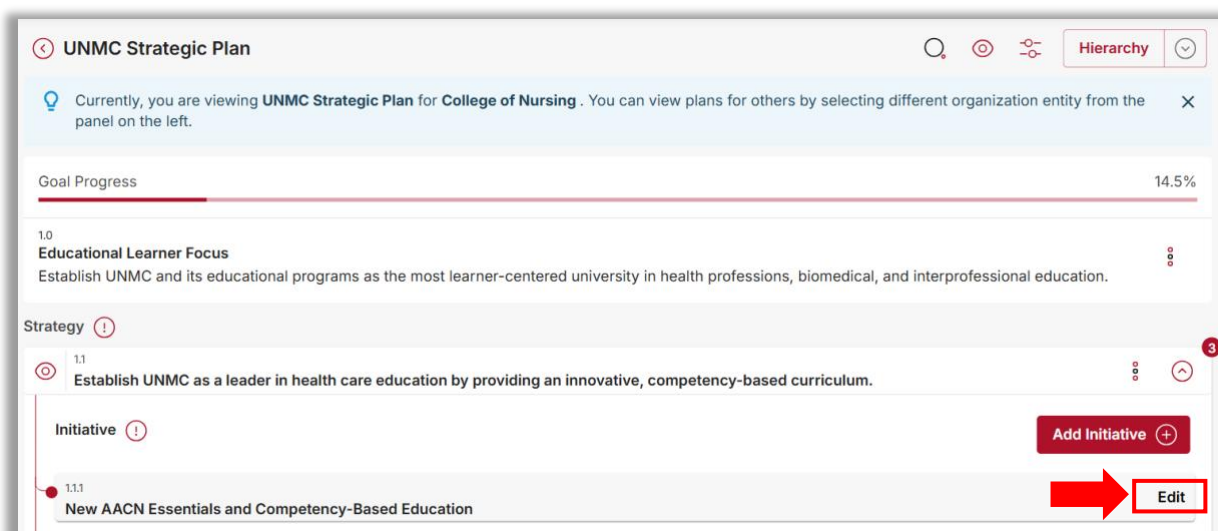
- f) Select the organization entity from the top and choose the review period of the strategic plan. By default, your assigned organization entity and the current year are selected.




- g) Select the strategic plan element (Goal, Strategy, etc.) associated with the strategic action items (Initiatives) for your organization entity.



h) Click on the “Edit” button against the strategic action item (Initiative) and navigate to the “Progress” tab.




i) Fill in the required details, including progress tracking period, measurement value, progress status, and progress comments.

 **Add Initiative**  
Enter initiative for a strategy, add users, and track its progress

< INITIATIVE USERS **PROGRESS** TASK COMMENTS >

**Overall Initiative Status**  

● In Progress

 Please enter the progress value in Percentage (%) towards the overall target. The per review period progress will automatically be calculated based on your projections.

**Track Progress**  

Jan 2025 - Mar 2025

Percentage (%) Progress Value

Select status

Add your progress update comments

- j) Click on “Save Progress” to add or update the progress against the strategic action item (Initiative).

**Progress Breakdown By Review & Progress Tracking Period**  
By Year Targets Jul 2024 - Jun 2025


100%

By Year Progress Achieved - 0% of **Overall Target** (100%).

**Quarterly Breakdown**  
● On Track ● Off Track

	Jul 2024 - Jun 2025
Jan - Mar	
<b>Total</b>	<b>0%</b>

Back



Save Progress

- k) Once the progress is added or updated, it will be visible in the Progress Overview section.

#### 5.1.4 Expected Result

Once progress has been added or updated against a strategic action item (Initiative) in VisionSync:

- The changes will be visible to all relevant team members.
- The Progress Overview section will reflect the added or updated progress.

#### 5.1.5 Dependency & Restrictions

- a) Only users with the required permissions for their organization entity can add or edit progress for strategic action items (Initiatives).
- b) Users cannot update the progress for a tracking period that has not yet started. Additionally, skipping any progress tracking period is not allowed.

## 6. Strategic Action Item (Initiative) Metric

### 6.1 Add and Update


#### 6.1.1 About feature

The **Metric** tab in VisionSync allows users to define and manage how a Strategic Action Item (Initiative) contributes to its associated metrics. These metrics serve as a foundation to quantify impact and progress. Users can assign, update, or delete metrics association with the strategic action item, as well as define contribution levels for each. However, once progress has been tracked for any period, changes to the initial metric association are restricted to maintain historical consistency.

#### 6.1.2 Screen explanation

The “**Metric**” tab of the Strategic Action Item (Initiative) screen contains the following elements:

- **Auto-Selected Progress Period:** When the tab is opened, the current progress period is automatically selected.
- **Add/Edit Button:** Located at the top right, it enables users to enter edit mode for the metrics and their contribution levels.
- **Metrics:** Lists all metrics associated with the Strategic Action Item at the time of its creation or later showing their contribution levels.
- **Contribution Level Configuration:** Allows adjusting how much each metric contributes to the overall progress during the selected progress period.


**Add Initiative**

Enter initiative for a strategy, add users, and track its progress

<

INITIATIVE

USERS

PROGRESS

**METRIC**

TASK

COM


>

Track Metric Contribution Levels

b

ADD/EDIT

+


Set the contribution level for each Metric for the selected progress period. Levels can stay the same or be adjusted as impact shifts over time.

Track Progress

Apr 2025 - Jun 2025

a

⌵

○○○

Research and Creative Activity

Alignment Unit Use of Academic Analytics for Collaborations

● Core Catalyst

⌵

○○○

Grants and Contracts

Research Externally Sponsored Research Expenditures

● Incremental

⌵

Research F&A Recovery on Research Sponsored Projects per Faculty

● Foundational

⌵

Back

Save Metric

Add Metrics / Edit Existing Metrics

Select Metric

c

○○○

Research and Creative Activity

Alignment Unit Use of Academic Analytics for Collaborations

● Core Catalyst

⌵

🗑

○○○

Grants and Contracts

Research Externally Sponsored Research Expenditures

● Incremental

⌵

🗑

Research F&A Recovery on Research Sponsored Projects per Faculty

● Foundational

⌵

🗑

d

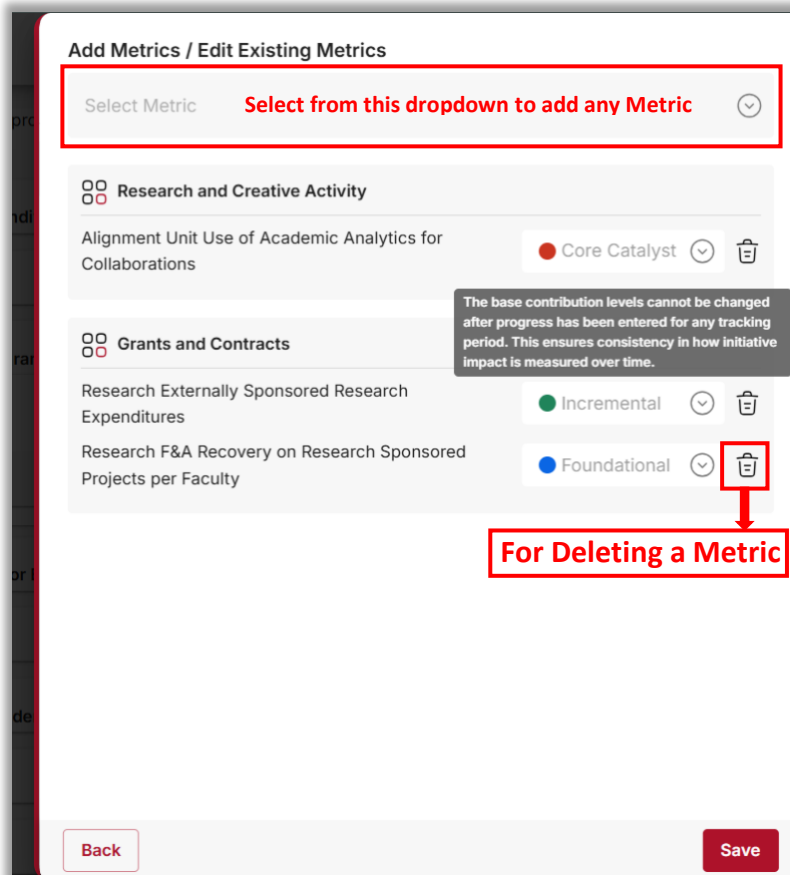
Back

Save

Note:-

Page 45 | 85

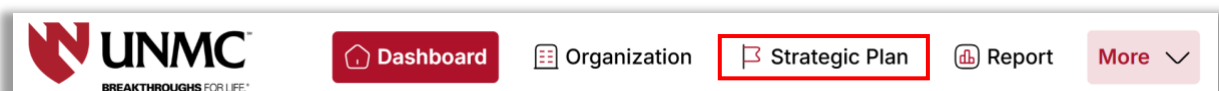
- **Metric Edit Locking:** If progress has been recorded for any period, the contribution level set at the starting point of the association gets locked for editing. Only contribution levels for each progress period can be changed. This will allow us to check how the influence of the strategic action item of the metric is changing over time.
- **Metric Deletion Cascade:** Deleting a metric removes all tracked progress across all tracking periods for that metric.
- **Metric Addition Cascade:** Adding a new metric along with its contribution level propagates the change to all progress periods where that metric was not previously present.



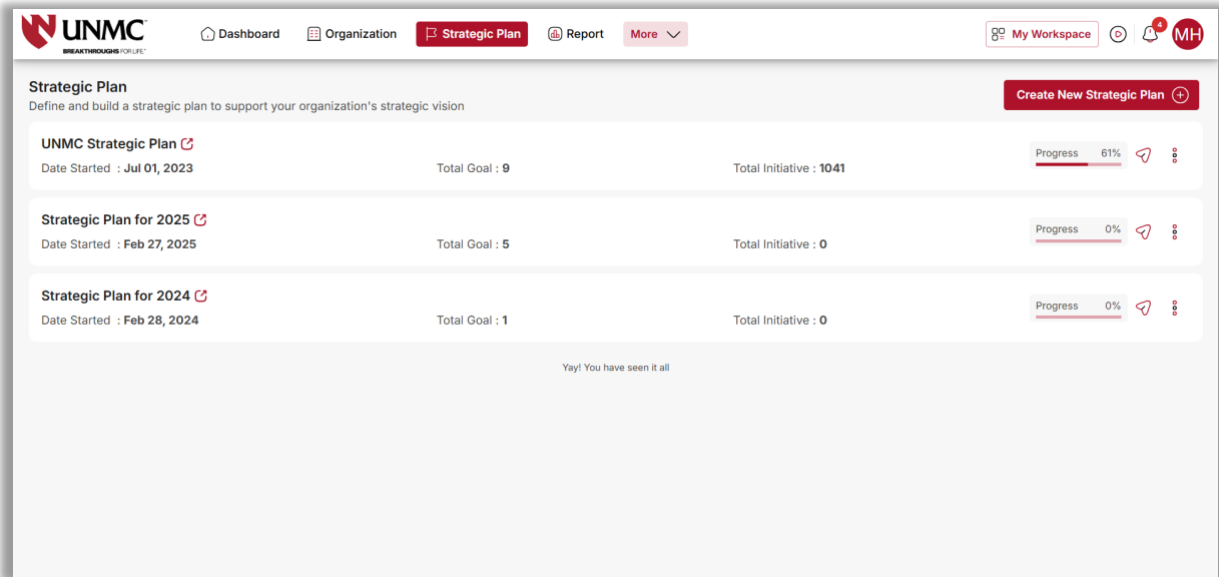
### 6.1.3 How to perform this feature/functionality?

#### Adding or Updating Progress

- Log in to your VisionSync account using your credentials.
- From the Top-Navigation Bar, select "Strategic Plan".



- The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



**Strategic Plan**  
Define and build a strategic plan to support your organization's strategic vision

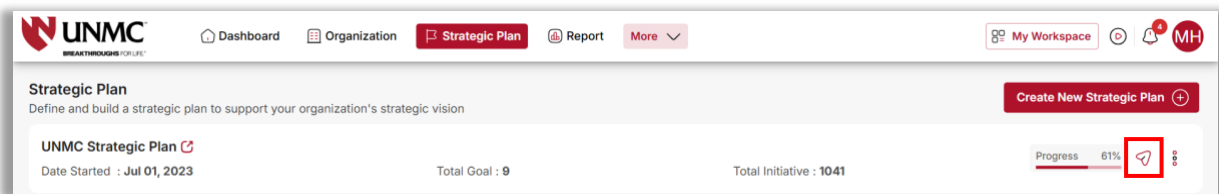
**UNMC Strategic Plan** [🔗](#)  
Date Started : Jul 01, 2023      Total Goal : 9      Total Initiative : 1041      Progress: 61% [🔗](#) [⋮](#)

**Strategic Plan for 2025** [🔗](#)  
Date Started : Feb 27, 2025      Total Goal : 5      Total Initiative : 0      Progress: 0% [🔗](#) [⋮](#)

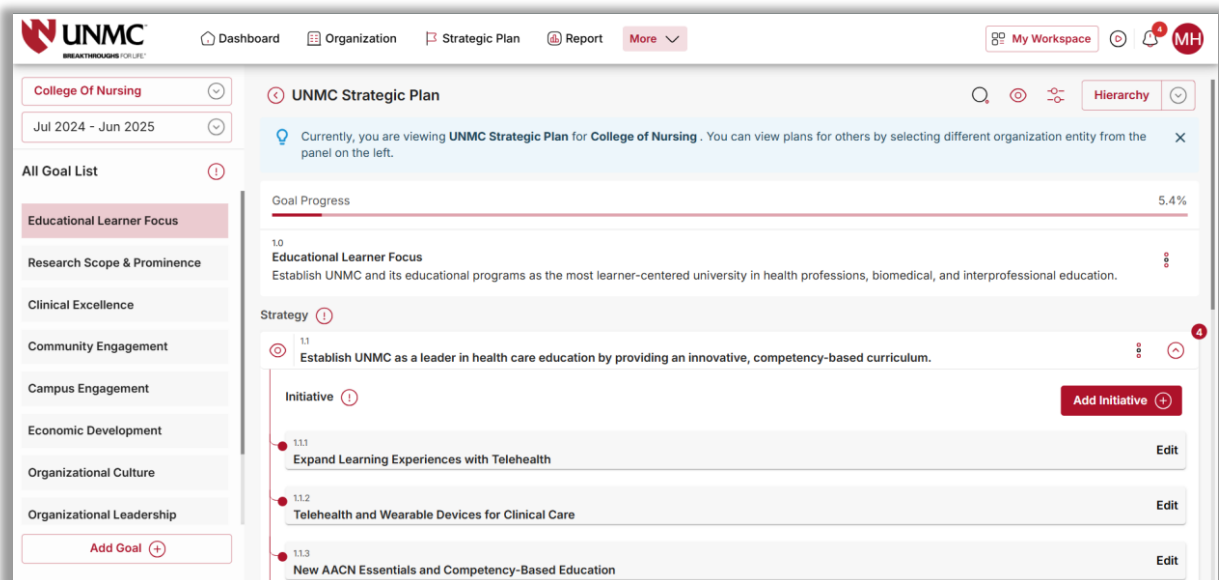
**Strategic Plan for 2024** [🔗](#)  
Date Started : Feb 28, 2024      Total Goal : 1      Total Initiative : 0      Progress: 0% [🔗](#) [⋮](#)

Yay! You have seen it all

d) Click on the “Build Plan” option for the respective plan.



e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).



**UNMC Strategic Plan** [🔗](#) [🔍](#) [🔄](#) [📊](#) [Hierarchy](#) [📄](#)

Currently, you are viewing **UNMC Strategic Plan** for **College of Nursing**. You can view plans for others by selecting different organization entity from the panel on the left. [✕](#)

**Goal Progress** 5.4%

**1.0 Educational Learner Focus**  
Establish UNMC and its educational programs as the most learner-centered university in health professions, biomedical, and interprofessional education. [⋮](#)

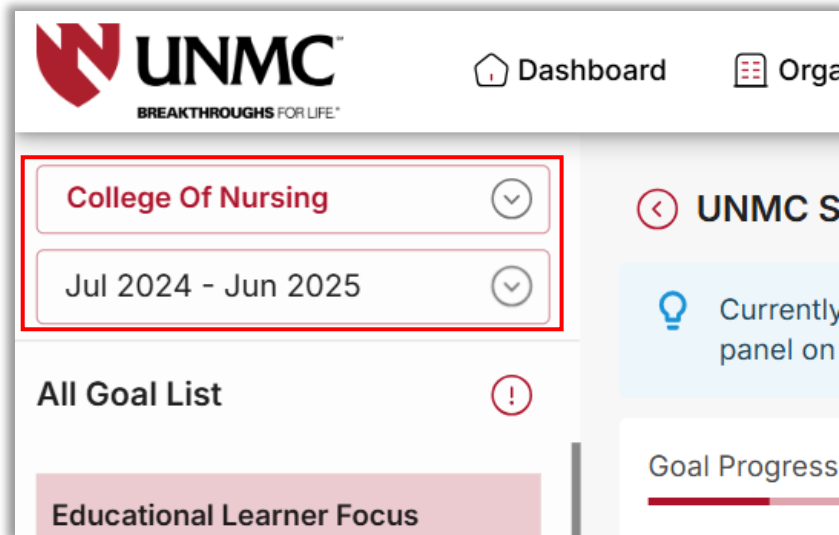
**Strategy** [🔗](#)

**1.1 Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum.** [⋮](#) [🔄](#) [4](#)

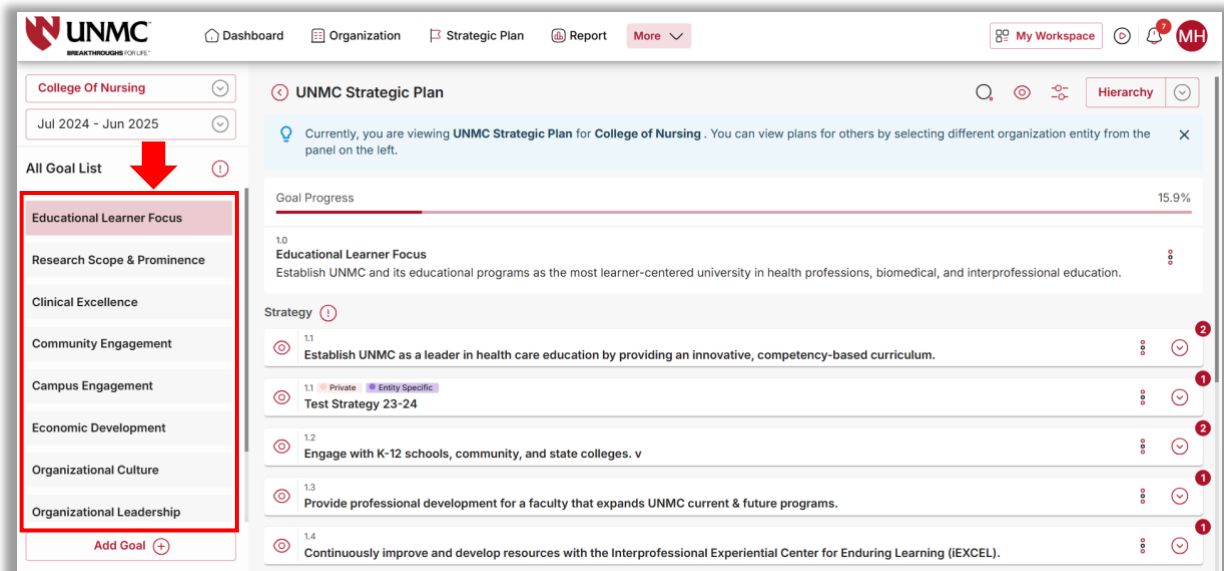
**Initiative** [🔗](#) [Add Initiative](#) [+](#)

- 1.1.1 Expand Learning Experiences with Telehealth** [Edit](#)
- 1.1.2 Telehealth and Wearable Devices for Clinical Care** [Edit](#)
- 1.1.3 New AACN Essentials and Competency-Based Education** [Edit](#)

f) Select the organization entity from the top and choose the review period of the strategic plan. By default, your assigned organization entity and the current year are selected.

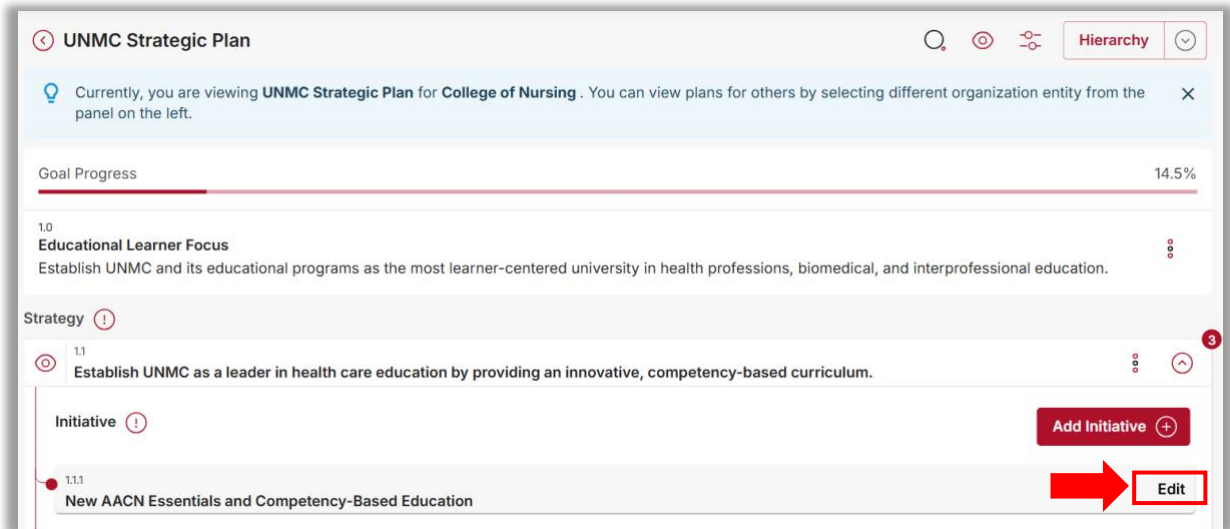


g) Select the strategic plan element (Goal, Strategy, etc.) associated with the strategic action items (Initiatives) for your organization entity.

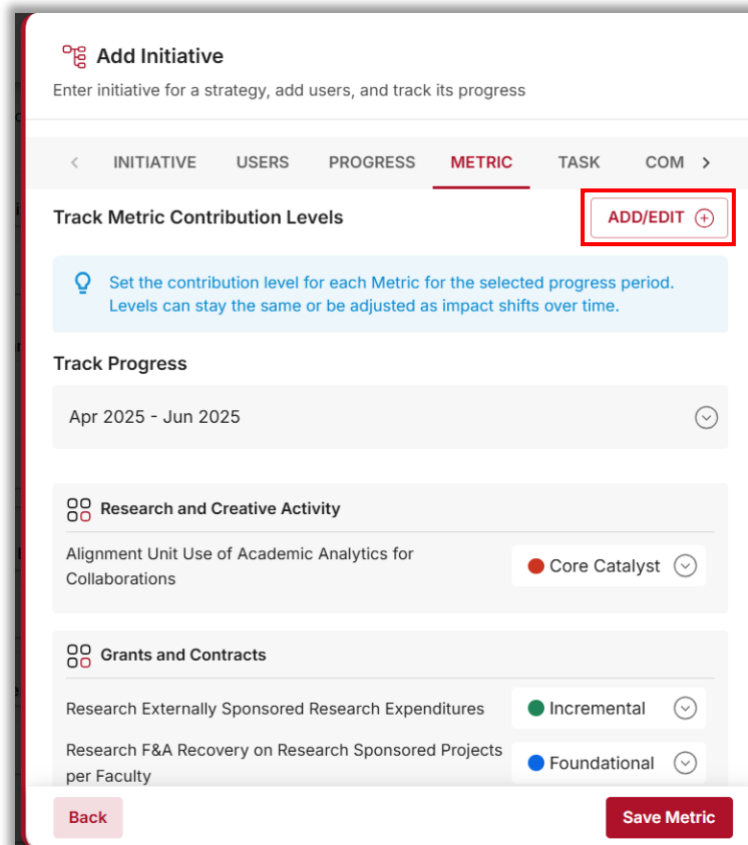


h) Click on the “Edit” button against the strategic action item (Initiative) and navigate to the “Metric” tab.



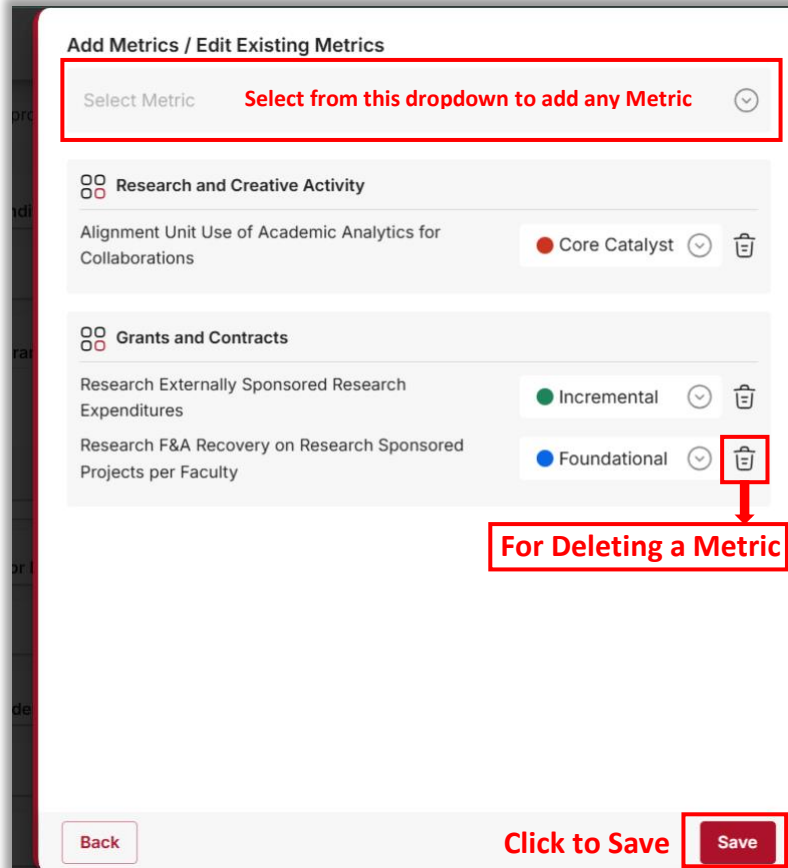


i) Click the **Add/Edit** button on the top right of the Metric tab.



j) In the Add/Edit screen:

- i. Add new metrics and define their contribution levels.
- ii. Edit contribution levels of existing metrics (only if no progress has been recorded).
- iii. Delete metrics



**Add Metrics / Edit Existing Metrics**

Select Metric **Select from this dropdown to add any Metric**

**Research and Creative Activity**

Alignment Unit Use of Academic Analytics for Collaborations **Core Catalyst**

**Grants and Contracts**

Research Externally Sponsored Research Expenditures **Incremental**

Research F&A Recovery on Research Sponsored Projects per Faculty **Foundational**

**For Deleting a Metric**

**Back** **Click to Save** **Save**

- k) Click on “Save” to apply the changes.
- l) If progress has already been recorded in any tracking period:
  - i. Metrics and their contribution levels are disabled for editing.
  - ii. Users can still select other progress tracking periods and adjust contribution levels for existing metrics.
- m) All metric configurations and changes (within allowed constraints) are reflected in the Metric tab per tracking period.

#### 6.1.4 Expected Result

Once metric updates have been saved for a strategic action item (Initiative) in VisionSync:

- The Metric tab reflects the added, updated, or removed metrics.
- Contribution levels are adjusted per progress period.
- Deleted metrics no longer appear, and their associated progress data is removed.
- Newly added metrics and contribution levels are cascaded to all applicable progress tracking periods.

#### 6.1.5 Dependency & Restrictions

- c) Only users with the required permissions for their organization entity can add or edit metrics for strategic action items (Initiatives).
- d) Once progress has been tracked in any progress tracking period, base metrics and their contribution levels become locked for editing.

- e) Users can still edit contribution levels in other periods or delete/add metrics, subject to cascading or deletion of progress data.

## 7. Strategic Action Item (Initiative) Tasks

### 7.1 Add and Update Tasks

#### 7.1.1 About feature

Actionable items (initiative) can be divided into smaller tasks for collaboration within the team members. By adding a task against an actionable item (Initiative) in VisionSync, you can ensure that the actionable item (Initiative) is being executed as planned, and the team members are on track towards making progress.

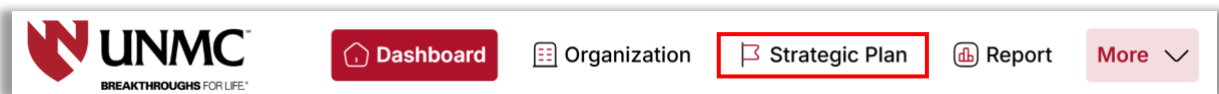
#### 7.1.2 Screen explanation

The "Task" tab of the Strategic Action Item (Initiative) screen contains the following elements:

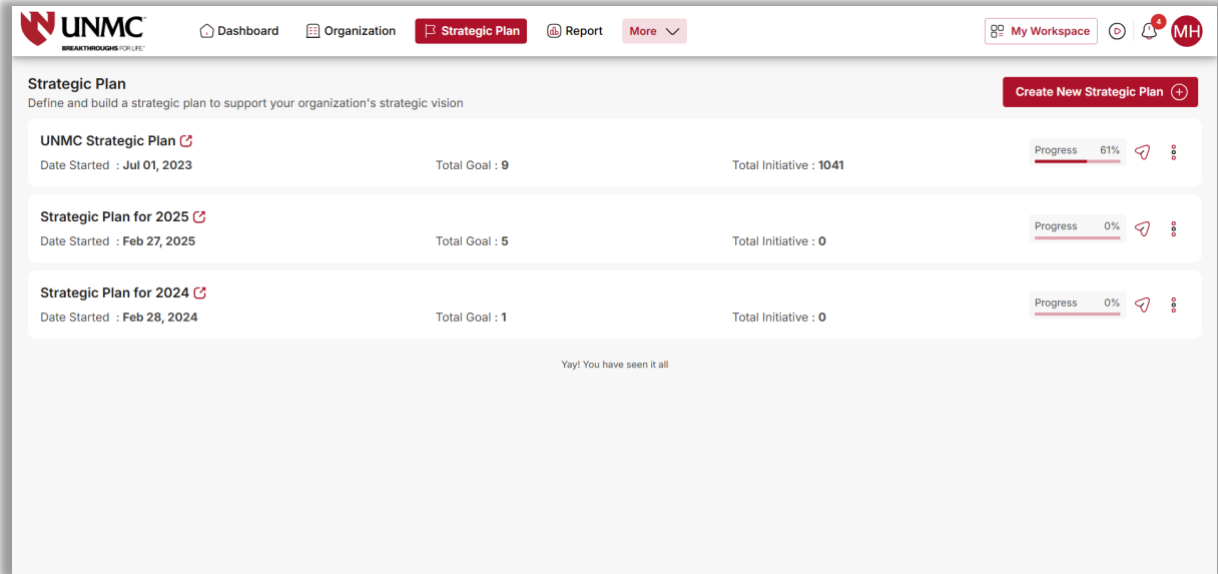
- a) Task Access: This is to set the task access level. Locking the task means that no one except the assigned team members and individuals who have permission can view the tasks.
- b) Task Details (Required): This field requires the details of the task.
- c) Task Duration (Required): This is to specify the start and end date of the task.
- d) Select Status (Required): This is to select the status of the task. A hint text will also be displayed below each status option if added to the strategic framework.

#### 7.1.3 How to perform this feature/functionality?

- a) Log in to your VisionSync account using your credentials.
- b) From the Top-Navigation Bar, select "Strategic Plan".



- c) The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



**Strategic Plan**  
Define and build a strategic plan to support your organization's strategic vision

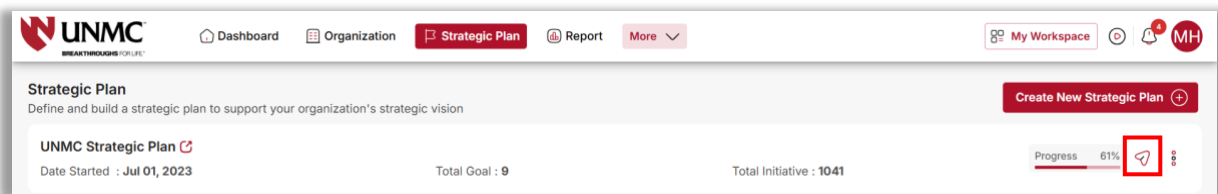
**UNMC Strategic Plan** [🔗](#)  
Date Started : Jul 01, 2023      Total Goal : 9      Total Initiative : 1041      Progress: 61% [🔗](#) [⋮](#)

**Strategic Plan for 2025** [🔗](#)  
Date Started : Feb 27, 2025      Total Goal : 5      Total Initiative : 0      Progress: 0% [🔗](#) [⋮](#)

**Strategic Plan for 2024** [🔗](#)  
Date Started : Feb 28, 2024      Total Goal : 1      Total Initiative : 0      Progress: 0% [🔗](#) [⋮](#)

Yay! You have seen it all

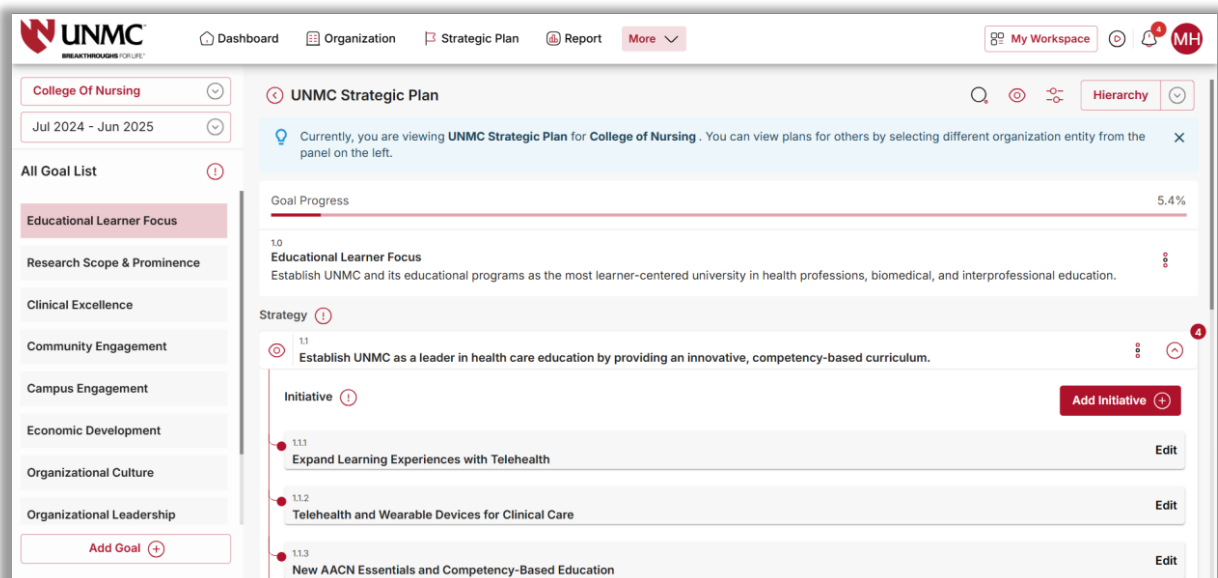
d) Click on the “Build Plan” option for the respective plan.



**Strategic Plan**  
Define and build a strategic plan to support your organization's strategic vision

**UNMC Strategic Plan** [🔗](#)  
Date Started : Jul 01, 2023      Total Goal : 9      Total Initiative : 1041      Progress: 61% [🔗](#) [⋮](#)

e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).



**UNMC Strategic Plan** [🔗](#) [🔍](#) [🔄](#) [📊](#) [Hierarchy](#) [🔽](#)

Currently, you are viewing **UNMC Strategic Plan** for **College of Nursing**. You can view plans for others by selecting different organization entity from the panel on the left. [✕](#)

**Goal Progress** 5.4%

**1.0 Educational Learner Focus**  
Establish UNMC and its educational programs as the most learner-centered university in health professions, biomedical, and interprofessional education. [⋮](#)

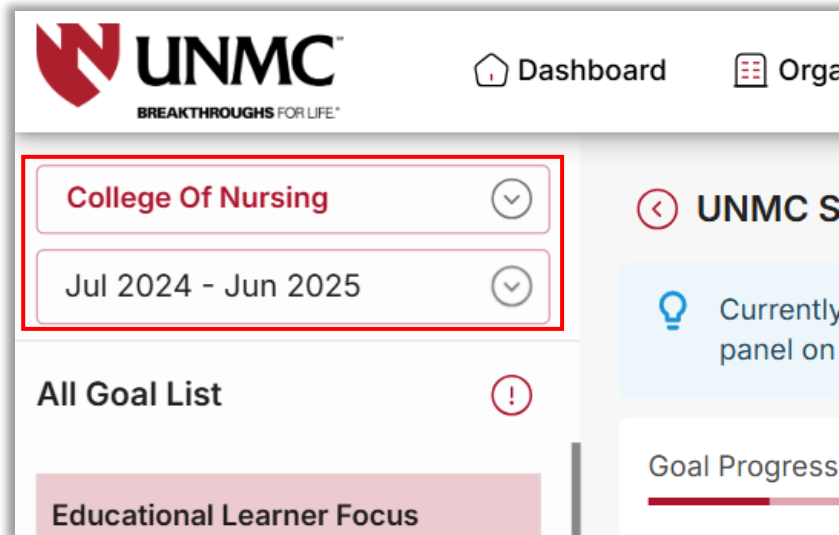
**Strategy** [🔗](#)

**1.1 Establish UNMC as a leader in health care education by providing an innovative, competency-based curriculum.** [⋮](#) [🔄](#) [4](#)

**Initiative** [🔗](#) [Add Initiative](#) [+](#)

- 1.1.1 Expand Learning Experiences with Telehealth** [Edit](#)
- 1.1.2 Telehealth and Wearable Devices for Clinical Care** [Edit](#)
- 1.1.3 New AACN Essentials and Competency-Based Education** [Edit](#)

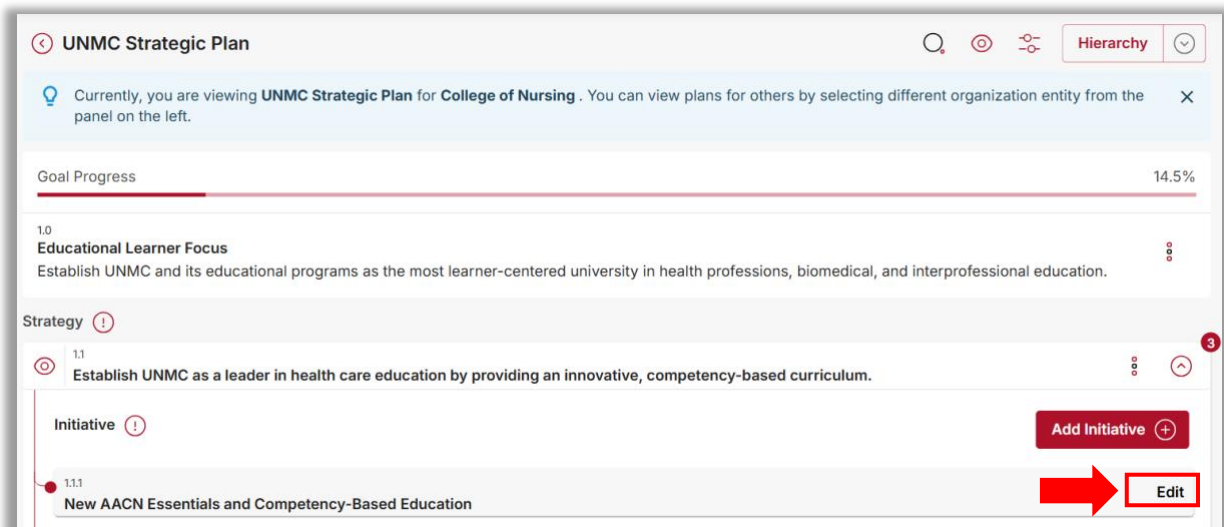
f) Select the organization entity from the top and choose the review period of the strategic plan.




- g) Select the strategic plan element and choose the strategic action item for which you want to add or update a task.

#### Adding a Task



- h) To add a task against a strategic action item (Initiative), click on the “Edit” button and navigate to the “Task” tab.





- i) Fill in the task details, task duration, and status, and set the task access level from the top right. If the lock option is enabled, only the team members and users with permission will be able to access the tasks.


 **Add Initiative**  
Enter initiative for a strategy, add users, and track its progress


< INITIATIVE USERS PROGRESS **TASK** COMMEI >

**Task Access**   Lock

Enter details

 Start (mm/dd/yyyy) to  End (mm/dd/yyyy)

Select status 

Add Task 


Back Save Task

- j) Click on “Save Task” to add a task to the strategic action item (Initiative).

### Updating a Task


- h) To edit a task against a strategic action item (Initiative), click on the “Edit” button and navigate to the “Task” tab.
- i) Click on the “Edit” button against the task you want to update and make the required changes.

< INITIATIVE USERS PROGRESS **TASK** COMMEI >

**Task Access** 

☐ Lock


**Task 1**

 **Edit**


(03/06/2025 to 03/31/2025)

**Task Demo**


In Progress

Add Task 

j) Click on “Save Task” to save changes against the task in the strategic action item (Initiative).

 **Add Initiative**  
Enter initiative for a strategy, add users, and track its progress

< INITIATIVE USERS PROGRESS **TASK** COMMEI >

**Task Access** 

☐ Lock


**Task 1**

**Edit**

(03/06/2025 to 03/31/2025)

**Task Demo**

In Progress

Add Task 

Back

Save Task

#### 7.1.4 Expected Result

Adding a Task

- Once you have added a task against the strategic action item (Initiative) in VisionSync, the task will be visible to all relevant team members.

#### Updating a Task

- Once you have updated a task against the strategic action item (Initiative) in VisionSync, the changes in the task will be visible to all relevant team members.

### 7.1.5 Dependency & Restrictions

#### Adding a Task

- Adding/editing the task for strategic action items (Initiatives) is available only to users who have permission to do so for their organization entity.

#### Updating a Task

- Adding/editing the task for strategic action items (Initiatives) is available only to users who have permission to do so for their organization entity.

## 8. Strategic Action Item (Initiative) Comments

### 8.1 Add Comments

#### 8.1.1 About feature

VisionSync provides a collaborative platform for creating and managing strategic plans. By adding a comment for an actionable item, team members can communicate with each other about a specific actionable item (Initiative), task, or progress update, ensuring everyone is on the same page.

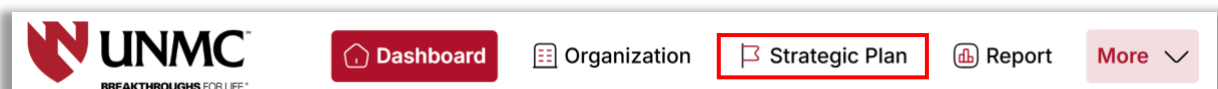
#### 8.1.2 Screen explanation

The “Comments” tab of the Actionable item (Initiative) screen contains the following elements.

- a. Comments Access: This is to set the comments access level. Locking the comments means that no one except the assigned team members and users with permission can view the comments section.
- b. Comment (Required): This field requires the comment.
- c. Post Button: This button is to post the comment.

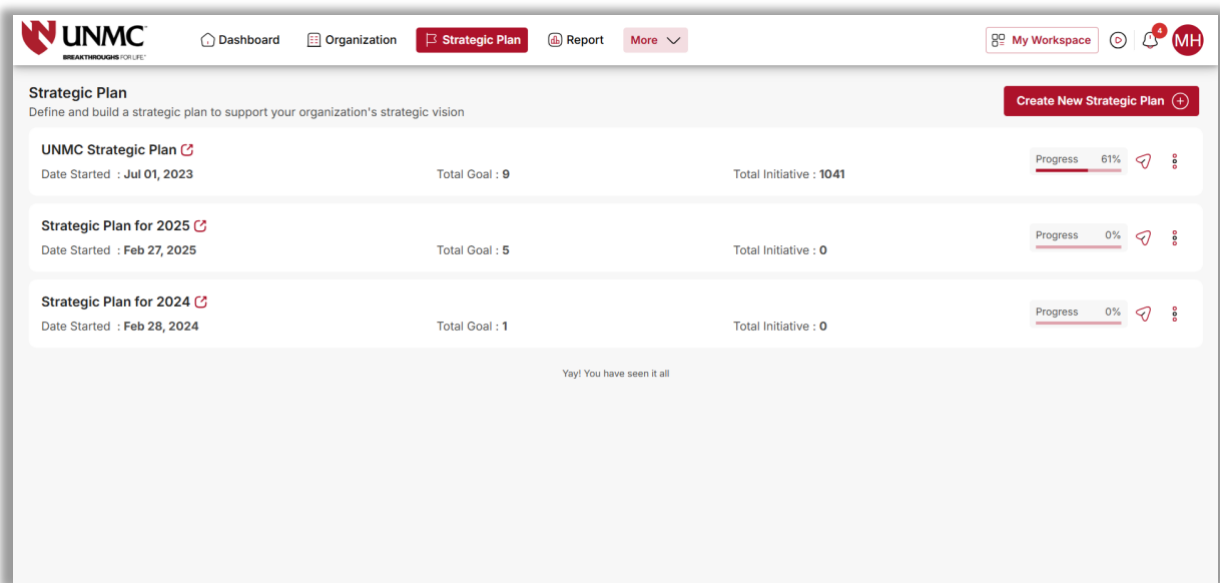
#### 8.1.3 How to perform this feature/functionality?

- a) Log in to your VisionSync account using your credentials.
- b) From the Top-Navigation Bar, select "Strategic Plan".

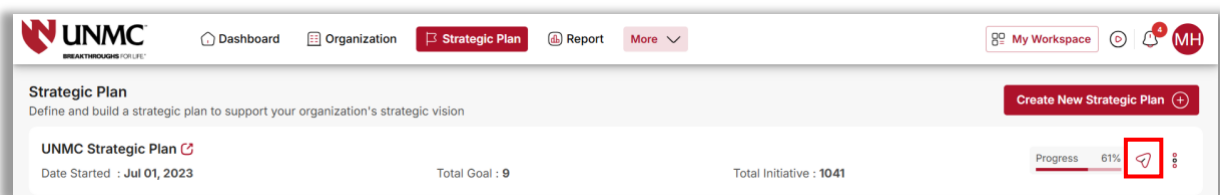




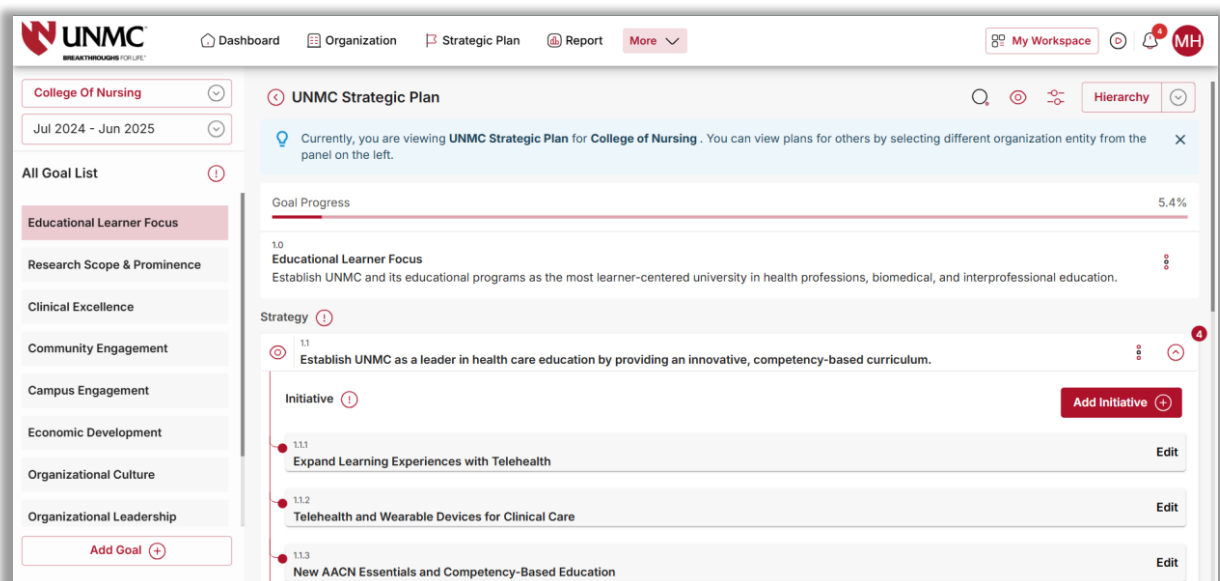
- c) The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



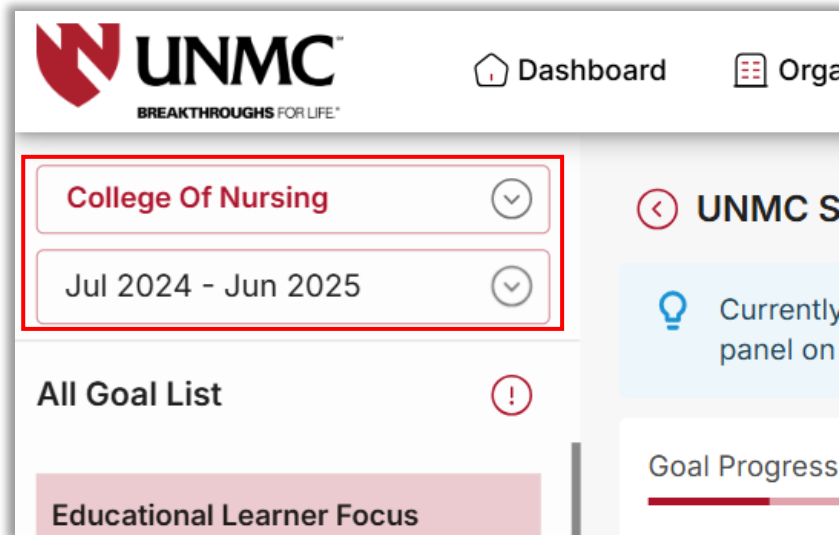
- d) Click on the "Build Plan" option for the respective plan.



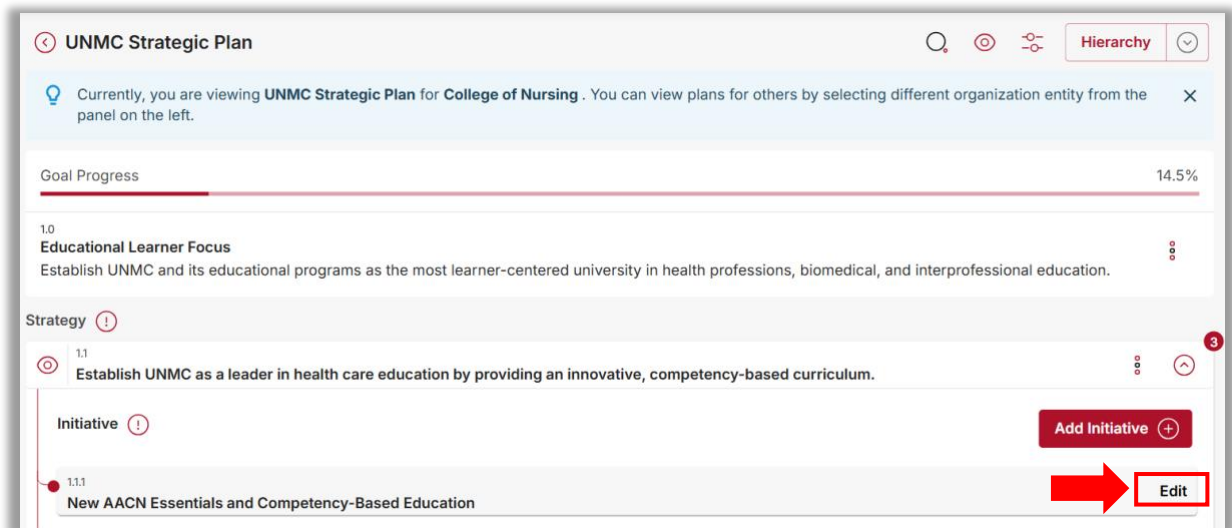
- e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).



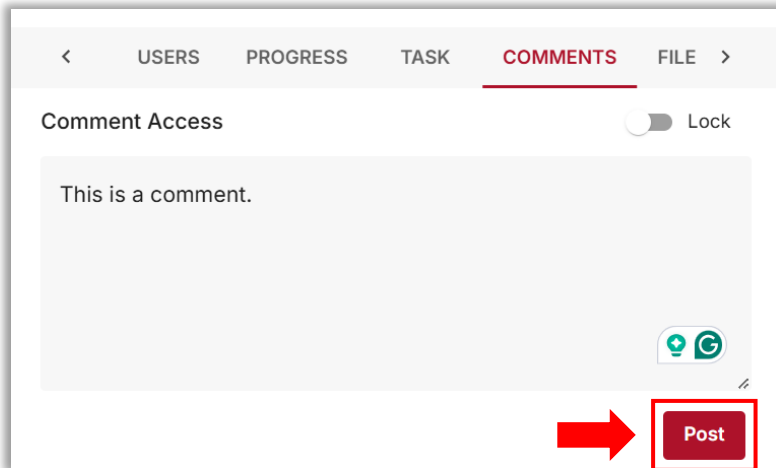
- f) Select the organization entity from the top and choose the review period of the strategic plan.



- g) Select the strategic plan element and select the strategic action item for which you want to add a comment.
- h) To add a comment against a strategic action item (Initiative), click on the “Edit” button against it and go to the “Comments” tab.



- i) Enter the comment you want to write and click “Post”.



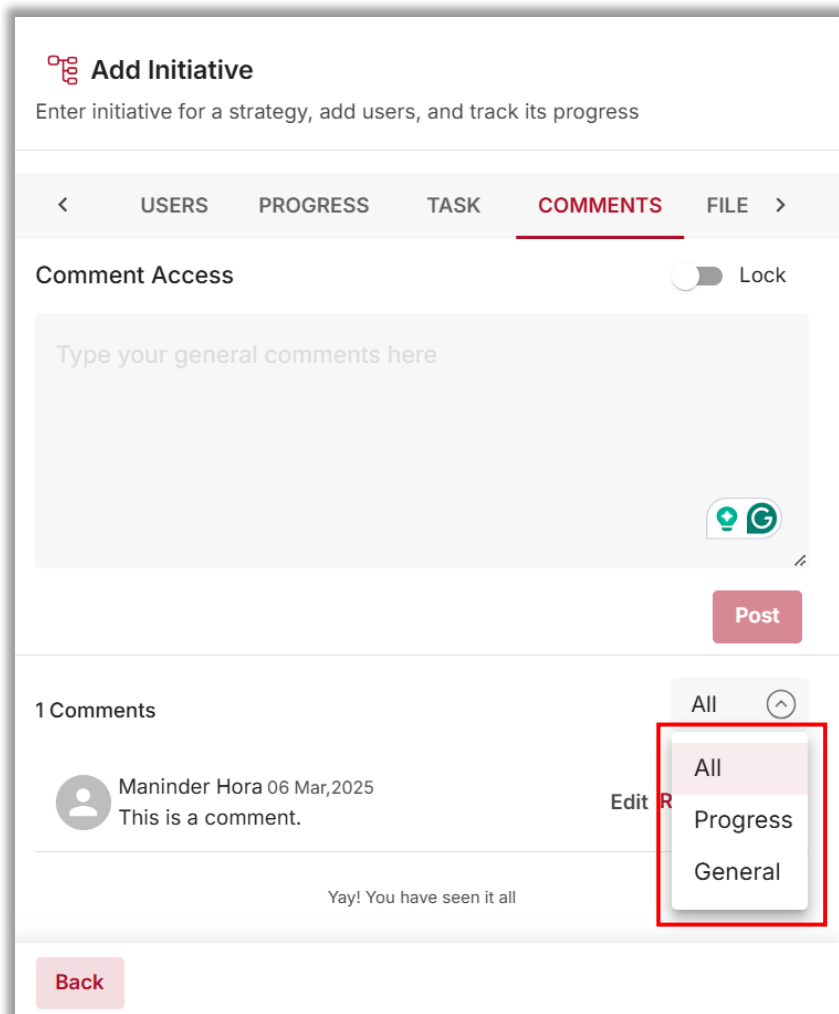
Navigation: < USERS PROGRESS TASK **COMMENTS** FILE >

Comment Access ☐ Lock

This is a comment.

**Post**

- j) Once the comment is posted, you can view it under the comments section.
- k) To filter the comments, apply the desired filter from the “All”, “Progress”, and “General” options.



**Add Initiative**  
Enter initiative for a strategy, add users, and track its progress


Navigation: < USERS PROGRESS TASK **COMMENTS** FILE >

Comment Access ☐ Lock

Type your general comments here

**Post**

1 Comments

 Maninder Hora 06 Mar,2025  
This is a comment.

Yay! You have seen it all

**Back**

Filter: All (dropdown menu open showing: All, Progress, General)

#### 8.1.4 Expected Result

Once you have added a comment in VisionSync, it will be visible to all relevant team members.

#### 8.1.5 Dependency & Restrictions

- a. Add/edit the comments for actionable items (initiatives) is available to only the users who have permission to do it for their organization entity.
- b. Only the owner can edit comments. Progress comments cannot be edited.

## 9. Actionable Item File Upload

### 9.1 Upload/Download File

#### 9.1.1 About feature

This feature allows users to share relevant documents with other team members, ensuring everyone has access to the necessary information.

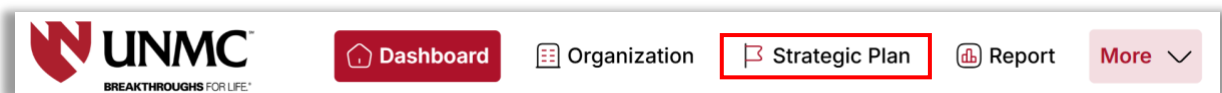
#### 9.1.2 Screen explanation

The "File Upload" tab of the Actionable item (Initiative) screen contains the following elements.

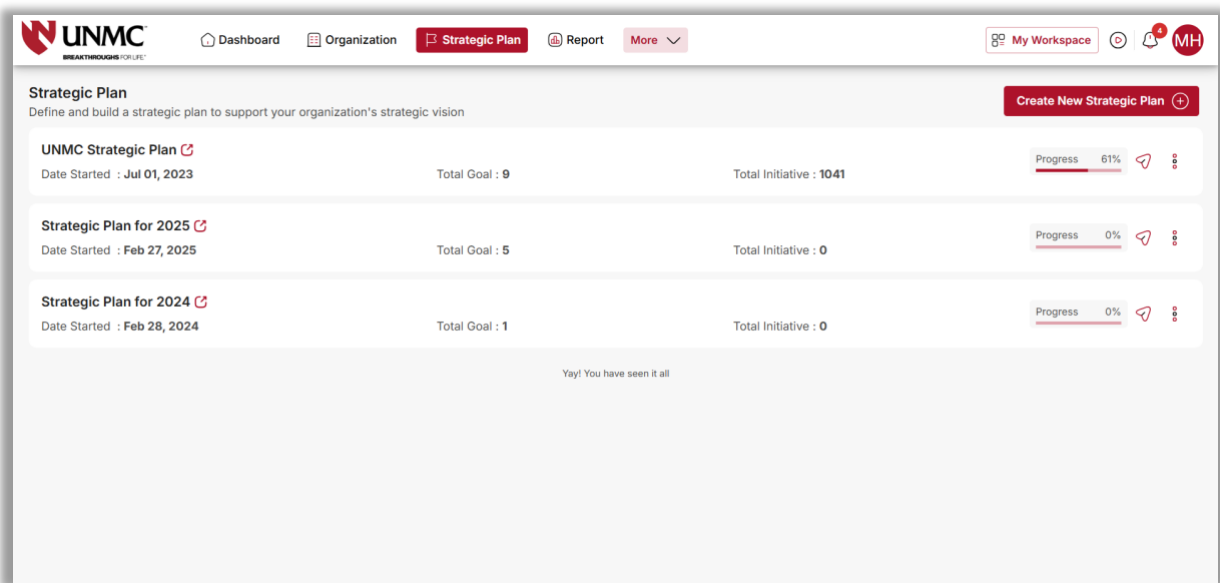
- a. File Access: This is to set the file's access level. Locking the file section means that no one except the assigned team members and users who have permission can view the files shared.
- b. Drag or Upload File Button: This button allows the user to upload the file. There are limitations to the file size and type displayed on the screen. Users should use that as a guideline to upload the file.
- c. Save File Upload Button: This button allows the user to save the upload activity.

#### 9.1.3 How to perform this feature/functionality?

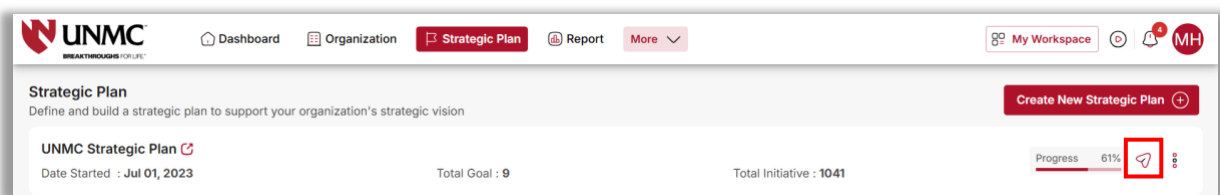
- a) Log in to your VisionSync account using your credentials.
- b) From the Top-Navigation Bar, select "Strategic Plan".



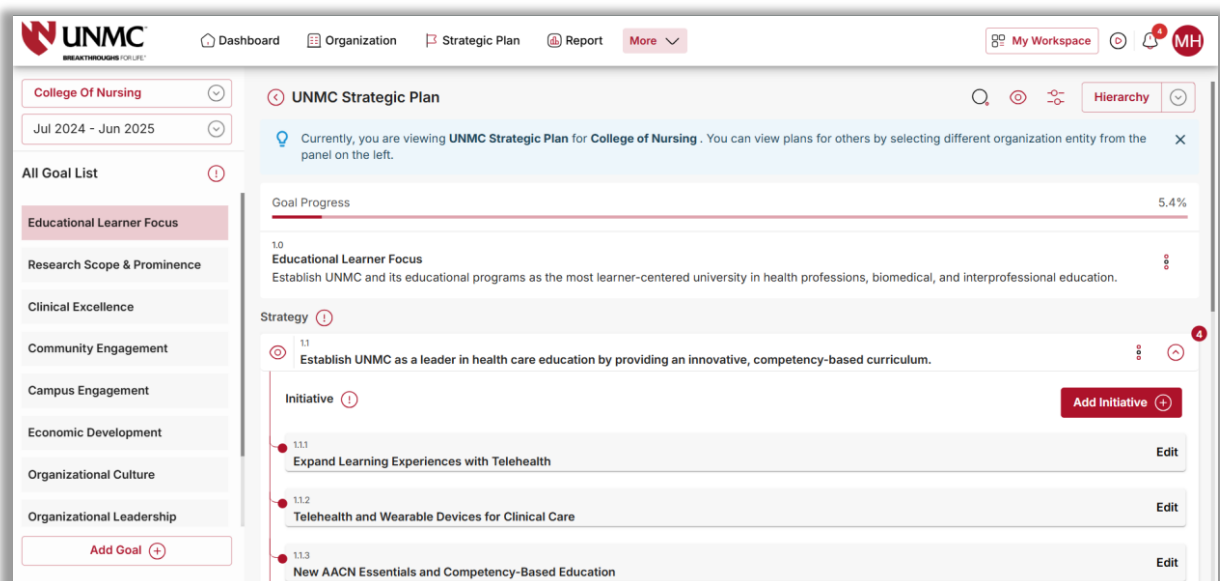
- c) The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



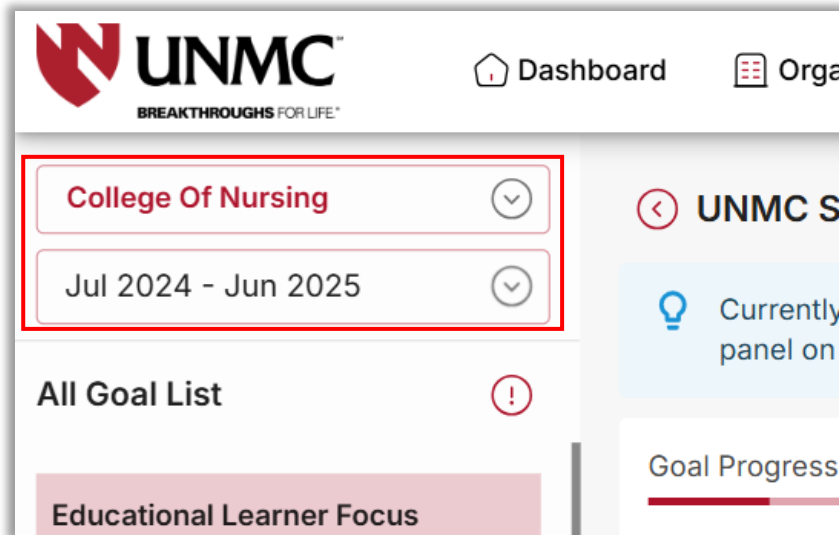
- d) Click on the "Build Plan" option for the respective plan.



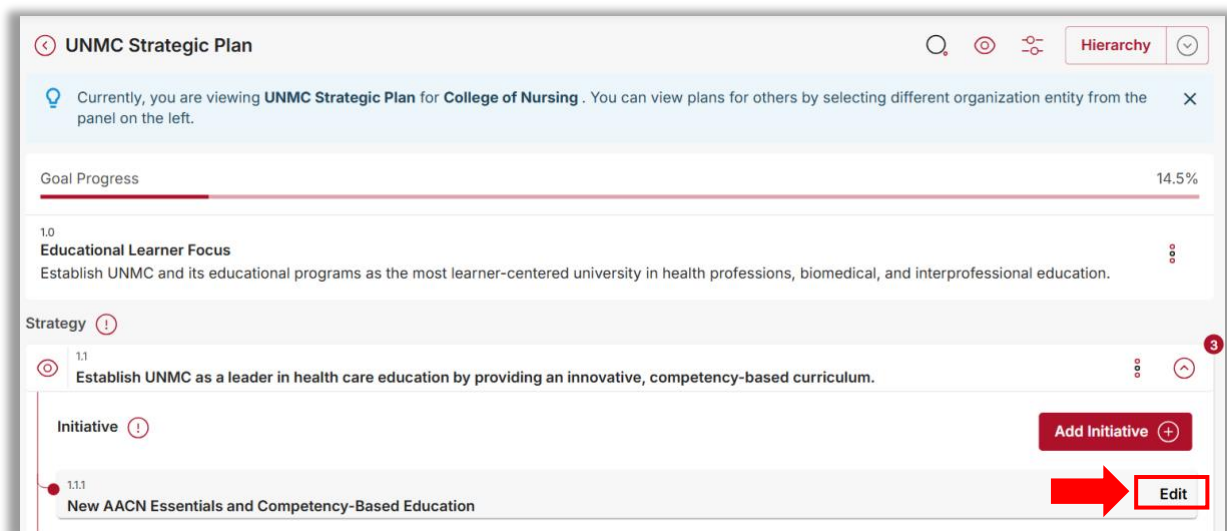
- e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).




- f) Select the organization entity from the top and choose the review period of the strategic plan.



- g) Select the strategic plan element and select the strategic action item for which you want to add a comment.
- h) To upload or download a file for a strategic action item (Initiative), click on the “Edit” button against it and go to the “File Upload” tab.







- i. Drag or select the file from the device to upload. Click on the “Download” button against the file you want to download.

 **Add Initiative**  
Enter initiative for a strategy, add users, and track its progress

< S
PROGRESS
TASK
COMMENTS
**FILE UPLOAD**
>

**File Access**
☐ Lock

 Drag or upload file

 **Screenshot 2025-03-06 203326.png**  
Uploaded on 7th Mar 2025



\*File size must be less than 10mb. Acceptable file type jpg, png, svg, jpeg, gif, doc, docx, dot, dotx, xls, xlsx, pdf, ppt, pptx, txt, rtf, csv, xml, mp4, mp3

Back
**Save File Upload**

j. Click on “Save File Upload” to complete the upload activity.

#### 9.1.4 Expected Result

Once you have uploaded a file in VisionSync, it will be visible to all relevant team members to view and download.

#### 9.1.5 Dependency & Restrictions

- a. Upload/Download the file for actionable items (initiatives) is available to only the users who have permission to do it for their organization entity.

## 10. Dashboard

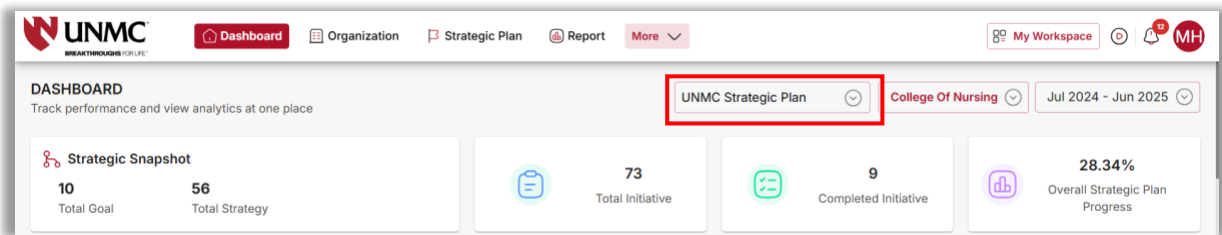
### 10.1.1 About feature

Users can see Dashboard page where multiple charts and some filters are available to view the data visually.

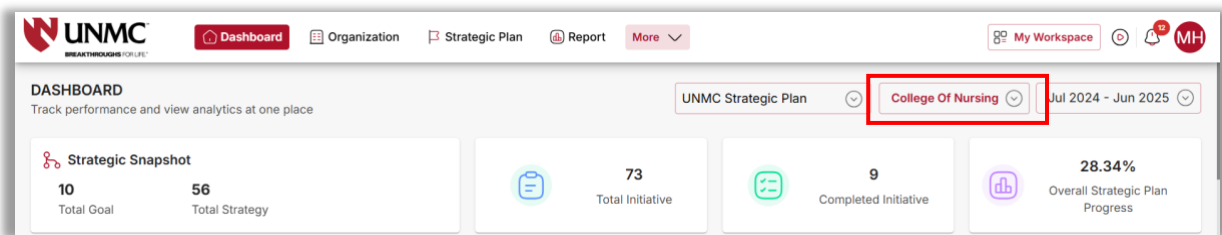
### 10.1.2 Screen explanation

The “Dashboard” screen contains the following elements.

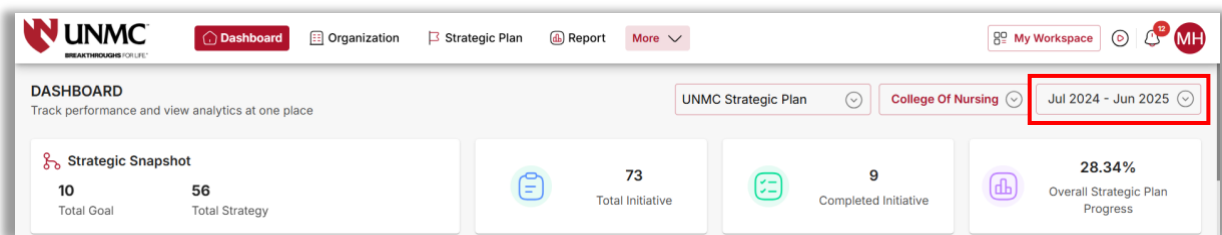
- a. Select Strategic Plan (Required): This field allows users to select the strategic plan against which they want to view data.



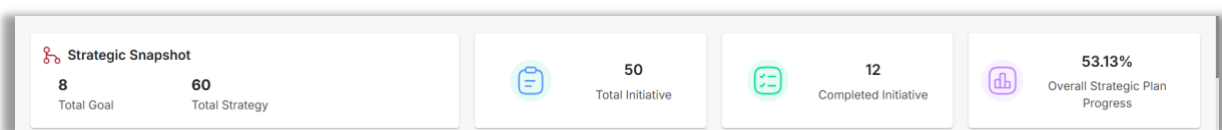
- b. Select Organization Entity (Required): This field shows all the assigned organization entities for a strategic plan that you selected in the field before.



- c. Select Review Period (Required): This field shows all the review periods based on the selected strategic plan timeframe and strategic plan review period frequency.

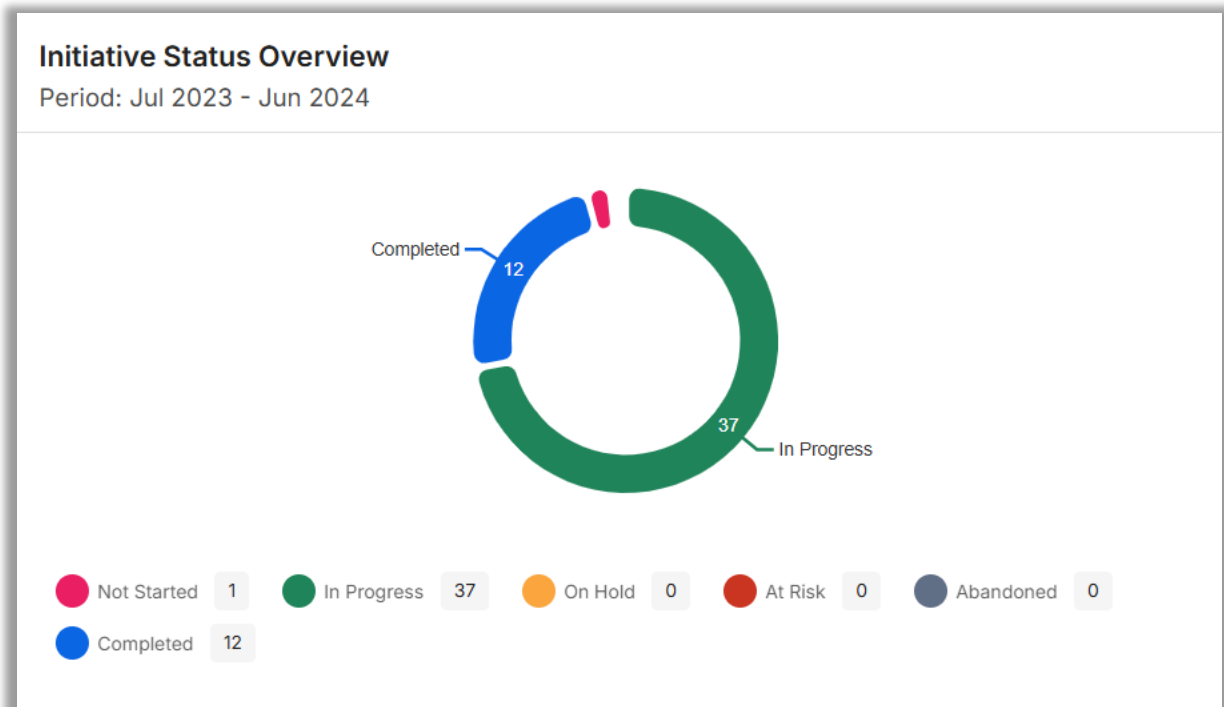


- d. Quick Strategic Plan Snapshot: This block gives us a quick information about the total number of the strategic plan elements and actionable item (initiative). It also displays the overall progress in percent complete for all the initiatives in the strategic plan.

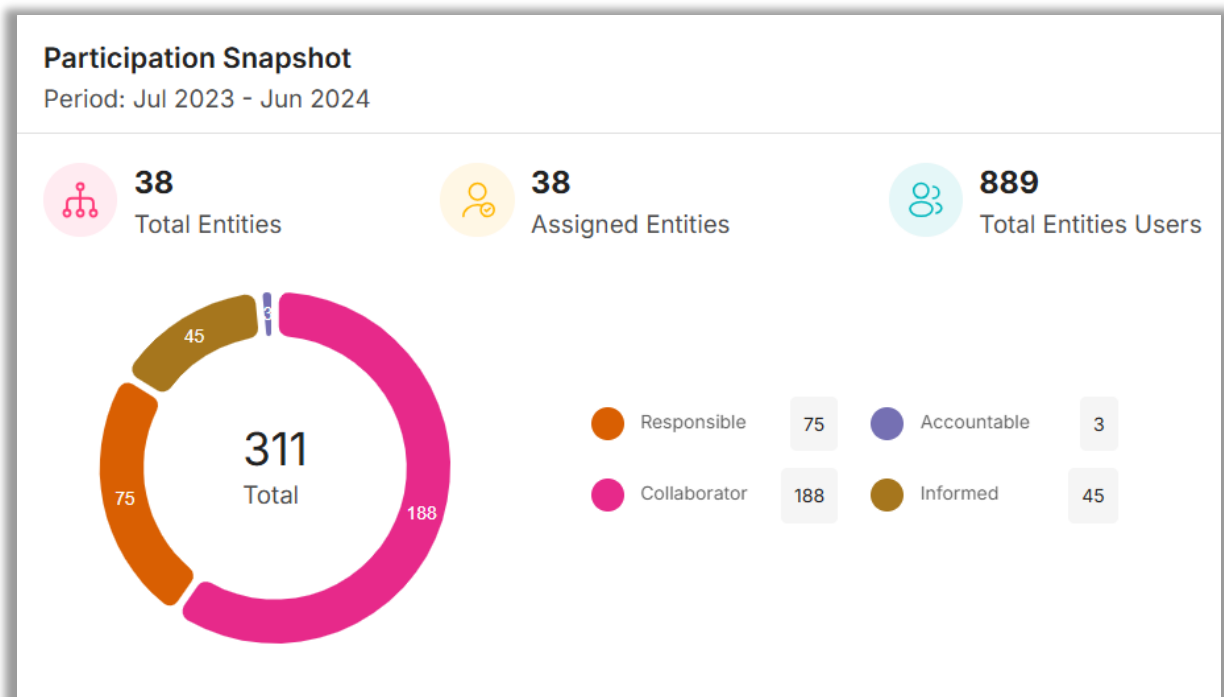




e. Overall Actionable Item (Initiative): This block displays a pie chart for the actionable items by their status defined in the strategic framework of the strategic plan.



f. Quick Engagement Snapshot: This block displays the entities assigned to a strategic plan and count of the users participating in the execution of the strategic plan. It also displays the breakdown of the users by the roles defined on the actionable item level in the strategic framework of the strategic plan.



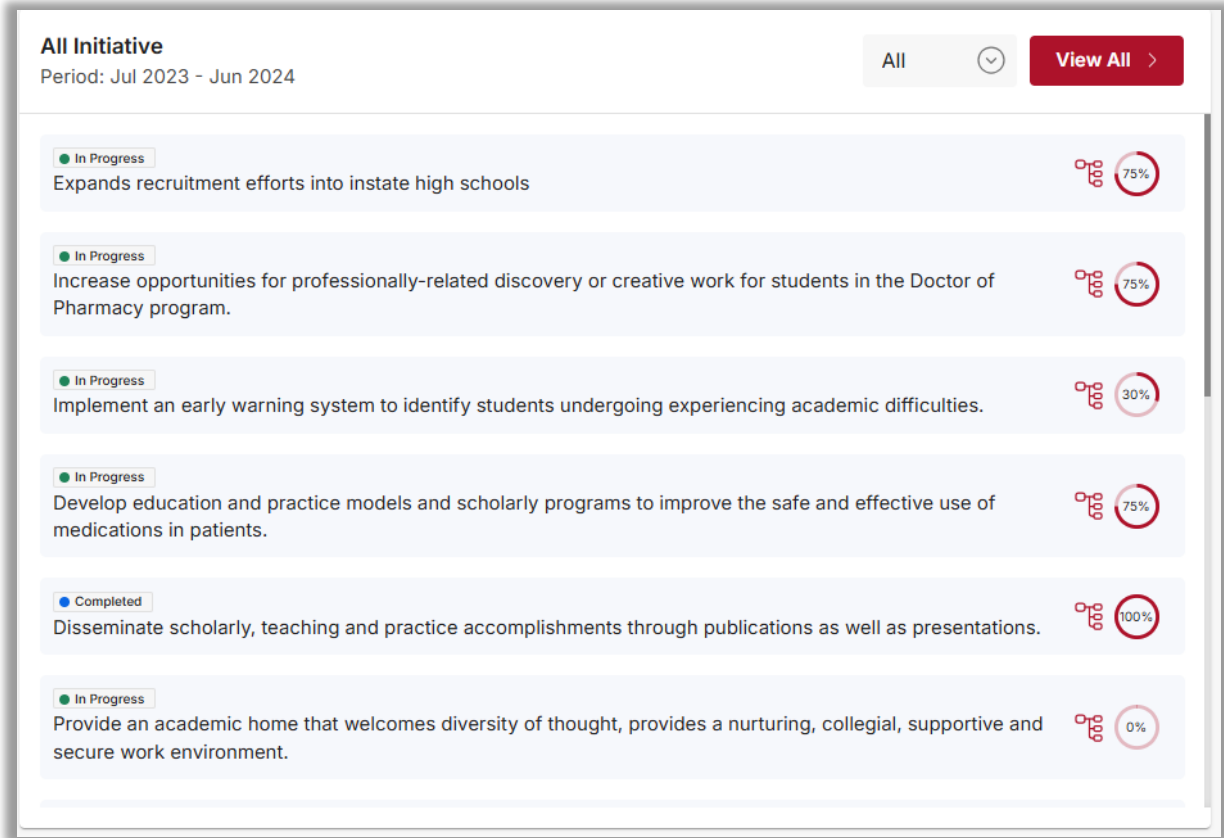
g. Heatmap: This block displays all the strategic plan elements except actionable items (initiative) on the left and cross tabulate the organization entities on the right with the progress indicators on the tile found at the cross section of each organization entity and strategic plan element. Each tile is color coded based on the progress -

- Red - Needs attention and may be off track
- Green - On track
- Blue - Going good

Other elements of the tile are the total number of the actionable item completed / total number of the actionable item created by the organization entity for a strategic plan element (goal, strategy, etc). The title also shows the percent complete progress of all the actionable items that existed in a particular strategic plan element (goal, strategy, etc). The percentage calculation is actually weighted average that is propagated from actionable item (initiative) level to the top levels of the strategic framework.




h. Actionable Item List by Status: This block simply has the clickable list of actionable items for an organization entity selected on the filter at the top of the screen. You can filter the list by the status of the actionable item. You can also click on view all, to go to the reporting section and get more data.

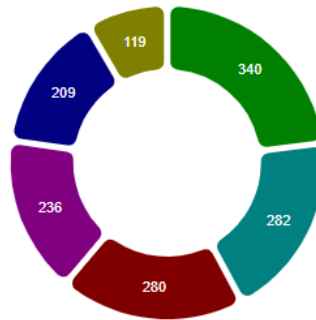








i. Label and Sub-Label Progress: This block represents the progress of the organization entities in the strategic plan. The progress displayed is based on the progress tracking period selected for the strategic plan.

### Label and Sub-Label Progress Overview

Period: Jul 2023 - Jun 2024

NU 5-Year Strategy 



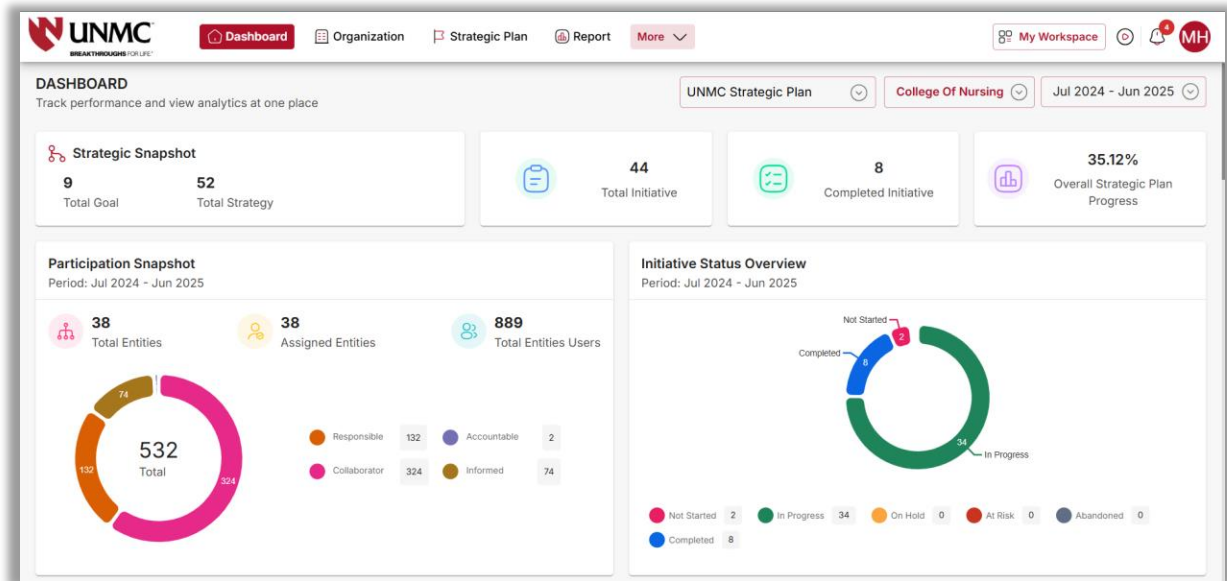
Label	Total Progress (%)	Initiative Count
 Access, Affordability and Attainment	69.58%	209
 Talent Development	69.26%	340
 Engagement	67.49%	282
 Partnerships	71.04%	280
 Efficiency and Effectiveness	72.69%	236
 Not Applicable	60.76%	119

### 10.1.3 How to perform this feature/functionality?

- Log in to your VisionSync account using your credentials.
- From the Top-navigation menu, select "Dashboard".



- The screen will open, displaying a chart containing the data based on the filters selected above.



#### 10.1.4 Expected Result

After applying filters to a dashboard, the resulting charts will be displayed.

## 10.2 Filter and Export Reports

### 10.2.1 About feature

The Filter Reports feature in VisionSync allows users to view specific data sets and narrow down their report results based on custom criteria. This feature is useful when analyzing large amounts of data and trying to find specific information quickly and easily. The Export Report feature allows users to save and download reports in different file formats, such as Excel or CSV. This feature is useful when users need to share or analyse their report data offline or in other software applications.

### 10.2.2 Screen explanation

The "Report" screen contains the following elements.

- Select Strategic Plan (Required):** This field allows users to select the strategic plan against which they want to view data.
- Select Organization Entity (Required):** This field shows all the assigned organization entities for a strategic plan that you selected in the field before.
- Select Review Period (Required):** This field shows all the review periods based on the selected strategic plan timeframe and strategic plan review period frequency.
- Autosize:** This button allows the users to get back to the default size of columns.
- Columns Button:** This shows all the columns for a strategic plan you selected. The list gets changes with the change in strategic plan based on its association with the

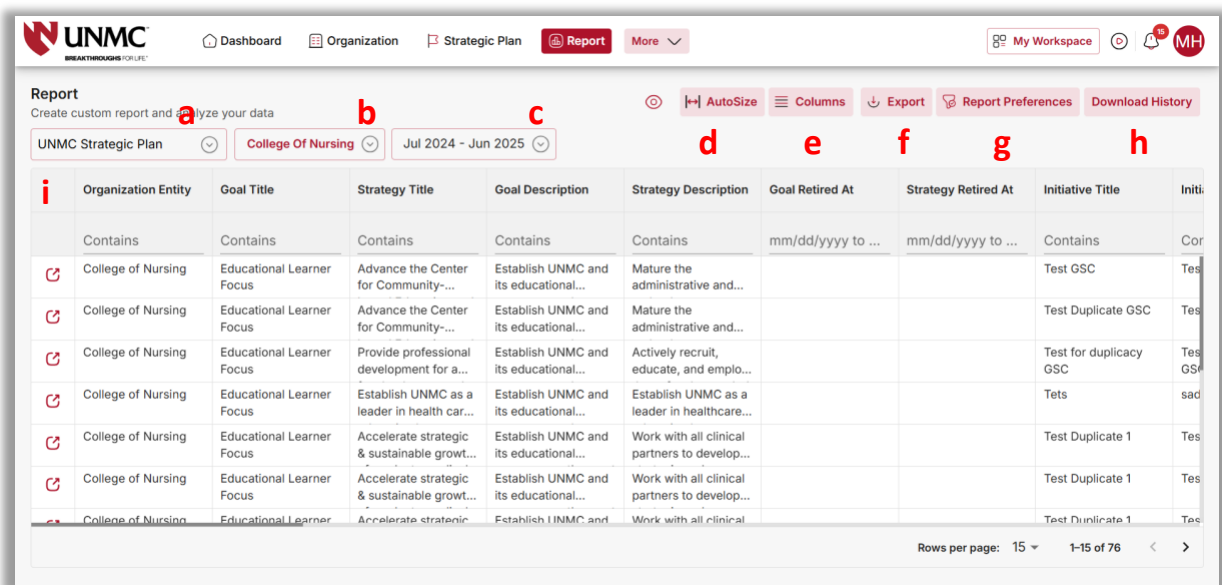
strategic framework. This button allows the user to enable and disable columns in the Report Table.

f. Export Button: This button allows the user to export the report results in excel or csv format.

g. Report Preference: This button allows user to instantly access personalized reports by saving and reusing your customized report preference.

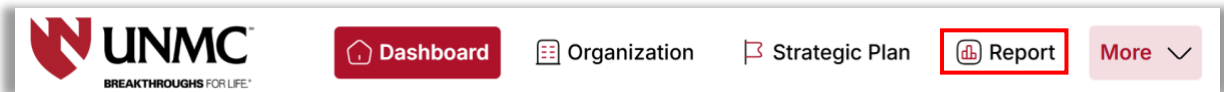
h. Download History: This button allows the users to download the requested custom report and analyze their data.

i. Report Table: This table displays the report results according to selected options and filters.

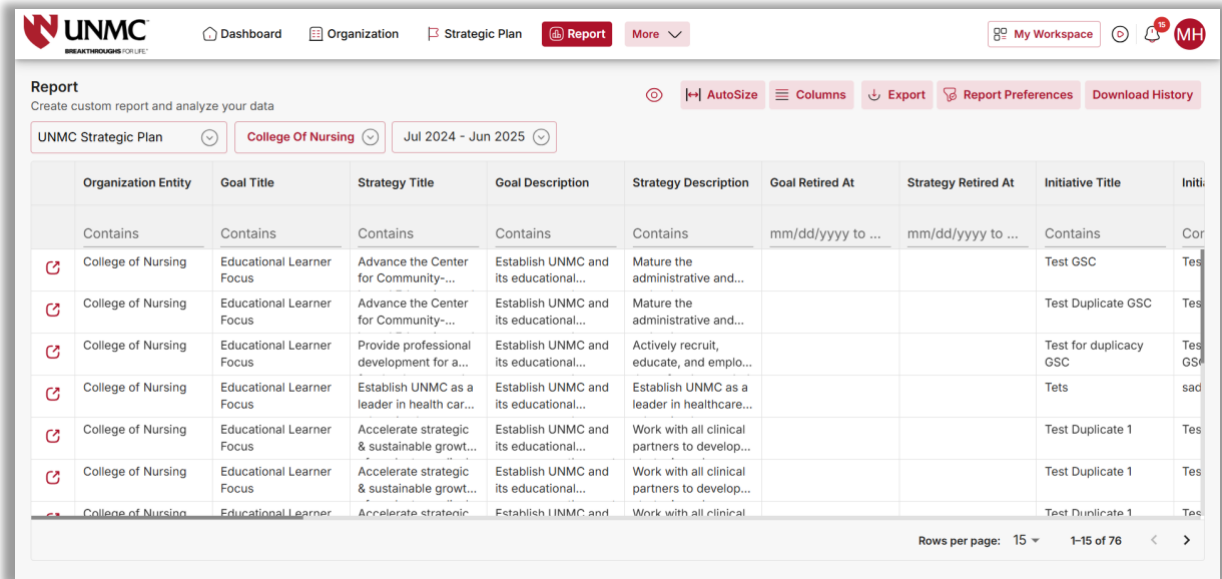


### 10.2.3 How to perform this feature/functionality?

- Log in to your VisionSync account using your credentials.
- From the Top-Navigation Bar, select "Reports".



- The Report screen will open, displaying a table containing the report data and available filters.



**UNMC** **Report** **More** **My Workspace** **MH**

**Report**  
Create custom report and analyze your data

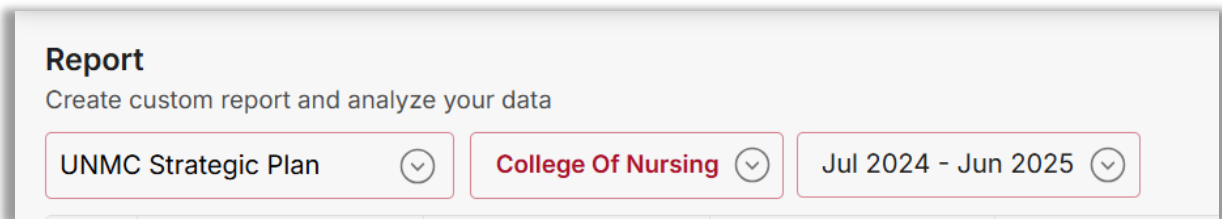
**UNMC Strategic Plan** **College Of Nursing** **Jul 2024 - Jun 2025**

**AutoSize** **Columns** **Export** **Report Preferences** **Download History**

Organization Entity	Goal Title	Strategy Title	Goal Description	Strategy Description	Goal Retired At	Strategy Retired At	Initiative Title	Initi
Contains	Contains	Contains	Contains	Contains	mm/dd/yyyy to ...	mm/dd/yyyy to ...	Contains	Cor
College of Nursing	Educational Learner Focus	Advance the Center for Community...	Establish UNMC and its educational...	Mature the administrative and...			Test GSC	Test
College of Nursing	Educational Learner Focus	Advance the Center for Community...	Establish UNMC and its educational...	Mature the administrative and...			Test Duplicate GSC	Test
College of Nursing	Educational Learner Focus	Provide professional development for a...	Establish UNMC and its educational...	Actively recruit, educate, and emplo...			Test for duplicacy GSC	Test
College of Nursing	Educational Learner Focus	Establish UNMC as a leader in health car...	Establish UNMC and its educational...	Establish UNMC as a leader in healthcare...			Tets	sad
College of Nursing	Educational Learner Focus	Accelerate strategic & sustainable growt...	Establish UNMC and its educational...	Work with all clinical partners to develop...			Test Duplicate 1	Test
College of Nursing	Educational Learner Focus	Accelerate strategic & sustainable growt...	Establish UNMC and its educational...	Work with all clinical partners to develop...			Test Duplicate 1	Test
College of Nursing	Educational Learner	Accelerate strategic	Establish UNMC and	Work with all clinical			Test Duplicate 1	Test

Rows per page: 15 1-15 of 76

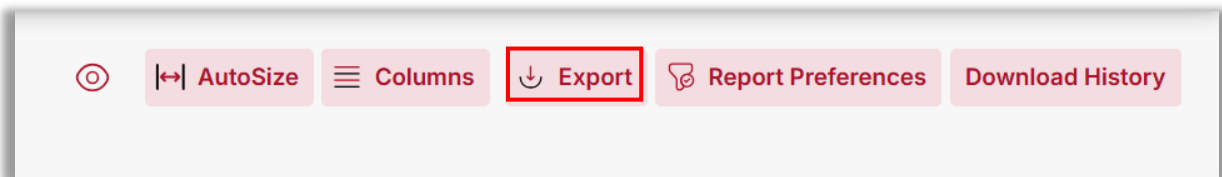
- d) Select the strategic plan, organization entity and review period to view the report results. By default, you default organization entity and current year are selected.



**Report**  
Create custom report and analyze your data

**UNMC Strategic Plan** **College Of Nursing** **Jul 2024 - Jun 2025**

- e) To narrow down the results further, use the filters above each column.
- f) Click on the “Export” button on the top right and select the format “CSV” or “XLSX” to download the report.



**AutoSize** **Columns** **Export** **Report Preferences** **Download History**

### 10.2.4 Expected Result

After applying filters to a report, the resulting data set will be displayed on the right-hand side of the Filter Reports screen. This data set will only show the records that match the selected criteria.

After exporting a report, the resulting file will be saved to your computer in the selected format.

## 11. My Workspace

The "My Workspace" feature allows users to see all the actionable items (Initiatives) in one place. The "Assigned" list is the set of actionable items (Initiatives) where the user is part of the team working on that actionable item (Initiative). Users can also create their custom watchlist and add or remove actionable items (initiatives) to that list. Every list is organized per strategic plan per organization entity.

### 11.1 View Strategic Action Items

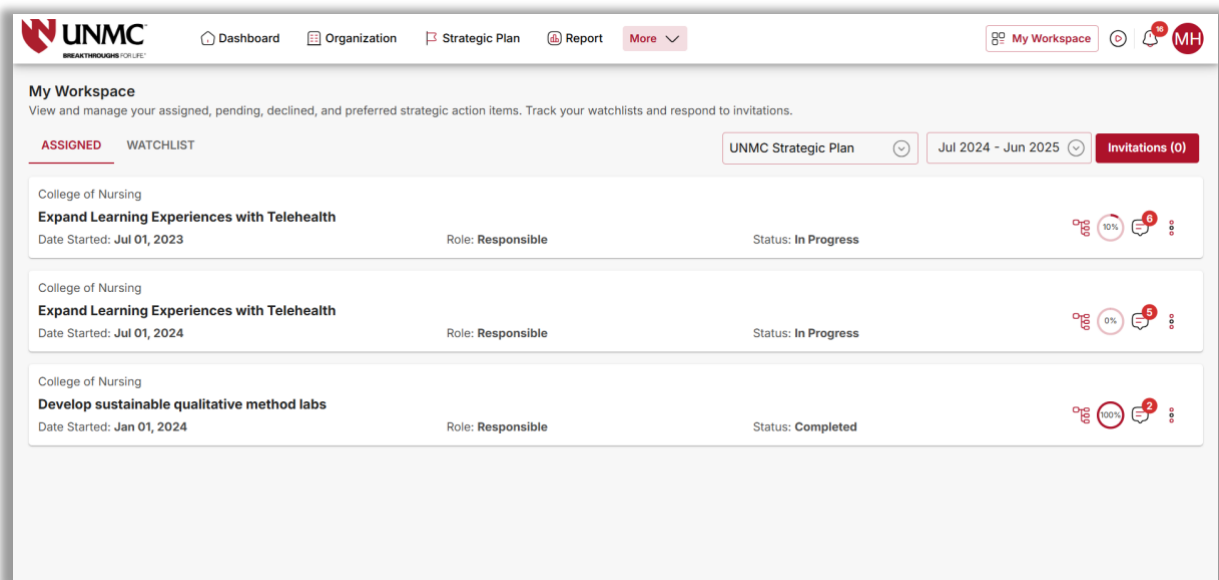
#### 11.1.1 About feature

The "View Strategic Items" feature allows users to view a list of actionable items (Initiatives) that they are part of the team or custom list of actionable items (Initiatives) that they have saved.

#### 11.1.2 Screen explanation

The "My Workspace" screen contains the following elements.

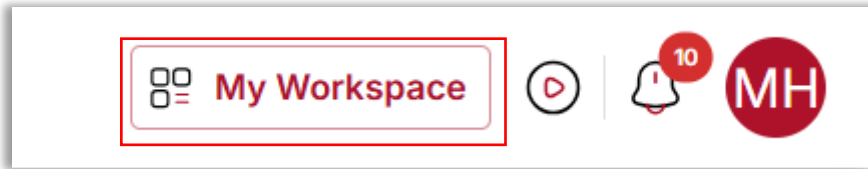
- Assigned :** The "Assigned" tab in the Strategic Action Items page contains the list of all the actionable items (initiatives) assigned to the user. The actionable items will only be added to the list once the user accepts the invitation to that actionable item. Users can view or edit the actionable items (initiatives) based on their assigned role in each actionable item. Users see this list by default.
- Watchlist :** The Watchlist tab in the Strategic Action Items allows users to navigate to custom watchlists created by the user.



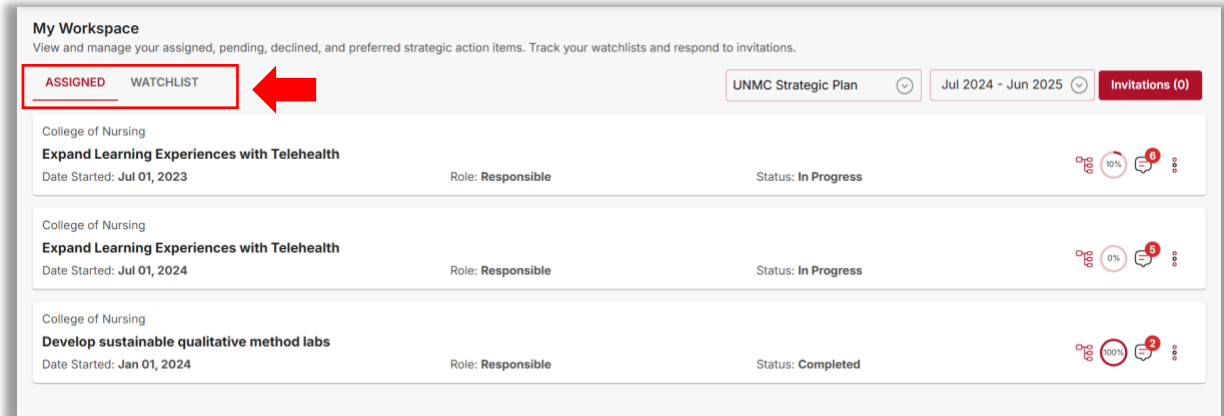
#### 11.1.3 How to perform this feature/functionality?

- Go to the VisionSync login page.
- From Top-Navigation menu, select "My Workspace".





c. You will be redirected to the page containing two tabs: “Assigned” and “Watchlist”.



d. On the Assigned tab, you will see a list of all actionable items (initiatives) that are assigned to you. The actionable items will be added to the Assigned list only when you accept the invitations to those actionable items.

### Strategic Action Item Invitations

See pending and declined invitations

PENDING (1)
DECLINE (0)
ACCEPTED (5)

#### Expand Learning Experiences with Telehealth

Organization Entity: College of Nursing

Strategic Plan: UNMC Strategic Plan

Goal: Goal

Invited By

Invitation Date

Role

Status

Accept

Decline

Stephen Hug

Mar 08, 2025

Accountable

Pending

Yay! You have seen it all

Back

Accept All

e. The actionable items (initiatives) on the Assigned list page are arranged per strategic plan per organization entity.

f. You can edit or view the actionable items (initiatives) on the Assigned list page based on your assigned role in each actionable item.

g. Click the “edit” or “view” button from the kebab menu against the watchlist that you want to edit or view.

### My Workspace

View and manage your assigned, pending, declined, and preferred strategic action items. Track your watchlists and respond to invitations.

ASSIGNED
WATCHLIST

UNMC Strategic Plan

Jul 2024 - Jun 2025

Invitations (1)

College of Nursing

Expand Learning Experiences with Telehealth

Date Started: Jul 01, 2023

Role: Responsible

Status: In Progress

10%

Edit

Delete

College of Nursing

Develop sustainable qualitative method labs

Date Started: Jan 01, 2024

Role: Responsible

Status: Completed

100%

Edit

Delete

h. You can also see the invitations to actionable items on the Assigned list page and choose to “Accept” or “Decline” by selecting the respective option.

### Strategic Action Item Invitations

See pending and declined invitations

PENDING (1)

DECLINE (0)

ACCEPTED (5)

Expand Learning Experiences with Telehealth

Organization Entity: College of Nursing

Strategic Plan: UNMC Strategic Plan

Goal: Goal

Invited By	Invitation Date	Role	Status	
Stephen Hug	Mar 08, 2025	Accountable	Pending	<div>Accept</div> <div>Decline</div>

Yay! You have seen it all

Back

Accept All

i. On the Watchlist tab, you will see a custom list of actionable items added by you in different watchlists.

### My Workspace

View and manage your assigned, pending, declined, and preferred strategic action items. Track your watchlists and respond to invitations.

ASSIGNED

WATCHLIST

UNMC Strategic Plan

Jul 2024 - Jun 2025

Demo Watchlist

College of Nursing

Expand education research in College of Nursing

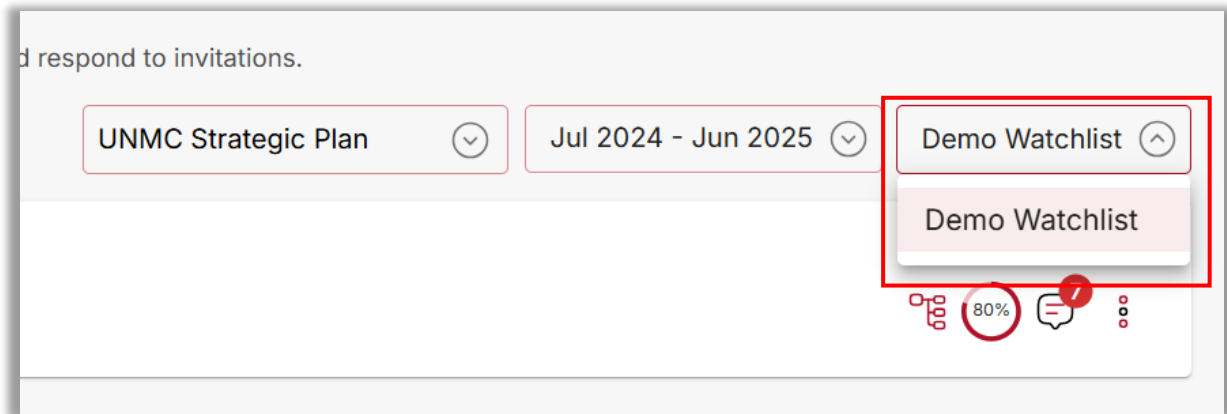
Date Started: Jul 01, 2023

Status: In Progress

80%

7

j. To filter watchlists, select the watchlist you want from the filter option on top right.



k. The actionable items saved in that watchlist will be displayed.

#### 11.1.4 Expected Result

Using the "View Strategic Action Items" feature, users can easily access a list of actionable items (Initiatives) assigned to them or a custom list of actionable items (Initiatives) that they have saved. This feature provides users with a convenient way to stay organized and quickly access the initiatives that they are interested in.

## 11.2 Create and Edit Watchlist

### 11.2.1 About feature

#### Create Watchlist

The "Create Watchlist" feature allows users to create custom lists of strategic action items (Initiatives) that they can save and access later. These lists could be used to track the progress of the strategic action items (Initiatives) of interest.

#### Edit Watchlist

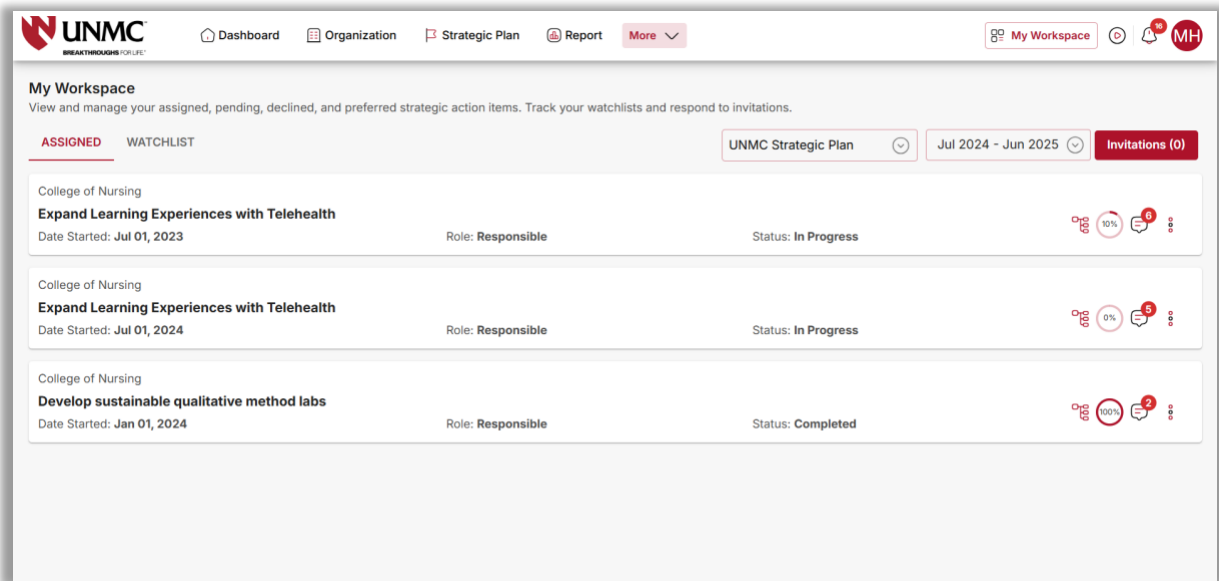
The "Edit Watchlist" feature allows users to modify the name of an existing custom watchlist in the system. These lists could be used to track the progress of the strategic action items (Initiatives) of interest.

### 11.2.2 Screen explanation

The "My Workspace" screen contains the following elements:

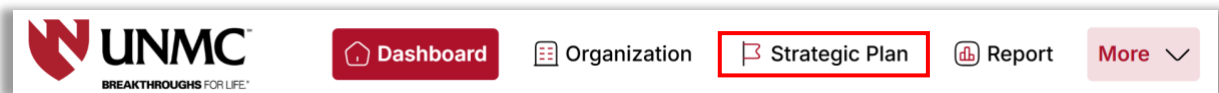
- Assigned: The "Assigned" tab on the Action Items page contains the list of all the strategic action items (initiatives) assigned to the user. The strategic action items will only be added to the list once the user accepts the invitation to that strategic action item. Users can view or edit the strategic action items (initiatives) based on their assigned role in each strategic action item. Users see this list by default.

- Watchlist: The "Watchlist" tab in the Action Items allows users to navigate to custom watchlists created by the user.

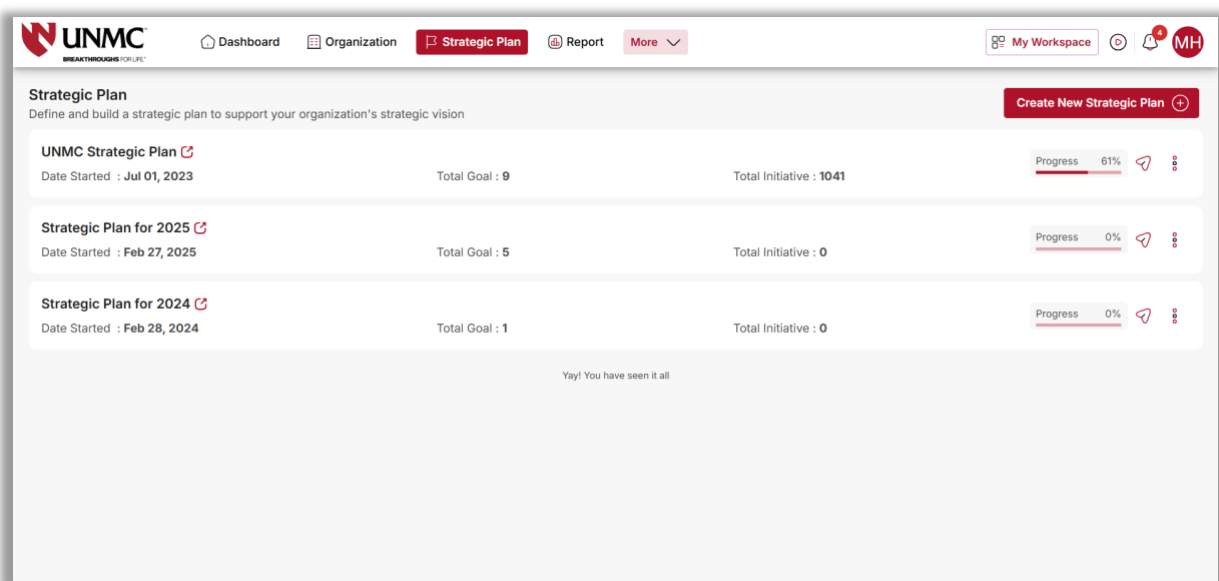


### 11.2.3 How to perform this feature/functionality?

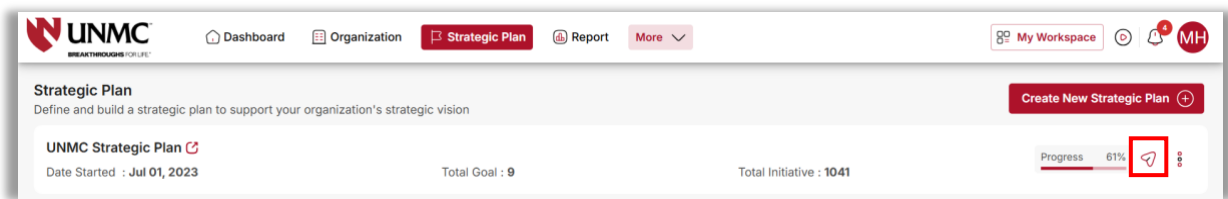
- Log in to your VisionSync account using your credentials.
- From the Top-Navigation Bar, select "Strategic Plan".



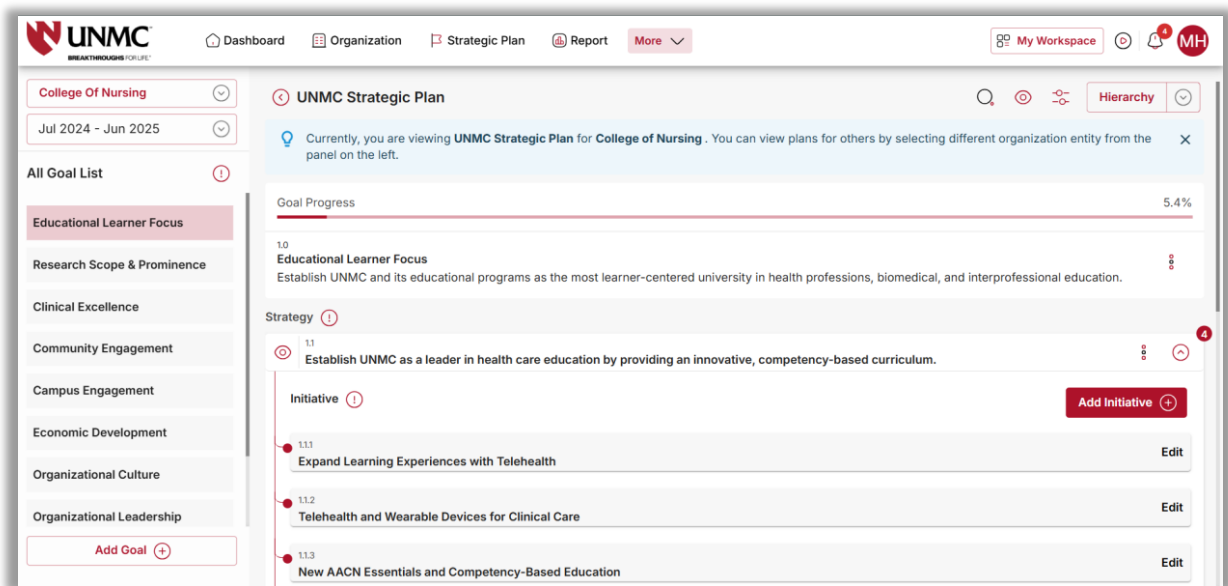
- The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



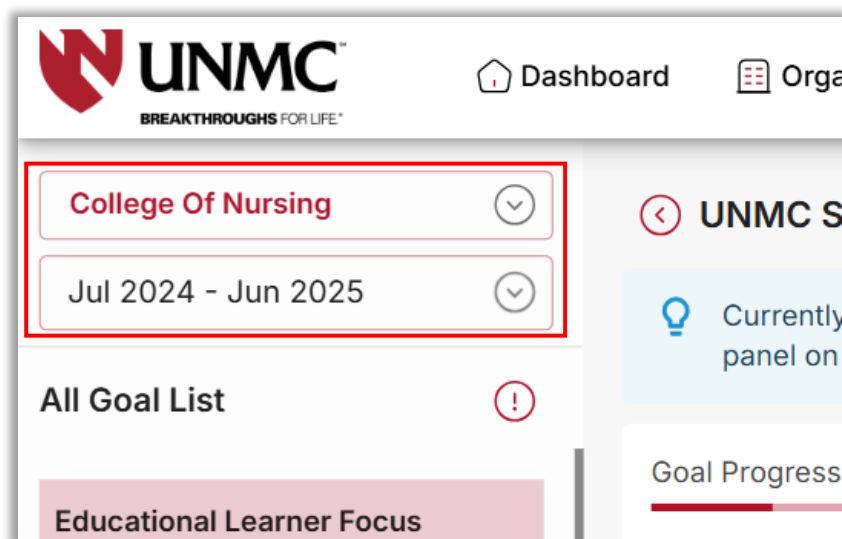
d) Click on the “Build Plan” option for the respective plan.



e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).



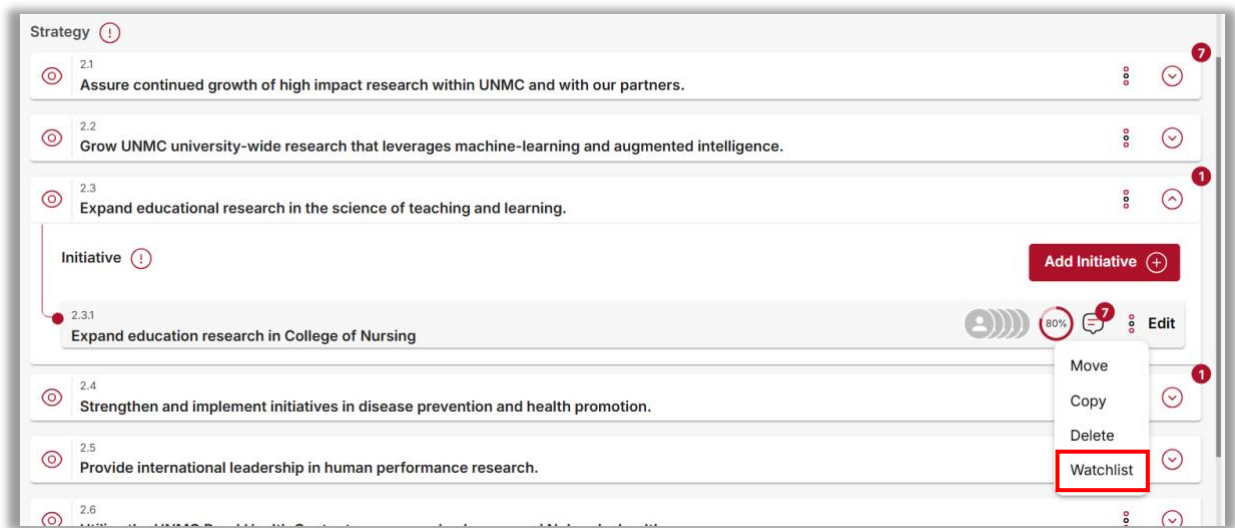
f) Select the organization entity from the top and choose the review period of the strategic plan.



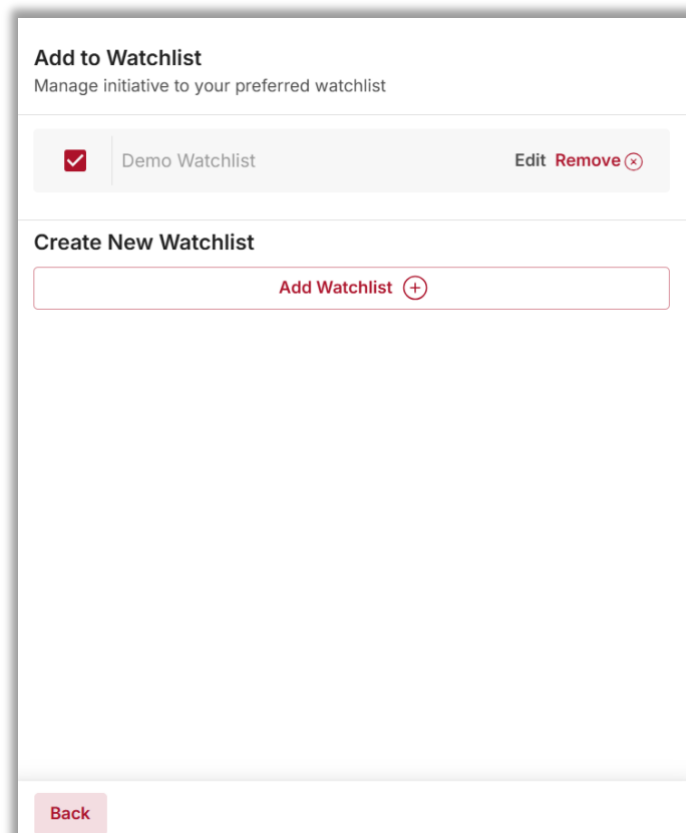
g) Select the strategic plan element and select the strategic action item.

## Creating a Watchlist

h. To create a new watchlist, click on the “Watchlist” option from the kebab menu against the strategic action item (initiative) button that you want to add to the watchlist.



i. Click the “Add Watchlist” button from the Watchlist window and enter the name you want for the list.



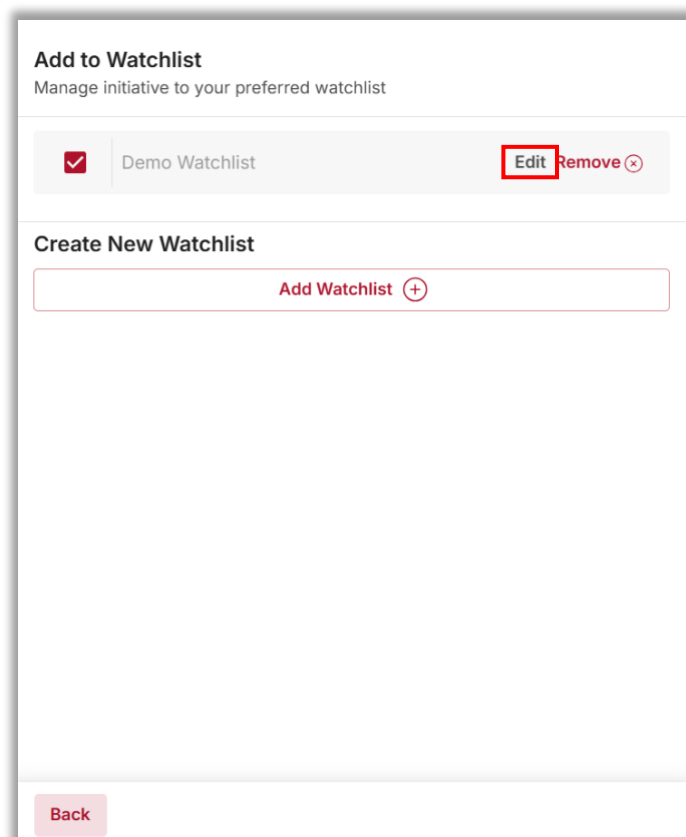
j. After creating a new watchlist and selecting it, any strategic action item (initiative) added will be saved to the selected watchlist. To add more strategic action items to the same list, select the previously created watchlist instead of creating a new one while adding strategic action items to the Watchlist.

k. To delete the watchlist, navigate to the Watchlist page from the strategic action item by clicking the “Watchlist” button against it. From the watchlist tab of that strategic action item, click on the “Remove” button against the watchlist you want to remove.

### Editing a Watchlist

h. To edit an existing watchlist, click on the “Watchlist” option from the kebab menu against any strategic action item (initiative).

i. From the watchlist window, click the “Edit” button against the watchlist you want to modify.



j. Click “Save” after making the desired changes.

## 11.2.4 Expected Result

### Creating a Watchlist

Using the "Create Watchlist" feature, users can easily create custom lists of strategic action items (Initiatives) that they can access later.



## Editing a Watchlist

Using the "Edit Watchlist" feature, users can easily modify the name of an existing custom watchlist in VisionSync.

In-app and email notifications are automatically sent to users for items on their watchlist whenever there are updates, progress changes, new comments, or uploaded documents related to the respective items.

### 11.2.5 Dependencies and Restrictions

- **Creating a Watchlist:** No strategic action item can be added to the default watchlist called "My List" by the user. This list is maintained automatically based on whether you are a team member on any strategic action item (Initiative).
- **Editing a Watchlist:** The default watchlist called "My List" cannot be edited or deleted. No strategic action item can be added to the default watchlist called "My List" by the user. This list is maintained automatically based on whether you are a team member on any strategic action item (Initiative).

## 11.3 Adding or Removing a Strategic Action Item (Initiative) from a Watchlist

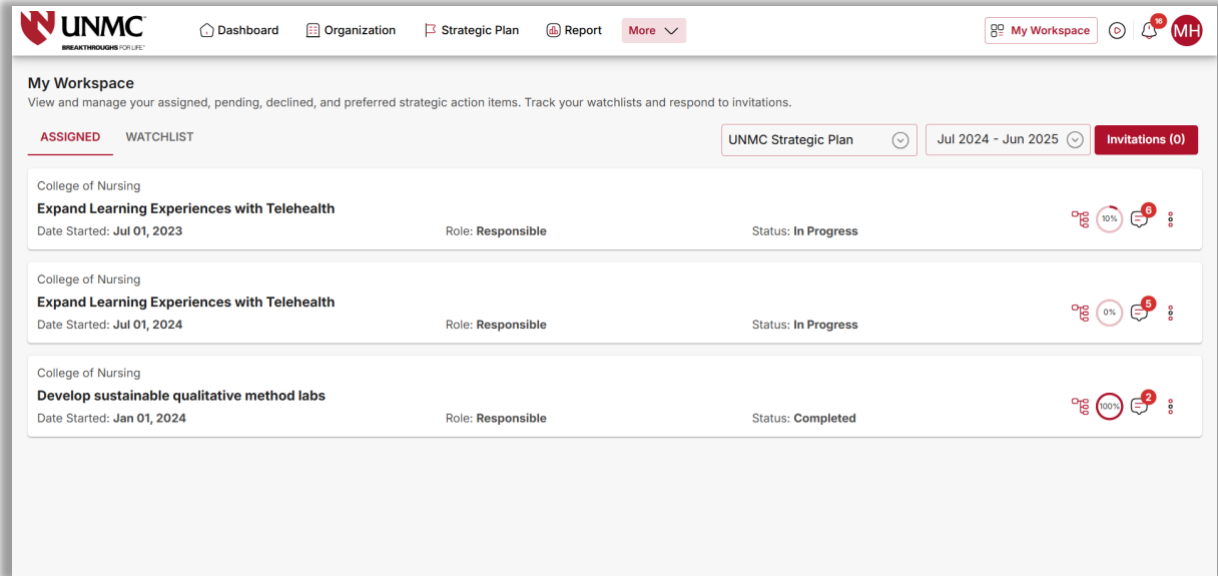
### 11.3.1 About feature

The "Add Actionable Item to Watchlist" feature allows users to add actionable items (initiatives) to their custom watchlists in VisionSync.

### 11.3.2 Screen explanation

The "Strategic Action Items" screen contains the following elements.

- a. **Assigned :** The "Assigned" tab in the Strategic Action Items page contains the list of all the actionable items (initiatives) assigned to the user. The actionable items will only be added to the list once the user accepts the invitation to that actionable item. Users can view or edit the actionable items (initiatives) based on their assigned role in each actionable item. Users see this list by default.
- b. **Watchlist :** The Watchlist tab in the Strategic Action Items allows users to navigate to custom watchlists created by the user.



**My Workspace**  
View and manage your assigned, pending, declined, and preferred strategic action items. Track your watchlists and respond to invitations.

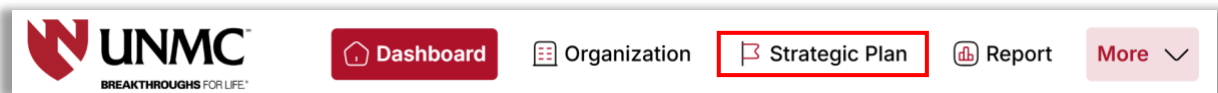
**ASSIGNED** WATCHLIST

UNMC Strategic Plan Jul 2024 - Jun 2025 Invitations (0)

Item	Role	Status	Progress
College of Nursing Expand Learning Experiences with Telehealth Date Started: Jul 01, 2023	Responsible	In Progress	10%
College of Nursing Expand Learning Experiences with Telehealth Date Started: Jul 01, 2024	Responsible	In Progress	0%
College of Nursing Develop sustainable qualitative method labs Date Started: Jan 01, 2024	Responsible	Completed	100%

### 11.3.3 How to perform this feature/functionality?

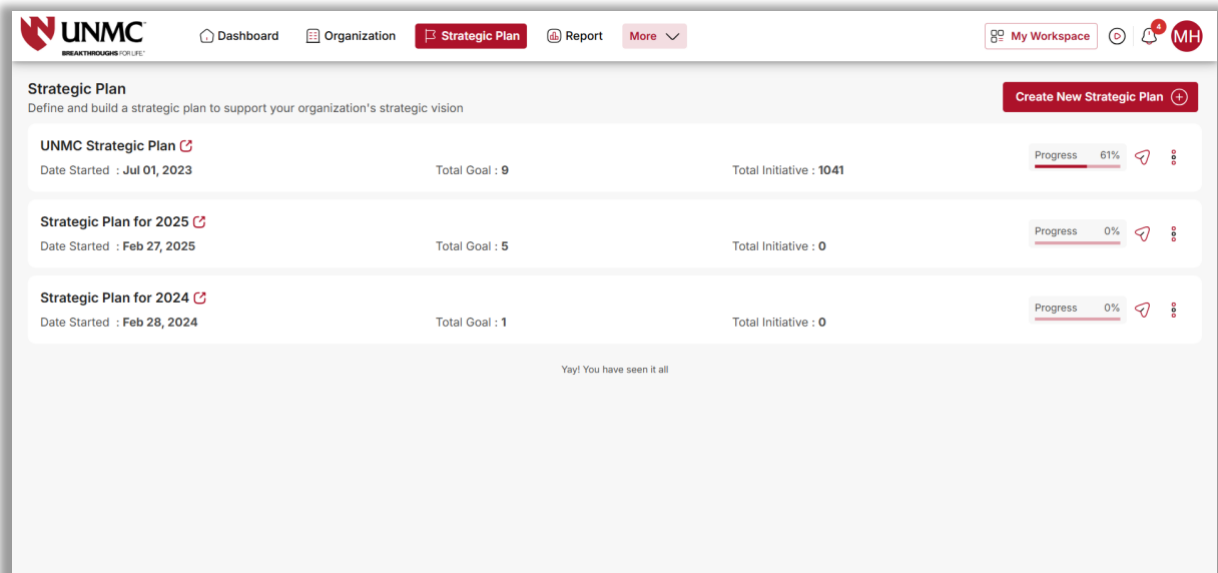
- Log in to your VisionSync account using your credentials.
- From the Top-Navigation Bar, select "Strategic Plan".



UNMC BREAKTHROUGHS FOR LIFE

Dashboard Organization **Strategic Plan** Report More

- The Strategic Plan screen will open, displaying a list of all strategic plans created within your organization.



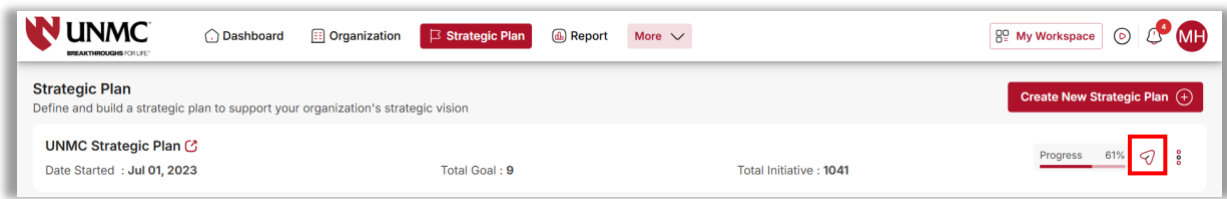
**Strategic Plan**  
Define and build a strategic plan to support your organization's strategic vision

Create New Strategic Plan

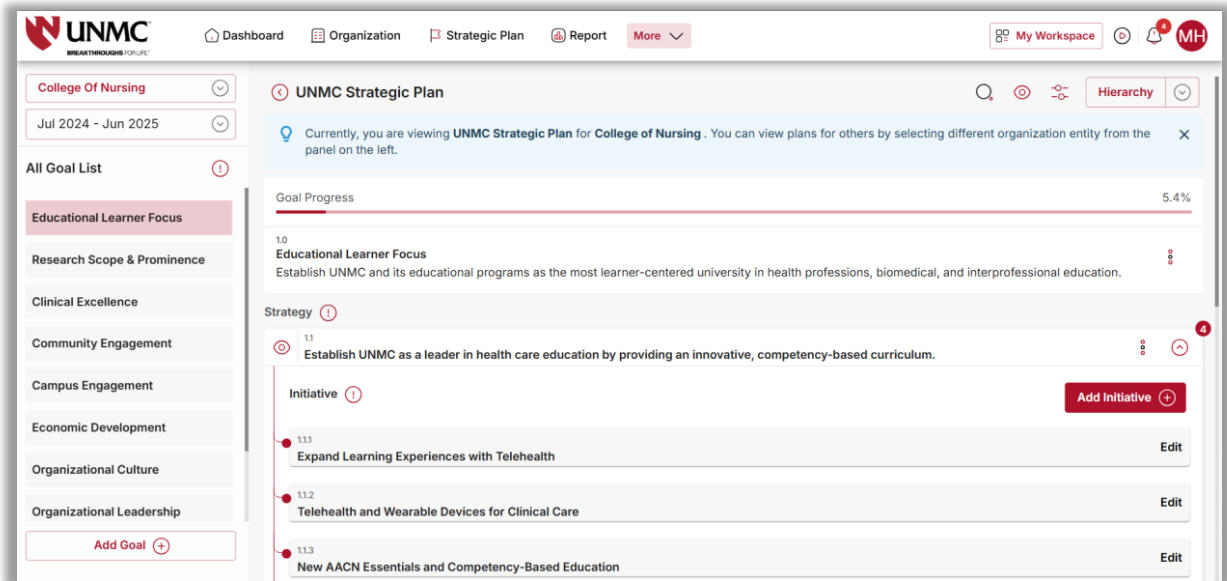
Plan	Date Started	Total Goal	Total Initiative	Progress
UNMC Strategic Plan	Jul 01, 2023	9	1041	61%
Strategic Plan for 2025	Feb 27, 2025	5	0	0%
Strategic Plan for 2024	Feb 28, 2024	1	0	0%

Yay! You have seen it all

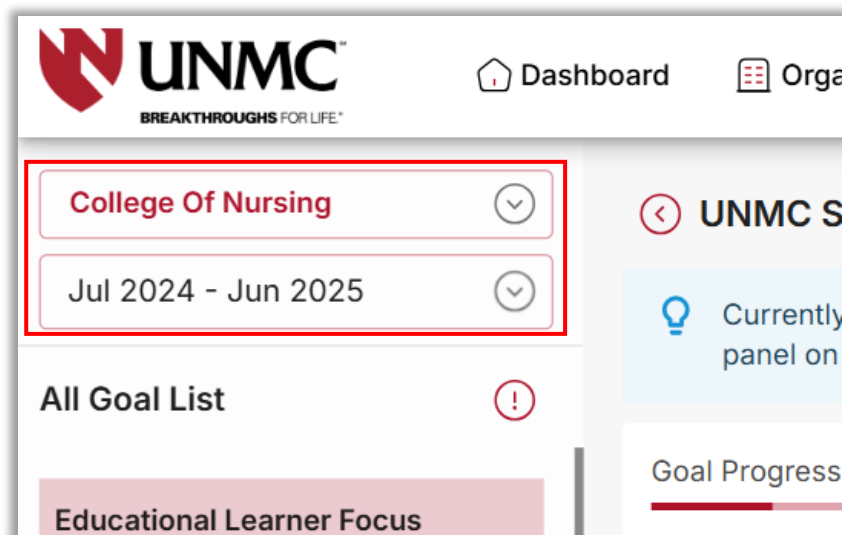
- Click on the "Build Plan" option for the respective plan.



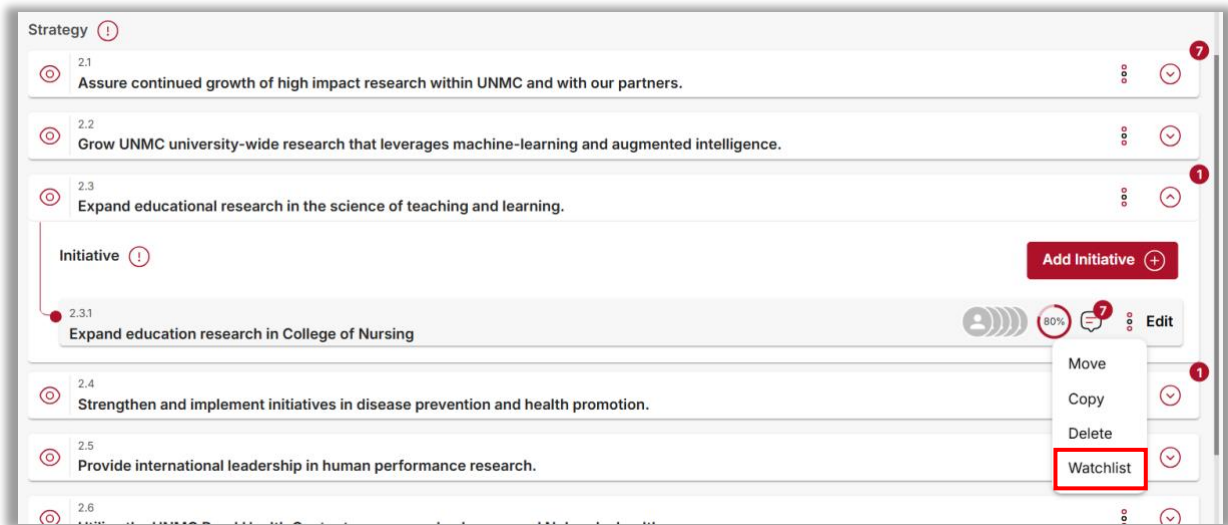
- e) A new screen will open containing the strategic plan details, including assigned organization entities, review periods, and strategic framework levels (Goals, Strategy, etc.).



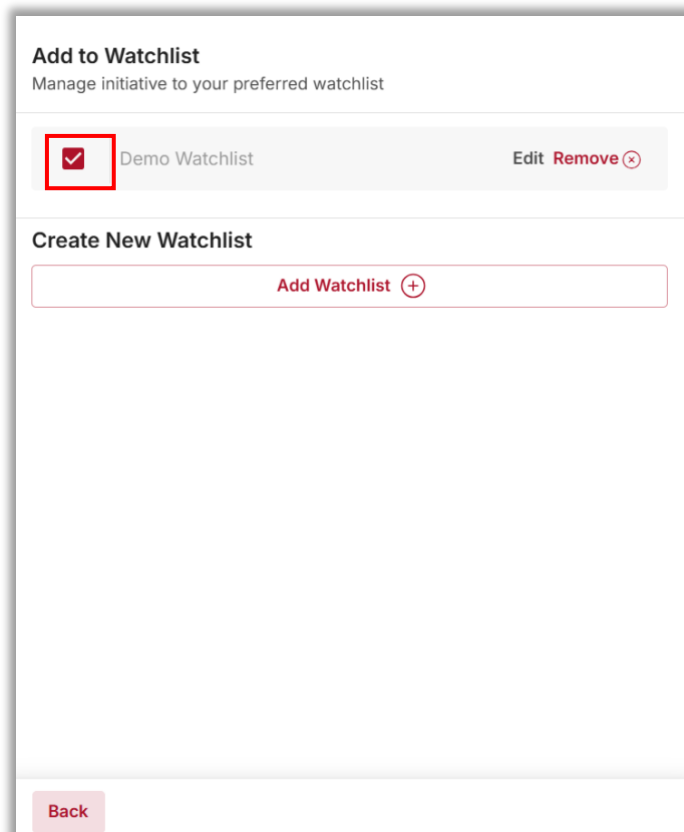
- f) Select the organization entity from the top and choose the review period of the strategic plan.



- g) Select the strategic plan element and select the strategic action item against which you wish to add or remove actionable items (initiative) from a watchlist.

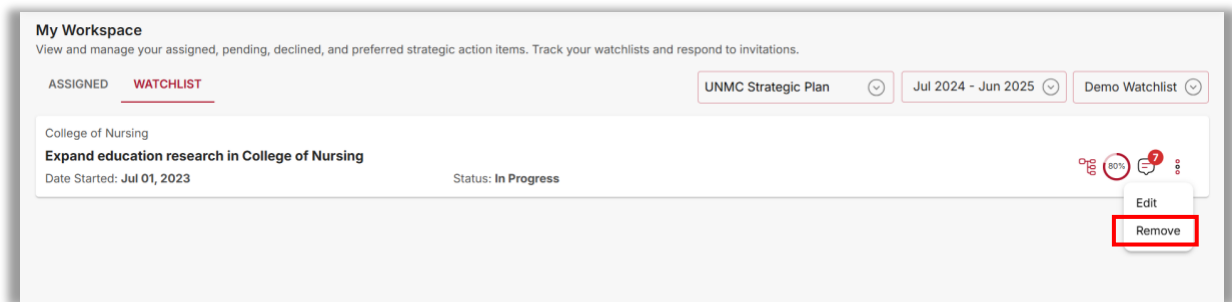


- h) To add an actionable item to a watchlist list, navigate to the selected actionable item and click the “Watchlist” option from the kebab menu against that item. Choose the watchlist you want to add the actionable item (initiative) to.



- i) A confirmation message will be displayed on the top of the screen stating that an actionable item has been added to the watchlist.

- j) Similarly, to remove a strategic action item from a watchlist, Go to the "My Workspace" page, click on the **Watchlist** tab, use the dropdowns in the top right to filter by plan and review period, view the saved strategic action items, and remove any item by selecting it and clicking "Remove" from the kebab menu.



### 11.3.4 Expected Result

1. Once users have added actionable items to a watchlist, they can view all the added items in one place within that watchlist.
2. In-app and email notifications are automatically sent to users for items on their watchlist whenever there are updates, progress changes, new comments, or uploaded documents related to the respective items.
3. Using the "Remove Strategic Action Item from Watchlist" feature, users can easily manage their custom watchlists by removing strategic action items (initiatives) from them in VisionSync. After removing strategic action items from a watchlist, the removed items will no longer be displayed in that watchlist.

### 11.3.5 Dependencies and Restrictions

The default watchlist called "My List" cannot be edited or deleted. No actionable item can be added to the default watchlist called "My List" by the user. This list is maintained automatically based on if you are a team member on any actionable item (Initiatives).

The strategic action item from the Assigned list cannot be removed unless you are removed from the assigned users in that strategic action item.