

Getting Started with StrategyBlocks

Training Guide – StrategyBlocks 4.0

Section 6: Dashboards



- News
- Charts
- Custom
- Reports
- Bookmarks

6.1 News

- Dashboard
- Blocks
- Monitor

- News
- Charts
- Custom
- Reports

This section displays a newsfeed view of all updates to blocks, risks and metrics relevant to your strategy. Every new update is highlighted in blue

Recent Activity

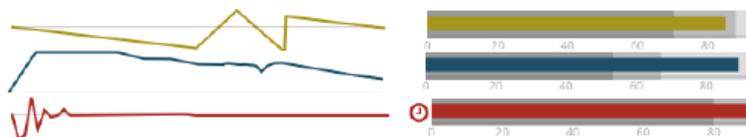
 Allen Keyte Updated progress on block: Fully leverage assets from 0% to 0%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	
 Allen Keyte Updated progress on block: Fully leverage assets from 0% to 8%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	
 Allen Keyte Updated progress on block: Fully leverage assets from 8% to 10%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	
 Allen Keyte Updated progress on block: Fully leverage assets from 10% to 14%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	
 Allen Keyte Updated progress on block: Fully leverage assets from 14% to 18%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	
 Allen Keyte Updated progress on block: Fully leverage assets from 18% to 18%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	
 Allen Keyte Updated progress on block: Fully leverage assets from 18% to 16%.	05/04/16 (15 hours ago)
<i>Parent: Operations management — Deadline: in a year — Current Status: 449 days remaining. 52% expected.</i>	

6.2 Charts

Blocks

This section displays all the 'blocks' of that chosen user, showcasing each blocks health and progress shown in milestone sequences. If you click on any 'block', it will direct you to the blocks tree, giving you a full view of your physical block. If you further hover your cursor over  icon, it will show you your health in terms of %

-  Customer Survey
-  Financial Control
-  Improving council performance



-11% Total Health Variance

-3% Block Progress Variance (Δ 2)

14% Total Metrics Variance (Δ 2)

14% Fixed Costs

-45% Total Risks Contribution (Δ 2)

-45% Failure to achieve joint outcome

-45% Income reduction

Blocks

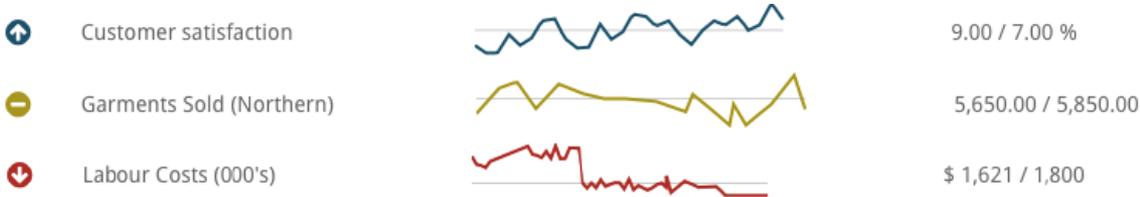
Clicking on the drop down arrow on the title allows you to view more of your blocks, metrics or risks



6.2 Charts

Metrics

This section displays all the metrics that the user owns showcasing how well that metric is doing

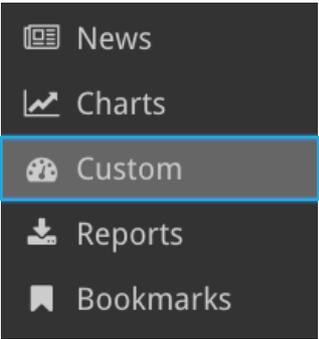


Risks

The sections next to each risk states the stage that each risk is currently at. For example, the risk Failure to achieve joint outcome has been triggered, therefore, the previously entered post-event response steps are displayed explaining the action required (optional) to set about mitigating that risk

	Technology infrastructure	No action required
	Failure to achieve joint outcome	1- Corporate Partnership Register

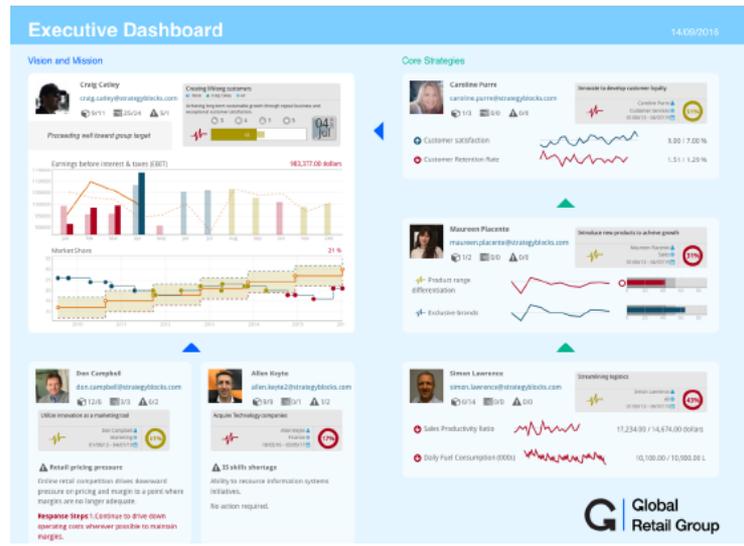
6.3 Custom



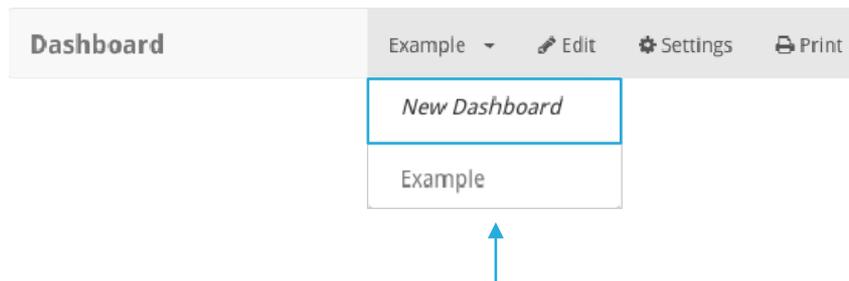
This section allows you to create a personal dashboard which displays live dashboard reports of your company's Blocks, Metrics and Risks that you or your company are interested in following

This feature also allows you to construct what you have created into a visually appealing report, presentation or handout

Example



6.3 Custom – Creating a Dashboard



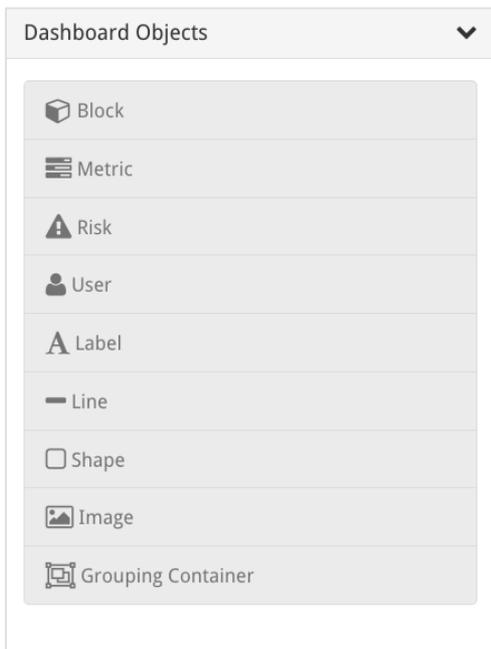
Clicking [New Dashboard](#) allows for a new dashboard to be created. Clicking save within your dashboard provides you with settings allowing you to name your dashboard as well as provide a description, screen type, size dimension of your dashboard as well as other additional features

To add Blocks, images...



Selecting this icon takes you to an options menu. If you select [Dashboard Objects](#), it will provide you with a number of features that you are able to add your new dashboard

6.3 Custom – Creating a Dashboard



If, for example, you would like to add a block onto your dashboard, click and drag the block tab onto your dashboard which will appear on your page as shown below

To choose which block you would like to appear click on the small pencil icon highlighted below. You will then be able to select what block you would like and how you want it to be displayed. Clicking save will show the block to appear onto your dashboard



6.3 Custom – Creating a Dashboard

Dashboard Block

Choose what view of the block you want to see in your report.

Block

View Type

Block Title

Show Description

No Yes

Delete Cancel Save

Preview

No block selected

The screen on the left is the screen you will be presented with once you select the pencil icon, allowing you to choose between any block within your strategy as well as how you would like it displayed

The icons highlighted below are to use when positioning objects so that they can be either displayed on top of another dashboard object or hidden behind

Dashboard

New Dashboard Cancel Save

Fully leverage assets

Block ▲ Asset Keys ▲ Finance

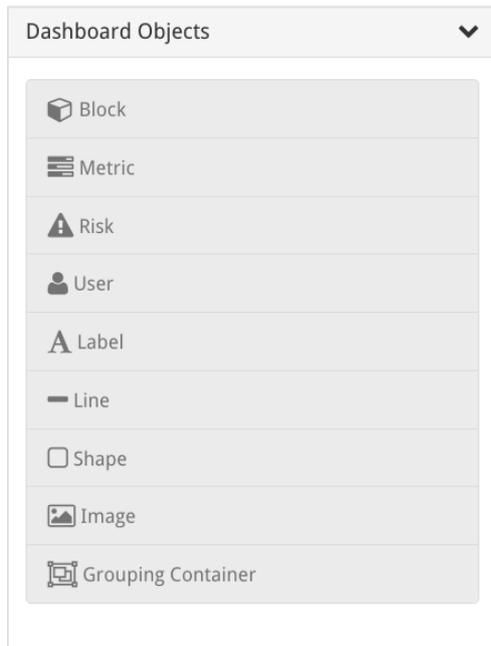
Protect our investment and optimise the use of assets.

14 2 1 5 28 Sep

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6.3 Custom – Creating a Dashboard

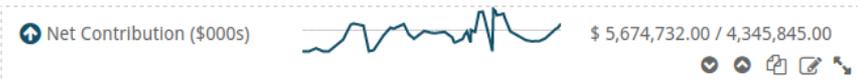


Similar to the method in adding a block, adding metrics, risks and user(s) follow a very similar method, the only difference being that you will select the metric, risk or user you would like displayed

To delete or change a dashboard object that has already appeared on your dashboard, simply click the pencil icon that you had previously used to select your original object and click the delete button

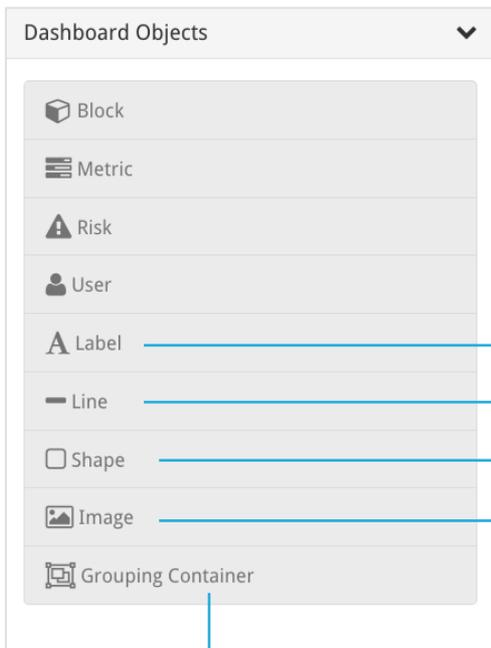
The icon highlighted below allows you to duplicate any object such as blocks or metrics

Example of a Metric



6.3 Custom – Creating a Dashboard

The last features including label, line, shape, image and grouping container are all additional design features, allowing you to build a visually appealing dashboard



Allows you to create titles that can be changed to the font size, color and style that best suits your layout

This design feature allows you to create lines that can be created to align in a variety of directions along with choosing color, thickness, type and transparency

Similar to the line feature, the shape feature allows you to create shapes of different colors, sizes, style, thickness and transparency

This feature allows you to upload images to use within your dashboard

A square will be created allowing you to drag objects into it. Once saved, you can drag the container around the dashboard helping you to organize groups of widgets

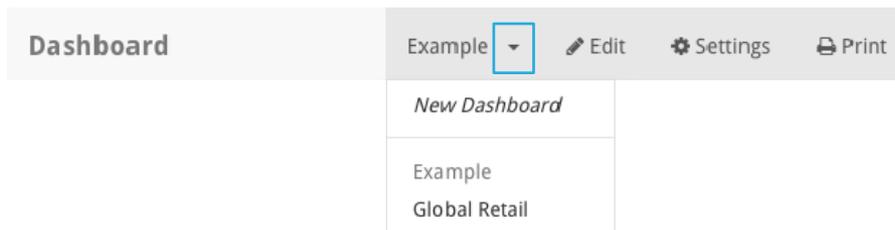
6.3 Custom – Creating a Dashboard

The screenshot shows a dashboard editor interface. At the top, there is a header bar with the text "Dashboard" on the left, a dropdown menu "Dashboard - example" in the center, and "Cancel" and "Save" buttons on the right. Below the header, the dashboard content is displayed. On the left, there is a large image of the Christchurch Opera House. On the right, there is a logo for "Global Retail Group" with a stylized "G" and several small icons below it. Below the image and logo, there is a user card for "Director" with a profile picture of Craig Catley, his name, email address "craig.catley@strategyblocks.com", and some statistics: "37/40", "25/24", and "5/1". The user card is highlighted with a dashed border. Labels "Image", "Label", and "User" are connected to the image, the "Director" text, and the user card respectively. Labels "Line" and "Shape" are connected to the top and bottom borders of the user card. At the bottom of the dashboard, there are "Add Page" and "Delete Page" buttons.

6.3 Custom – Other Dashboard Options

Switch between custom dashboards

You can switch between your created custom dashboards by clicking on the drop down arrow above and selecting between your different dashboards or can create a new dashboard



Print custom dashboard

Print your custom dashboard by clicking the Print button which downloads your dashboard as a printable PDF document



6.4 Reports

Reports

You can email or download 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.

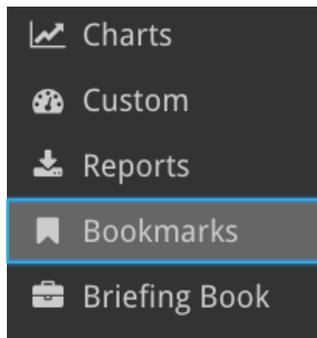
If you don't own any objects, these options will be disabled.

	Report Type		Formats
My Blocks	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	JPEG	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
My Metrics	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	PDF	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
My Risks	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	CSV	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
Closed Blocks	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	HTML	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes

 Send

The report will be sent to the email that you input under [Your Settings > Account](#). You are welcome to change this email at any point if you wanted to send a particular report to a certain email. To send a report, select an available report type then choose the format that you wish that report to be formatted within

6.5 Bookmarks



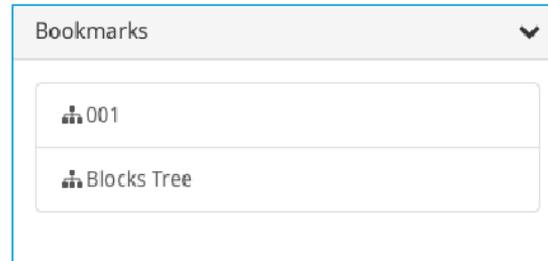
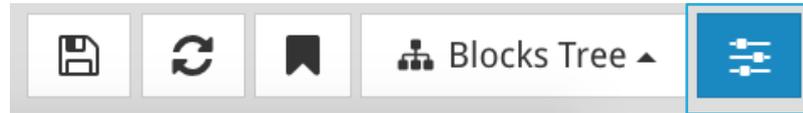
This feature allows you to capture any page within your strategy that you wish to go back to later

Firstly click the bookmark icon highlighted below. A screen asking you to name the bookmark will appear. Remember, you must name it otherwise it will not save your bookmark

The screenshot shows the StrategyBlocks interface. On the left is a navigation sidebar with a 'Bookmarks' icon highlighted. The main content area displays a strategy page titled 'Creating lifelong customers' for 'Global Retail Group'. The page is divided into sections: 'Vision & Mission', 'Goals', and 'Utilize innovation as a marketing tool'. A 'Bookmarks' dialog box is open, prompting the user to 'Give your bookmark name:' with the text 'Blocks Tree' entered. A blue callout box with an arrow points to the bookmark icon in the bottom right corner of the page, with the text 'To Bookmark a page'.

6.5 Bookmarks

To refer back to your previously saved bookmark anywhere in your strategy, click on the icon highlight below and select bookmarks. All the bookmarks that you have saved within your strategy will appear under this tab



To access your bookmarks directly in order to edit the title, description or to delete the bookmark, refer back to your bookmark tab under dashboard



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