



## StrategyBlocks 6 Overview – What's new

1.00

### User Interface and Homepage

Lightened to draw attention to the centre of the screen  
New left-hand side menus

2.00

### StrategyBlocks Ideas

Bottom-up Block creation  
Comparison and approval of new StrategyBlocks Ideas  
Reuse of Block structures

# 1.00 | User Interface and Homepage

1.01  
New menus

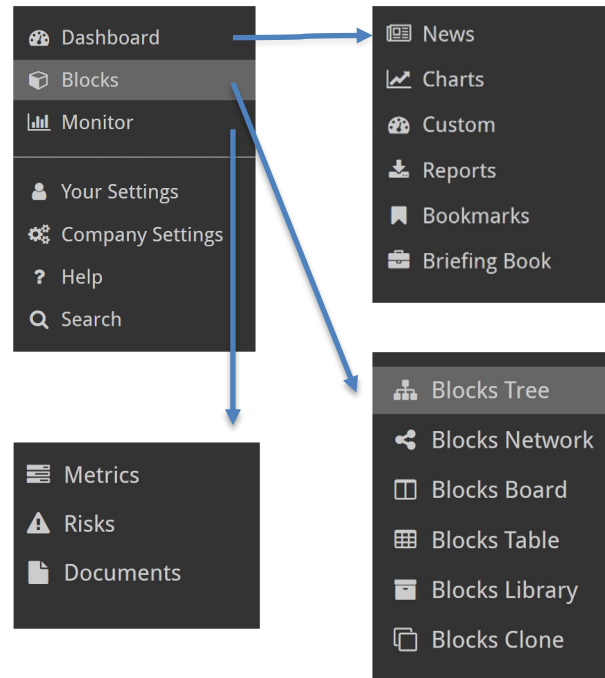
1.02  
New look and feel

1.03  
Homepage introduction

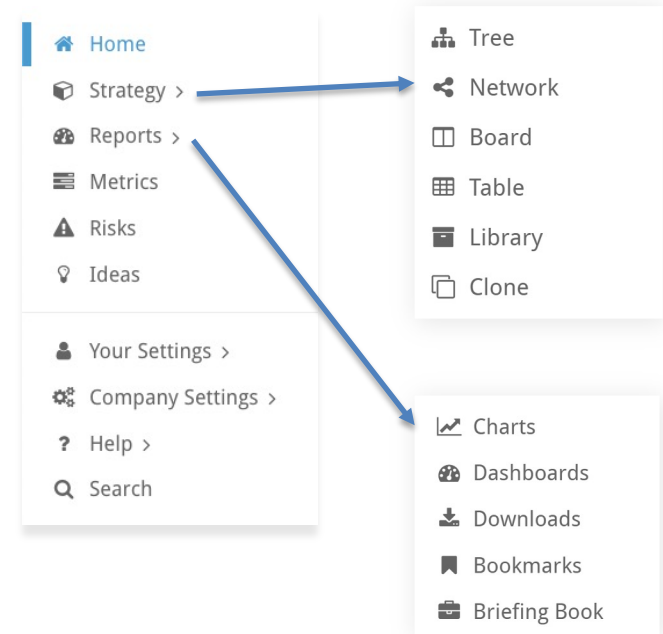
# 1.01

New menus

## Version 5 Left-Hand Side Menu



## Version 6 Left-Hand Side Menu



## Version 6 left-hand side menu

We've made some changes to the left-hand Side Menu

**News** (previously located in the Dashboard menu)

This is now called News Feed and can be found on the bottom right of your Home Page.

**Documents table** (previously located in the Monitor menu)

This can now be found in the Company Settings menu

# 1.02

New look and feel

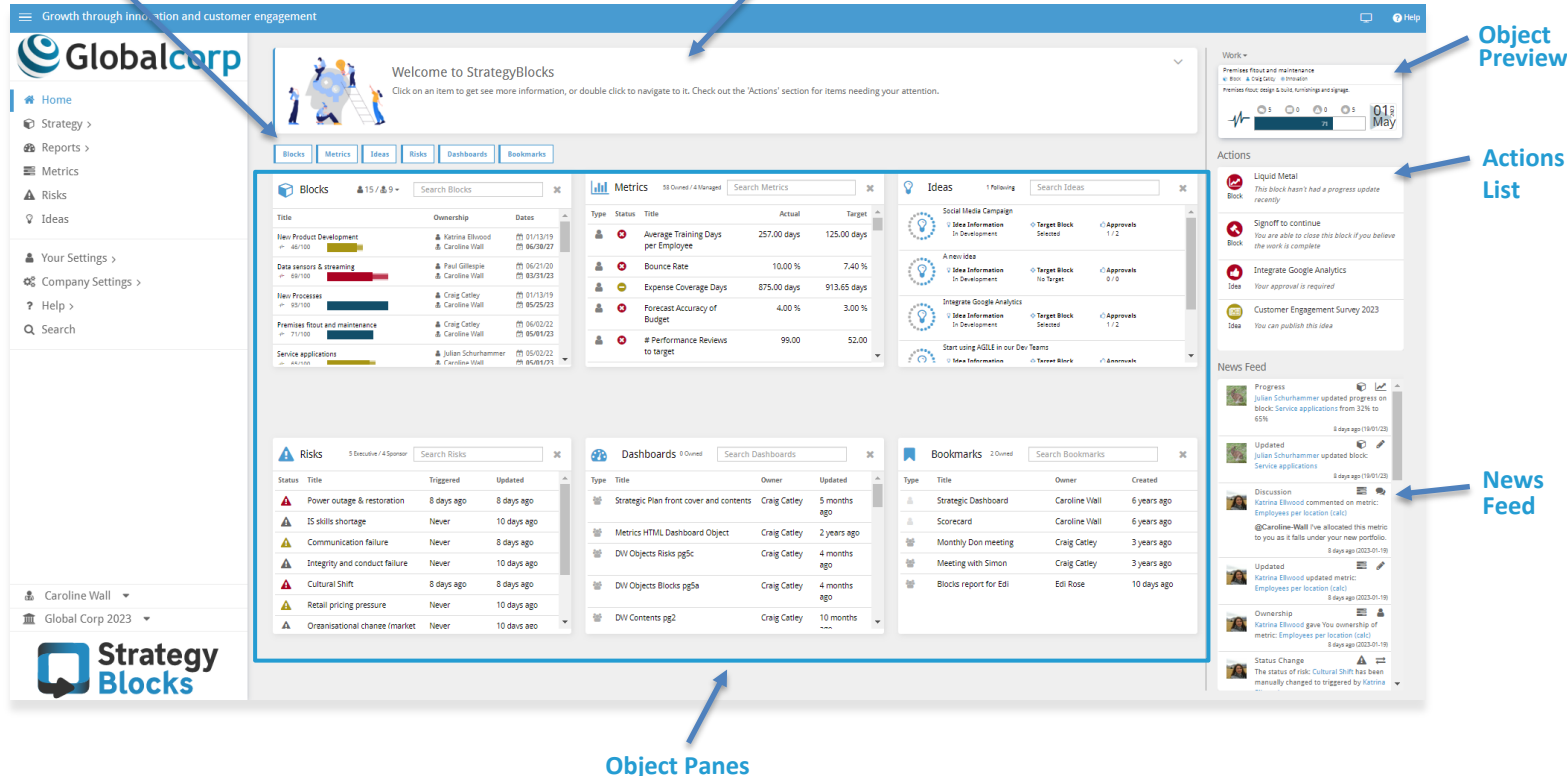


## New look and feel

1. Every page has been lightened to draw user focus to the centre of the screen
2. Blocks have been given a more modern colour palette to match

## Pane Selector Buttons

## Welcome Banner



## Homepage Introduction

**Welcome Banner** - Provides a high level description of the page. Click on the down arrow to hide the Welcome Banner and free up more room on your home page for your favourite Object Panes.

**Pane Selector Buttons** - Click on these buttons to customize the information you want displayed on your home page. When a button is blue, the object type will appear on your home page. When it is grey, it will be hidden.

**Object Panes** - Provides an overview of objects you own or manage in StrategyBlocks. Single click on an object to view it in the Object Preview. Double click on an Object to navigate to that Object's sidebar menu, where you can edit all attributes for that Object.

**Actions List** - Highlights Blocks and StrategyBlocks Ideas that you may need to update or action.

**Object Preview** - Provides additional information about an object you have clicked on in an Object Pane. For all objects except Blocks, click on Open to navigate to that object's sidebar menu, where you can edit all attributes for that object. For Block objects, click on the down arrow icon to change the Block face, or quick update by clicking on the pencil icon. Click on the tree icon to locate the Block in the Blocks tree.

**News Feed** - Highlights any recent changes to objects you own, follow or manage.

# 2.00 | StrategyBlocks Ideas

2.01  
Ideas Hub

2.02  
Create an Idea

2.03  
Ideas Overview page

2.04  
Details page

2.05  
Outline page

2.06  
Sandbox page

2.07  
Timeline page

2.08  
Contention page

2.09  
Approvals page

2.10  
Publishing a Block

2.11  
Ideas Settings  
page

# 2.01

## StrategyBlocks Ideas Hub

Growth through innovation and customer engagement

Globalcorp

Home

Strategy >

Reports >

Metrics

Risks

Ideas

Your Settings >

Company Settings >

Help >

Search

Katrina Ellwood

Global Corp 2023 ...

Strategy Blocks

Ideas Hub - Homepage

Welcome to Ideas

Each section shows ideas in different collections. Selecting a section header will take you to a more detailed table.

Owned 1 owned

A new idea

Status In Development

Target Block Not Selected

Idea Information 0 / 0

Public 4 total

Start using AGILE in our Dev Teams

Status In Development

Target Block Not Selected

Idea Information 0 / 0

Social Media Campaign

Status In Development

Target Block Selected

Idea Information 1 / 2

Integrate Google Analytics

Status In Development

Target Block Selected

Idea Information 0 / 2

A new idea

Status

Target Block

Idea Information

New Idea

Idea Details

Idea Owner Katrina Ellwood

Date Created 2023-01-13

Duration 31

Focus Area All

Likes 0

Comments 3

Measures

Metrics 0

Blocks 1

Risks 0

Files 0

Approvals 0 / 0

Contention 0

Custom Fields

Block Status Project not started

Project Code Select one

Initial Assumptions enter text

Department Select a Department

Hub

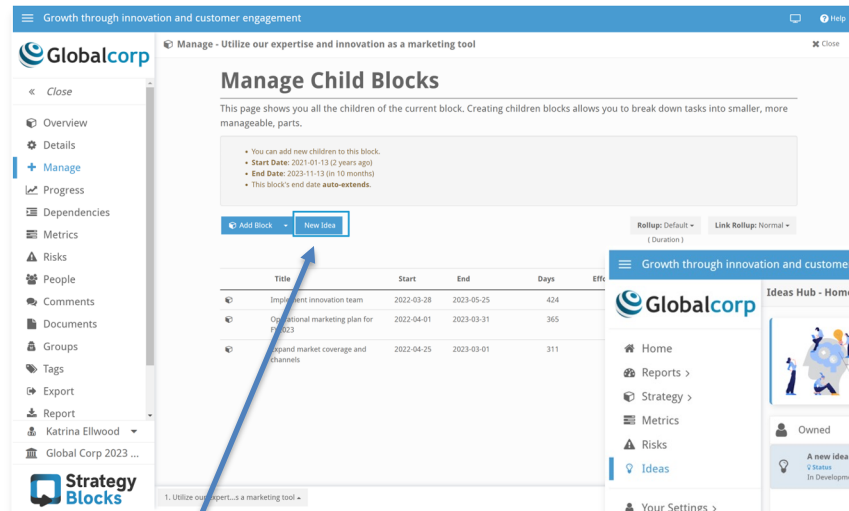
View Buttons

## StrategyBlocks Ideas Hub

The Ideas Hub lists all StrategyBlocks Ideas you own or can see, Ideas waiting for your approval, and enables you to compare Ideas before you approve them. Click on the View buttons located on the bottom left-hand side of your screen to limit your view to Ideas you own only, all Public Ideas in your organization or to compare Ideas. Single click on an Idea to see a high level summary of the Idea in the Overview Pane on the right-hand side of your screen. Double click on an Idea to view more detailed information or edit the Idea.

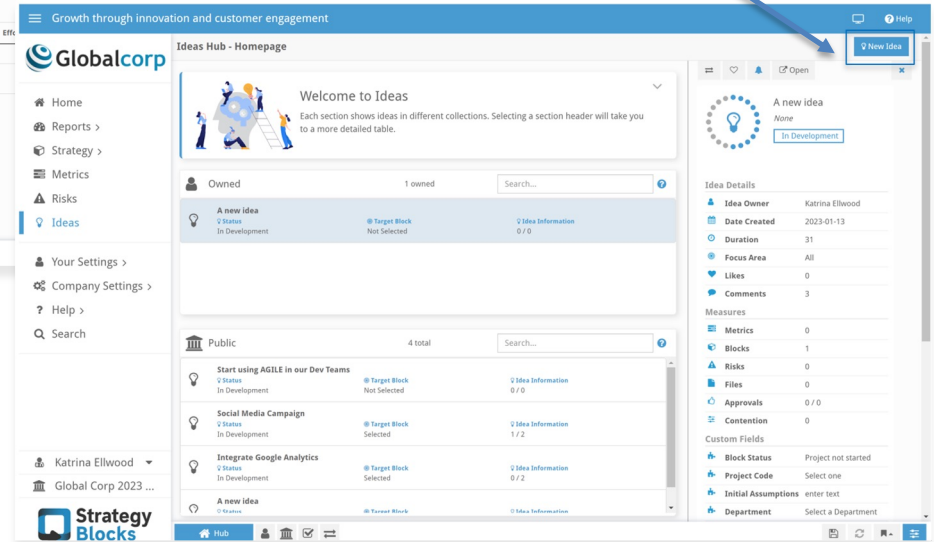
# 2.02

## Create a StrategyBlocks Idea



New StrategyBlocks Idea Button (Blocks Tree)

New StrategyBlocks Idea Button (StrategyBlocks Ideas Hub)



## Create a StrategyBlocks Idea

### Blocks Tree

To create an Idea from the Blocks tree, find the parent Block you wish to attach the new Idea to, and click on the Clog icon. Navigate to **Manage** on the Block left-hand side menu and click on New Idea. This will take you to the Ideas Wizard, in the Ideas Hub.

### StrategyBlocks Ideas Hub

To create an Idea from the Ideas hub, click on the New Idea button on the top right-hand corner of your screen. This will take you to the Ideas Wizard, which will step you through adding the key information required to create a new Idea, selecting a Target (Parent) Block and adding people or groups who can see or contribute to the Idea.



# 2.03

## StrategyBlocks Ideas Overview page

The screenshot displays the 'Idea Overview' page for 'Customer Engagement Survey 2023' within the StrategyBlocks interface. The page is titled 'Idea Overview: Customer Engagement Survey 2023' and includes a 'Close' button and a 'Publish' button. The main content area shows the idea's status as 'In Development', owned by Katrina Ellwood, and created on 2023-01-20. It features a description field with the text 'There is no description yet', a details section with fields for Visibility (Public), Focus Area (All), Start Date, and End Date, and a recent activity section showing a comment from Katrina Ellwood. The right sidebar contains sections for 'Completion - In Development' (showing Idea Information, Target Block, and Approvals), 'Build Your Idea' (showing Blocks, Block Owners, and Focus Areas), 'Target Block' (with a 'Select Target Block' button), and 'Approvals'.

## Ideas Overview page

Once you have created the StrategyBlocks Idea, you will be directed to the Idea Overview page, where you can see key information about your Idea, add commentary, add a Target (parent) Block, and add additional approvers for your Idea. Once an Idea is complete, you can also publish it from this page (see the section of this guide for Publishing Blocks).

# 2.04

Details page

The screenshot shows the 'Idea Details' page for 'Customer Engagement Survey 2023' in the StrategyBlocks application. The page has a blue header with the text 'Growth through innovation and customer engagement' and a 'Help' icon. A left sidebar contains the 'Globalcorp' logo and a navigation menu with options: Overview, Details (selected), Outline, Sandbox, Timeline, Contention, Approvals, Metrics, Risks, Documents, and Delete. Below the menu are user and organization selectors for 'Katrina Ellwood' and 'Global Corp 2023 ...'. The main content area is titled 'Idea Details: Customer Engagement Survey 2023' and includes a 'Close' button and a 'Save' button. A callout box titled 'Edit Idea Details' provides instructions: 'Edit the basic details of this idea, including the ownership, security, and your organisation's custom fields'. The form fields include: 'Title' (Customer Engagement Survey 2023), 'Description' (with a rich text editor toolbar), 'Focus Area' (1. All), 'Is this idea visible to anyone else?' (Yes selected), 'Owner' (Ellwood, Katrina), and 'Editors' (Users who can make changes).

## Details page

Make changes to key information about your StrategyBlocks Idea, such as the Title, Description, Focus areas, access settings, and custom fields on the Details page.

2.05

## Outline page

Globalcorp

Idea Outline: Customer Engagement Survey 2023

« Close

Overview

Details

Outline

Sandbox

Timeline

Contention

Approvals

Metrics

Risks

Documents

Delete

Katrina Ellwood

Global Corp 2023 ...

Strategy Blocks

Idea Outline: Editing Blocks

The outline is a list-based view of your templated blocks that will be created when the idea is published. You can add / edit the rows to give them a title, dates, and owner. You can also drag rows to order and nest them.

Block Title	Start Date	End Date	Block Owner
New block title...	dd/mm/yyyy	dd/mm/yyyy	Select an Owner
Customer Engagement Survey 2023	20/01/2023	19/02/2023	K. Ellwood

Target Block

The Target Block determines where in the Blocks Tree your Idea will appear when Published.

Select Target Block

Publication Dates

Planned Start

Planned End

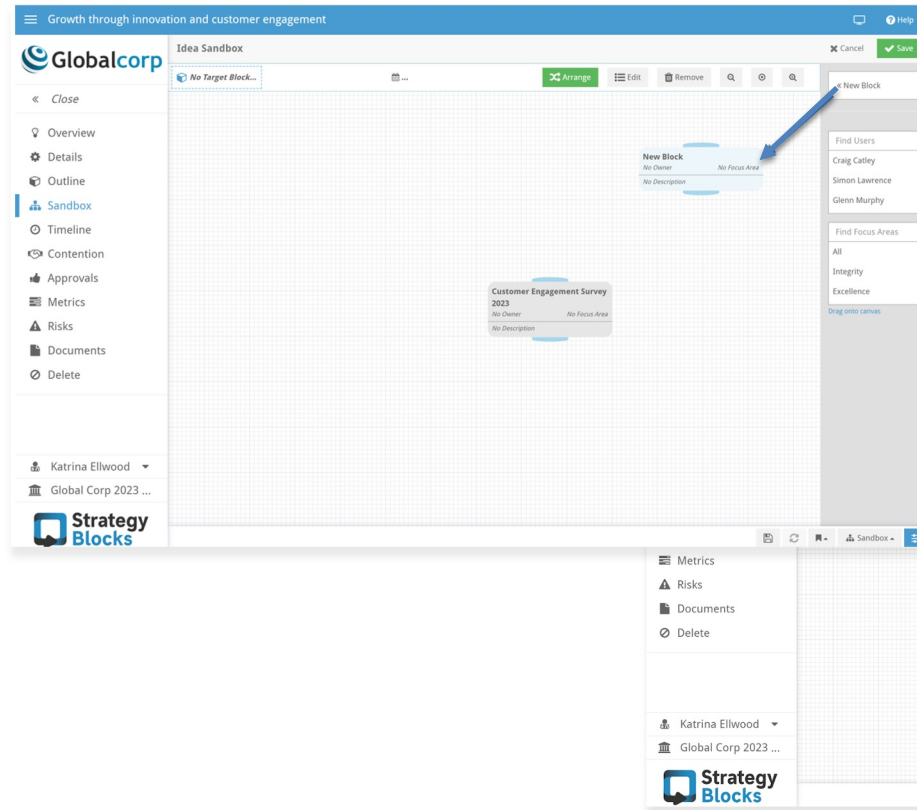
## Outline page

The Outline page is a list-based view of your templated Blocks that will be created when the StrategyBlocks Idea is published. Import template Block structures from your Blocks Library, or click on the **Edit** button on the top right-hand side of the page to create new Blocks in a list view. Give your new Block a Title, Start date, End Date and Owner, then click the + button. Drag Blocks to nest them in a hierarchical Block structure. Click on the Save button on the top right-hand side of the page to save your changes.

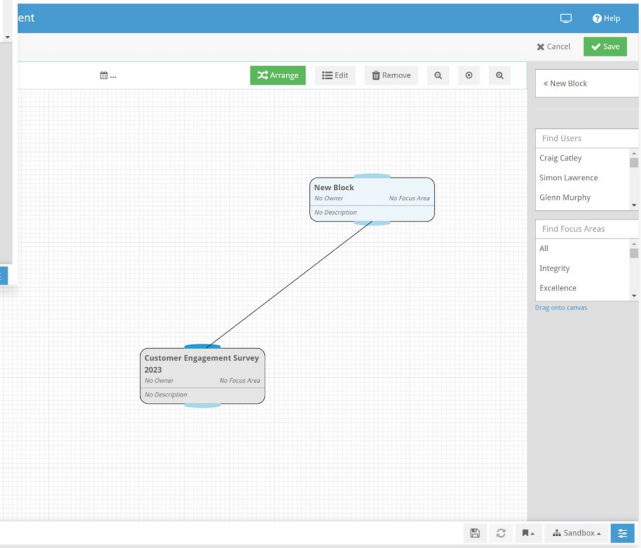
After an Idea is published, this page will also show the status of the Published Blocks.

# 2.06

## Sandbox page



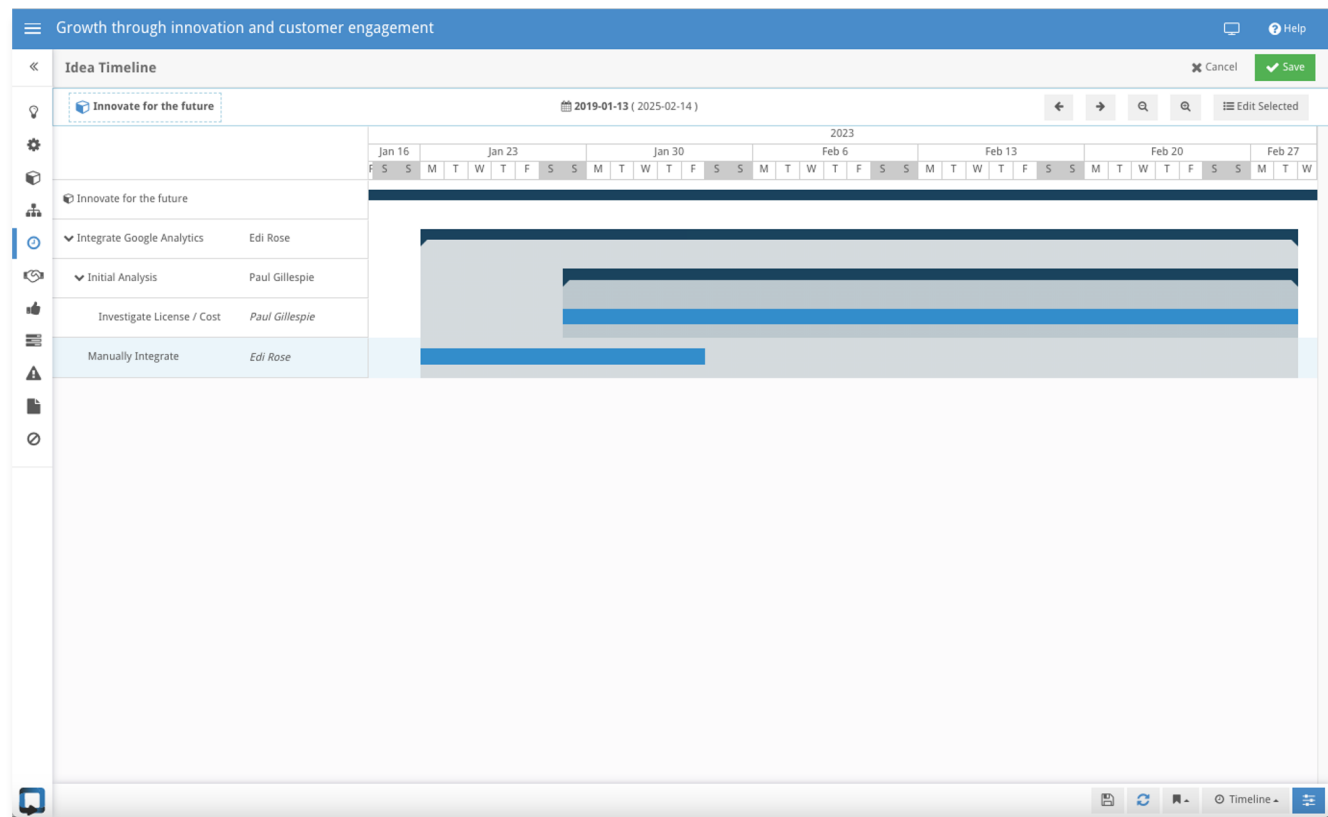
“New Block”  
Click and drag  
on to canvas



## Sandbox page

The Sandbox page provides a mind map for those who prefer to build the structure of their StrategyBlocks Idea visually. To add new Blocks to your Idea, click on the **Edit** button at the top right-hand side of the page, click on New Block and drag it onto your canvas. Drag and drop an Owner and/or Focus Area onto your new Block, or double click on your new Block to give it a Name or assign an Owner. New Blocks can be moved on the canvas by dragging and dropping them in a new location.

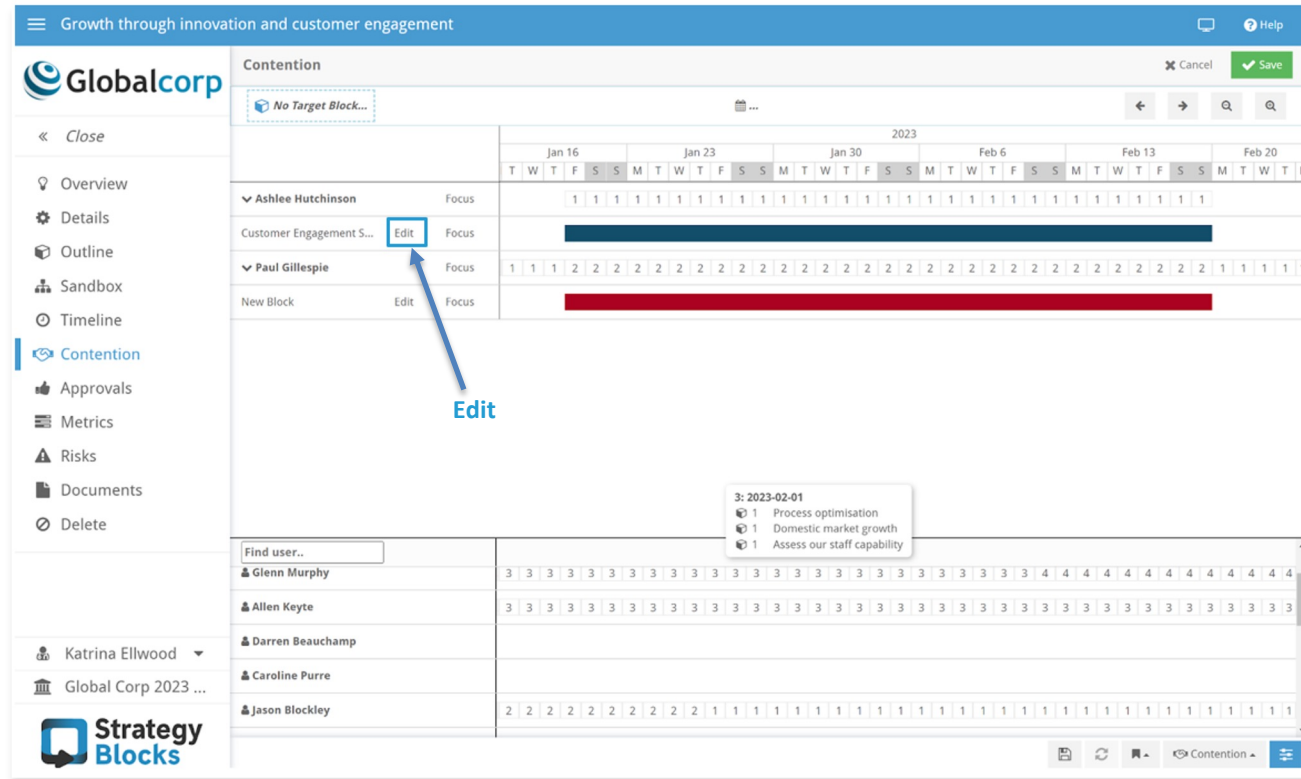
To create a hierarchy in the structure of your Idea, click on the **blue connector nodes** at the top or bottom of a Block, and drag the line to connect it to another Block. If you change your mind, click on the top blue connector node for the child Block and drag it down onto the child Block to disconnect it. Click **Save** to keep your changes.



## Timeline page

Plan when you would like to start or end your new Blocks using the Timeline page. To view more dates on your screen, use the magnifying glass symbols at the top of the page to zoom the dates in and out, or scroll across the page using the left and right arrows buttons.

Click on the **Edit** button at the top right-hand side of the page to begin changing the dates on your Blocks. Dragging a Timeline Bar when clicking on the blue section will move the Timeline Bar with the Block's existing duration. Shorten or increase the duration by dragging the black section of the Timeline Bar, which appears when you hover on a Block Timeline bar. Click **Save** when you are happy with your changes.



## Contention page

Before assigning Blocks in your StrategyBlocks Idea to a particular team member, it may be useful to know what other projects or work they are committed to. The Contention Page provides a brief overview of the number of other Blocks your potential Block owner is already working on, or will be at the time the Block is scheduled to start.

The numbers in the rows to the right of a user are the numbers of active Blocks they have on any given date. Hover over a number, and a pop-up will appear listing the names of the Blocks they are working on. To Change the owner of a Block on the Contention page, first click on the **Edit** button in the top right-hand side of the screen. Next, click on **Edit** beside the name of a Block. A pop-up window will appear where you can change the owner of the Block.

Remember to save your changes before exiting the screen.

The screenshot shows the 'Approvals: Integrate Google Analytics' page in the StrategyBlocks interface. The page is titled 'Approvals (1 / 2)' and includes a 'Close' button. The main content area displays a list of approvals, with the first one by 'Edi Rose' showing a 'Reject!' button. Below this, there is a section for 'Caroline Wall' with 'Remove' and 'Approve!' buttons. The right sidebar contains 'Idea Details' (Idea Owner: Edi Rose, Date Created: 2023-01-17, Duration: 32, Focus Area: IT, Likes: 1, Comments: 11) and 'Measures' (Metrics: 1, Blocks: 4, Risks: 0, Files: 0, Approvals: 1 / 2, Contention: 31). The bottom of the sidebar shows 'Custom Fields' with values for Block Status, Project Code, Initial Assumptions, Department, Cost Centre, Approval Year, and Corporate Value. The bottom navigation bar includes icons for Overview, Details, Outline, Sandbox, Timeline, Contention, Approvals (active), Metrics, Risks, Documents, and Delete.

## Approvals page

Your StrategyBlocks Idea must be assigned a Target Block (parent Block) before it can be approved. The owner of the Target Block will automatically be added as a required Approver for your Idea.

**Note:** If you are the owner of the Target Block, your Idea will automatically be approved by you.

However, sometimes it may be appropriate to add additional approvers, and you can do this on the Approvals page. To add an additional approver, click on the **Add Approver** button at the top right-hand side of the page. Start typing your additional approvers name, or use the dropdown arrow to select a name from the dropdown list. Click **Require Approval** and your approver will be sent an email notification.



# 2.10

## Publishing a Block

The screenshot displays the 'Idea Overview' page for 'Customer Engagement Survey 2023'. The interface includes a top navigation bar with 'Growth through innovation and customer engagement' and a 'Help' icon. The left sidebar lists various navigation options: Overview, Details, Outline, Sandbox, Timeline, Contention, Approvals, Metrics, Risks, Documents, and Delete. The main content area shows the idea's status as 'Submitted', its owner as Katrina Ellwood, and its creation date as 2023-01-20. A 'Publish' button is highlighted in the top right corner with a blue arrow. The right sidebar shows completion status, build your idea details, target block information, and approvals.

Click Publish button once your StrategyBlocks Idea is approved

## Publishing a Block

Once your StrategyBlocks Idea has been approved, it is ready to be published into the Blocks Tree. To publish a Block, navigate to the Overview page and click on the green Publish button at the top right-hand side of the page.

The Idea Blocks will then be added to the strategy, under the Target Block.

**Note:** Until your StrategyBlocks Idea has been assigned a Target Block and approved, the Publish button will be greyed out.



# 2.11

## Ideas settings page (Administrator only)

The screenshot shows the 'Ideas Settings' page in the StrategyBlocks application. The page is titled 'Growth through innovation and customer engagement'. The left-hand side menu is expanded, showing 'Company Settings' with 'Ideas' selected. The main content area contains the 'Ideas Settings' form. The form has the following fields:

- Title:** A text input field containing 'Requires Administrator approval'.
- Description:** A rich text editor with a toolbar showing options like Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, and a 'Normal' button. The description field is currently empty.
- Approver:** A dropdown menu showing 'Catley, Craig'.
- Start Level:** A dropdown menu showing '1 vision & mission'.
- End Level:** A dropdown menu showing '6 objectives'.
- Focus Area:** A dropdown menu showing 'Select...'.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The bottom of the page shows the StrategyBlocks logo and a navigation bar with icons for Home, Settings, and Ideas.

## Ideas settings page

The StrategyBlocks Ideas settings page enables the StrategyBlocks Administrators to apply some controls around which levels in the Blocks Tree new Blocks can be added to, using the Ideas feature. For example, the Administrator may want to have oversight on the creation of Blocks in levels one (Organizational Vision), two (Strategy), and 3 (Initiatives).

The Ideas Settings page can be found in the left-hand side menu under **Company Settings > Ideas**.

To create a new Approval, click on the **Open** button on the Approvals section of this page, and then the **Add** button on the next page.

The form will appear. Complete the mandatory fields, and click save to activate this Approval.



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