Strategy Blocks

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
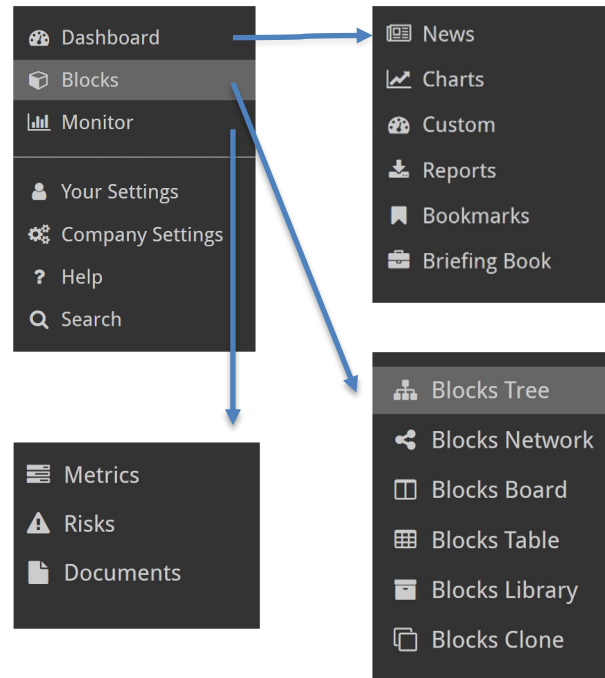Reuse of Block structures

1.00 | User Interface and Homepage

Version 5 Left-Hand Side Menu

Version 6 Left-Hand Side Menu

- Dashboard
- Blocks
- Monitor

- Your Settings
- Company Settings
- ? Help
- Search

- News
- Charts
- Custom
- Reports
- Bookmarks
- Briefing Book

- Metrics
- Risks
- Documents

- Blocks Tree
- Blocks Network
- Blocks Board
- Blocks Table
- Blocks Library
- Blocks Clone

- Home
- Strategy >
- Reports >
- Metrics
- Risks
- Ideas

- Your Settings >
- Company Settings >
- ? Help >
- Search

- Tree
- Network
- Board
- Table
- Library
- Clone

- Charts
- Dashboards
- Downloads
- Bookmarks
- Briefing Book

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

Strategy
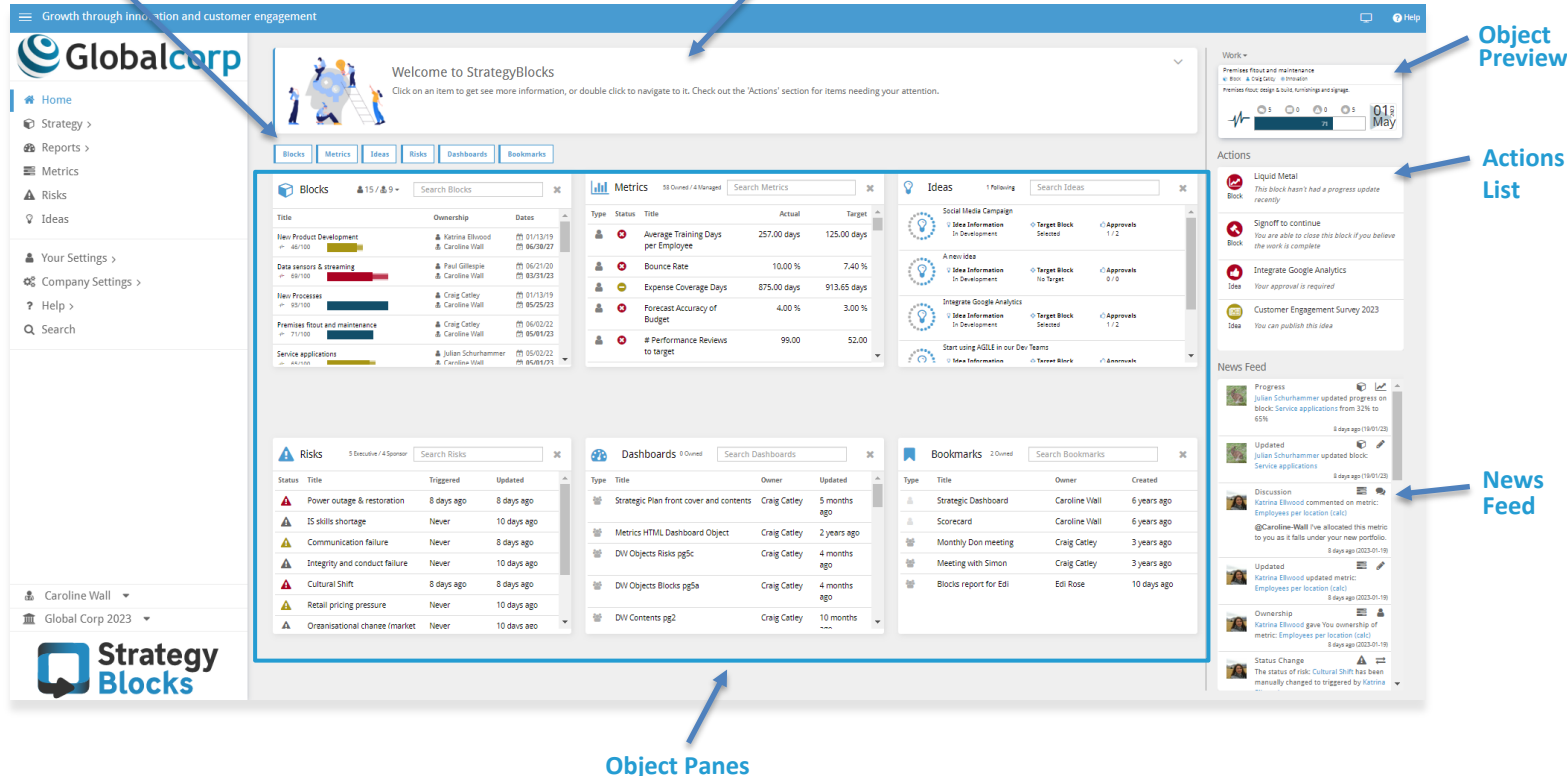**Blocks**

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

1.03

Homepage Introduction

Welcome Banner

Object Preview

Actions List

News Feed

Object Panes

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.

Strategy Blocks

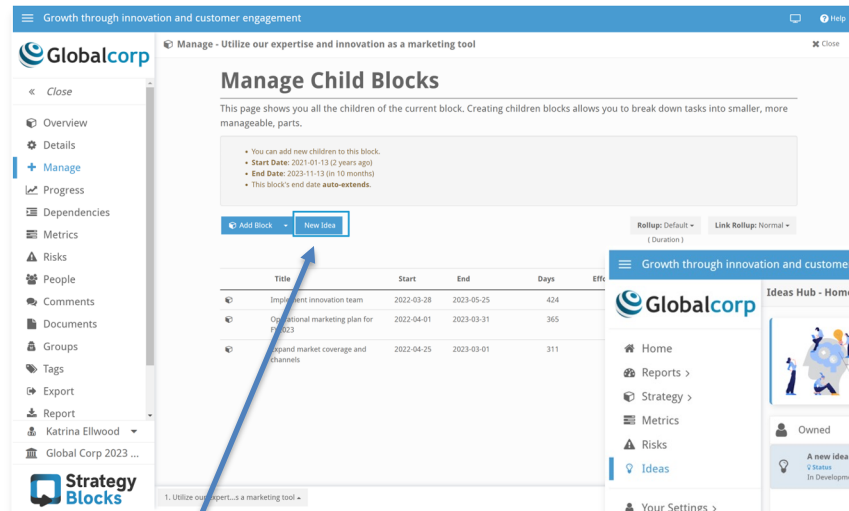# 2.00 | StrategyBlocks Ideas

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)
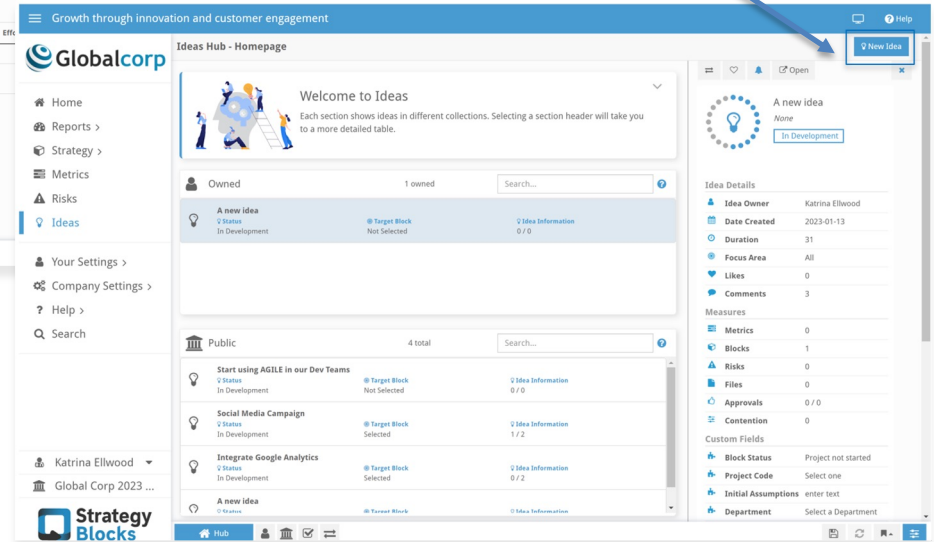
Create a StrategyBlocks Idea

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.

StrategyBlocks Ideas Overview page

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).

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

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.
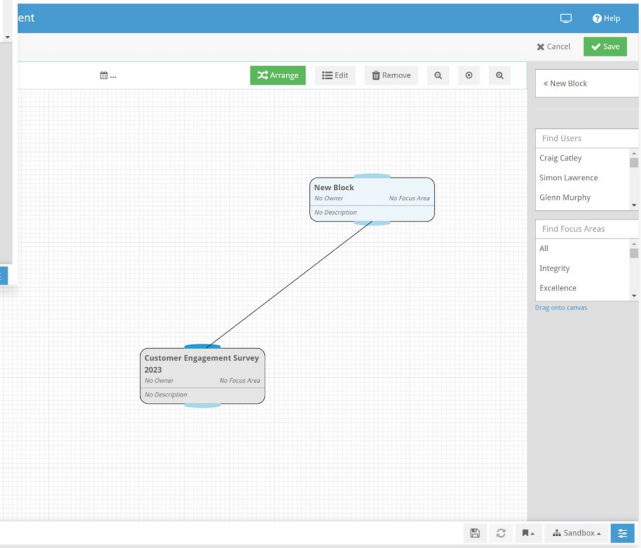
After an Idea is published, this page will also show the status of the Published Blocks.
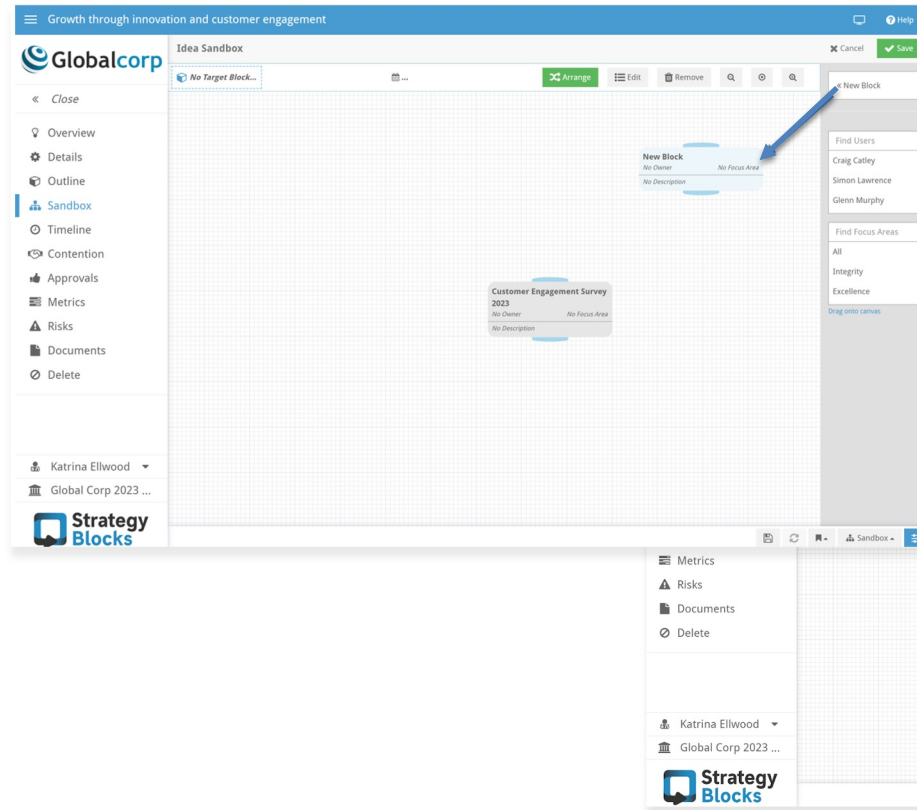
"New Block"
Click and drag
on to canvas

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.

Strategy Blocks

2.07
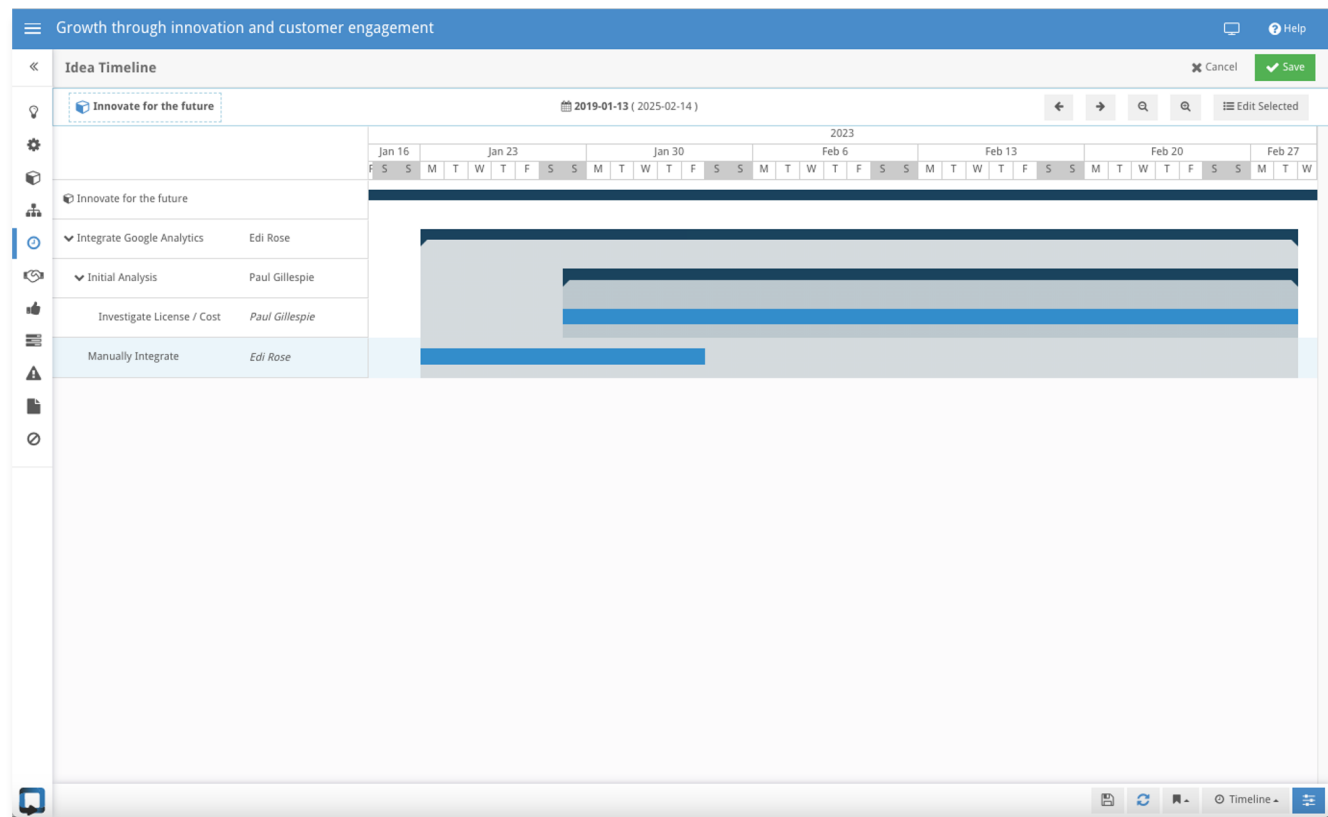
Timeline page

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.

2.08
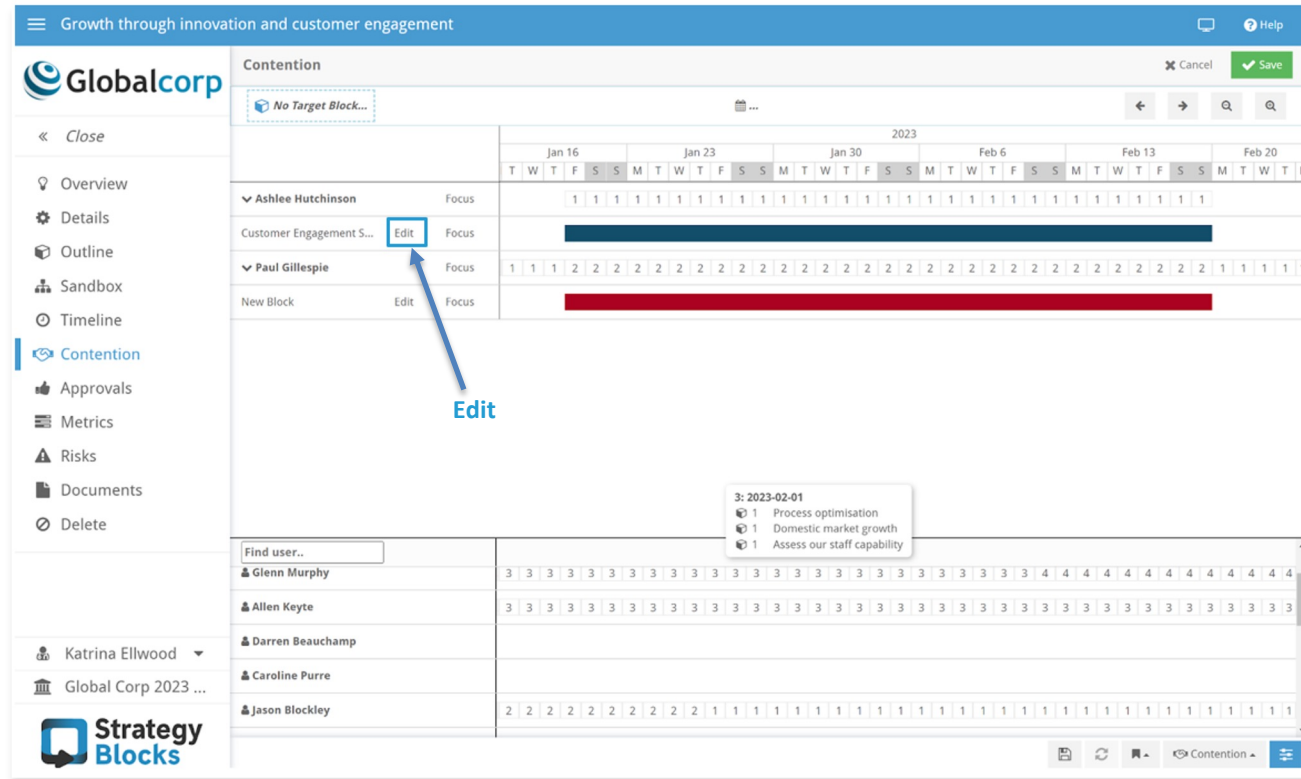
Contention page

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.

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

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.

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.

Strategy Blocks

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