

# StrategyBlocks Downloadable Guide

## About

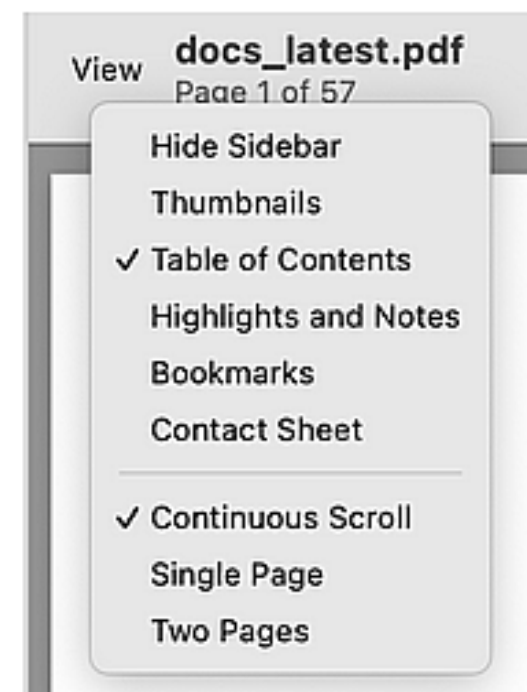
This downloadable PDF is based on the live site and contains all of the same content at the time of downloading. As the live site is updated this guide will become out of date and will need to be redownloaded.

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## Navigation

You can navigate quickly between pages using the Table of Contents or Bookmarks features in your PDF viewer. This will give you a side bar similar to the one of the live site.

The PDF is selectable so you can copy text, you can also search the document for keywords using Control F on your keyboard.



## Limitations

Links within the documentation, which on the live site would take you between pages, will not work in the PDF version. It should be clear from the link text which page to go to via the Table of Contents side menu.

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# Logging Into StrategyBlocks

## Finding the Site

Refer to your initial correspondence for the correct server. If your instance is hosted on-premise then refer to your local administrator. In most cases your URL will be one of the following:

- <https://app.strategyblocks.com>
- <https://aus.strategyblocks.com>



## Ways to Log In

Once on the site, you can log in by entering your StrategyBlocks email and password.

You can also log in with Google, Salesforce and Azure AD. To learn more about setting up Azure SSO [click here](#).



**Your StrategyBlocks Account**

Enter your email address and your password to sign into your StrategyBlocks account.

Email

Password

By signing in, you agree to the StrategyBlocks terms of use including our privacy policy which includes our use of cookies.

**Cookie Policy**  
StrategyBlocks only uses essential cookies. [Learn More](#)

## Forgot Password

If you have forgotten your StrategyBlocks password, simply click "forgot password". This will take you to a page where you can enter your email address and get a password reset link. If you have forgotten the email you used, contact your organisation's StrategyBlocks Administrator.



**Reset Your Password**

Enter your email address if you have an account and you will receive a confirmation link to reset your password. Once this is done, we will send a new random password to you. Please remember to **change your password** once you sign back into StrategyBlocks.

Email address

# The StrategyBlocks Homepage

## About

The Homepage is where the user first lands after logging in. It displays all of the user's owned and managed objects in StrategyBlocks for quick access and provides information about where the user might want to begin.

## Welcome Banner

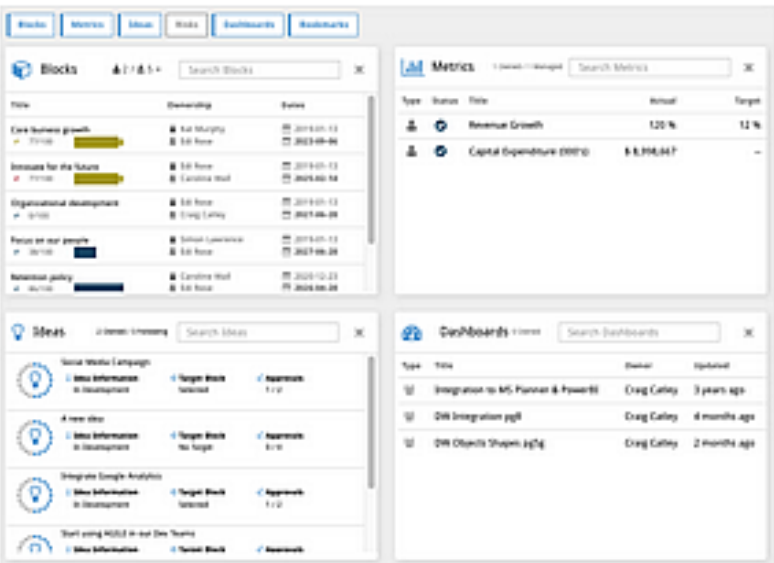
Provides a high level description of the page. Click on the down arrow to hide the Welcome pane and free up more room on your home page for your favourite Object Tables.



## Object Tables

The Object Tables are the centrepiece of the Homepage, displaying all your objects in StrategyBlocks, clicking any item once will open them in the preview pane, double clicking will open them in StrategyBlocks.

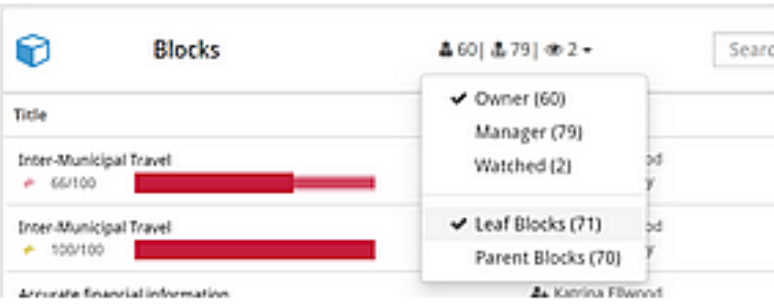
- **Blocks:** Blocks you own/manage. Click on the dropdown in the table header for filter controls.
- **Risks:** Risks which you own/manage, their status and when they were last updated.
- **Metrics:** Metrics you own/manage, their status and last actual/target values.
- **Ideas:** Ideas you own/manage, their stage of development and approval status.
- **Dashboards:** Dashboards you own and when they were last updated.
- **Bookmarks:** Your Bookmarks, allowing you to quickly navigate to the screens you use most.



You can show/hide different object tables using the display buttons under the welcome banner. This allows you to customise your Homepage for the features you use most.

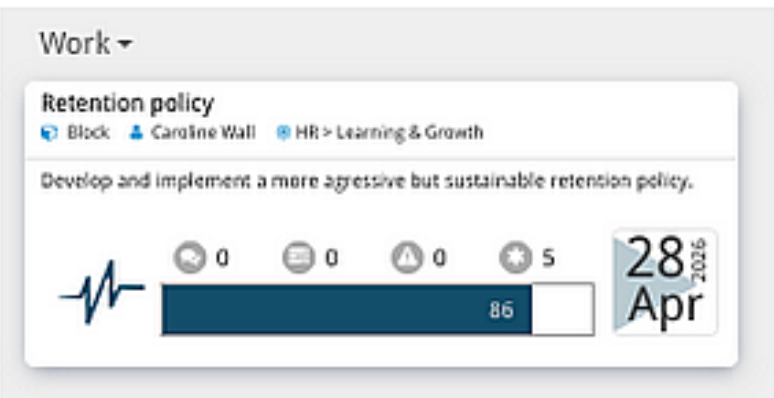
## Block Table Filters

Clicking on the dropdown menu in the header of the Blocks table will reveal some filtering options. You can filter by leaf/parent blocks and by blocks you manage/own/watch.



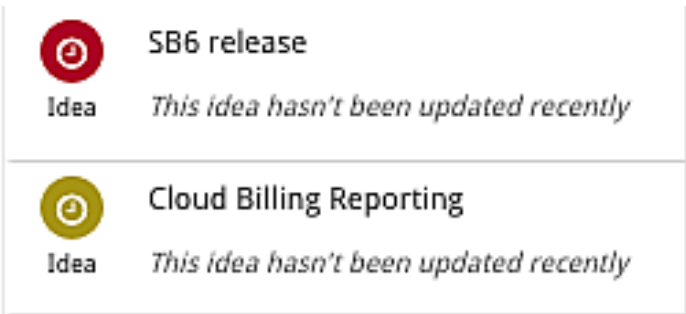
## Preview Pane

Selecting any object in the Objects Tables will open them in the Preview Pane. This provides a compressed view of the object, in the case of blocks, you can update their details and progress directly in the Preview Pane.



## Actions Pane

Highlights potential actions which may need to be taken by a user. Such as, updating a block's progress, addressing a triggered risk or approving an idea. Double clicking on the action will take you to the related object in StrategyBlocks.



## News Feed

Highlights any recent changes to objects you own, follow or manage.





# Basic Terminology

## What is a Block?

A **block** describes a specific strategy. Blocks describe: what has to be achieved, by whom, and by when.

They are arranged in a top-down hierarchy and describe your organization's strategic activities at all levels. Often strategies need to be broken down into smaller tasks. The top block is the **parent** and the blocks under it are **child** blocks. A block at the very bottom of a tree, with no child blocks, is called a **leaf**. For more information on how blocks are arranged, checkout [Block Structure](#).

## Block Permissions

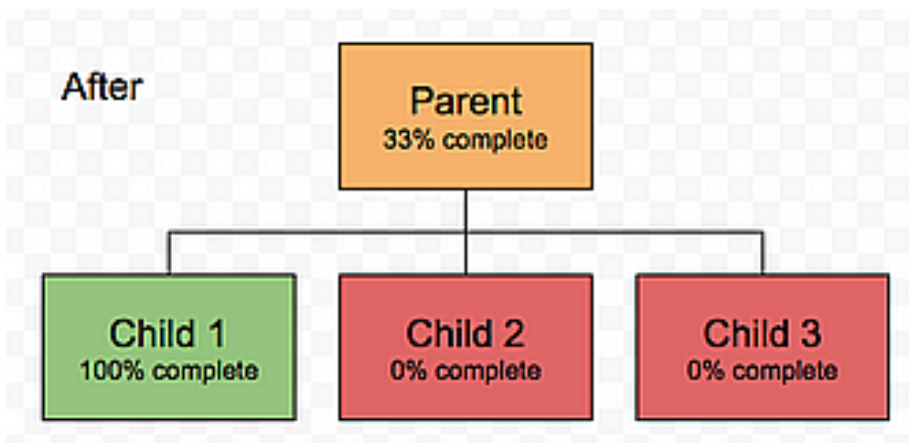
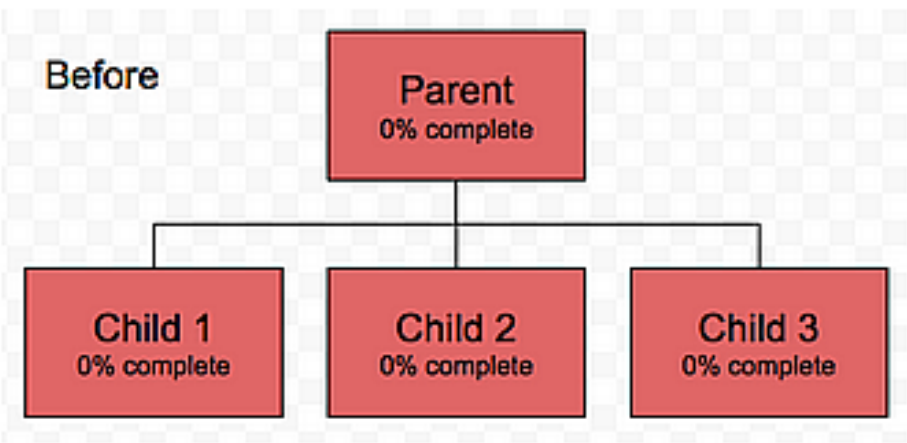
The **block functions** available to you depend on your level of **permission**. The table below outlines the different **permissions a user** can have relative to a **block**.

Note that the adjustable company setting *Block Owner Can Manage* allows Owners the ability to edit blocks. Read more on these [capabilities](#).

User	What they can do
Owner	Is responsible for completing the task. Can update progress and create child blocks.
Manager	Is the owner of the parent block. Ensures that the owner is making adequate progress. Can change the block details (including the owner) Once the owner has marked it as complete will close the block, and rate it.
Watcher	Receives email reports about the block's status, and see newsfeed items about its activity (comments, progress updates, etc...)

## What is Progress?

Progress indicates the percentage completion of a block, if a block's progress is updated to 100% then the block is complete. Only blocks at the bottom of a tree, which we call "leaf blocks" have their progress updated directly by the user. When you update the progress of the leaf, it **rolls up** its progress to the block(s) above. This is illustrated in the images below. If you want to learn more about how to update the progress of a leaf block, read the [update progress](#) page.



## What is a Metric?

A metric describes a numeric value (measure) that can help determine if a strategic activity is driving an expected result. Metrics almost always have a target, so at any particular point in time it is possible to determine a variance from an expected target or plan. A metric can be linked to 1 or more blocks or no blocks.

You can view all your organisation's metrics on the [Metrics Table](#).

## What is a Dashboard?

The [Custom Dashboard](#) view is a layout tool for creating highly graphical, multipage reports updated in real-time, allowing for the creation of personalised custom dashboards via a simple drag and drop UI. Users can customise information to individual preferences, with data that is updated in real-time.

The [Personal Charts](#) view provides a complete overview of each users strategic activity regarding their owned and managed blocks. Blocks, Metrics, and Risks are also displayed, showcasing the health and progress shown in milestone sequences and the different stages of each risk.

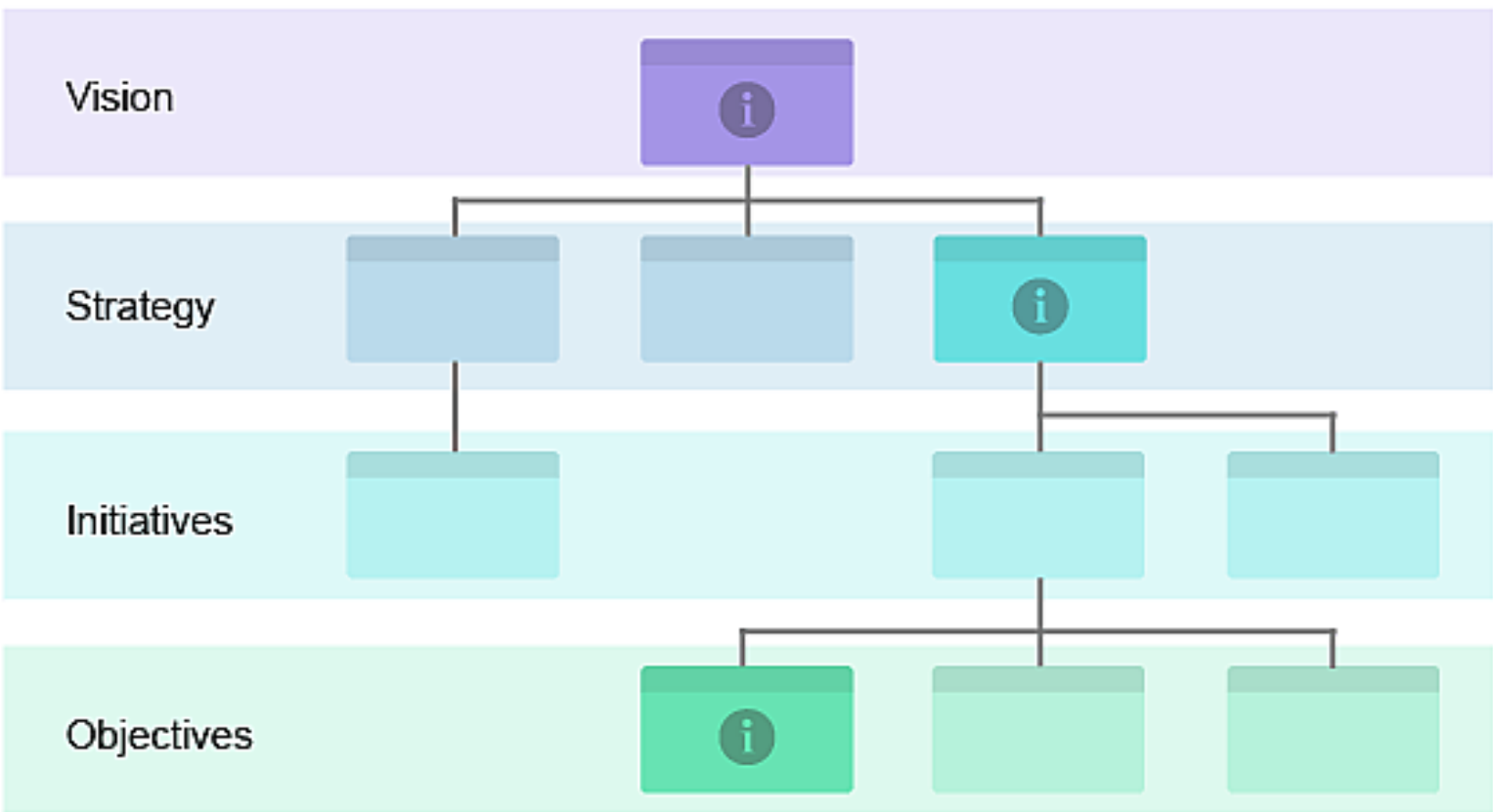
## What is a Health?

The health of a block is determined by several factors. These factors include progress (updated within the progress bar), metrics and risks. You can create your own [health definitions](#) allowing you to choose the type of weighting that you believe that each factor should have on your blocks. You have the option of using the default set of health definitions or creating more sets of health definitions. Each set can be applied to different blocks.



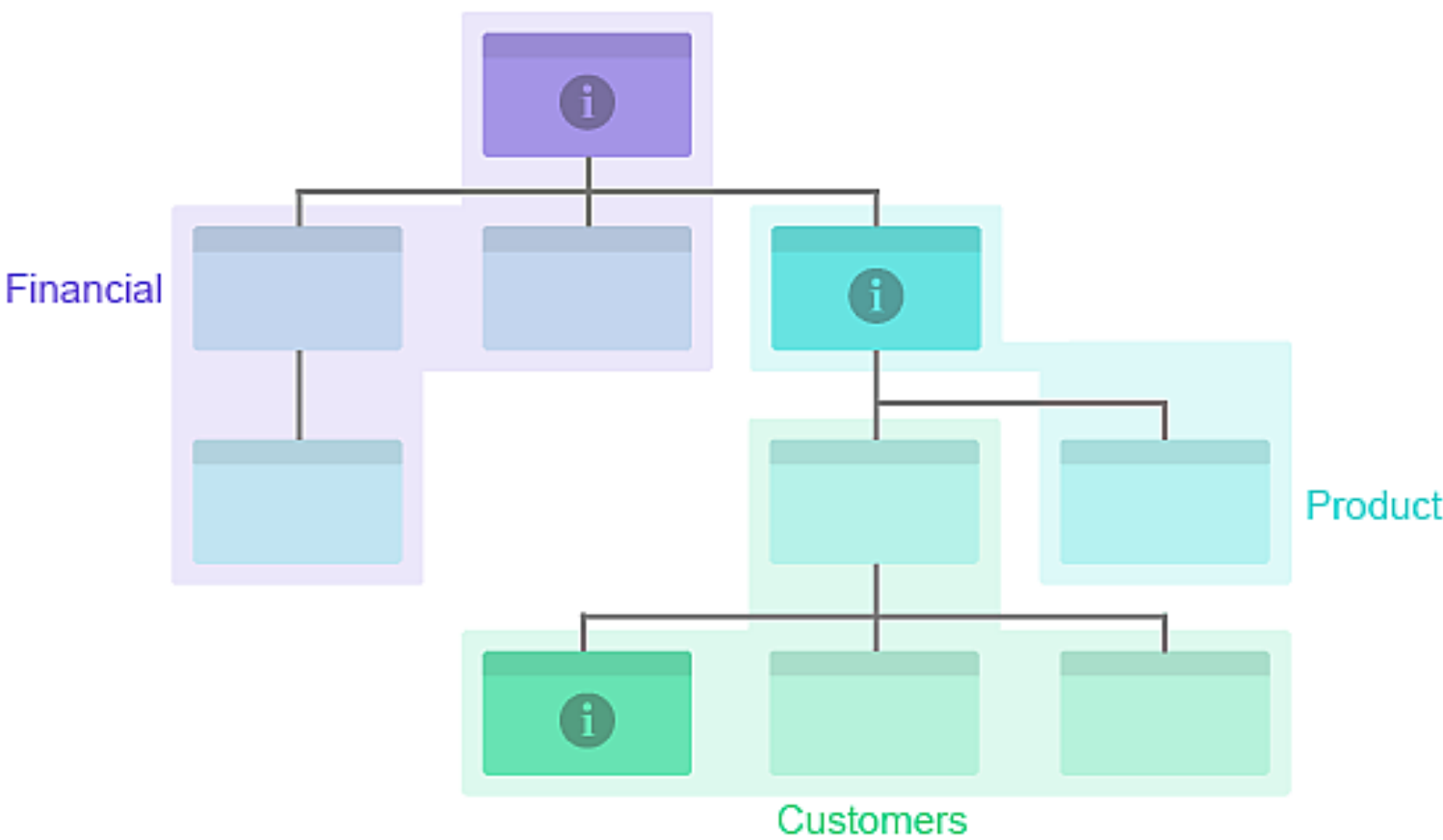
# Block Structure

Blocks are arranged in levels, moving from very high level strategic (Vision – at the top) to detailed operational tasks (Objectives – at the bottom).



Each level can be named to match the terminology used by your organisation. E.g. vision statement, strategies, etc.

Blocks, Metrics and Risks are also arranged into focus areas, to draw specific attention to one broad area. (E.g HR, customers, product, etc.)



These labels can be customised to the terminology used by your organisation and can also be nested by the Administrator. e.g. broken down by region, or branch, etc

You can update the progress of blocks that:


- > you own, and
- > are **leaves** in the block tree. (a **leaf** is the very bottom block, with no blocks underneath)

When you update the progress of the leaf, it **rolls up** its progress to the block(s) above. (parent, grandparent, and so on.) This is shown in the diagrams below.



# Left-Hand Navigation Menu

## About

The **left-hand navigation menu** provides links to navigate through the features in StrategyBlocks. You can hide or expand this menu at any time by clicking , located at the top left corner of your screen. When hidden, you will still be able to use the menu by clicking on the icons.

## Home

This is your StrategyBlocks homepage. It displays all of the user's owned and managed objects in StrategyBlocks for quick access and provides information about where the user might want to begin. You can learn more about it in the [Homepage document](#).

 Home

## Strategy

Strategy is where you can find your different block views: Tree, Network, Board, Table and the Block Library, and Clone functions. You can learn more about the different Block Views in StrategyBlocks in the Block Views section.

 Strategy >

## Reports

Reports is where all your reporting tools live, such as: Charts, Dashboards and Downloads. This is also where you will find your Bookmarks and Briefing Book pages.

 Reports >

## Metrics

This is your Metrics table. Use it to track and add new KPIs, these can be driven by block performance and affect the health of blocks.

 Metrics

## Risks

Risks will lead you to your Risks table. Here you can track risks in StrategyBlocks and connect them to your Strategy.

 Risks

## Ideas

Ideas is our ideation / block creation tool which empowers all users to share, evaluate and turn their ideas into strategy.

 Ideas

## Your Settings

Here you can update you personal account setting such as your name and information, password, notification frequency.

 Your Settings >

## Company Settings

Here company admins can update the company wide StrategyBlocks custom settings. This includes which features are available to users, control over the roles of users and much much more.

 Company Settings >

## Help

This section will lead you to this documentation, allow you to open the tutorial, and view the latest changes to StrategyBlocks. You can also leave us feedback and learn more about the technology used to build StrategyBlocks.

 Help >

## Search

Here you can do a keyword search for objects (blocks, metrics, risks, ideas) in StrategyBlocks.

 Search



# Control Bar

## About

Most pages in StrategyBlocks feature the Control Bar. It is where you can get page specific view and filtration options. This page will run you through the different tools available on the Control Panel.

## Block Faces

On pages which feature blocks, you will be able to switch between different block display options called Block Faces. You can learn more about the different block faces in the [Block Faces documentation page](#).



## Magnifying Zoom In/Out

Clicking on the + or – magnifying glasses allows you to zoom in / out in the block view. You can also control zoom using your scroll wheel, or by pinching on a touch screen device.



## Briefing Book

Clicking on the save icon on the control bar and then adding a name in the pop up screen will save the current page to the briefing book feature. From there you can easily download printable versions of the page for you use outside of StrategyBlocks.



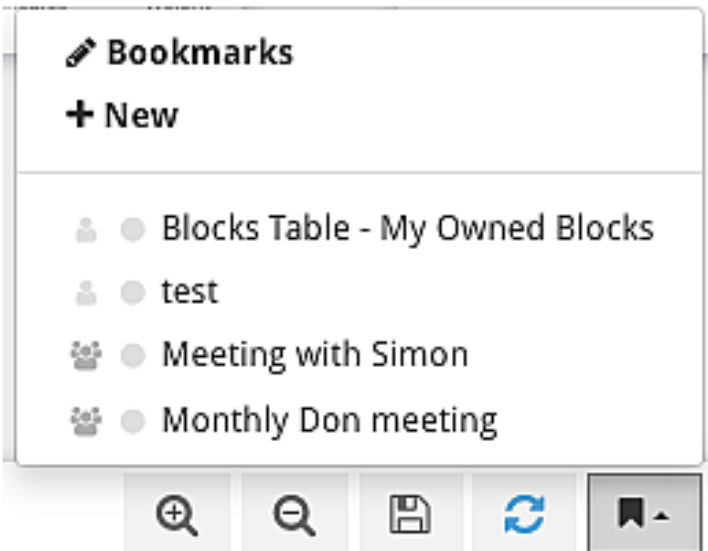
## Reset Filters

Clicking the reset button will remove any page filters applied through the options menu.



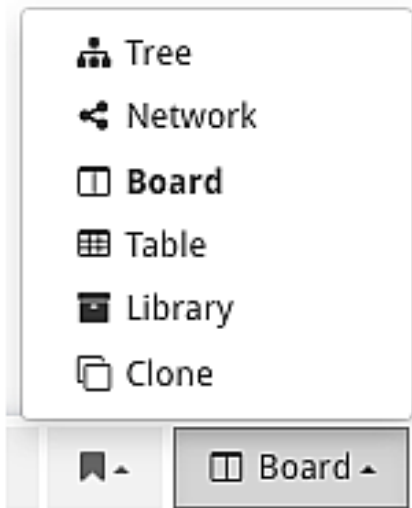
## Bookmarks

Clicking the bookmarks icon will open the bookmarks drop up menu. Here you can access saved bookmarks and create a new bookmark on the current page.



## Switch Between Subpages

You can use this dropdown menu when in Strategy or Reports pages. It allows you to switch between the Blocks Views or Reports pages easily within the page.



## Options Menu

The options menu provides you with filtration and other options. Learn more about it in the [Options Menu documentation](#).



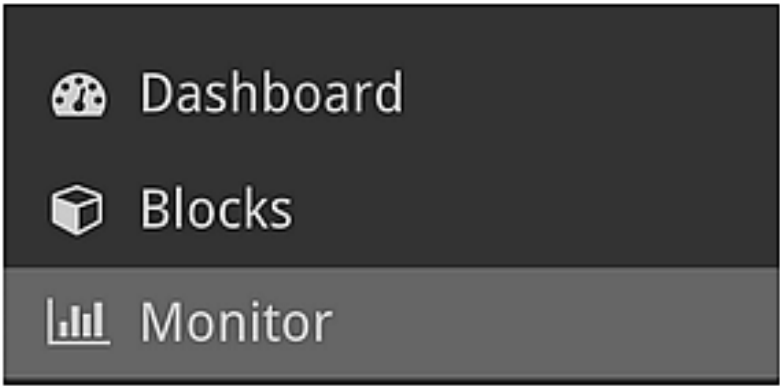
# Metrics Table

## About

The metrics table is where data is entered and viewed, tracking the real data behind your company. For example, this is where you can enter your actual financial performance, as compared to projected, and then analyse the information graphically or textually.

## Where to find

The **Metrics Table** displays all the metrics you've created. It is found through the Monitor tab on the [Left-Hand Menu](#).



## Create a new metric

Click on the “New” button in the top right to create a new metric. There are three types of Metric:

- **Normal** – where you manually enter targets and actuals.
- **Calculated**– use a series of fixed numbers and other metrics to create a new metric.
- **Cascading**– similar to calculated, but pre-set.

Note: metrics can be entered for blocks on any level, not just the leaves, but only cascading metrics reflect the data for that block.



## Select a Metric

Double clicking on any metric in the table will open its' overview page and update the side menu with metric options. On the overview page you can add targets or actuals which are then reflected in the metric graphs.

If the actuals buttons are greyed out, this means you do not have access, and cannot update this metric.

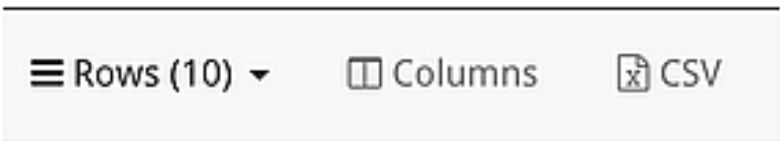


## Top Bar Options

The **Rows** drop down lets you select how many rows are shown on the table per page. Pages can be navigated between using the buttons on the bottom right of the table.

The **Columns** button takes you to a new page which allows you to fully customise which columns appear in the risk table.

The **CSV** button allows you to download the risk table to computer as a CSV file which you can then enter into excel, google sheets or your spreadsheet application of choice.





# Metrics Side Menu

## About

Clicking on a metric in the metric table will open its' metric overview page. It will also update the navigation options in the left-hand menu, below is a breakdown of the different options available in this new menu.

- › **Overview** – provides an overview of the metric, including a chart of its' history and a table of all the entries.
- › **Details** – edit the key details of the metric, such as title, description, tolerance ranges, ownership, type and more.
- › **Actuals** – allows you to edit the “actual” calculation for your metric.
- › **Target** – this page allows you to edit the “target” calculations for your metric.
- › **Attached Blocks** – shows all the blocks this metric is attached to. In the case of cascading metrics, the list will only show the blocks that have their own local values.
- › **People** – view/edit the users involved directly (owner/manager) or indirectly (watching) to this metric.
- › **Comments** – view/delete/add comments on the metric.
- › **Documents** – view or attach files and links which support this metric.
- › **Groups** – view and apply security groups to this metric to restrict who can see it.
- › **Clone** – copy all the details of this metric to create a new one.
- › **Delete** – delete a metric. If it is a cascading metric, this will also delete its' targets and actuals which are attached to individual blocks.



Overview



Details



Actuals



Targets



Attached Blocks



People



Comments



Documents



Groups



Clone

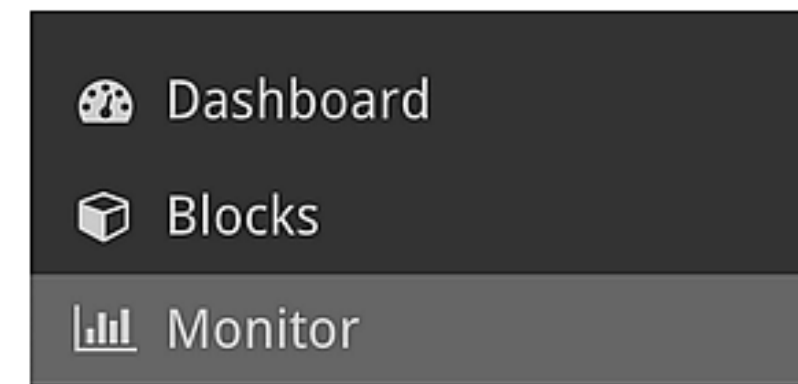


Delete

# Risks Table

## Where to find

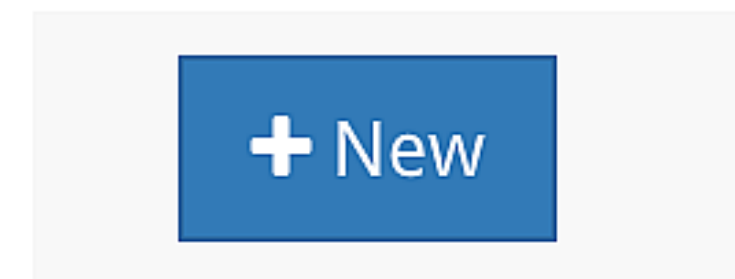
The **Risk Table** displays all the risks to your strategy you've identified. It is found through the Monitor tab on the [Left-Hand Menu](#).



## Add a New Risk (Admin Only)

To add a New Risk click on the "New" button in the top right of the screen (shown in the image).

This will take you to a new page where you will fill in the details of the risk. You must have the administrator role to create a new risk



## Top Bar Options

The **Rows** drop down lets you select how many rows are shown on the table per page. Pages can be navigated between using the buttons on the bottom right of the table.

The **Columns** button takes you to a new page which allows you to fully customise which columns appear in the risk table.

The **CSV** button allows you to download the risk table to computer as a CSV file which you can then enter into excel, google sheets or your spreadsheet application of choice.





# Create a Risk

## What is a Risk?

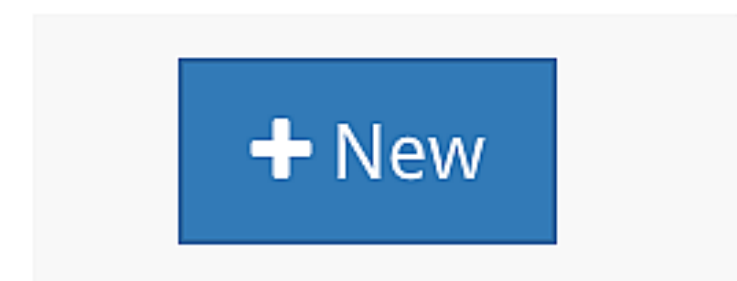
This picture demonstrates the interconnections between the different functional areas within StrategyBlocks and the effect that each one directly or indirectly has on one another. If, for example, your organization is doing well at implementing your staff (activity), this drives metrics – the outcome of that activity. The area of risk asks; what would happen to your organization if you fail to do this? Risk suggests that if you do not do a great job at implementing your staff, there is a risk that customer engagement is going to be poor, therefore, your metric being revenue renewal is likely to decline.



## Add a New Risk (Admin Only)

To add a New Risk click on the “New” button in the top right of the screen (shown in the image).

This will take you to a new page where you will fill in the details of the risk. You must have the administrator role to create a new risk



## Adding Details to a Risk

Now you can add the details which make up the risk.

- **Title:** Name of the risk in StrategyBlocks
- **Description:** A description of the risk
- **Executive (Owner):** The executive can manually trigger the risk and is expected to coordinate with owner/managers of driver blocks when the risk goes into warning/triggered states.
- **Sponsor (Manager):** The sponsor has editorial control over the risk, and will be notified when the risk is triggered.
- **Focus Area:** Strategic group within StrategyBlocks
- **Strategic (Yes/No):** Dictates whether a Star appears next to a risk which represents that risk's level of importance to the company's overall strategy. A company may not want to get confused between Risks that play a large factor or not within a strategy, therefore, users can choose any Risk to be 'strategic' or not.
- **Risk Impact Level:** Describes the users estimate of the Risks possible impact if triggered
- **Risk Likelihood Level:** The users estimate of the Risks likelihood of being realised/triggered.
- **Business Impact:** The impact to your company / organization in the case where this risk gets triggered.
- **Mitigation Steps:** What steps need to be taken when this risk enters the *warning* state in order to prevent it from being triggered (or minimize its effects)
- **Response Steps:** The steps which need to be taken in the case this risk becomes triggered.

### Create a New Risk

Define the settings for this risk. The sponsor has editorial control over the risk, and will be notified when the risk is triggered. The executive can manually trigger the risk and is expected to coordinate with owner/managers of driver blocks when the risk goes into warning/triggered states.

#### Details

**Title**  
Title of your Risk

**Description**  
Normal Bold Italic Underline Link Image Video Audio Embed Code  
Describe your Risk

**Executive (Owner)**  
Risk ID

## Adding Block Drivers and Impacts

In your block views, select blocks and click on their Risks tab in the [Block Side Menu](#). Here you can attach risks as either being driven by or impacting the block.

Risks that are impacting blocks can affect the block's health when that risk is triggered.

When a risk is driven by a block, the block's health can cause the risk to enter a warning or triggered state. You can make the current block a driver for any risk you manage.

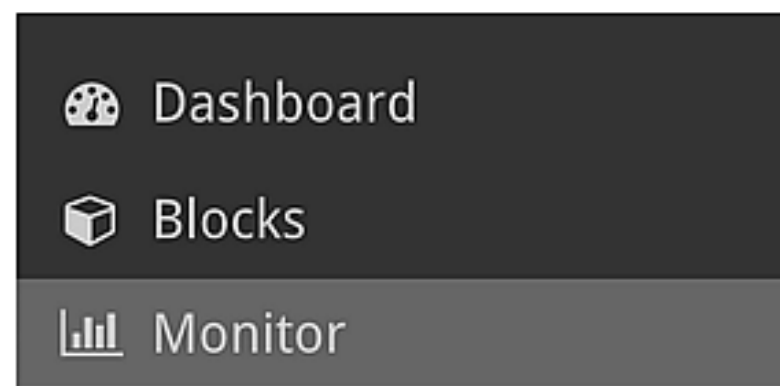
The impact of a triggered risk is determined by it's Risk Impact Level, the amount of health affected by each Risk Impact Level is set by Company Admins in the [Risk Management page of Company settings](#).



# Documents Table

## About

The **Documents Table** allows you to find and manage all documents attached to blocks in one central location. **Click on a document** to navigate to its' Documents page on its' related block. Here if you are the manager of the block you can update the document's name, description, or remove it from the block.



## Where to Find / On Table Filters

You can navigate to the **Documents Table** through the Monitor tab on the [Left-Hand Menu](#).

You can **click on the column headers to sort** by type, title, user, last modified, etc.

Type	Title	User	Last Modified
Document	Contract 12345	John Doe	2023-10-27 10:00
Document	Project 12345	John Doe	2023-10-27 10:00
Document	Project 12346	John Doe	2023-10-27 10:00
Document	Project 12347	John Doe	2023-10-27 10:00
Document	Project 12348	John Doe	2023-10-27 10:00
Document	Project 12349	John Doe	2023-10-27 10:00
Document	Project 12350	John Doe	2023-10-27 10:00
Document	Project 12351	John Doe	2023-10-27 10:00
Document	Project 12352	John Doe	2023-10-27 10:00
Document	Project 12353	John Doe	2023-10-27 10:00
Document	Project 12354	John Doe	2023-10-27 10:00
Document	Project 12355	John Doe	2023-10-27 10:00
Document	Project 12356	John Doe	2023-10-27 10:00
Document	Project 12357	John Doe	2023-10-27 10:00
Document	Project 12358	John Doe	2023-10-27 10:00
Document	Project 12359	John Doe	2023-10-27 10:00
Document	Project 12360	John Doe	2023-10-27 10:00
Document	Project 12361	John Doe	2023-10-27 10:00
Document	Project 12362	John Doe	2023-10-27 10:00
Document	Project 12363	John Doe	2023-10-27 10:00
Document	Project 12364	John Doe	2023-10-27 10:00
Document	Project 12365	John Doe	2023-10-27 10:00
Document	Project 12366	John Doe	2023-10-27 10:00
Document	Project 12367	John Doe	2023-10-27 10:00
Document	Project 12368	John Doe	2023-10-27 10:00
Document	Project 12369	John Doe	2023-10-27 10:00
Document	Project 12370	John Doe	2023-10-27 10:00
Document	Project 12371	John Doe	2023-10-27 10:00
Document	Project 12372	John Doe	2023-10-27 10:00
Document	Project 12373	John Doe	2023-10-27 10:00
Document	Project 12374	John Doe	2023-10-27 10:00
Document	Project 12375	John Doe	2023-10-27 10:00
Document	Project 12376	John Doe	2023-10-27 10:00
Document	Project 12377	John Doe	2023-10-27 10:00
Document	Project 12378	John Doe	2023-10-27 10:00
Document	Project 12379	John Doe	2023-10-27 10:00
Document	Project 12380	John Doe	2023-10-27 10:00
Document	Project 12381	John Doe	2023-10-27 10:00
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Document	Project 12390	John Doe	2023-10-27 10:00
Document	Project 12391	John Doe	2023-10-27 10:00
Document	Project 12392	John Doe	2023-10-27 10:00
Document	Project 12393	John Doe	2023-10-27 10:00
Document	Project 12394	John Doe	2023-10-27 10:00
Document	Project 12395	John Doe	2023-10-27 10:00
Document	Project 12396	John Doe	2023-10-27 10:00
Document	Project 12397	John Doe	2023-10-27 10:00
Document	Project 12398	John Doe	2023-10-27 10:00
Document	Project 12399	John Doe	2023-10-27 10:00
Document	Project 12400	John Doe	2023-10-27 10:00

## Top Bar Options

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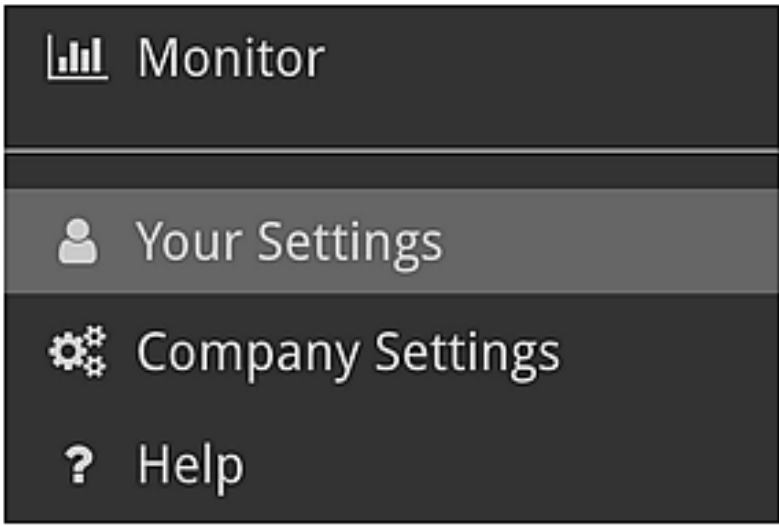


# Your Settings

## Where to find

To find your user settings, click on **Your Settings** in the side menu. Different links to settings pages will then appear in the side menu.

Calendar Integration is covered [on this page](#) in the integration section.



## Account

The Account Settings page allows you to edit the following fields associated with your account:

- Email
- First Name
- Last Name
- Timezone
- Date format

Some fields may be unavailable for edit depending on your level of permissions.



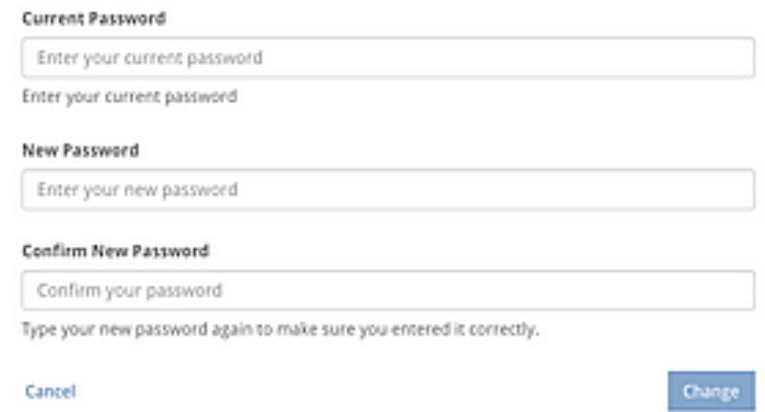
## Account Picture

You can upload your profile picture by clicking the **Browse** button, or by dragging a picture from your filesystem if that's supported. If you remove your picture completely, we use your email address to find (or generate) a [Gravatar](#) profile picture.



## Update Password

To change your user's password navigate to User Settings -> Password. You will be required to confirm your current password before you can update it, if you don't remember your current password, you can log out and use the [Forgot Password](#) link on the login page.



## Adjust Notification Settings

You can adjust the frequency of status reports using the dropdown on this page. Options include: weekly, fortnightly, monthly and never.

You can also select whether you will receive event notifications (chat, assigned block, ect..) or not.



## Login History

View a table that displays the login history of your StrategyBlocks account. The columns of the table are Status, When, IP Address, Location, and Device.

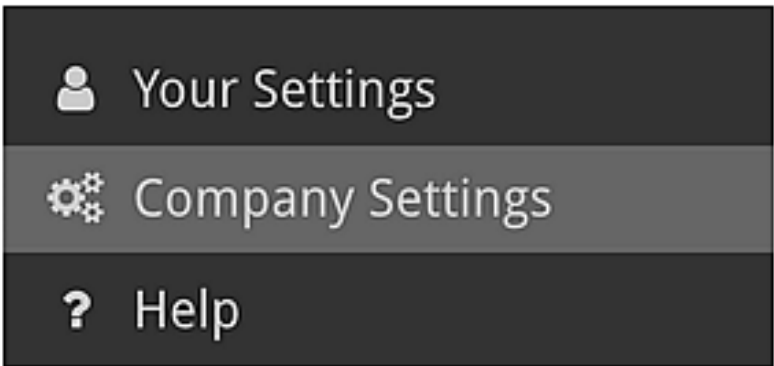
## Login History

This table shows you when you've logged into this StrategyBlocks server and from what location.

# Users Table

## Where to find

The **Users Table** displays all the Users in your organisation. It is found by navigating to **Users** on the **Company Settings** tab in the [Left-Hand Menu](#).



## Add a New User

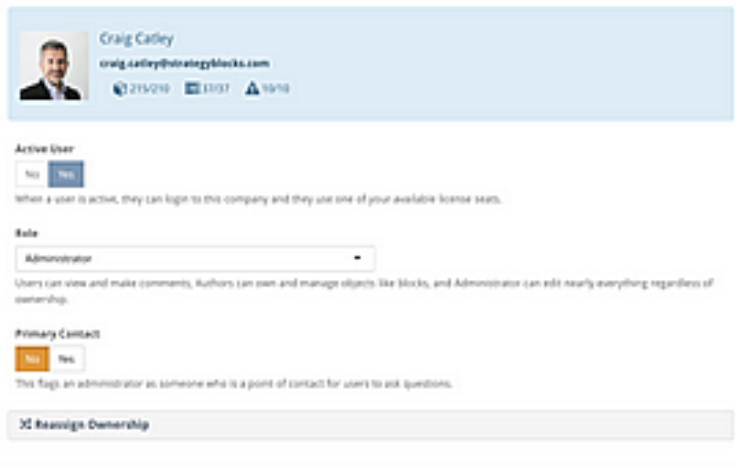
To **add a New User** click on the “Add Users” button above the table (shown in the image).

This will take you to a new page where you will fill in the details of the User.



## Edit a User

Clicking on a row in the User Table will open the edit user page. From here an **Administrator** will be able to deactivate a user, alter their role, make them a primary contact and **reassign the ownership** of their objects in StrategyBlocks, more on this below.

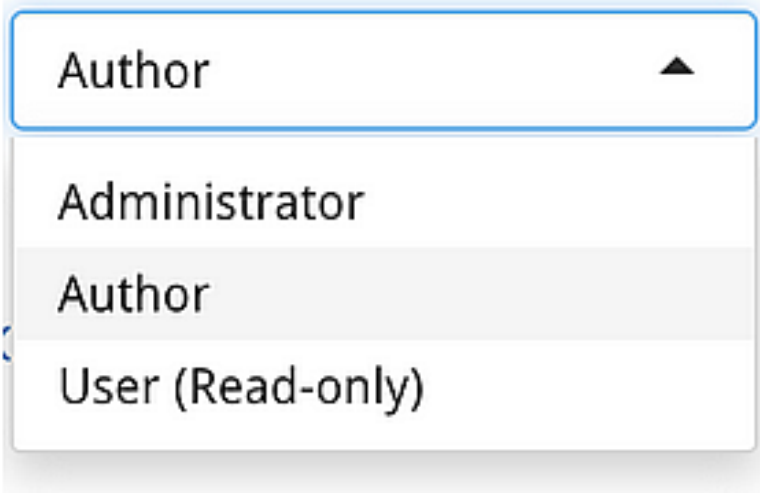


## Types of Users

**Administrator** – full access to all aspects of the model

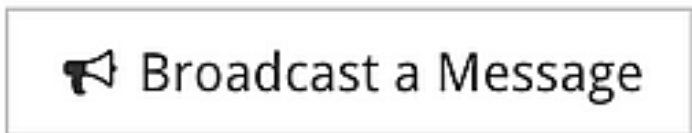
**Author** – can own and manage blocks, metrics and/or risks

**User** – can view only and not own objects



## Broadcast Message

A **Broadcast Message** can be used to send an email message to the selected users (or user). If you select the **Owners** option for any of the object types, this message will be sent to the owners of those objects. If you select the **Managers** option, a message will be sent to all the managers of those objects. Select **Send Message** to send.



## Reassign Ownership

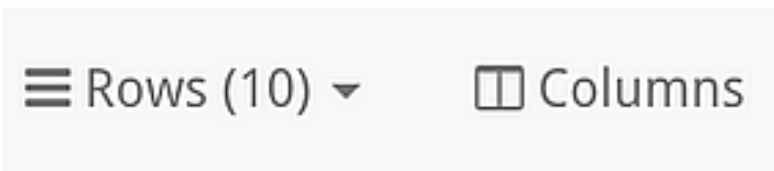
A user can not be deleted from the system if they own objects in the model (blocks, metrics, risks and exports). In order to delete a user (or reassign a current users objects), the **Reassign Ownership** can be used. Another active user can be selected to receive all objects, or these objects can be distributed across other users based on their type. The reassign user can also inherit the user's exports, watchlist items, bookmarks and group privileges. Select **Reassign Ownership** to execute.



## Top Bar Options

The **Rows** drop down lets you select how many rows are shown on the table per page. Pages can be navigated between using the buttons on the bottom right of the table.

The **Columns** button takes you to a new page which allows you to fully customise which columns appear in the users table.





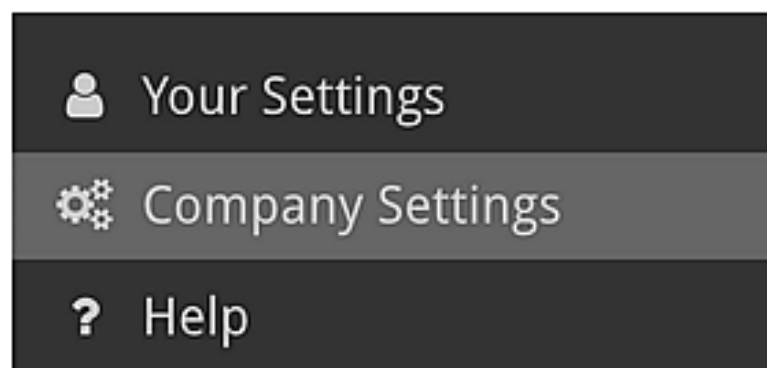
# Security Groups

Security groups are used to **restrict access** and **visibility** of objects in the strategic plan (blocks, metrics, risks) from unauthorised users. For instance, when you add a group to a block, users who don't belong to the group will no longer see that block or any of its children. As metrics and risks are non-hierarchical, adding a group will just hide that object. With calculated metrics, you can group the component pieces of the calculation as a way to hide them from view. **Groups can contain users as well as other groups**, this means that the users of any child group selected below will also be permitted to see objects that are restricted to this group.

---

## Where to find

Security Groups found by navigating to **Groups** on the **Company Settings** tab in the [Left-Hand Menu](#).



## Add Group

Click on the "Add Group" button to create a new group within StrategyBlocks. This will open up a new page where you will give the group a name, description and can specify which users and groups will be apart of this new group.

---



# Focus Areas

## About

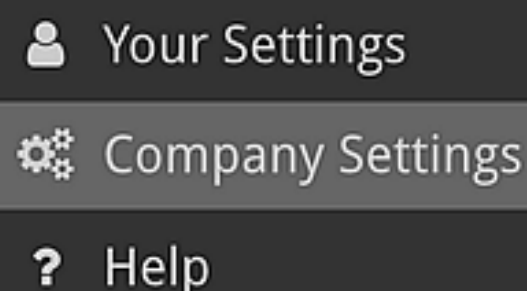
**Focus Areas group objects** (blocks, metrics or risks) together, they form **broad strategic categories**. These areas of focus don't specifically describe what the organisation intends to do; they are not "how" statements. Instead they are more useful when thought of as **classifications** (department, theme, geography, value, perspective etc). They **enable the strategy map to be filtered** to a specific area of focus.

By default, focus areas are collapsed but they can be expanded by clicking the arrow icon. Therefore they can have other focus areas nested inside a parent (by drag and drop). However this is an informal hierarchy, all objects must belong to a focus area classification, but the focus area hierarchy is not rigid.

Administrators can re-order focus areas by using the lined icon to drag the rows into different positions and expand their hierarchy by using the arrow. The tables also displays the number of objects categorised within a focus area.

## Where to find

The **Focus Areas** page displays all the Focus Areas in your organisation. It is found by navigating to **Focus Areas** on the **Company Settings** tab in the [Left-Hand Menu](#).



## Add Focus Area

To add a new focus area click on the "Add Focus Area" button. This will take you to a new page where you enter the new area's title, description and select a parent focus area (all by default).

A blue rectangular button with a white icon of three horizontal lines and the text 'Add Focus Area' in white.



# Levels

## About

Levels are the labels for each step of the blocks tree. The idea is that you can normally categorise the type of strategic objective by how many steps from the vision it is. Each organisation will have its own names for these steps and this page is to edit them, their order and associated colours.

---

## Add a New Level

Click on the “Add Level” button to add a new level. This will take you to a new screen where you can allocate a name, colour and position for the new level.

A blue rectangular button with a white icon of three horizontal bars on the left and the text "Add Level" in white on the right.

Add Level

## Edit Level

Click on a Level in the Table to open the Edit Level screen. Here you can adjust the title, colour and position.

Title

Label Color

Position

# Strategic Health

## About Health

Health is a customisable calculation involving a number of key values, that separately have an important role, but together can provide a great deal of strategic intelligence to the organisation (output – progress, outcome – metrics and risk). The Health calculation is used to aggregate both the subjective and structured data associated with a blocks delivery and produce an overall performance status.

The Health Calculation Definitions table lists all the health calculations defined for your company. Each calculation takes the status of the block, its attached metrics and risks, and produces a status 'health' value. An administrator can change the weight of each factor by changing the tolerance ranges. The default calculation is used by all blocks automatically, unless the block's manager overrides it at the block level.

## Add a New Health Definition

To add a new health definition click on the "Add new Definition" button. This will take you to a new page where you will enter the new definition title, description and variance weights depending on how important they are to this definitions health. The difference weightings are: progress, metrics and risk.

You will decide whether the block's health will be skewed by priority with the "Priority Skew" Yes/No switch. If yes then high priority blocks will be skewed to be more positive or more negative. Low priority blocks will be less positive and less negative.

You will also define your positive and negative tolerance ranges. Anything below the negative tolerance range is considered bad, anything above the positive tolerance is good and anything in the middle is in a warning. These are usually represented with the red, blue and orange colours.

+ Add New Definition

Priority Skew

☒ No ☐ Yes

Positive Tolerance %

-  +

Negative Tolerance %

-  +

## Make Default

Make a Health Definition default to have all health calculations in StrategyBlocks be according to its' definition. Click on the "Make Default" button on a individual definitions page to make it your default.

♥ Make Default



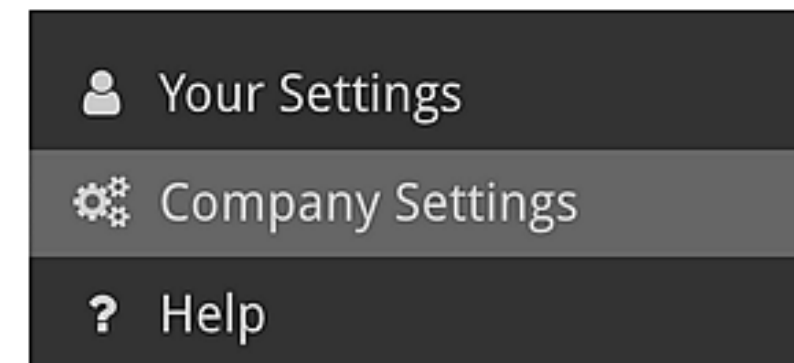
# Custom Fields

## About

Custom fields allow the attachment of more information to blocks, metrics, and risks. Administrators can create as many fields as they like. Once they are created, they will appear on the Details pages of the selected objects. They can be added to a single object type or a combination.

## Where to find

The **Custom Fields page** displays all the custom fields your organisation has created. It is found through the Company Settings tab under "Custom Fields" on the [Left-Hand Menu](#).



## Add a New Custom Field

To add a new Custom Field click on the "Add Custom Field" button above the table (shown in the image).



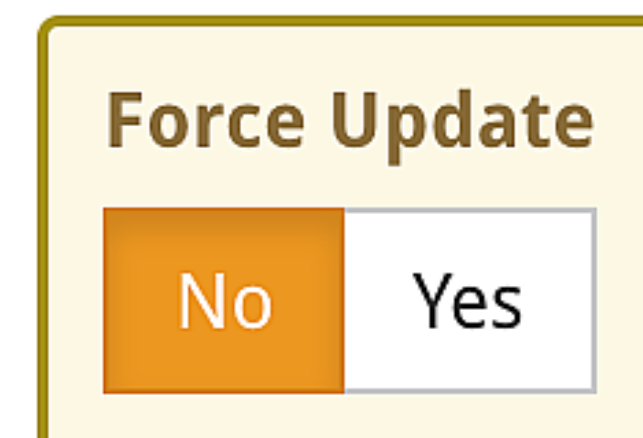
This will take you to a new page where you will fill in the details of the new custom field:

Title, description, maximum length, default value, multiline (yes/no), required (yes/no).

You can also determine whether the field is to be attached to blocks, metrics or risks and whether the field will be updated by an external system.

## Edit Custom Fields / Force Update

Click on one of the custom fields to edit it. Clicking "Yes" on the Force Update will allow you to override previously values that may go against the previous schema of the field. (e.g., reducing the *maxlength* of a text input may require truncating saved data).



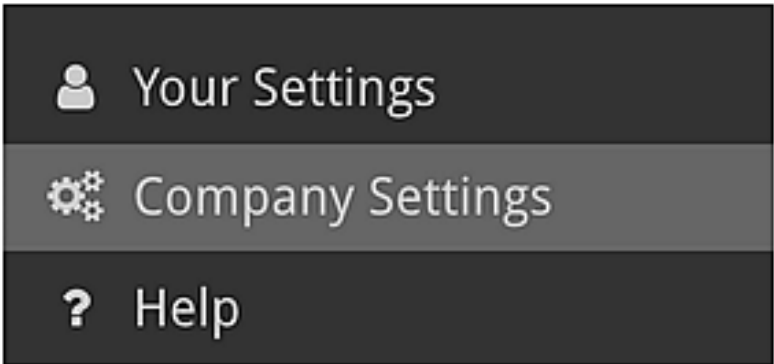
# Milestone Definitions

## About

A milestone definition is a list of tasks that need to be completed before a block can be marked as completed. Each item in a milestone definition has a number that defines its percentage contribution to a block's total progress. Managers can assign one of these definitions to a block in place of raw progress updates, to better enumerate what work has been completed.

## Where to find

The **Milestone Table** displays all the milestones created by your organisation. It is found under Milestones through the Company Settings tab on the [Left-Hand Menu](#).



## Add a New Milestone

To add a New Milestones click on the "Add Milestone" button at the top of the table (shown in the image).

This will take you to a new page where you will fill in the details of the new milestone, and the steps making it up.

Steps have a name and a value attached which represents their value within the milestone. For instance, if each step is **10** and you have five steps, each step contributes **20%**.



## View / Edit / Delete a Milestone

To view or edit the details of a milestone click on it in the milestones table. This will open the Milestone Definition page where you can update the title, description and steps of the milestone.

Confirm your changes by clicking "Save" or discard them by clicking "Cancel". If you want to delete the milestone, click the "Delete" button in the bottom left.

### Milestone Definition

Describe the steps of the milestone. For instance, if each step is 10 and you have five steps, each step contributes 20%.

Title

Survey Process

Description

Describe your definition



# Capabilities

The capabilities section allows an administrator to configure StrategyBlocks from a series of toggles. Each toggle will enable or disable an area of functionality.

Note that 'Chat' in this context refers to comments or progress update messages on a block or metric.

- › **Block Chat Inherited** – allow blocks to inherit comments/progress update messages from child blocks.
  - › **Block Chat Delete** – allow comments/progress update messages to be deleted from a block by any user. Note that you do not have to be the owner to delete a chat.
  - › **Progress Comment Required** – a comment is required before saving a block progress update.
  - › **Block Locking** – allow Blocks to be locked (prevent updates, edits), until it is ready to be unlocked.
  - › **Block Owner can Manage** – allow Owners to edit blocks as Managers.
  - › **Disable Block Creation**: This prevents anyone from creating blocks from the manage children screen.
  - › **Progress rollup data smoothing size** – Progress values for non-leaf blocks will be simplified to the number of data points specified.
  - › **Progress Tolerance Upper Bound** – Company Progress Tolerance Upper Limit, read more on [tolerance ranges](#).
  - › **Progress Tolerance Lower Bound** – Company Progress Tolerance Lower Limit, read more on [tolerance ranges](#).
  - › **Security Group Progress Rollup** – Progress values will be rolled up to the parent block based on the blocks visible to a user.
  - › **Closed Blocks Are Non-Rollup** – Closed Blocks will not rollup progress to parent blocks.
  - › **Metric Chat Delete** – allow comments and updates on Metrics to be deleted.
  - › **Interpolated Metrics** – new metrics are Interpolated by default (line of best fit).
  - › **Cumulative Metrics** – new metrics are cumulative by default (same until new value).
  - › **Metric Locking** – allow Metric to be locked from changes.
  - › **Empty Metric Values Symbol** – symbol to show for metric values when there's no data (e.g. — instead of O).
  - › **Outputs(metrics) Forecast**: Enable/Disable the metrics forecast Feature
  - › **Outputs(metrics)** – Enable/Disable the metrics feature.
  - › **Risk** – Enable the Risks Feature.
  - › **Ideas**: Enable Ideas Feature
  - › **Risk Chat Delete** – allow Risk comments/update messages to be deleted.
  - › **Company Blocks** – enable company blocks feature, enabling the linkage of one model to another.
  - › **Company notifications** – enable automatic email notifications to users of this company. Email notifications can be customised per user on the [user settings page](#).
  - › **Company IP Range** – Specify an IP address or an IP subnet mask (CIDR) to restrict access within an IP range.
  - › **Session Timeout Period** – Specify the time period in minutes.
-

# Risk Management

## About

Defining the parameters of the organisations risk management profile is primarily managed within the risk matrix. The matrix itself can be comprised of either 9 (3×3) cells or 25 (5×5) cells. The risk profile matrix can be customised: each cell can be selected and edited individually (as either normal, moderate or severe). If you are unfamiliar with risk matrices, you can watch a brief video explaining the basics [here](#).

The risk matrix of each block can be viewed using the **Risk Block Face**. Follow this link to learn more about [Block Faces](#).

## Edit Risk Profile

Edit the risk profile matrix. Each cell can be selected and edited individually. The color of the cell does not have any affect on the risk, but should reflect the severity of the risk to your company. For each cell, you can set the definition and consequences for that combination of Likelihood and Impact.



## Risk Settings


Both the short and long form labels for the impact/ likelihood levels can be customised from the risk settings table. This also enables and Administrator to add/change the percent contribution of each impact level to affected blocks' health (when the risk is in "triggered" state). NB: These settings might be reset if you change the size of the risk profile matrix.


Select **Save** to retain changes.




## Want to create a new risk?

This page is only for adding existing risks, to create a new risk, navigate to the [Risks Table](#).

 Dashboard

 Blocks

 Monitor



# Company Settings

These settings enable the configuration of the entire model, and includes:

- › **Name** – the name of the company or organization
- › **Time zone** – sets the primary central time zone. This applies to block deadlines. Users can change their own time zones from their **Your Settings** menu
- › **Fiscal Year** – defines when to change “day” and “year” this applies to the aggregation of cumulative metrics.
- › **Saved login duration** – allows the user to save their login credentials and stay logged in between browser sessions for a given duration. They won't need to sign in again during this period.
- › **Default progress rollup** – defines the default way for child block progress to contribute to its parent. This can be overridden by a block’s owner on the manage children screen. Options include:

**Custom** – parent blocks can define a custom weight integer for each child that is used to weight progress rollups.

**Duration** – weight the progress based on the block duration — number of days between start and end dates.

**Effort** – a block might have a year-long duration, but only 12 days of work (monthly tasks), so weight based on estimated effort required.

**Priority** – used primarily to skew block health, priority can also be used to weight progress contribution when compared to its sibling(s) blocks.

Block Progress Rollup Method

Duration

Custom

Duration

Effort

Priority

overridden on the Block Manage screen.

The default progress rollup method for linked blocks in your company. Individual blocks can override this on the Block **Manage** screen.

- › **Linked blocks Progress Rollup Method** – Linked blocks can appear in multiple places in the blocks tree, but different situation may require different progress rollup types. When a block is linked (mirrored) in a different branch(s) (multiple parents) the rollup can be controlled with the following options. This can be overridden by the block’s owner on the manage children screen:

**None** – a blocks progress is only included at the blocks original (master) location, it indicates that cloned blocks never contribute progress.

**Normal** – the progress of the block is rolled up wherever it exists this rollup treats the clones as real blocks.

**Eliminate** – treats links as normal blocks until the intersect of their branches, where only a singular instance will be used (to avoid double-counting). Effectively the blocks progress is eliminated when all blocks meet at a common ancestor block.

Linked Block Progress Rollup Method

Normal

None

Eliminate

Normal

can override this on the Block **Manage** screen.

## Company Settings

Review or change the settings which affect your entire company.

Name

Global Corp

The name of your company or organization.

Timezone

(GMT+12:00) Wellington

Select the primary timezone for your company.

Fiscal Year

01/04/18

Choose the date that your fiscal year starts on. The year itself will be ignored.

Saved Login Duration

4 Weeks

Allow users to save their login credentials for a period of time. They won't need to sign in again during this period.

Block Progress Rollup Method

Duration

The default progress rollup method for blocks in your company. Individual blocks can be overridden on the Block **Manage** screen.

Linked Block Progress Rollup Method

Normal

The default progress rollup method for linked blocks in your company. Individual blocks can override this on the Block **Manage** screen.

Reset

Save

## Logo Upload

The logo appears in the top-left of the application, and replaces the default StrategyBlocks logo. Use **Delete** to remove the existing logo, browse (a file on your computer) to or drag in a new logo and click the upload button.

Set the **Background Color** to change the background color to better suit your company’s branding. Select **Save** to retain your choice.

## Upload your Company Logo

You can upload a company logo by clicking the **Browse** button, or by dragging a picture from your filesystem if that’s supported.

Current Logo

Globalcorp

Delete

Drag here

Upload your image...

Browse ...

Background Color

# ffffff

Save

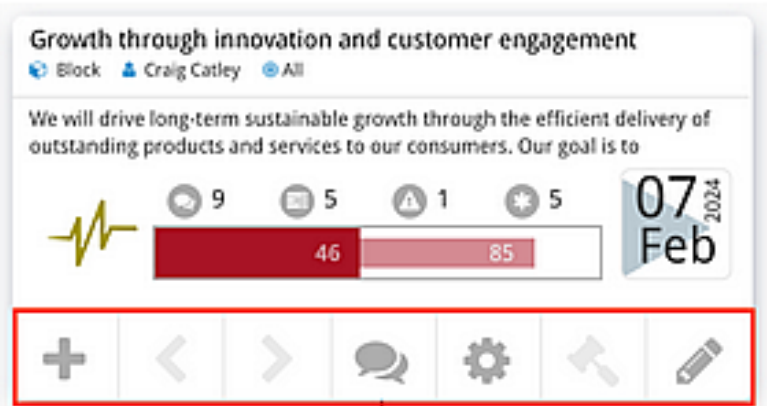
Change the background color to better suit your company logo.










# On Block Options

This page documents the options made available by clicking on a block on the Board or Tree views in StrategyBlocks.

When a block is selected, a row of action buttons is displayed (shown in the image on the right). The table below describes what each of these options do.



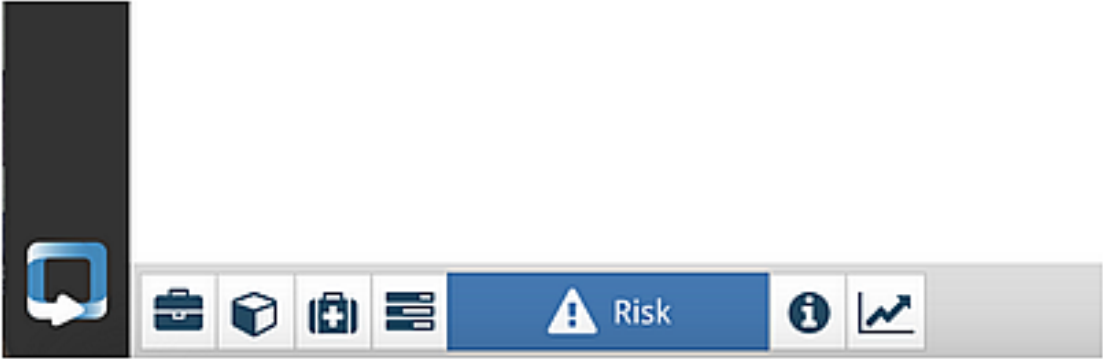
Button	What it does
	Add a child block (or manage existing children for this block)
	Move block to the left of the block tree
	Move block to the right of the block tree
	Add a comment / view comments that have already been made
	Takes you to the Overview page for this block, where you can access full menu of options (Manage, Progress, Shift, Delete, etc). More on these options is available below.
	Rate – performed by the manager, once the block has been completed
	<div>Edit – allows you to quick edit the following details:</div> <ul style="list-style-type: none"><li>• Title</li><li>• Description</li><li>• owner,</li><li>• focus area</li><li>• start/end dates</li></ul>



# Block Faces

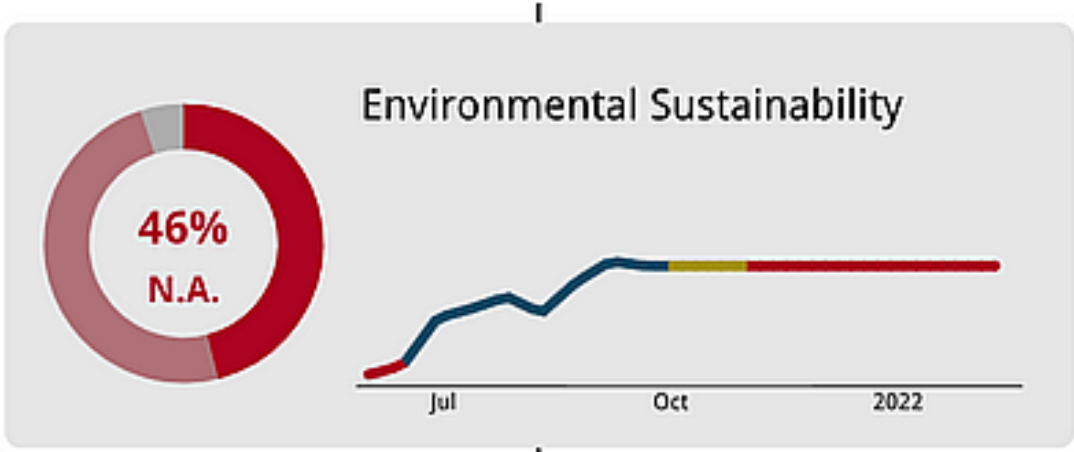
## About

Available on the Block Tree and Block Board views, Block Faces are a series of distinct view options which change what information is shown on the block. You can go between different Block Faces using the icon bar at the bottom left of your screen, shown here. Click on the different icons to change the Block Face.



## Delivery

The **Delivery Block Face** shows the blocks progress over time, with the line's color changing depending on how it compares to expected progress. Blue sections represent times when the block was ahead of schedule, yellow is warning, and red is critically behind where it should be. On the left, the percentage and corresponding circle indicate how close the block is to being complete.



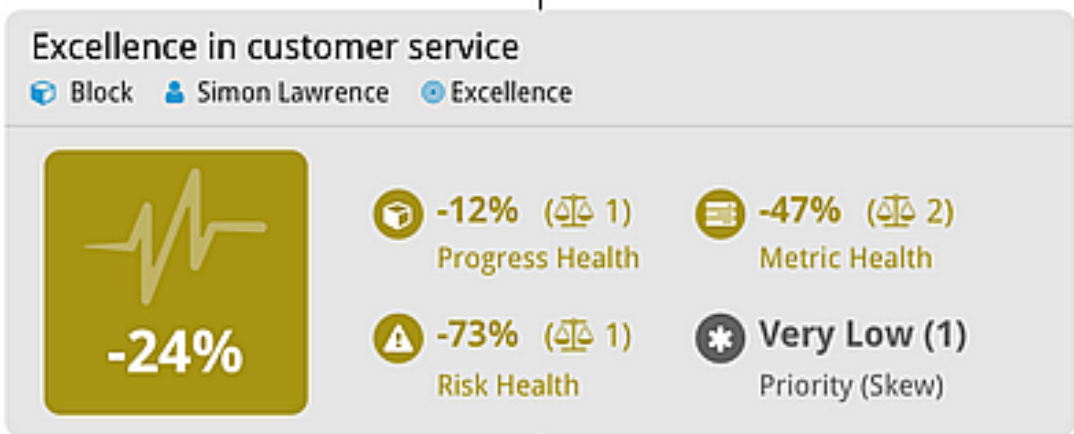
## Information

The **Information Block Face** provides the user with a view of a block comprised of key information relating to the block. You can hover over each icon to display their titles. An annotated screen shot with these titles is shown here on the right.



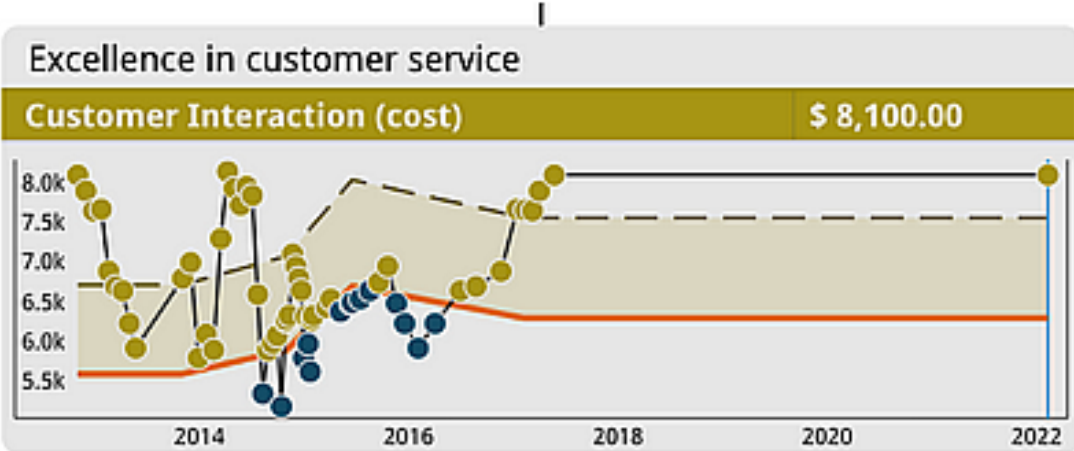
## Health

The **Health Block Face** displays the overall health of a block on the left and its' component parts: Progress, Metric, Risk and Priority Skew on the right.



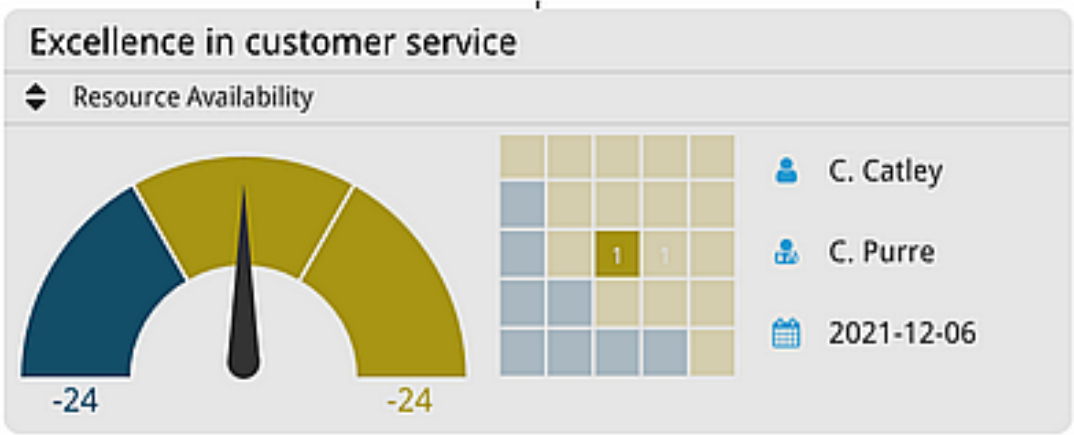
## Metrics

The **Metrics Block Face** displays the target vs actual values for the block's attached metrics. You can switch between different metrics using the side dropdown next to the Block Faces icons. This block face is similar to the progress face.



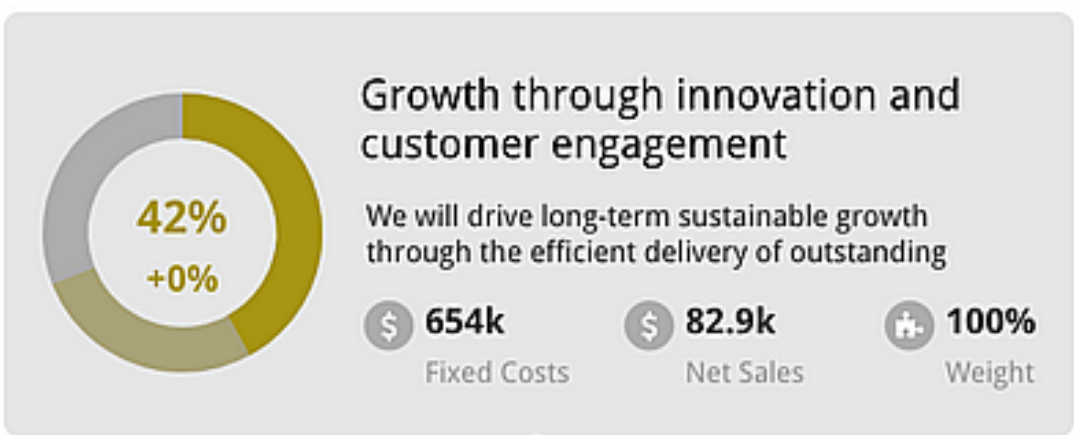
## Risks

The **Risks Block Face** displays all risks that impact the block, their likelihood and impact. It does this with a risk matrix, numbered boxes represent identified risks, their height on the matrix indicates their likelihood and their distance to the right indicates their impact.



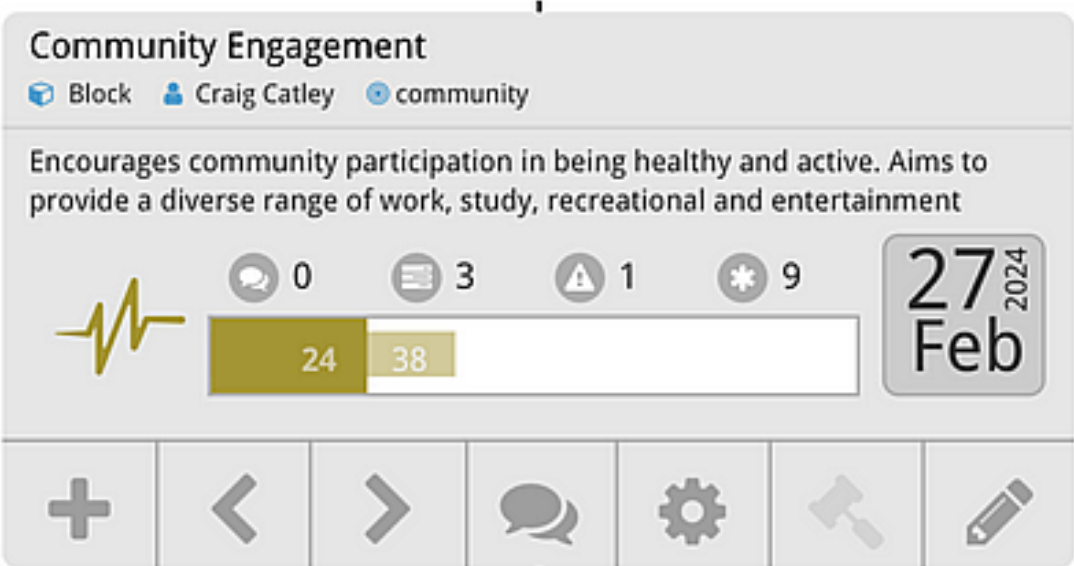
## Overview

The **Overview Block Face** show's the amount of work outstanding, the two highest priority metrics and the comparative weighting of work delivery roll-up.



## Work

The **Work Block Face** displays a full view of the block including: title, description, ownership, focus area, health and start or end date. It is the primary operational block face.



## Small

The **Small Block Face** is only available at the Blocks Board page and provides a compact view of the block, a stripped down version of Overview.





# Block Sidebar Menu Navigation

Clicking on the cog icon on a block will open the block overview page. It will also update the navigation options in the left-hand menu, below is a breakdown of the different options available in this new menu:

- › **Overview** – a quick view of the block and its current status.
- › **Details** – edit key attributes for the block, such as title, description, owner, start and end dates, priority, health calculation, focus area and milestones.
- › **Manage** – add, view and edit child blocks of the selected blocks.
- › **Progress** – update the progress (if the block is a leaf)
- › **Dependencies** – add dependant blocks to this block. The selected blocks start date will be adjusted to be the maximum end date of all its' dependant blocks.
- › **Metrics** – add and edit metrics
- › **Risks** – manage the risks attached to a block and add new risks.
- › **People** – view and add people watching this block. You cannot remove watchers from your list after they have been added. If a Watcher no longer wants to follow your block, they will need to navigate to the People tab in the On Block left hand menu and click on the 'Unwatch' button
- › **Comments** – view and add comments related to this block. Please note, there is a character limit of 10,000 characters in the comments field. If you require more text than this, please attach as a document. Comments from the parent block (block directly above) will also appear in the comments list.
- › **Documents** – view or attach files and links which support this strategy. (For example, governance, budgetary approvals, meeting minutes, etc...)
- › **Groups** – view and apply security groups to this block to restrict who can see it. Please contact your administrator if you require a new group.
- › **Tags** – view and manage the tags associated with the selected block.
- › **Export** – export the selected block as a CSV, PNG, or as a library item in the Blocks Library.
- › **Report** – download or Email a CSV or HTML report for this block and its descendants.
- › **Shift** – change the selected blocks's dates and / or give it a new parent. You must be the owner of the parent block to move a block
- › **Delete** – delete a block and it's descendants. You can also choose to only delete the children and retain the selected blocks. Once deleted, blocks will appear in your blocks library where you can re-import them into the strategy. Note that progress and comments will be lost.

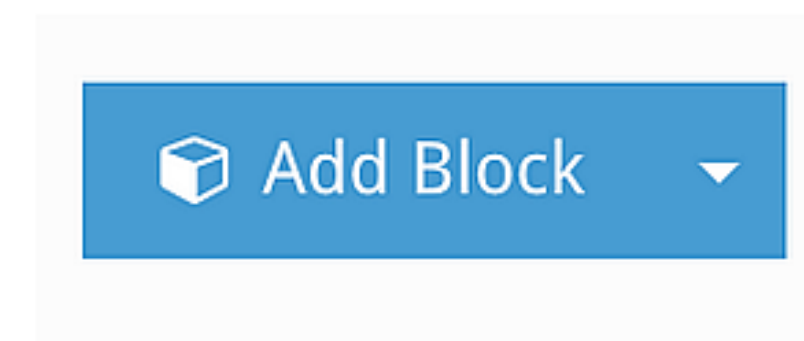
# Adding a New Block to the Strategy

## When to Create a New Block

When deciding on how you would like your task to be carried out you may ask yourself: "Do I want carry out the task/idea through a single Block alone or delegate it onto other Blocks to make the task more manageable?". Delegating your task into smaller sub tasks would allow for others within the organization to be apart of the execution. These individuals would now become owners of their assigned Block, signing over a % of responsibility in helping to execute the main (parent) task.

## Adding Child Blocks

Adding new strategy will mean new child blocks need to be created. In a block view, find the parent block you want to add the new block under and select it and click on the "+" symbol. This will take you to the block's **Manage Block** page, here click on the "Add Block" button shown in the image.



Note that you can only add child blocks to blocks that you own/manage.

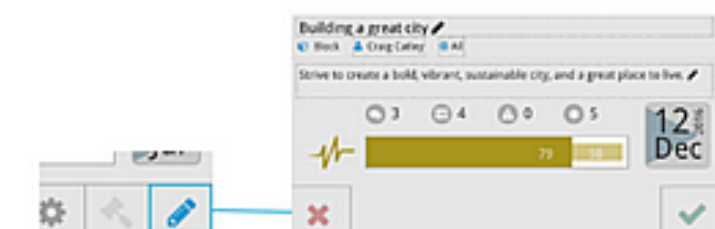
## Additional Block Types

Before clicking on Add Block, you can click the drop down arrow. This will provide you with 3 options for Block types



## Enter Block Details

Once you have entered the new block's title it will be added to the list of child blocks. Clicking on your new block will take you to a new page where you can edit/add all the details of the block, including: description, start and end dates, focus area and priority. Here you can also choose whether or not the block is private.



## Other Block Features

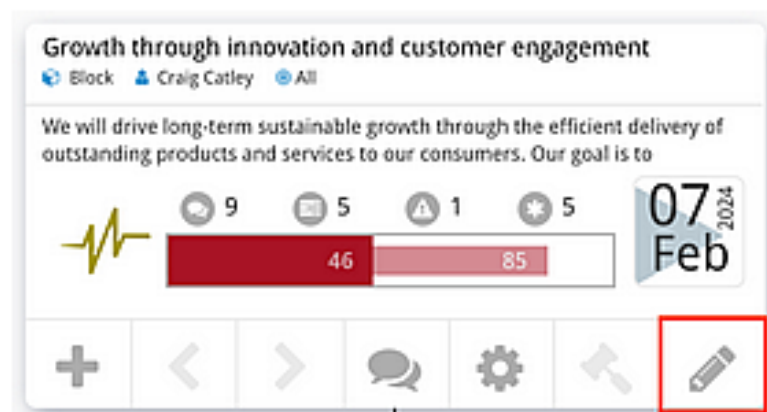
There are too many features/aspects of blocks to cover on this page. Look under the Parts of a Block, or Updating and Managing your Blocks sections for information about how to get the most out of your Blocks.

# Quick Update a Block

## Double Click

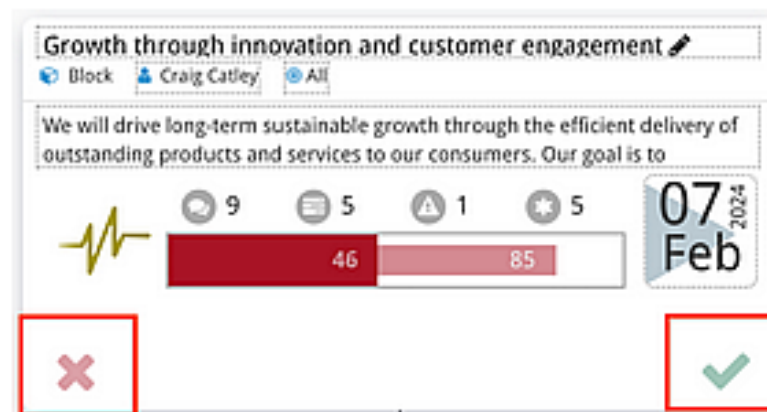
On the block you wish to update, either double click anywhere on the block, or click the pen icon.

Note: You must be the owner of the block to do this.



## Editable Fields

As shown in the image, a dotted line box appears around the following fields, indicating that you can change them: Title, Owner, Focus area, Description (pen icon indicates you can retype in this field), Start/end date.





# Update the Progress of a Block

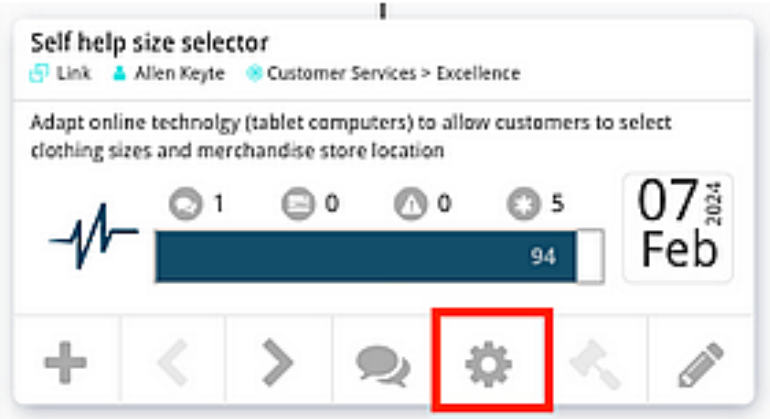
## About

This page is for helping the user update the progress of a leaf block via the block progress page. A leaf block, is a block at the bottom of a branch with no blocks beneath it. These blocks should represent low-level pieces of work, whose progress will cascade up through the rest of your strategy tree. You can also quick update progress, learn more about that on the [Quick Update Your Block](#) page.

Note: you can only update blocks you are the owner of.

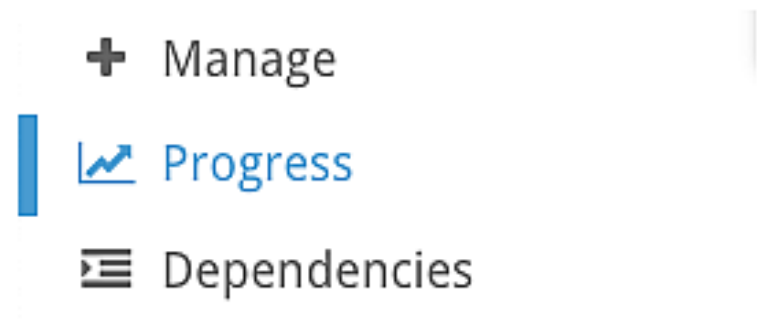
## Click on the cog on a leaf block

To update progress, **click on the cog icon** on a leaf blocks.



## Click on Progress in the side menu

Clicking on the cog will update the side menu with block options. Click on "Progress" to open the progress menu.



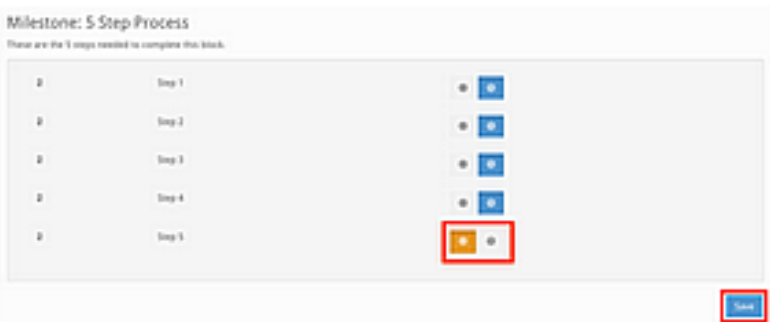
## Update Progress

From this screen you can view the overview and history of this block, and update its progress. Either: use the + and – buttons to increase or decrease the Current Progress percentage, or type a percentage figure in the box. Then write a comment that describes the update, and then **click Update**.



## Update Progress with a Milestone

If the leaf block is being tracked with milestones, instead of a progress bar here you will be able to update the completed milestones of a block. Simply click on the switch buttons next to each milestone to confirm they are complete, then click save. The block progress will be updated to the percentage of completed milestones.



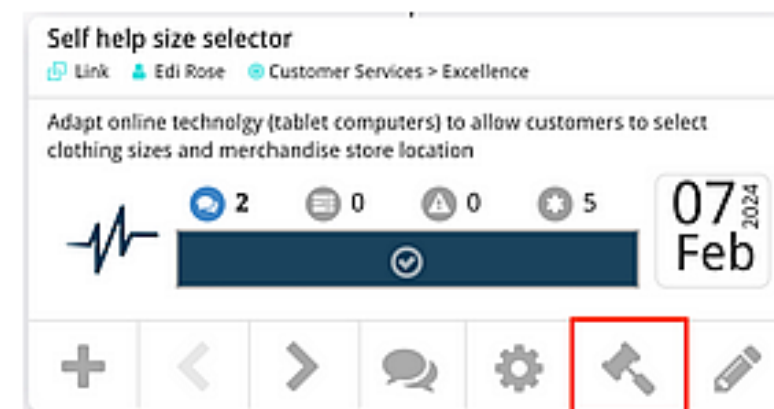
# Rate then Close a Block

## About

Once a block is completed with a progress of 100%, you will be able to add a rating and close the block. You **must be the manager** of the block to do this. Checkout the permissions section of the [Basic Terminology](#) page to learn about block managers.

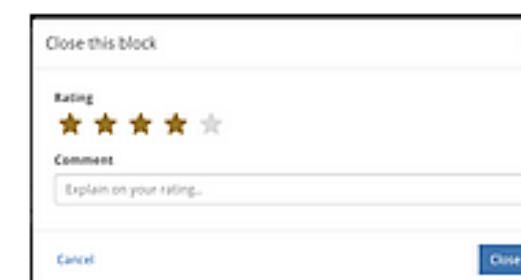
## Select a block and click on hammer

Click on the block you wish to close and rate to open its' on block options. Then click on the **hammer icon**.



## Add A Rating

Clicking the hammer icon on the block will open a popup menu, here you can give the block a rating in stars out of 5 and you can also leave a comment.



## Recover the Block

You can re-introduce the block into the strategy if you want to. Simply export the block to the Blocks Library, then import it back into the strategy from the Blocks Library. Follow the steps on the [Block Library page](#) to do this.

Tags

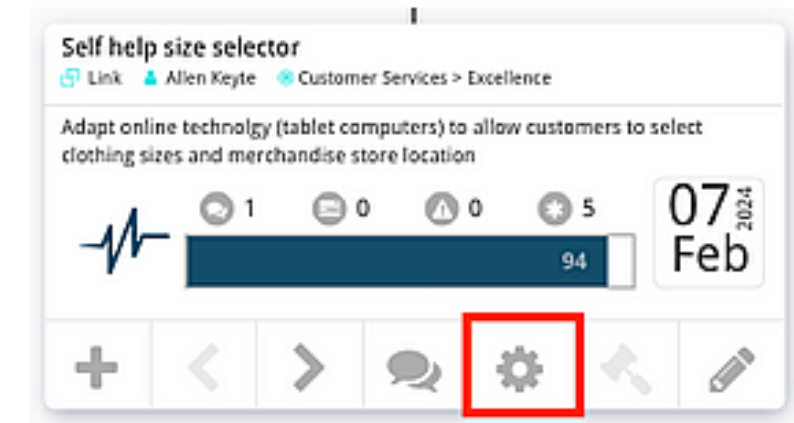
Export

Report

# Add a Supporting Document to a Block

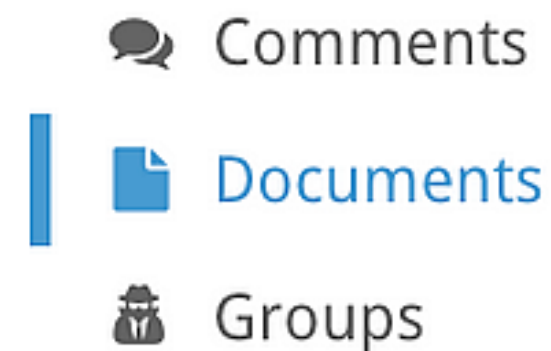
## Click on a block

To add a supporting document to a block, click on it to reveal its [On Block Options](#). Then **click on the cog icon** shown in the image.



## Blocks' Side Menu

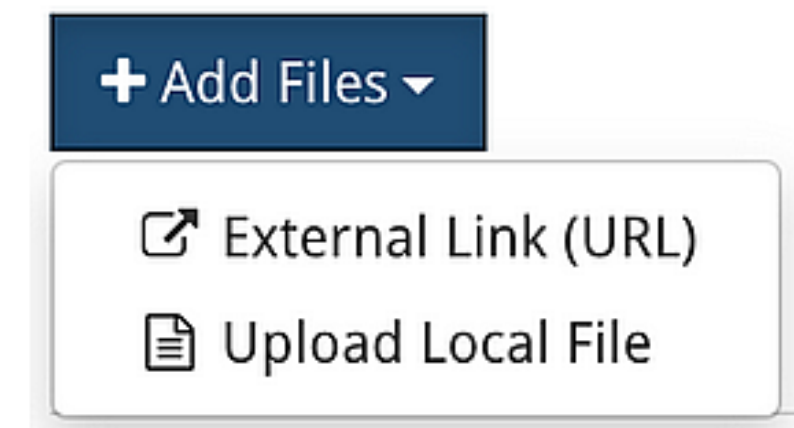
Clicking the cog will update the left-hand side menu with new block options. To add supporting documents, **click on the documents button**.



## Add Files

On the Documents page you should see an "Add Files" button. Clicking on this button will give you the option of adding your file via an external link, or upload a file from your local computer.

Note that files can be up to 10mb in size.



## Add Title and/or Description

You will not be able to save the uploaded document until you've added a title and/or description. This will allow you to click the "Save" button and complete the process.

Cancel

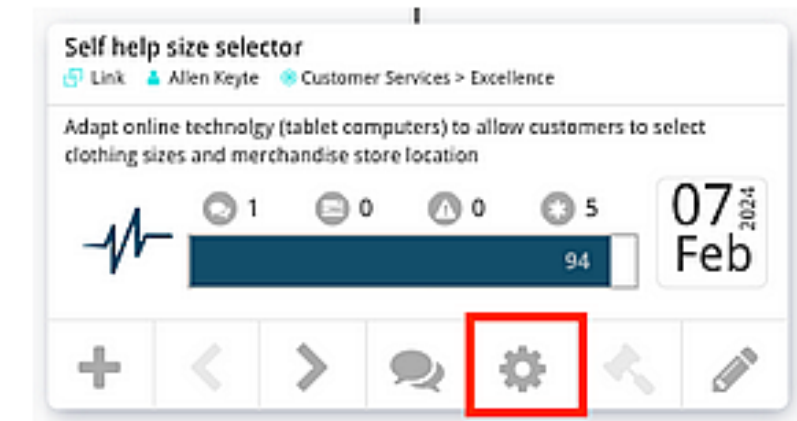
Save



# Edit or Remove Supporting Documents on a Block

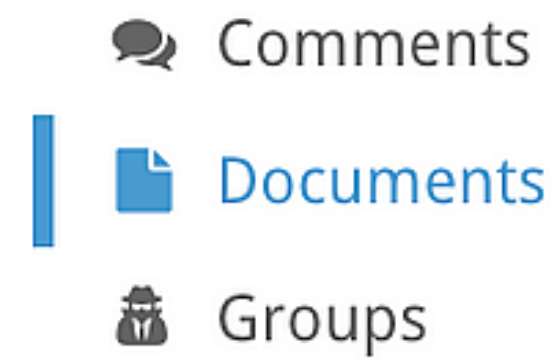
## Click on Cog

To edit or remove a supporting document on a block, click on it to reveal it's [On Block Options](#). Then **click on the cog icon** shown in the image.



## Blocks Side Menu

Clicking the cog will update the left-hand side menu with new [block navigation options](#). To view all the documents connected to the block, **click on the documents button**.



## Choose a Document

Clicking the documents button will open the Supporting Documents page. From here, **click on the document you want to edit or delete**. This will take you to the view document page.

### Supporting Documents

Here are documents or links which provide background or supporting information for this strategy. This includes planning information, meeting minutes, approvals, etc...

+ Add Files +				
Title	Type	User	Updated	
Internal White Paper for Superior Documentation	Link	Edi Rose	a few seconds ago	<a href="#">Open</a>
Proof of Concept	File (PNG image, 47.3 KB)	Edi Rose	2 minutes ago	<a href="#">Open</a>

## Edit Document

On the **View Document Page** you can edit details of the: title, description and file/link of the document. Click save to save changes or click delete to delete the document.

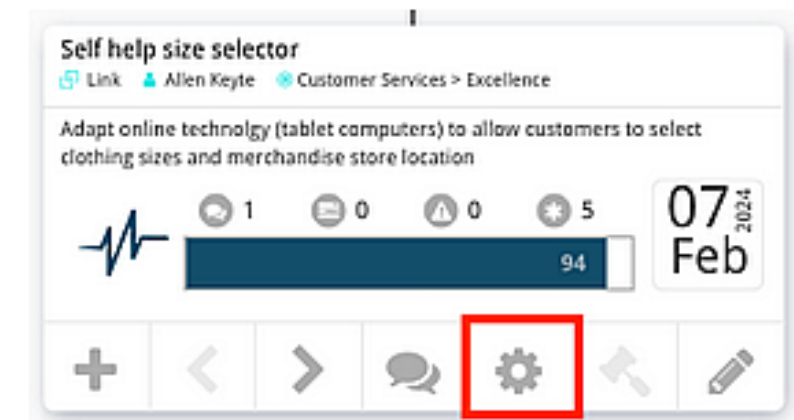
Note: only administrators and document owners can edit and delete documents.



# Attach a Risk to a Block

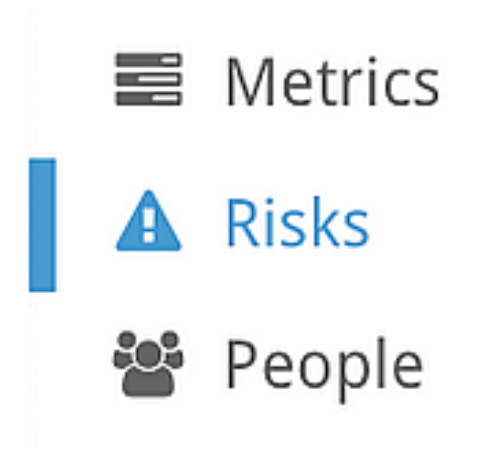
## Click on a block

To attach a risk to a block, click on it to reveal it's [On Block Options](#). Then **click on the cog icon** shown in the image.



## Blocks' Side Menu

Clicking the cog will update the left-hand side menu with new block options. To add risk, **click on the Risks tab**.



## Add Risk Dropdown

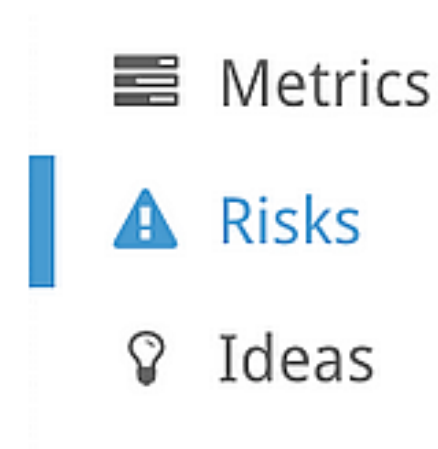
On the **Risks** page we can now attach risks to the block. Click on the **dropdown** to select a risk, and then click **save** to add it to the block.



## Want to create a New Risk?

To add a new risk, navigate to the [Risks Table](#) page and click the **Add Risk** button in the top right.

Note that only Company Administrators can add new risks.

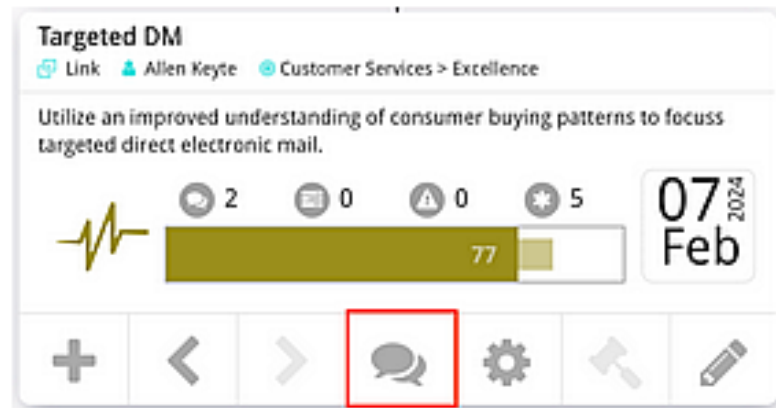




# View or Add Comments to a Block

## Click on Speech Bubble

To add a comment to a block, click on the block to reveal it's [On Block Options](#). Then **click on the speech bubble icon** shown in the image. You can also access comments through the [Block Side Navigation Menu](#).



## View Comments

The **Comments** page lists all comments that have been made on this block as well as the complete history (updates, changes, etc)

**Make a new comment** by typing in the text field, and **clicking Send**.

## Comments

My new comment

CancelSend

# Clone a Block

## Where to Find

Blocks Clone allows you to copy sets of blocks and add them to other positions in your block hierarchy. The Blocks Clone page is found by clicking "Strategy" in the left-hand side menu and then clicking "Blocks Clone".

 Table

 Library

 Clone

## Select Which Block/s to Clone

Now you can select which blocks to clone by ticking the box next to them, click to the arrow to view their children. You may select multiple.

Note if you do not select a parent location, the blocks will be inserted under the same parent as the original block.

- ☐ 1.3: Community Engagement
  - ☒ 1.3.1: Artistic & Creative
  - ☐ 1.3.2: Healthy Communities
  - ☐ 1.3.3: Recreational & Entertainment Services
  - ☐ 1.3.4: Participation in Education

## Edit Clone Options

On the Blocks Review page you can edit the owner of the cloned blocks, select the parent block for the cloned blocks, and other options.

☒ Target (parent(s) block)



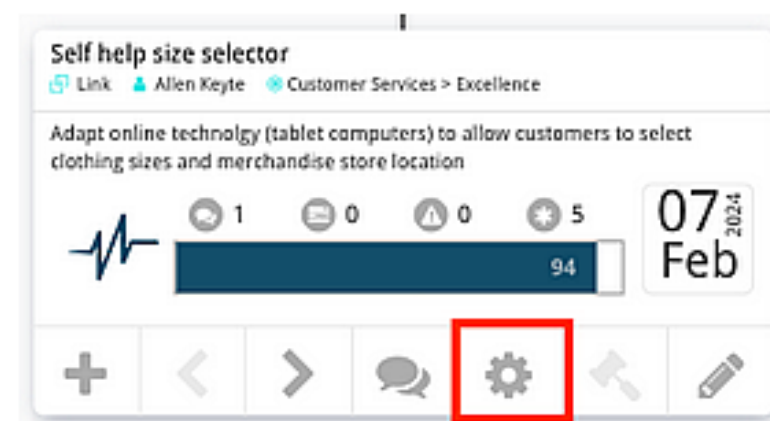
# Add a Tag to a Block

## About

Tags are user-created keywords that you can attach to blocks to create custom filtering. You can filter by tags using the [options menu](#).

## Navigate to Tags

Select a block and then **click on the cog icon**, this will update the left-hand side menu with block options, **select tags**.



## Tags Cloud

The **Tag Cloud** shows all the tags being used in your company, with the largest tags being used most frequently. Select the tag to toggle in on / off for the selected block.



## Tag Drop Down

Alternatively, you can assign and unassign tags using the dropdown selector below the Tag Cloud.

## Tags



# Shift a Block

## About

The Shift function allows the user to move a block and all its descendants to a different position in the tree. You do this by choosing a block to be the new parent of the selected block and its descendants.

---

## Navigate to Shift

Select a block and then **click on the cog icon**, this will update the left-hand side menu with block options, **select shift**.

 Report

 Shift

 Delete

## Select new parent block

On the shift page, use the dropdown to select which new parent block the blocks will be shifted under.

New Parent Block

Choose a new parent block.

## Change Dates

The Shift function also provides the user an opportunity to update the dates of blocks being moved. This can be done in two ways: **Overwrite**, and **Proportional**.

- **Overwrite** allows the user to select a single new Start and End date which will be applied to all the blocks being moved.
  - **Proportional** updates all the moved block dates such that they are moved and adjusted proportionally to fit within a selected date range. For instance, if the old parent's duration is one year and the new parent is two years, a block that used to start at the 6-month point will now start at the 1-year point, and if it had a 1-month duration it would become 2-months.
-



# Blocks Tree (Default)

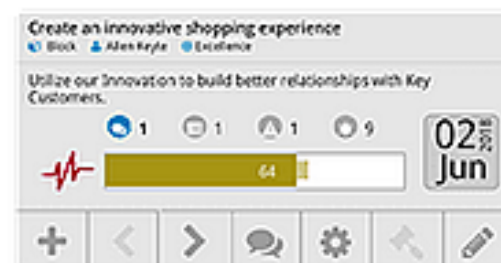
## About

The **Blocks Tree** is the default blocks view in StrategyBlocks. It displays blocks in their Hierarchical order, showing the children and parent blocks of the selected block.



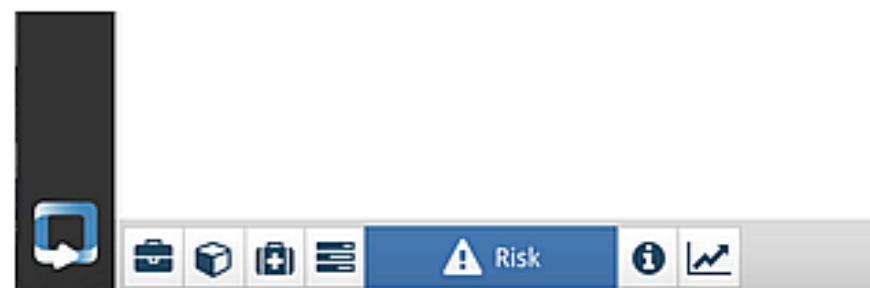
## Selecting a Block

Clicking on a Block will center the block in the tree, revealing its' child and parent blocks. The Block will also then display its' [On Block Options](#).



## Block Faces / Block View Options

In the Bottom Left of the Block Views you will see the different **Block Face Options**. These Block Faces provide different unique ways of viewing the information on a block while in the display. Learn more about [Block Faces](#).

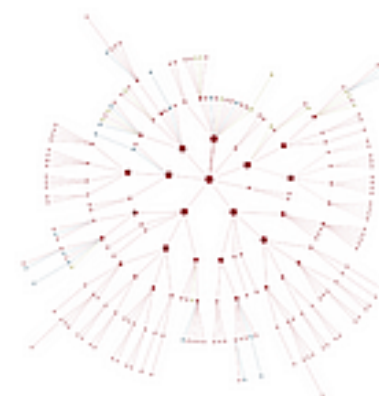


# Blocks Network

## About

The **Blocks Network** display provides a graphical bird's eye view of your blocks. Blocks can be displayed as circles, titles, or small blocks, and more layout options are available by using the Layout menu on the bottom left of the screen.

The lines between blocks are coloured according to their progress.



---

## Layout Options

Located in the bottom left of the Blocks Network are view options specific to the Blocks Network.

The **Layout** dropdown allows you to switch between: Radial, Horizontal and Vertical, network layouts. Radial is default.

The **Node** dropdown changes how the blocks are displayed in the Network. Choose between: Circles, Title, Small Block and Small Metric.

Layout: Radial ▲

Node: Circles ▲



# Blocks Table

## About

The **Blocks Table** view displays all blocks as rows in a table. This view shares many of the characteristics of the [Documents Table](#).

Health	Title	Owner
✂	Building a great city	Craig Cadey
✂	Robust Infrastructure	Craig Cadey
✂	Transport	Craig Cadey
✂	Personal Travel	Craig Cadey
✂	Inter-Municipal Travel	Craig Cadey

## Top Bar Options

The **Rows** drop down lets you select how many rows are shown on the table per page. Pages can be navigated between using the buttons on the bottom right of the table.

The **Columns** button takes you to a new page which allows you to fully customise which columns appear in the blocks table.

The **CSV** button allows you to download the risk table to computer as a CSV file which you can then enter into excel, google sheets or your spreadsheet application of choice.

≡ Rows (10) ▼

Columns

CSV

# Blocks Library

## About

The Blocks Library provides a store of blocks and families of blocks which we can use as templates. These library items retain their text contents (titles, descriptions, ect), any milestone definitions, and the proportional duration of each independent block. This allows us to reuse blocks with a quick import action.

## Add a new Block Structure to the Blocks Library

Click on the cog button on a selected block in a block view (tree, network, table, ect) then select "Export" in the blocks side-menu. This will lead you to the "Export this Block" page where you must select "Library Archive" as the export type. Here you can also choose how many levels below the selected block you wish to export.

Export Type

Library Archive

Levels

-

2

+

## Import a Block Structure from the Blocks Library

Start by clicking on the archived title block in the Block Library. This will take you to the archived blocks options page where you can edit it if you are the owner. From here click on the "Import" button and you will be lead to a final page where you can choose where to place the archived blocks, edit its' key dates, and focus area.

Import

# Create a Custom Dashboard

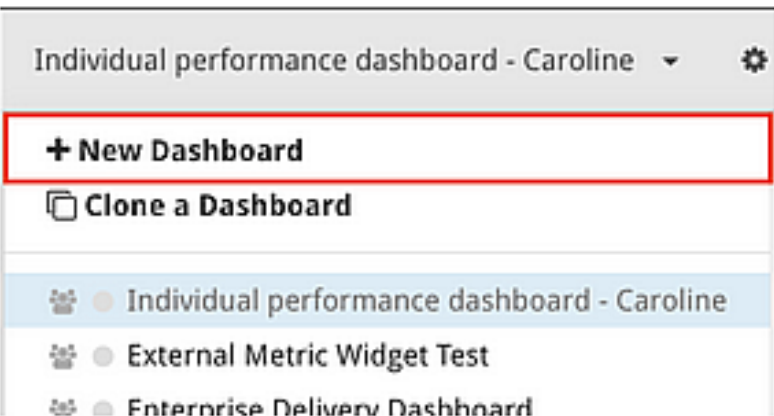
## About

You can create your own personal dashboard, providing live dashboard reports with Blocks, Risks, and Metrics that you are interested in keeping an eye on. This also allows you to create a high-level report for a presentation or printout.

Use these steps to create a new custom dashboard.

## Where to find

To create a new dashboard, first navigate to the Custom tab, under Dashboard, in the [left-hand side menu](#). Then click on the dropdown above the dashboard screen, and select “+ New Dashboard”.



## Add Basic Settings

Clicking “+ New Dashboard” will take you to a screen where you will fill in a form to provide the basic settings of the new dashboard. This includes: name, description, whether it is public or private, landscape or portrait, page type (screen or print), page size and level of zoom. Here you will also have the option to create an external link, which people outside StrategyBlocks can access to let them view the new dashboard.

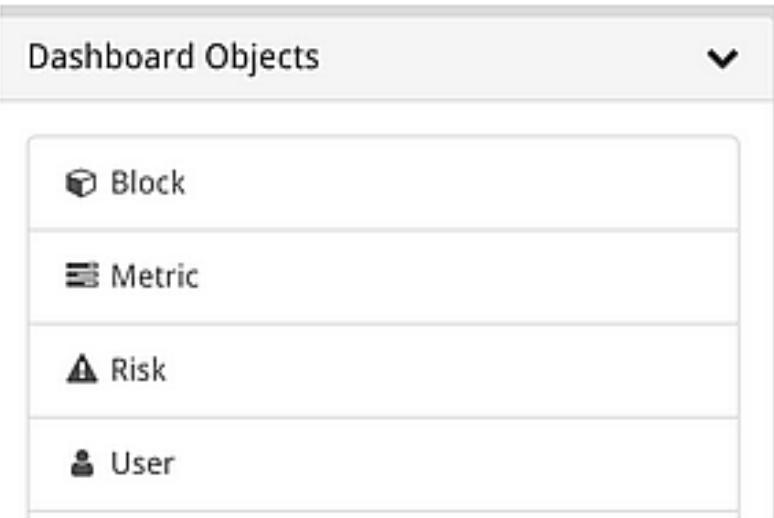
Then “Save” to commit changes and move on to the next stage.



## Add Dashboard Objects

To start adding to your dashboard you will need to click “edit” next to your dashboard name at the top of the screen. Once this is done your dashboard customisation options will become available. The main Dashboard customisation options are found in the options menu. Follow [this link](#) if you don’t know where the options menu is located.

In the options menu you will find the dashboard objects dropdown menu. Each of the objects in this dropdown can be dragged onto dashboard and edited from there.



## Customising Objects

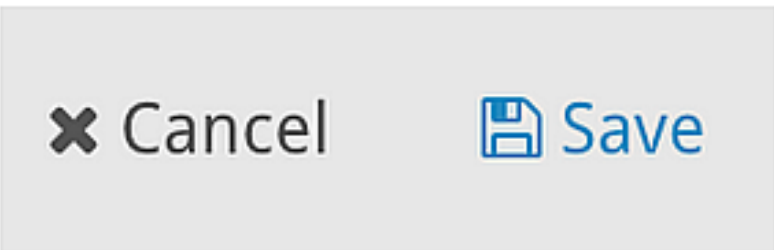
Once you first drag an object type onto your dashboard it will appear empty and useless at first. For some object types like blocks, you will need to select which block to present, and for other aesthetic objects like lines, you will want to control what it looks like and where it is pointing. To do these things, double-click on the highlighted area, that was created when you dropped the object. Or click “edit object” in the top bar dashboard menu.

This will open a new page full of customisation options specific to the object type.



## Save Dashboard

Once you’ve made the changes you want click “Save” in the top bar so you don’t lose your changes.

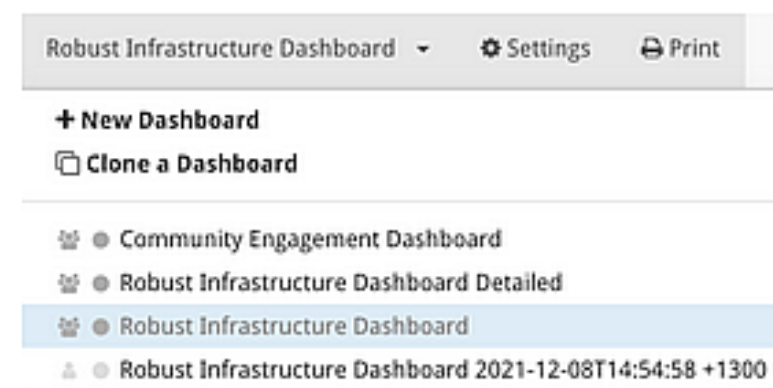




# Other Dashboard Options

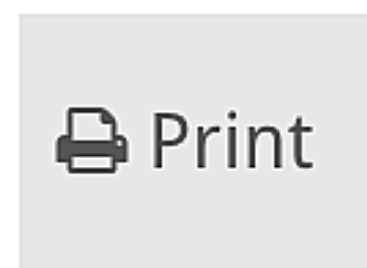
## About

This page covers dashboard options which are not included in the [Create Custom Dashboard](#) and [Dashboard Options](#) pages. These are mostly found in the top bar above the dashboard screen (shown in image).



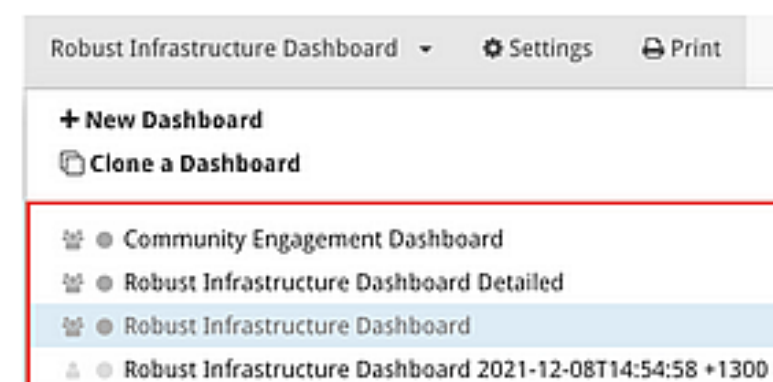
## Print

You can print or download your custom dashboard by clicking the "print" button on the top control panel, in the custom dashboard menu.



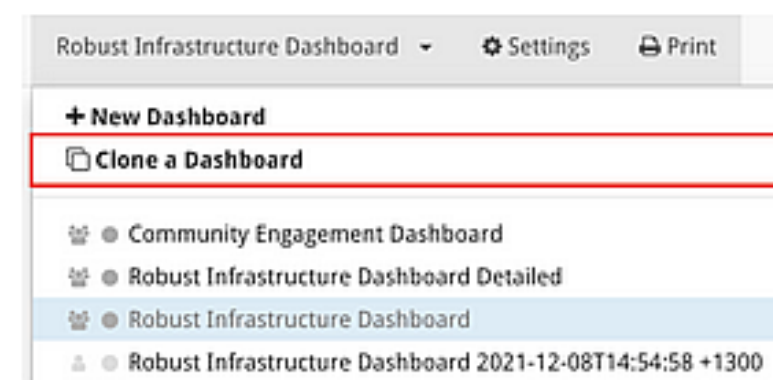
## Switch Between Dashboards

Click on the name of your dashboard at the top options panel to see a drop down of other dashboard names. Click on the one you want to view to switch to that dashboard.



## Clone Dashboard

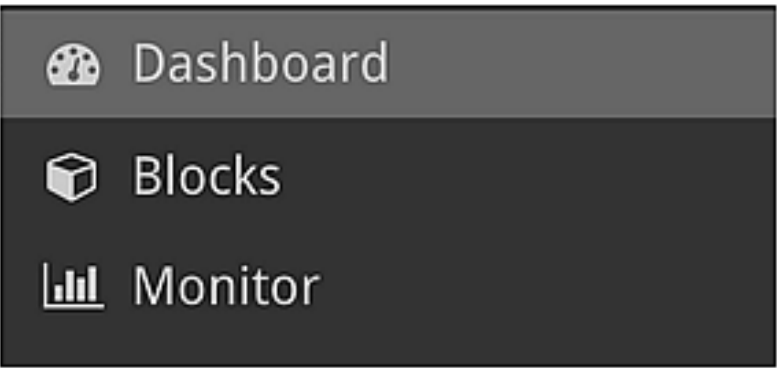
Click on "Clone a Dashboard" under the dashboard dropdown to clone a dashboard, this will open a new popup where you can select which dashboard you want to clone.



# Personal Charts

## Where to find

The **Personal Charts** page is found under **Dashboard -> Charts** on the [Left-Hand Menu](#). It displays a series of user specific charts relating to the performance of their blocks, metrics and risks.



## Select User

The **Personal Charts** page displays charts which are specific to the **blocks, risks** and **metrics** associated with a **specific user**. The drop down at the top of the page lets you choose which user.

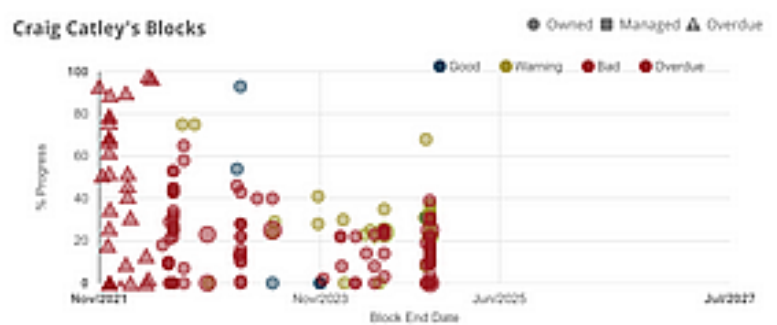
### User

Catley, Craig


View this dashboard for a different user.

## Blocks Chart

The **Blocks Chart** shows the progress status of the **selected user's** blocks and their expected end date. The different colors are based on the progress of a block vs it's expected progress.



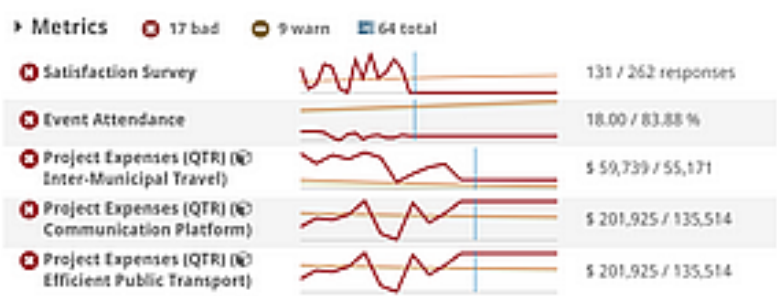
## Blocks Table

This section shows the health , progress vs expect progress over time, the current progress within the bounds of bad (dark grey), behind target (light grey) and on target (clear).



## User Metrics Table

The user metrics table covers each of the metrics associated with the selected user. It shows a graph of metric actuals vs targets, and also of total metric completion against its target.



## User Risks Table

The user risks table covers the risks associated with the selected user. It shows their title, status, and next actions required (if any).

Risks		▲ 1 triggered ▲ 5 warning ▲ 5 total
Technology Infrastructure	Develop new ICT governance and strategy policy to ensure technology modernisation at a sustainable rate.	
Resource Availability	-1- Targeted recruitment plans. -2- Understanding the drivers of turnover for these groups and implement appropriate interventions. -3- Efforts to retain specialist staff remain a focus.	
Cash Flow	No action required	

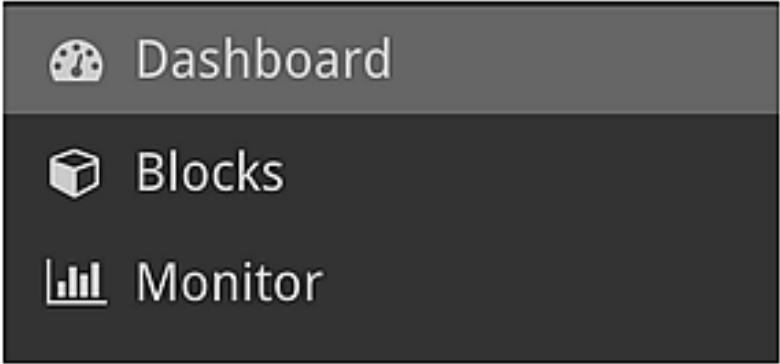
# Reports

## About

The Reports page is used for downloading or emailing a variety of reports as well as data sets which can be used in external reporting tools. Some of these reports are specific to objects that you own or manage, while the others (e.g., SQLite) are only restricted by access controls.

## Where to find

The **Reports Page** is found by clicking **Reports** in the **Dashboards tab** on the [Left-Hand Menu](#).



## Basic Report Options

Our basic reports include the objects that your accounts own allow you to **include** or **exclude** the following: Blocks, Closed Blocks, Metrics and Risks. If you **don't own** any objects, these **options** will be **disabled**.

These reports can be **downloaded** locally **or** sent to your account's **email** address.



## Download Database

You can **download a SQLite database** of your entire StrategyBlocks company. This will download as a .db file which you can then **restore as a database** in your SQL client.



## Metrics Reports

This function allows you to **download a CSV** file of **all the metrics** in your company. You can limit it by: focus area, parent block, or date range.





# Block View Options Menu

## About

This page will cover the functions of the Options Menu which are specific to the block views, **Block Tree**, **Block Network**, **Block Board**, **Block Library**, and **Block Table**.

## Find Blocks

This option lets the user have a quick overview of different blocks and sections of the strategy through a simplified navigation method.

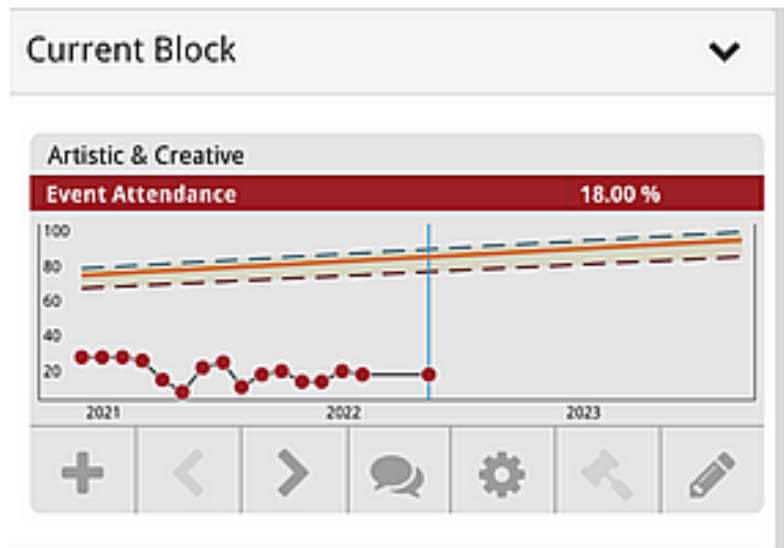
Find Blocks

Find blocks by title / description. Select a block to display it.

Search blocks...

## Current Block

Allows you to click on any block and have it displayed off the side of your screen. This provides a stand-alone live image of the selected block.



## Block Display Options

Allows the user to click on an individual Block within the Block tree, allowing selection of the Block type that they want to view e.g. Health, Risks, Metric. In the **network view**, this function is replaced by **Network Options**.

Block Display Options

Override the view type for the selected block

Block Type

Work

## Network Options

Network Options will appear when viewing your blocks in the **network view**. The "Current Node Type" option changes how you view the selected node, options include default, circle node, title, small block, and metric. You can also use switches to dictate whether the selected node's child nodes are collapsed and whether the selected node is centered on your display.

Network Options

Current Node Type

Circles

Current Node Collapsed

NoYes

Hides the branch below this node

Center Selected Node

NoYes

Presents the selected node as the root

## Block Filters

Block Filters allow for a more narrowed and specific search of particular blocks that you wish to find. This option reduces time spent methodically searching for a particular block. Blocks can be filtered by User, Date, Properties, Structure, Tags and Custom Fields.

Block Filters

Add Filter..

End Date

Between

2020-12-282027-07-01

# Dashboard Options

This page covers the functions in the Options menu which are specific to the Dashboard views: **Dashboard Objects** and **Dashboard Settings**.

**Dashboard Objects** allows the user to drag and drop new objects/widgets onto the dashboard. Follow this link to learn more about creating [Custom Dashboards](#) in StrategyBlocks.

**Dashboard Settings** provides a few different settings with which users can customize the appearance of their Dashboard.

- **Page Type:** switch between screen and print. This will control whether Page Size is in terms of pixels or in print size (A4, A5, etc)
- **Page Size:** controls the size of the page. In terms of either pixels or print size, depending on Page Type
- **Landscape:** dictates whether the custom dashboard is displayed/printed in landscape or portrait.
- **Zoom:** With a 50% zoom, for example, dashboard objects will appear half their normal size when not editing. When editing the dashboard, objects will be normal size and the pages will appear twice as large.
- **Filter Objects:** This function allows the user to only show the selected object types when editing. If empty, everything will show.

# Monitor Options

This page covers the functions in the Options Menu which only appear when in the Monitor section of the application: **Risk Filters**, and **Metric Filters**.

**Risk Filters:** This function appears on the [Risks page](#) and allows the user to search and filter which risks appear on the table by the following fields, status, likelihood, impact, owners, managers, focus areas, and groups.

**Metric Filters:** This function appears on the [Metrics page](#) and allows the user to search and filter which metrics appear on the Metrics Table by the following fields, strategic only (yes/no), types, status, trend, owners, managers, focus areas and groups.

Note that **Block Filters** may also appear in the while in the Monitor section but this function is covered in the **Block View Options** documentation.



# StrategyBlocks Ideas Overview and Homepage

## About StrategyBlocks Ideas

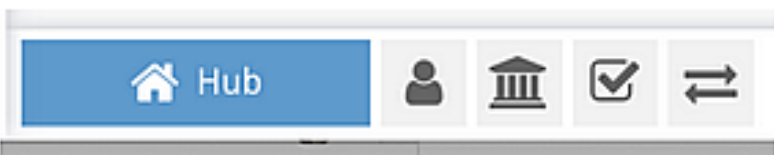
StrategyBlocks Ideas is an intuitive, user-friendly ideation tool within StrategyBlocks that empowers all users to share, evaluate and actualize their ideas into the overall strategy. Whether it's a new project proposal, a departmental business plan, or a staff suggestion, Ideas facilitates the seamless integration from idea into strategy.

## Ideas Homepage – Tables and Displays

Clicking on the Ideas tab in the left-hand menu will take you to the Ideas Homepage. Your ideas Homepage features four different tables:

- **Owned:** Displays your Ideas, those which you have created.
- **Public:** Displays all the Ideas in your organization which have been set to public.
- **Approvals:** Displays the Ideas of which you are the approver.
- **Compare:** Allows you to compare different Ideas.

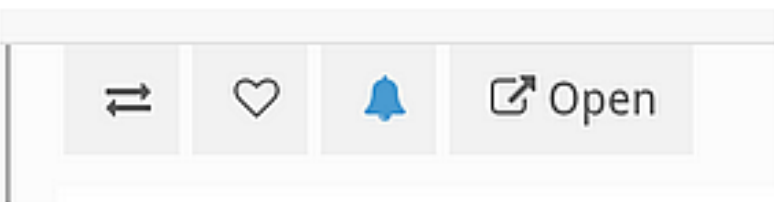
Clicking on any of the tables on your Homepage will take you to a more detailed full-page view. You can also do this by switching between display tabs on the bottom left of the screen, shown in the image.



## Ideas Homepage – Sidebar

Clicking on an Idea in the Ideas Homepage will open it in a pop up on the right side of your screen. This will give you a more detailed view of the Idea, without taking you away from the Homepage. Above the Idea title are four icon options:

- **Compare (Arrows):** Clicking this icon will add the Idea to your compare table.
- **Like (Heart):** Clicking the heart will "Like" the Idea, an Idea with more likes is more popular and this can be taken into consideration when comparing/implementing Ideas.
- **Notify (Bell):** Allows you to follow/unfollow Ideas. Ideas you follow will appear in your Ideas table on your Homepage and you will get notifications about their progress.
- **Open:** Clicking on this icon will open the Idea's overview page and give you access to the [Ideas left-hand menu](#).



## Create New Idea

Click on the "New Idea" button in the top right of the Ideas – Homepage to create a new Idea. For more information on how to create an Idea, [click here](#).





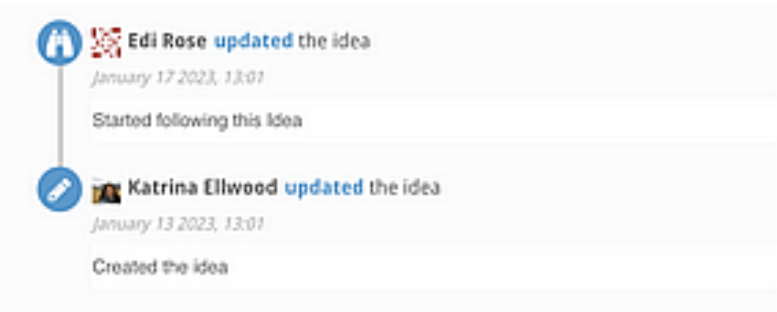
## StrategyBlocks Ideas Left-Hand Menu

## About

Selecting an Idea will open its Idea Overview Page and give the user access to the Ideas Left-Hand Menu. This page is to familiarize you with the different ideation functions available to you through this menu.

## Overview

This page allows you to manage and monitor an Idea, and provides a high level summary of the Idea and its ongoing activity. This page is also where you can view and add comments to the Idea.



## Details

The Idea Details page lets you edit the basic details of Ideas which you own. This includes the title, description, ownership, security, and your organization's custom fields. Scroll to the bottom and click "Save" to commit changes.



## Outline

The Idea Outline page displays a list-based view of your templated Blocks that will be created when the Idea is published. Click “Edit”, from here you can add/edit the Block templates to give them a title, dates, and owner. You can also drag rows to order and nest them.

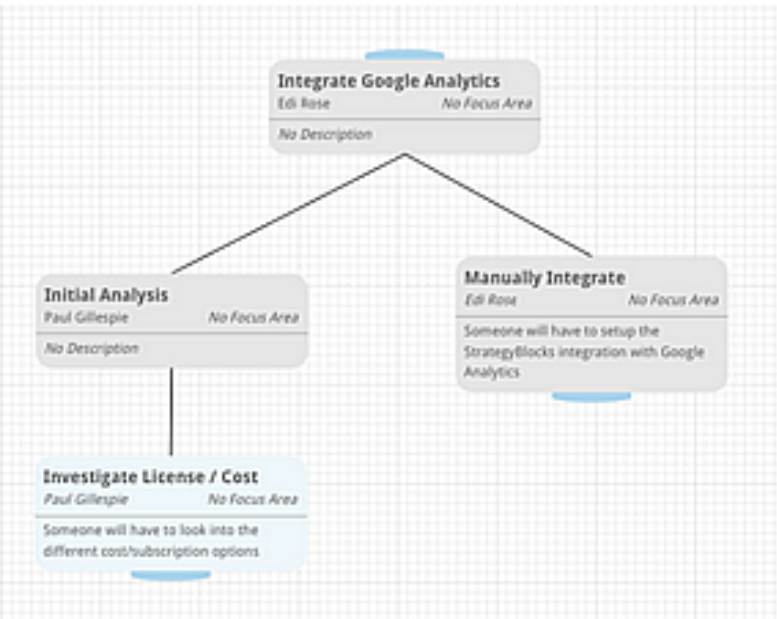
Block Title	Start Date	End Date	Block Owner
Integrate Google Analytics	2023-01-18	2023-02-17	E. Rose
Initial Analysis	2023-01-21	2023-02-02	P. Gillespie

You can also import Block structures from the Block Library to use as the outline for your Idea. To do this click "Import from Library" and select which Block structure you'd like to use. Then select between "Append" and "Replace" to dictate how the new Block structure is introduced to the existing outline.

To learn more about this page, [click here](#).

## Ideas Sandbox

The Ideas Sandbox provides the user with a visual space to mind-map their Idea. It enables users to create and edit various components of their Idea, assign blocks to team members, categorize blocks by focus area, and structure them in a hierarchical tree format by connecting Blocks with parent-child relationships using drag-and-drop functionality.



To learn more about using the Ideas Sandbox, [click here](#).

## Ideas Timeline

The Ideas Timeline is a visual tool that facilitates effective Block scheduling management. It allows users to view and manage the delivery schedule of their Idea and estimate the duration of each Block with precision.



To learn more about the Ideas Timeline, [click here](#).

## Ideas Contention

The Ideas Contention tool enables the allocation of work for each Block of the Idea, according to user availability in the timeline. The user availability list in the bottom section shows the specific blocks that users are assigned to, and the corresponding dates. Users with fewer assigned blocks have higher availability, allowing you to efficiently assign tasks to the appropriate users.

Catention

Innovate for the Future

2019-01-13 (2025-02-14)

+

-

Q

Q

			2023													
			jan 16					jan 23					jan 30			
	F	T	S	M	T	W	T	F	S	S	M	T	W	T	F	S
✓ Paul Gillespie	Focus															
IMBA...	Ede	Focus														

Find user...

✗ Craig Catley

11 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10

✗ Simon Lawrence

6 6 6 6 6 6 6 6 6 6 6 6 6 7 7 7 7

✗ Glenn Murphy

3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3

✗ Allen Kaye

2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2

To learn more about the Ideas Contention screen, [click here](#).

## Idea Approvals

The Approvals page is used to track the status of an Idea's approvals. Before an Idea can be published to the Blocks Tree, it must be approved by the designated individual(s). Every Idea must have an approval from the owner of the target Block under which the Idea Blocks are being published. Additional approvals can also be obtained as needed from other individuals. Anyone who is required to approve the Idea can add more approvals on this page as necessary.



To learn more about Approvals in Ideas, [click here](#).

## Metrics

Ideas should be supported by Metrics to give more context to the approvers as to why the Idea is needed. This screen allows the idea owners to attach Metrics to an Idea, and displays them for viewers/approvers.



## Risks

Similar to Metrics, it is important that users can associate their Idea with Risks that the Idea might aim to mitigate. This screen allows Idea owners to attach Risks to an Idea, and displays them for viewers/approvers.



## Documents

Similar to Metrics and Risks, this page allows the Idea owner to attach any documents or external links to supporting information associated with the Idea.



## Delete

The Delete page allows owners to delete the Idea.





# Create a StrategyBlocks Idea

## About

This page outlines how to create a new StrategyBlocks Idea and capture the key information about your Idea. Once you have finished this process, you can expand on your Idea in the [Outline](#), [Sandbox](#), [Timeline](#) and [Contention](#) screens.

## What is an Idea? What is a Target Block?

An Idea could be a new business plan, or staff suggestion which is then expressed as a block structure. When it is ready, the Idea can be approved and then incorporated into the Block Tree.

For an Idea to be published into the strategy, it must have a Block in the existing strategy which it falls under. This Block is the Idea's Target Block.

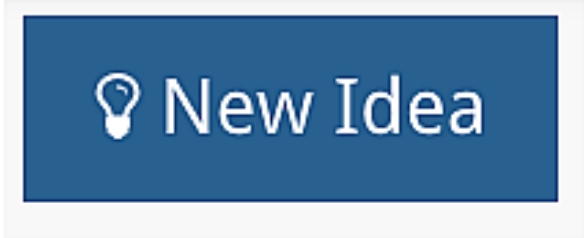


## Start the Process

There are two ways to create a new Idea in StrategyBlocks.

- **Through the Ideas Hub:** In the top right corner click “New Idea”
- **Via the Target Block:** Select the target Block, go to it's “Manage” page through the Block left-hand side menu and click “New Idea”

Doing either of these will take you to the Idea creation wizard.



## Add Title, Review Details

First, add the title of your Idea. Don't worry if you're unsure you can always change it later. Click “Next” at the end of each step to go to the next screen.

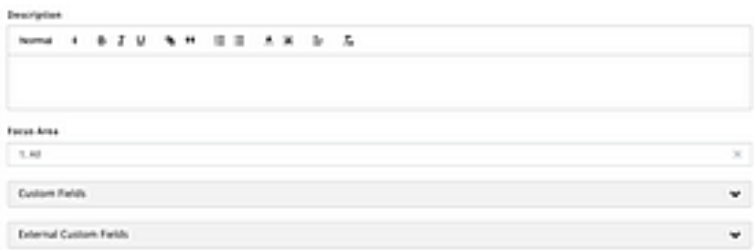
Note that on every step in creating a new Idea clicking the “Review” button will give you an overview of your Idea so far.



## Details

This page is for adding the basic details of your Idea.

- **Description**
- **Focus Area**
- **Public Yes/No:** Here you can set whether your idea should be visible to your company, you may decide to work on it a bit more before you make it public.
- **Custom Fields:** These are fields set by your company, learn more [here](#).
- **External Custom Fields:** These are fields set by your company which have been flagged as being external. If there are none, you will not see these on your screen.



## Select a Target Block:

Here you can select which block your Idea falls under, you don't have to select the Target Block yet if you're unsure, but your Idea cannot be published until you've added a Target Block.



## Collaboration / Security

This section allows you to customize the privacy and read/write access to this Idea. A private Idea can only be seen by the owner, but a public Idea can be visible to a few users or your entire organization. You can also give other users write access if you want to collaborate with them.

### On this page you can set:

- **Is this Idea public to anyone else?:** If no then only you can see it, if yes then more options will appear, allowing you to filter who can see the Idea.
- **Who owns this Idea?:** By default the owner of the Idea will be you, but if you wish you can set another user to own the Idea.
- **Editors:** You can add other users who will be able to make changes to the Idea.
- **Viewers:** Set who else in the organization can view your Idea.

## What Next

Now that your Idea has been created it has begun its journey towards becoming a part of your strategy. Click the following links to learn about:

- Using the [Ideas Sandbox](#) to mind-map your idea into a Block structure.
- Use the [Ideas Outline page](#) to import an existing Block structure from your Blocks Library into your idea.
- Propose an implementation timeline using the [Ideas Timeline](#).
- Use the [Ideas Contention](#) page to see who might be available to work on your Idea.
- The [approval and publishing process](#).



# StrategyBlocks Ideas Contention

## About

The Ideas Contention tool enables the allocation of work for each Block in the Idea, according to user availability in the timeline.

## Navigation

Use the arrow buttons to move your window screen forward or back in the timeline. Use the magnifying glass buttons to zoom in or out. Click the “Edit” button to start changing the timeline.



## User Availability

The user availability list in the bottom section shows how many Blocks the user is assigned to at a given time. Scroll over a block number to see which Blocks are assigned to them. Users with fewer assigned Blocks have higher availability, allowing you to efficiently assign tasks to the appropriate users.

Find user..				
👤 Craig Catley	8	8	8	8
👤 Simon Lawrence	7	7	6.3	6
👤 Glenn Murphy	3	3	3	3.1
👤 Allen Keyte	2	2	2	2

## Change Owner

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.



# StrategyBlocks Ideas Sandbox

## About

The Ideas Sandbox provides the user with a visual space to mind-map their Idea. It enables users to create and edit Blocks for their Idea and structure them in a hierarchical tree.

## Navigation and Edit

Click on the Edit button in the top right-hand corner of the screen to start creating and organizing your Blocks.



User the Zoom in and Zoom out buttons to make more, or less room on your Canvas, or use the scroll wheel on your mouse. Click on the Target icon to centre the Blocks on your Canvas.

## Drag and Drop Items

Clicking the “Edit” button will open a menu on your right side with the following drag and drop items:

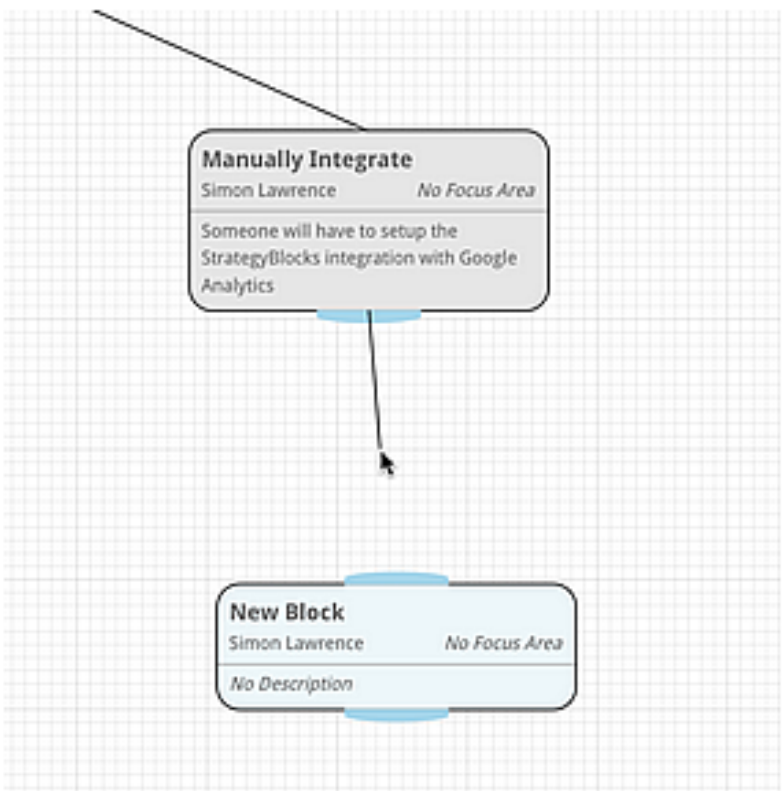
- **New Block:** Allows you to add new Blocks to your Idea’s block structure. Double click on the added Block to update its basic details.
- **Users:** Dragging and dropping users onto Blocks allows you to quickly and easily assign ownership.
- **Focus Area:** Dragging and dropping Focus Areas onto Blocks allows you to quickly and easily assign Focus Areas to Blocks.



## Managing Block Hierarchy/Connections

Notice the blue tabs at the top and bottom of each Block. Click and drag these tabs to establish relationships between Blocks. Connecting the bottom tab of one Block to the top tab of another will create a parent/child relationship and vice versa.

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.



## Arrange

If your Ideas block structure gets a bit messy, simply click the “Arrange” button to sort them into a clear structure.

Click Save you keep your changes.



# StrategyBlocks Idea Timeline

## About

The Ideas Timeline is a visual tool that facilitates effective Block scheduling management. It allows users to view and manage the delivery schedule of their Idea and estimate the duration of each Block with precision.

## Navigation

Use the arrow buttons to move your window screen forward or back in the timeline. Use the magnifying glass buttons to zoom in or out. Click the "Edit" button to start changing the timeline.



## Changing the Timeline

Clicking and dragging Block timelines allows users to adjust their duration and position. Clicking and dragging in the blue section of a Block timeline will move it to a different date, while clicking and dragging the black nodes at the front/end of a Block Timeline will shorten or lengthen the duration of the Block.

Leaf Block timelines are represented as light blue lines, while parent Block timelines are dark blue. The timeline of a parent Block will always encompass that of its child Blocks. Moving a parent timeline will move all of its child Blocks. Extending a child timeline beyond the boundaries of its parent timeline will also extend the parent timeline. Conversely, shortening a child timeline at the beginning or end of its parent timeline will shorten the parent timeline as well.





# StrategyBlocks Ideas Outline

## About

The Ideas Outline page is a list-based view of the Blocks that will be created when the Idea is published. From this page you can add new Blocks to your Idea, arrange Blocks in a hierarchical structure, and import template Blocks from the Blocks Library into your Idea.

## Add Blocks to your Idea

To add Blocks to your Idea from the Outline page, first click on the Edit button on the top right-hand side of the page. Next give your Block a name, Start and End Date, and Owner, and then click on the + symbol. Click on the Save button to keep your changes.

Block Title	Start Date	End Date	Block Owner	
Develop Survey	12/03/2023	31/03/2023	K. Ellwood	+
≡ Gather Requirements	30/01/2023	01/03/2023	T. Everitt	✕
≡ Customer Engagement Survey 2023	30/01/2023	01/03/2023	K. Ellwood	✕

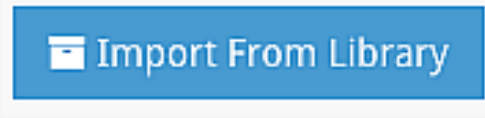
## Shift Blocks into Hierarchical Structure

To create the hierarchical structure of your Idea, first ensure the Outline page is in Edit mode – if not, click on the Edit button at the top right-hand side of the page. Next, click on a Block and drag it to nest it under the appropriate Parent Block.

Block Title	Start Date	End Date	Block Owner	
New block title...	dd/mm/yyyy	dd/mm/yyyy	Select an Owner	+
≡ Customer Engagement Survey 2023	30/01/2023	01/03/2023	K. Ellwood	✕
≡ Gather Requirements	30/01/2023	01/03/2023	T. Everitt	✕
≡ Develop Survey	12/03/2023	31/03/2023	K. Ellwood	✕
≡ Review results and Produce Report	01/05/2023	31/05/2023	C. Wall	✕

## Import Idea Structure from Blocks Library

The “Import From Library” function on the Ideas Outline page allows users to access and use saved Block Structures from their Blocks Library as a part of their current Idea structure. The user can choose to either append the imported structure to the current idea structure or replace it.





# Calendar Integration

The Calendar Integration function allows StrategyBlocks users to keep track of the key dates of their blocks using their calendar client of choice. Clicking the "Generate Token Email" button on the Calendar Integration Page (found on the side menu via Your Settings -> Calendar) will send an email to the user containing calendar event links.



Generate Token Email

The user can select a link depending on their preferred calendar client and the browser will download the calendar invite(s) in the correct format. The calendar events created will be the key due dates for all the blocks assigned to the user.



# Setup Azure Single Sign On

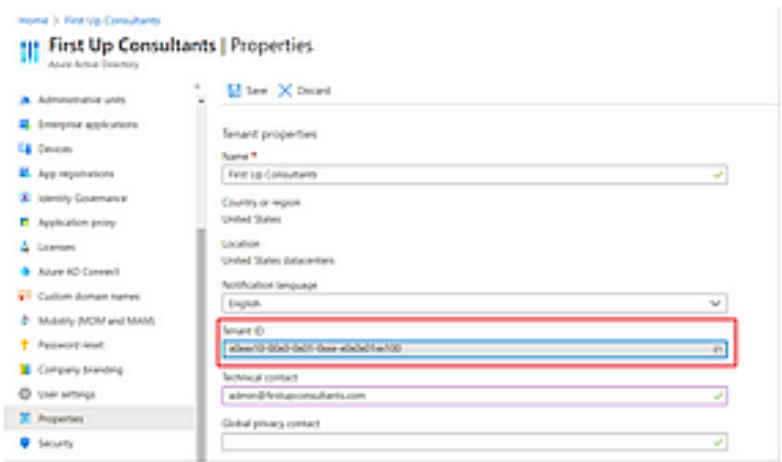
## About

To sign into StrategyBlocks using Azure AD SSO, organisations must add their Azure Tenant ID in Company Settings, and users must have their associated Azure Object IDs added to their user account within StrategyBlocks. This document is intended to show a user or administrator how to do this.

Note that when logging into StrategyBlocks using Azure AD SSO, you will only have access to those companies with the ObjectID/TenantID you have specified.

## Find Azure Tenant ID

The Azure Tenant ID is used to authenticate subscriptions for Azure products. To find your Azure Tenant ID, refer to the linked [microsoft documentation](#).



## Add Tenant ID in StrategyBlocks via Company Settings

In the left-hand navigation menu click "Company Settings" and then "Capabilities". Scroll down until you see the "Tenant ID for Azure Single Sign On" field and enter your Azure Tenant ID.

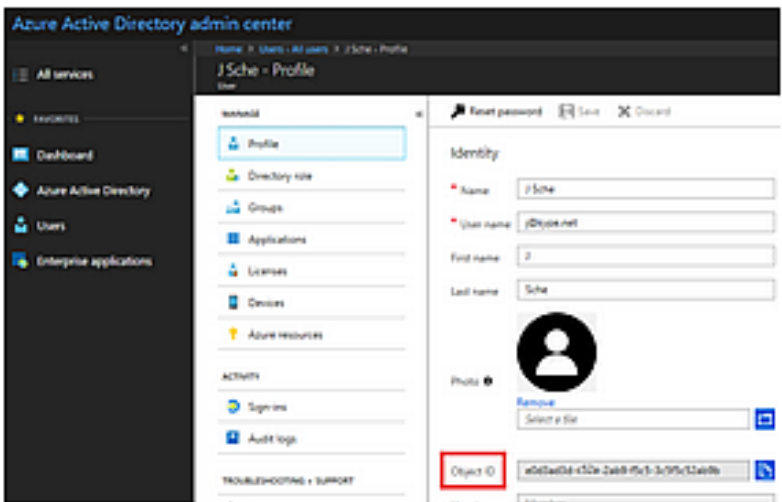


## Find User Object IDs

You can add Object IDs to users individually, or you can upload a users table provided by Azure AD to add the Object IDs to all users automatically.

To find an individual user's Object ID refer to the following [documentation](#).

The Azure Active Directory Portal allows you to download a spreadsheet (.csv) file of all your Azure users (including Object ID). To learn how to download the users spreadsheet refer to the linked following [documentation](#).



## Add User Object IDs in Strategy Blocks

In the left-hand navigation menu click "Company Settings" and then "Users" to view the User Table.

Above the table on the right side you will see a button labelled "Azure Set Up". Click on this button to open a pop-up menu.

From here you can either add the Object IDs to each user individually, or you can upload the user spreadsheet referenced in the previous section using the "Choose File" button found above the user list.

