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

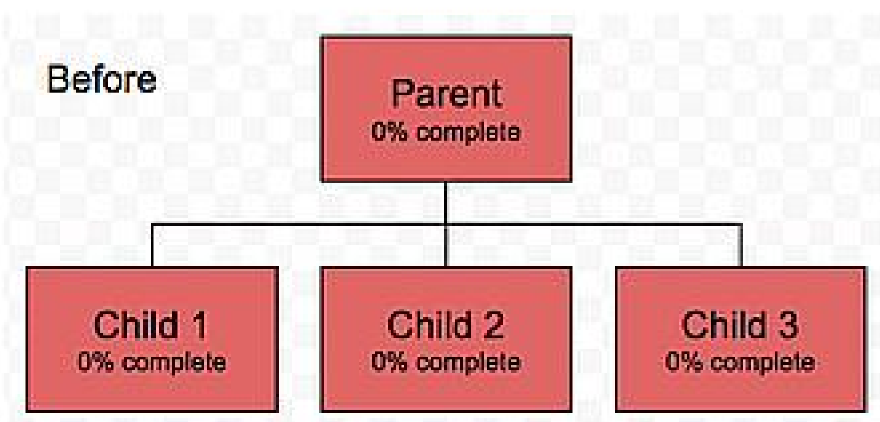
The **block functions** available to you depend on your level of **permission**. The table below outlines the different **permissions** a **user** can have relative to a **block**.

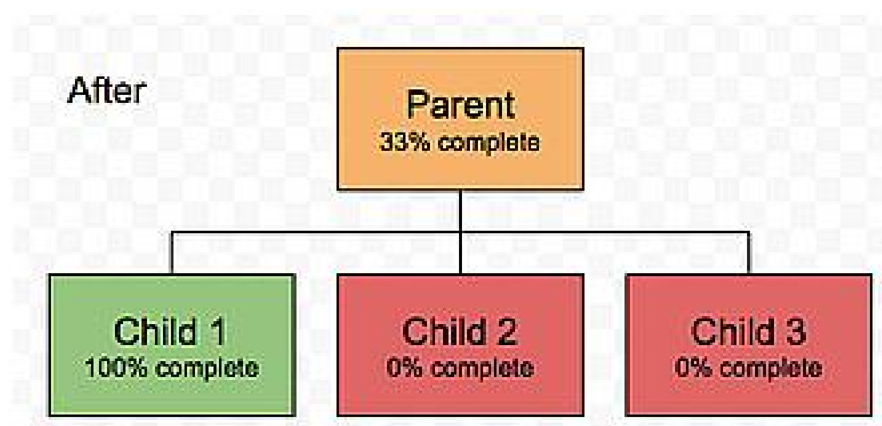
Note that the adjustable company setting *Block Owner Can Manage* allows Owners the ability to edit blocks. Read more on these capabilities.

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.

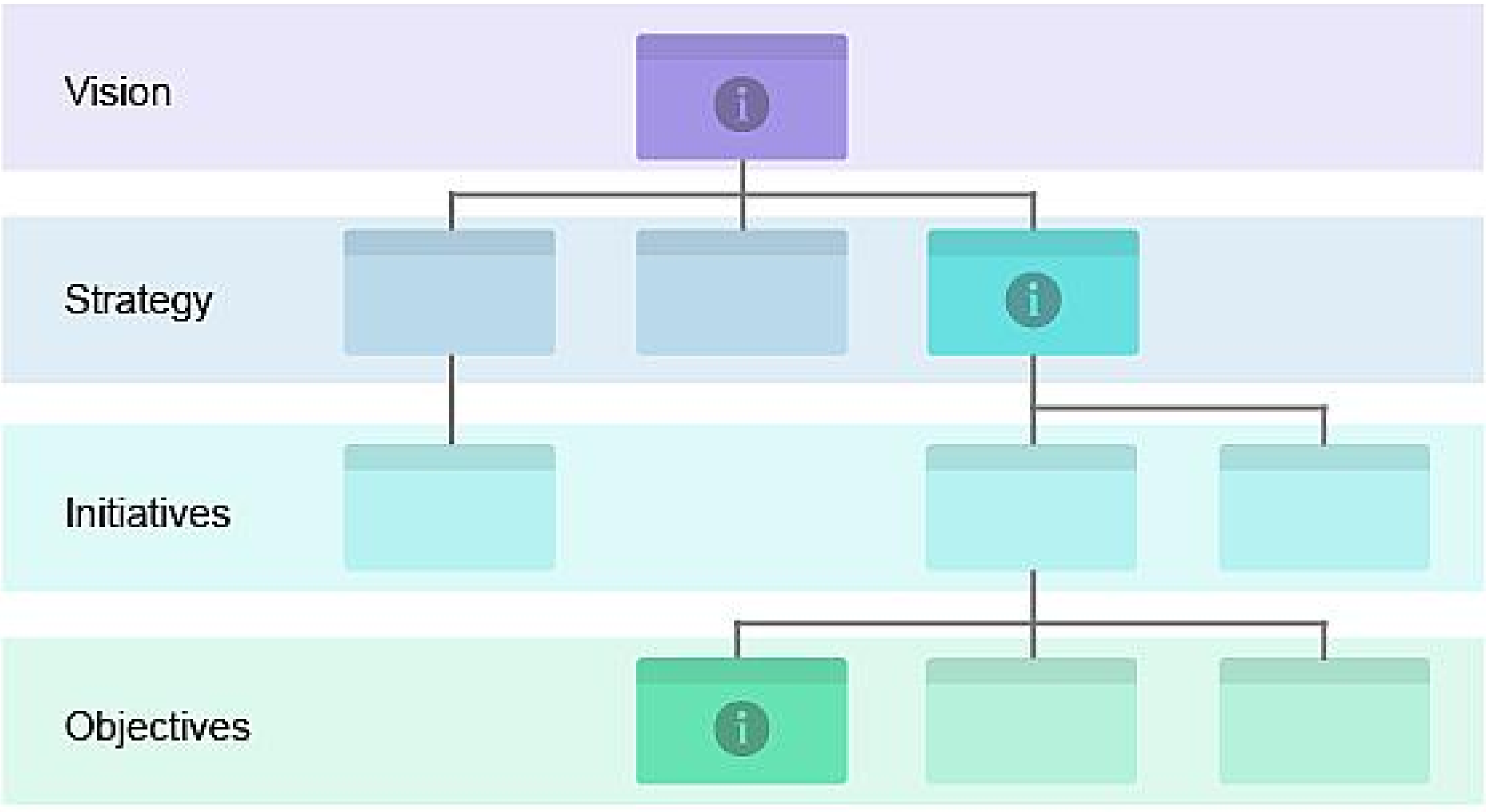
The Personal Charts view provides a complete overview of each users strategic activity regarding their owned and managed blocks. Blocks, Metrics, and Risks are also displayed, showcasing the health and progress shown in milestone sequences and the different stages of each risk.

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.

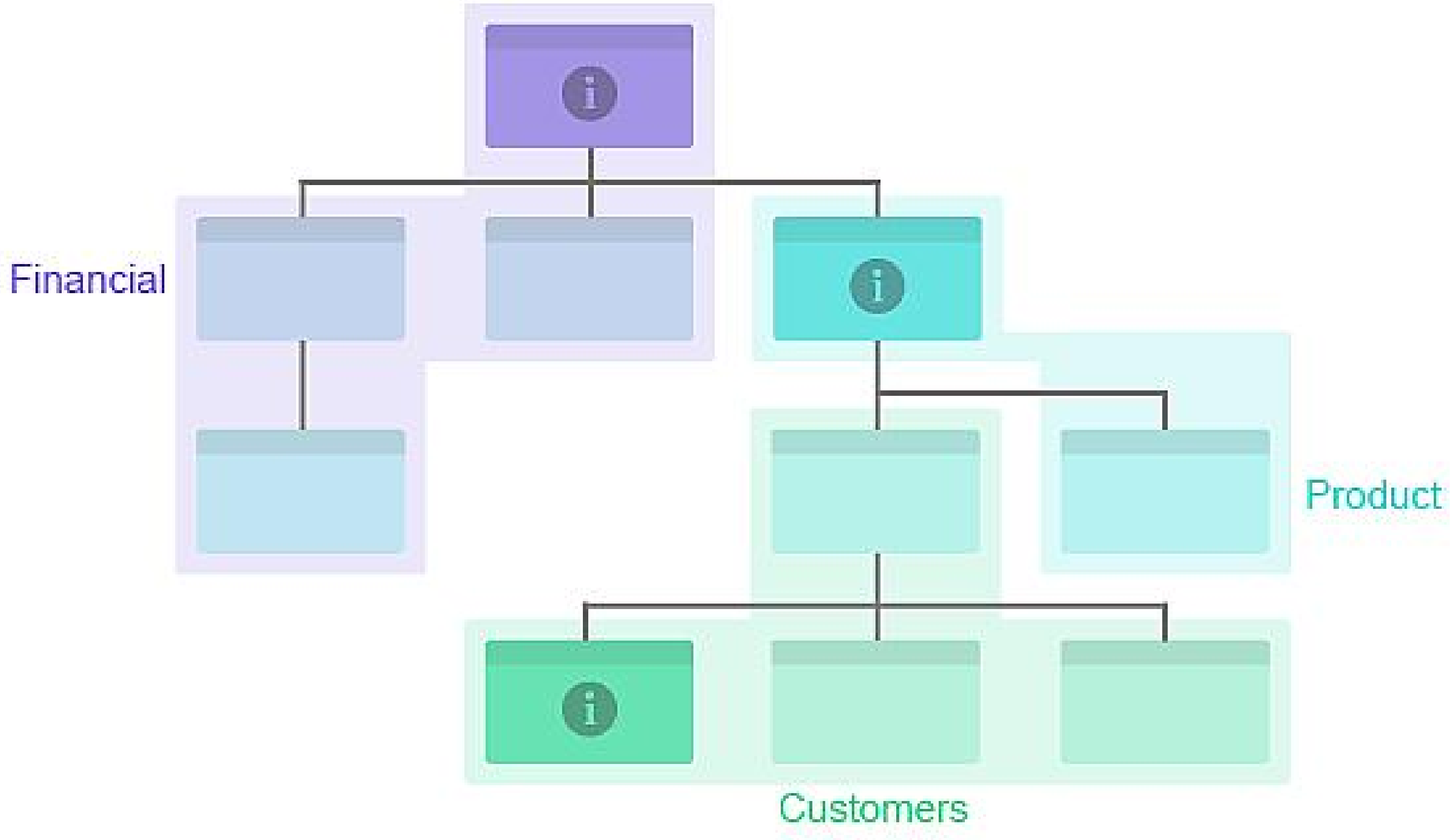
Block structure

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.

Untitled-5-01 Untitled-5-02

Basic navigation

Left-hand Menu – StrategyBlocks' Main Navigation Tool

The **left-hand menu** provides links to navigate through the features in StrategyBlocks. You can hide or display this menu at any time by clicking , located at the top left corner of your screen.

- **Dashboard** provides views of recent activity on your blocks, as well as a customisable area to show the things you want to see most often.
- **Blocks** is where you can view and edit your blocks, update their progress, and choose how you want to display them.
- **Monitor** allows you to see your risks, metrics and documents, in easy to read format. You can add new items, or customise the columns you see.
- **Account** allows you to view and edit your account details (change your profile picture email address, etc).
- **Settings** view (users) or edit (administrators) user and company settings.
- **Help** gives you access to help materials.
- **Search** gives a keyword search, across all items in StrategyBlocks.
- **Username,** clicking here gives the user the option of logging out or saving a session. Saving a session will keep the user logged in for 14 days.
- **Organisation name,** clicking here allows you to switch between organisations or parts of an organisation that have a different strategy tree.

Context Menus – Page-specific display and options

Control Bar: this bar at the bottom of the main display offers page-specific display and navigation options. This is also where you can quickly bookmark a page by clicking the icon.

Options Menu: toolbox options off to the right-hand side. The options available in this menu will change depending on which page you're on. To start learning about the **Options Menu** checkout our **Standard Options** documentation.

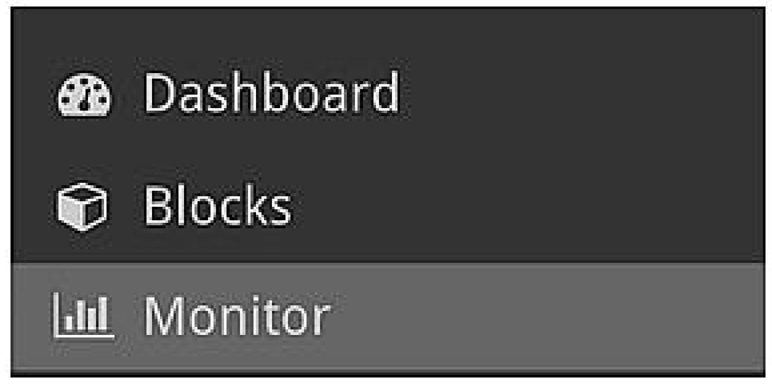
Metrics Table

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

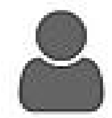
The **Metrics Table** displays all the metrics you've created. It is found through the Monitor tab on the Left-Hand Menu.

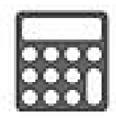


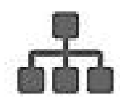
Create a new metric

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.





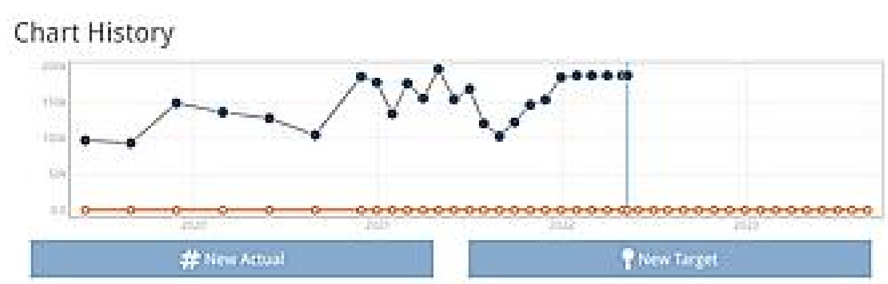


Note: metrics can be entered for blocks on any level, not just the leaves, but only cascading metrics reflect the data for that block.

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.

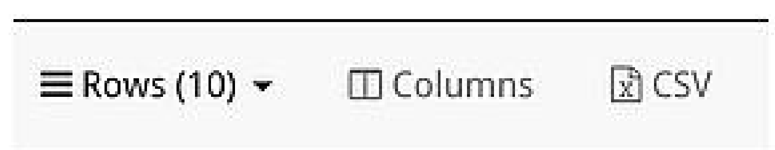


Top Bar Options

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.

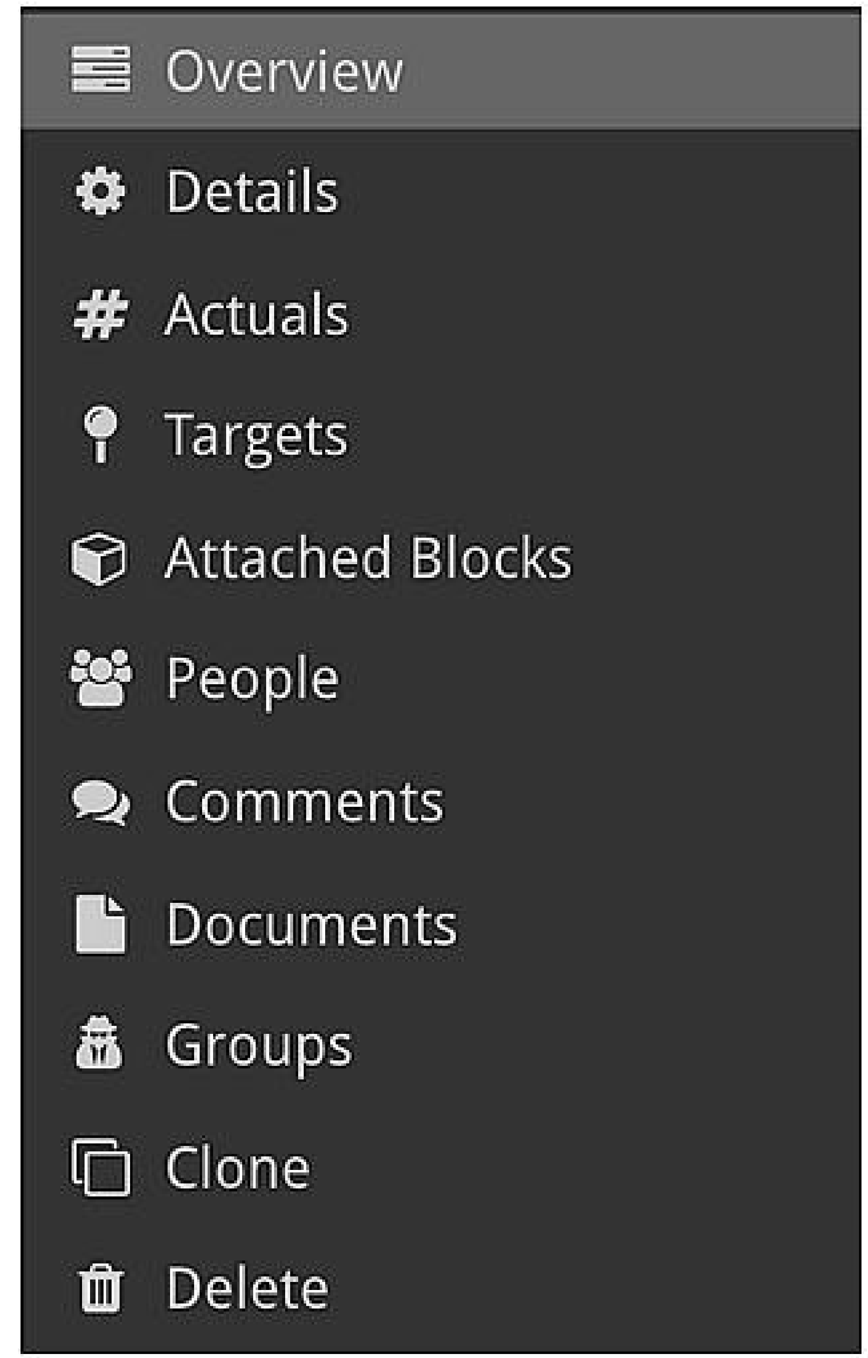


Metrics Side Menu

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.

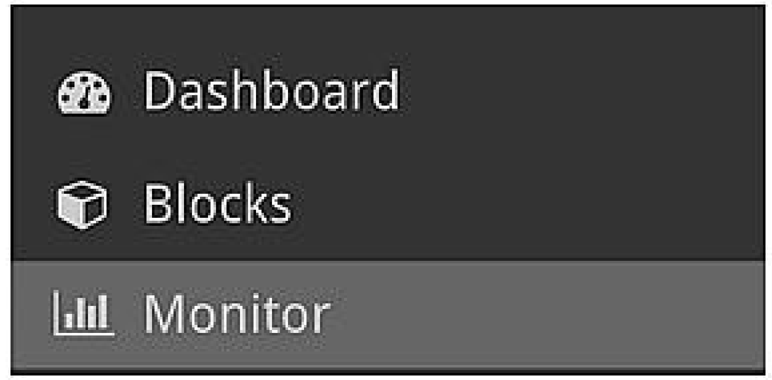
- **Overview** – provides an overview of the metric, including a chart of its' history and a table of all the entries.
- **Details** – edit the key details of the metric, such as title, description, tolerance ranges, ownership, type and more.
- **Actuals** – allows you to edit the "actual" calculation 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.



Risks Table

Where to find

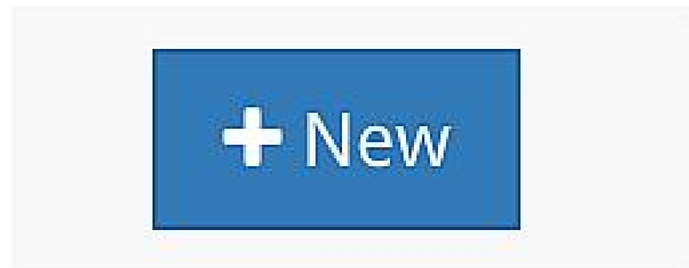
The **Risk Table** displays all the risks to your strategy you've identified. It is found through the Monitor tab on the Left-Hand Menu.



Add a New Risk

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.



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.

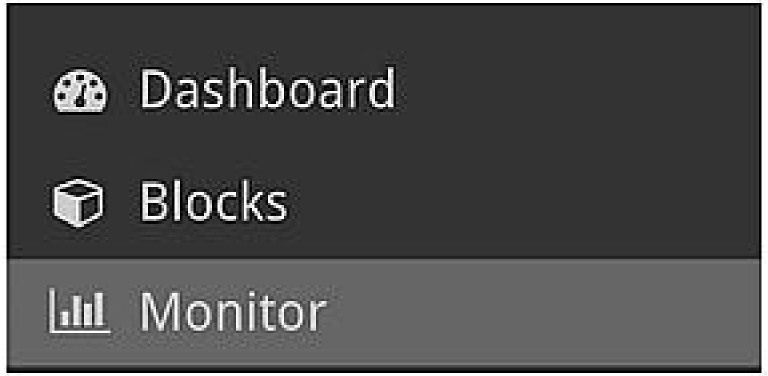
The **CSV** button allows you to download the risk table to computer as a CSV file which you can then enter into excel, google sheets or your spreadsheet application of choice.

Documents Table

Where to find

The **Documents Table** displays all the documents attached to blocks, risks and metrics. It is found through the Monitor tab on the Left-Hand Menu.

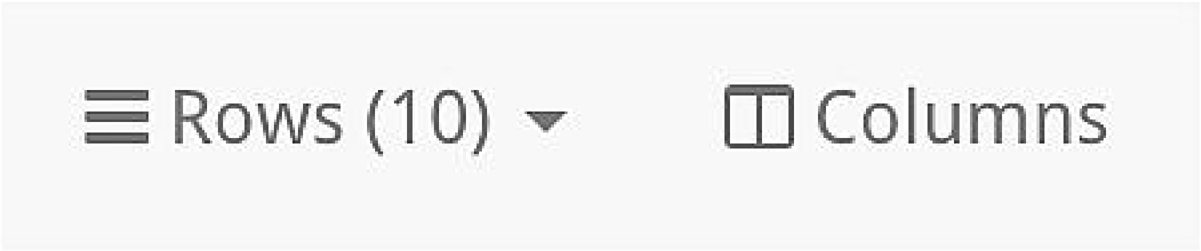
You can **click on the column headers to sort** by type, title user, last modified, etc. **Click on a document** to navigate to its' Documents page on its' related block.



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.

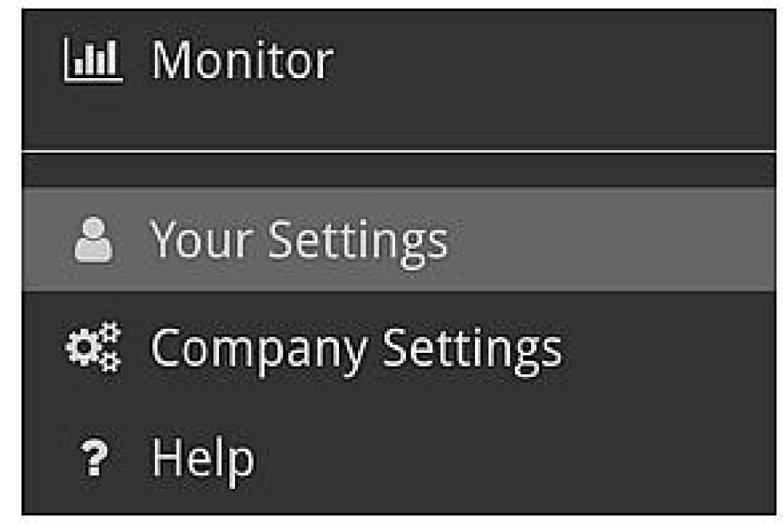


Your Settings

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

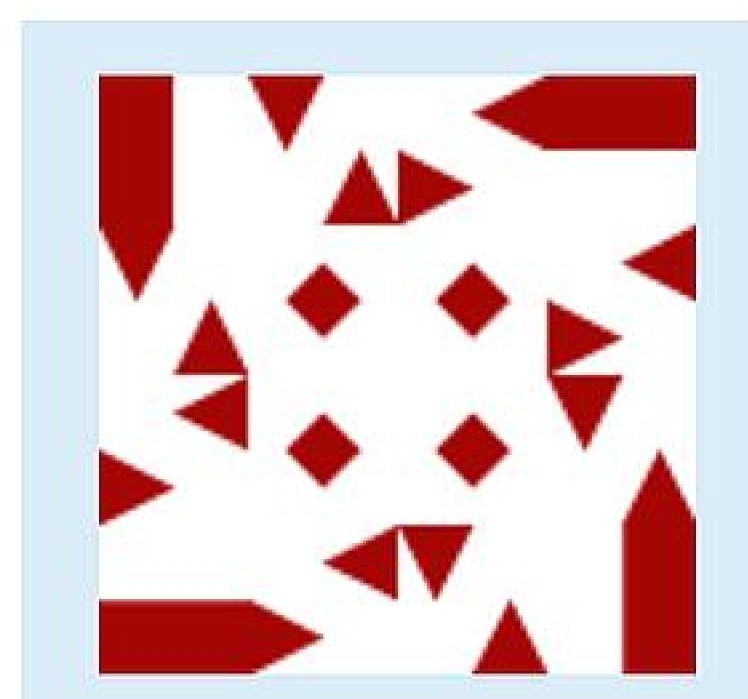
The Account Settings page allows you to edit the following fields associated with your account:

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

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

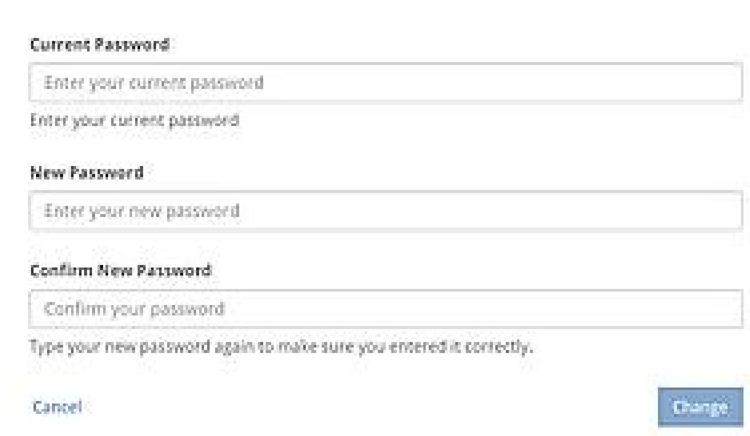
Account Picture

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.

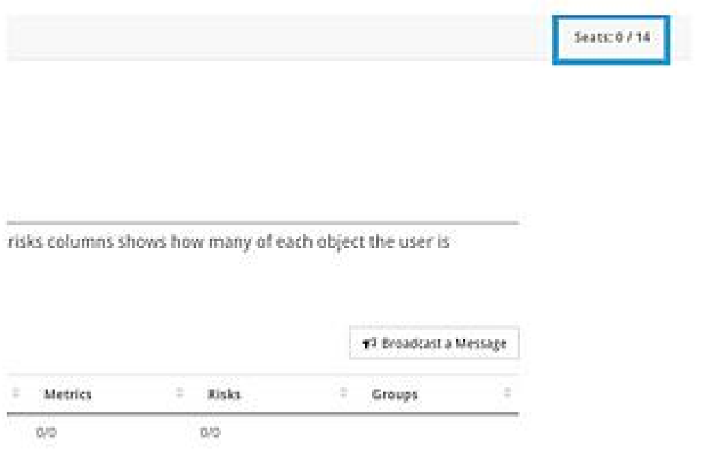
Login History

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.

User Management

In the top right hand corner of the screen is a number of unused subscriptions and the total of all subscriptions purchased.

The users table shows all users that have been created, only users made **Active** will draw down on the total available subscriptions.



The user table

The number of users listed in the table can be controlled from the **Rows** control on the ribbon at the top of the screen, and the **Columns** selector can be used to modify the contents of the user table.

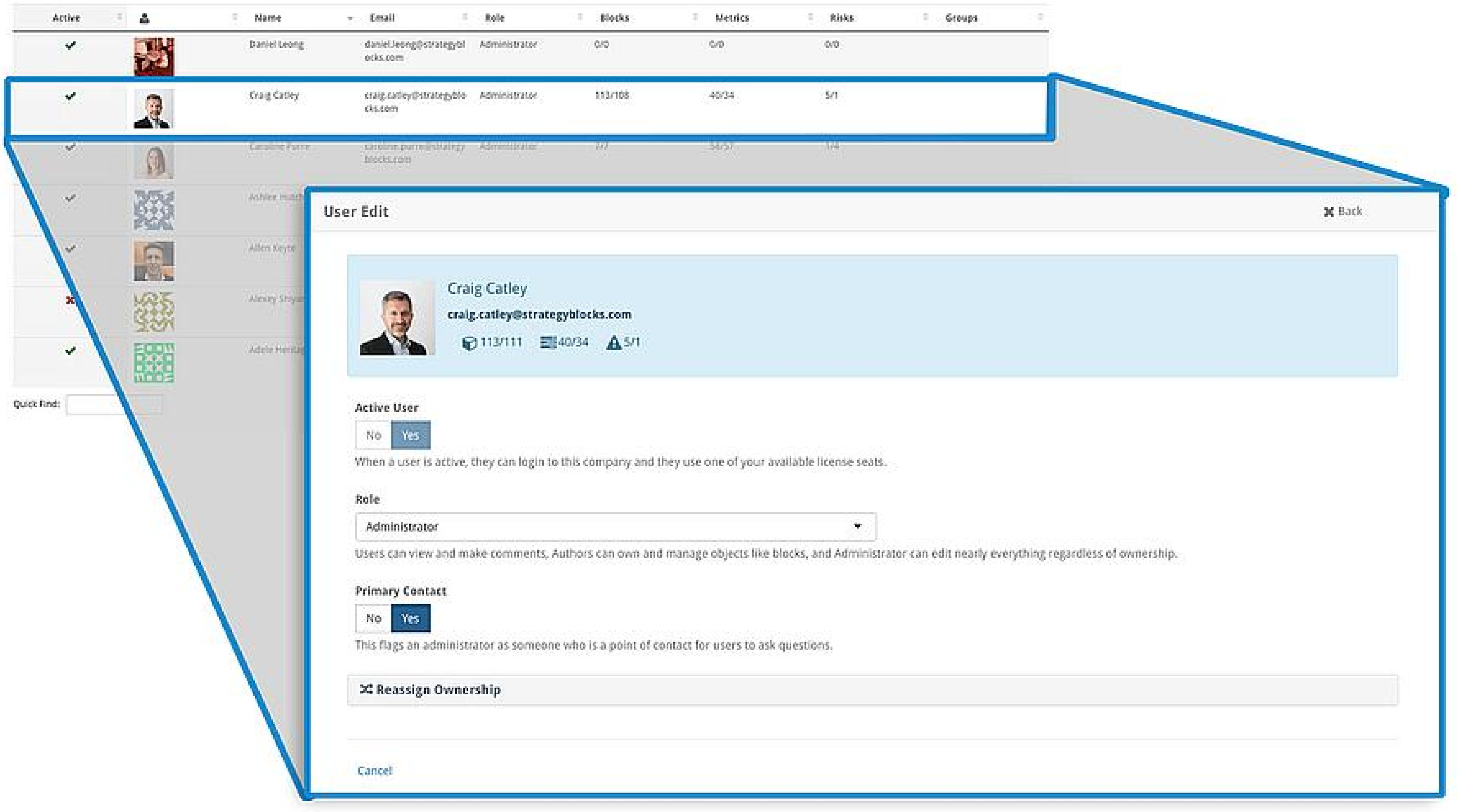
The table offers a search facility to locate a specific user, and page control to browse entries The columns available to be displayed are:

- **Active** – whether that user is **Active** or **Inactive**
- **Profile Picture** – the user's chosen avatar
- **Name** – first and last names
- **Email** – the email address and username for login access
- **Role** – which role (administrator, author or user) the user has within the model
- **Blocks** – a count of blocks owned / blocks managed
- **Metrics** – a count of metrics owned / metrics managed
- **Risks** – a count of risks owned / risks managed
- **Groups** – a list of all security groups that user is a member of

The **Add Users** button provides the ability to create a new user(s). Enter the first, last, and email address for each user you want to add. Use **Add Row** to add extra rows to the form. Select **Create Users** to save. Once saved users will automatically receive a welcome email and an email which will include their password.

User Edit

Selecting a user from the table will allow an Administrator to deactivate the user, alter their role and assign a user(s) as the internal primary contact. A Primary Contact is an administrator who will receive notifications from StrategyBlocks and act as an internal contact for users.



User Roles

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

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.

Broadcast Message

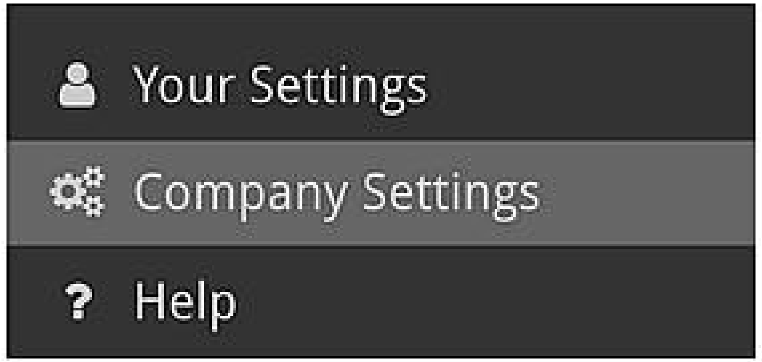
A **Broadcast Message** can be used to send an email message to the selected users (or user). If you select the **Owners** option for any of the object types, this message will be sent to the owners of those objects. If you select the **Managers** option, a message will be sent to all the managers of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

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

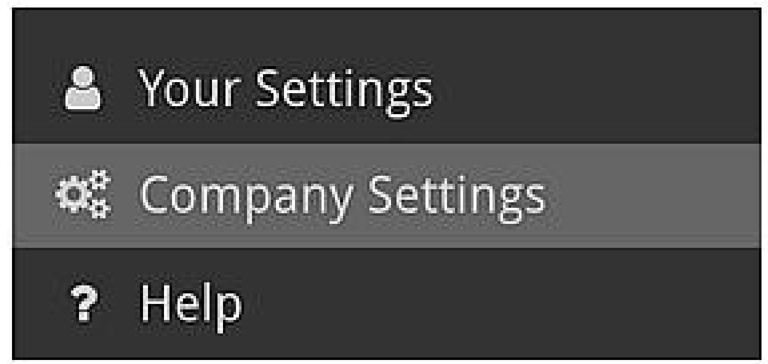
Focus Areas group objects (blocks, metrics or risks) together, they form **broad strategic categories**. These areas of focus don't specifically describe what the organisation intends to do; they are not "how" statements. Instead they are more useful when thought of as **classifications** (department, 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).

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.

Edit Level

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

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.

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).

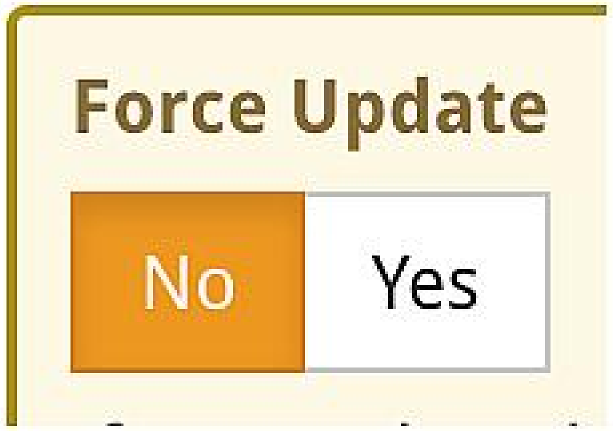
This will take you to a new page where you will fill in the details of the new custom field:

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).



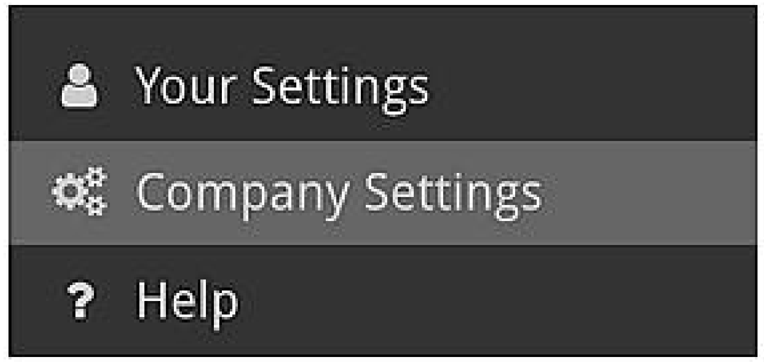
Milestone Definitions

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).

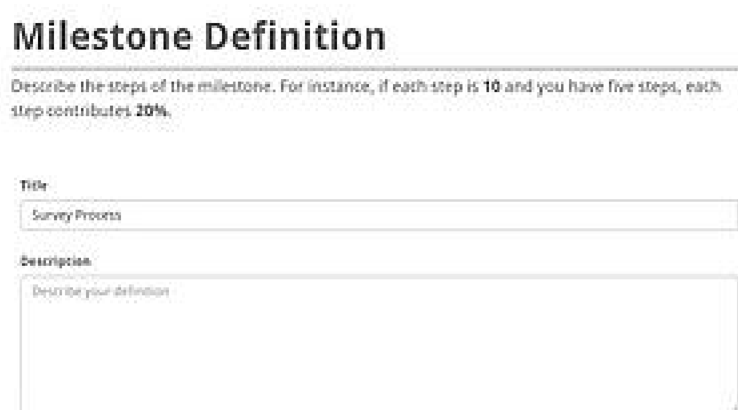
This will take you to a new page where you will fill in the details of the new milestone, and the steps making it up.

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.



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.
- **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)** – Enable the metrics feature.
- **Risk** – Enable the Risks 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.

ent

ns risk management profile is primarily managed within the risk matrix. The matrix itself can be comprised e risk profile matrix can be customised: each cell can be selected and edited individually (as either normal, with risk matrices, you can watch a brief video explaining the basics here.

d using the **Risk Block Face**. Follow this link to learn more about Block Faces.

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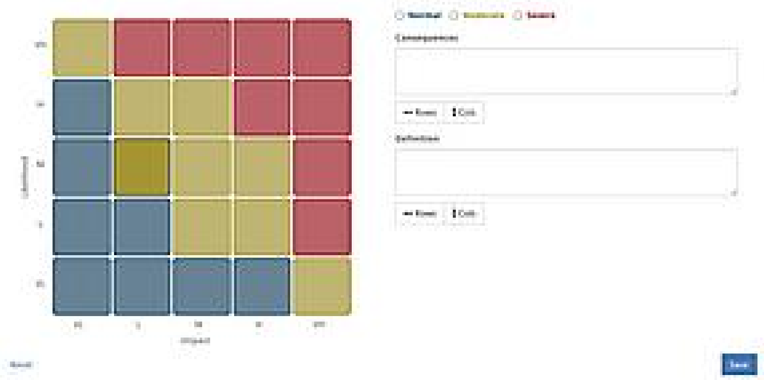
e selected and edited
nave any affect on the risk,
your company. For each
uences for that combination



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impact/ likelihood levels can
This also enables and
ontribution of each impact
sk is in "triggered" state).
nange the size of the risk

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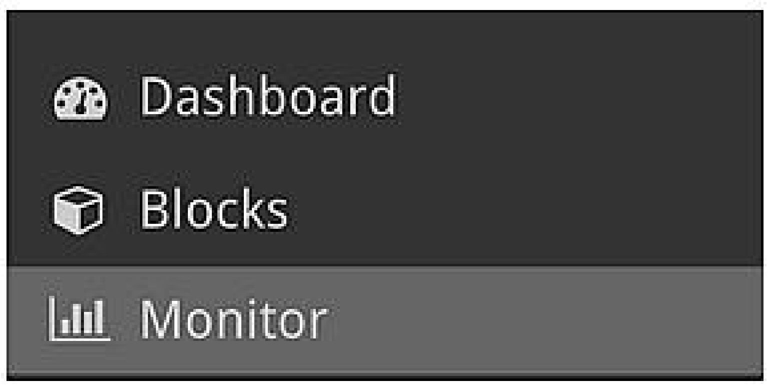
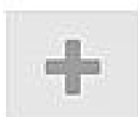
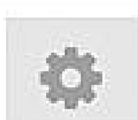
to create a new risk,



On Block Options

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

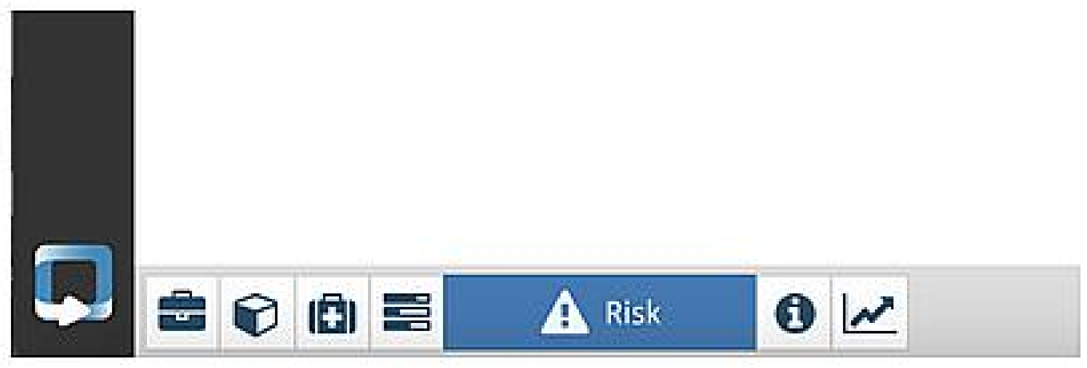
When a block is selected, a row of action buttons is displayed (shown in the image on the right). The table below describes what each of these options do.

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
edit	Edit – allows you to quick edit the following details: • Title • Description • owner, • focus area • start/end dates

Block Faces

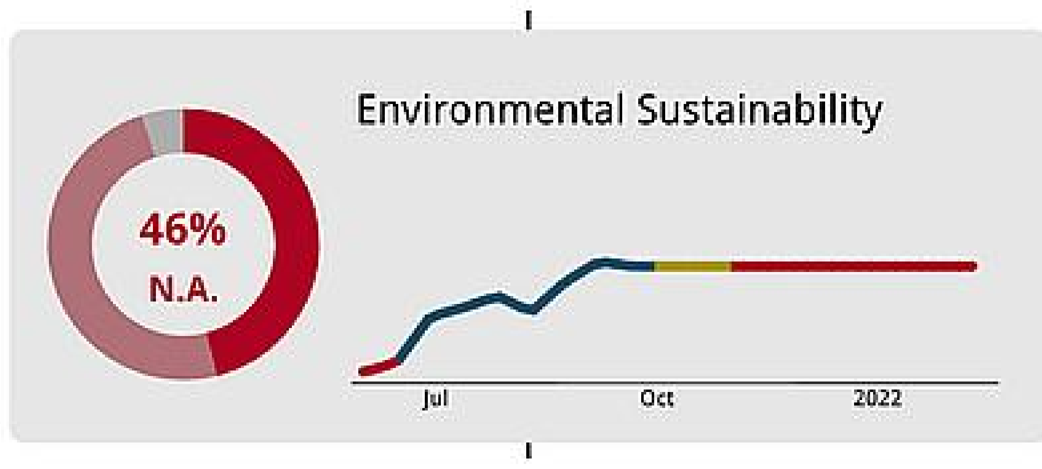
About

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.



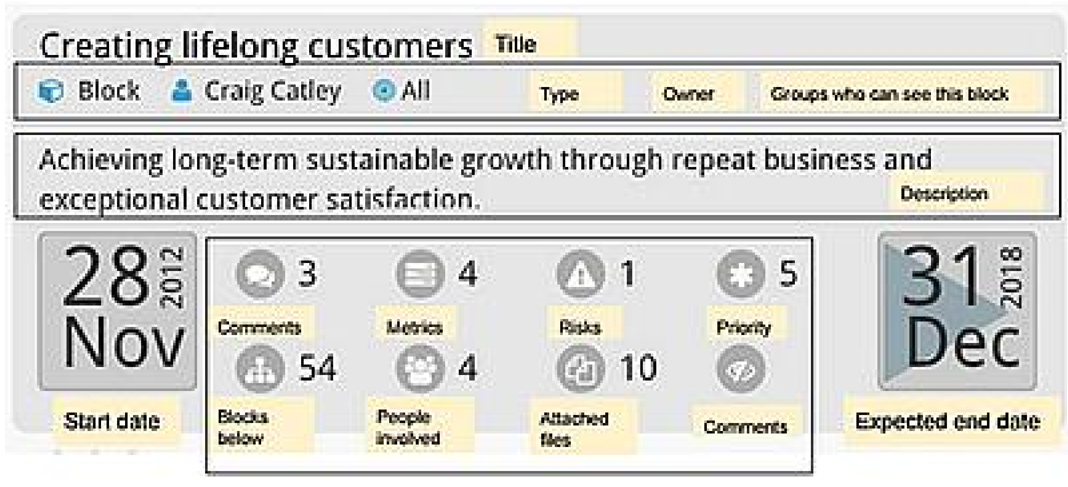
Delivery

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.

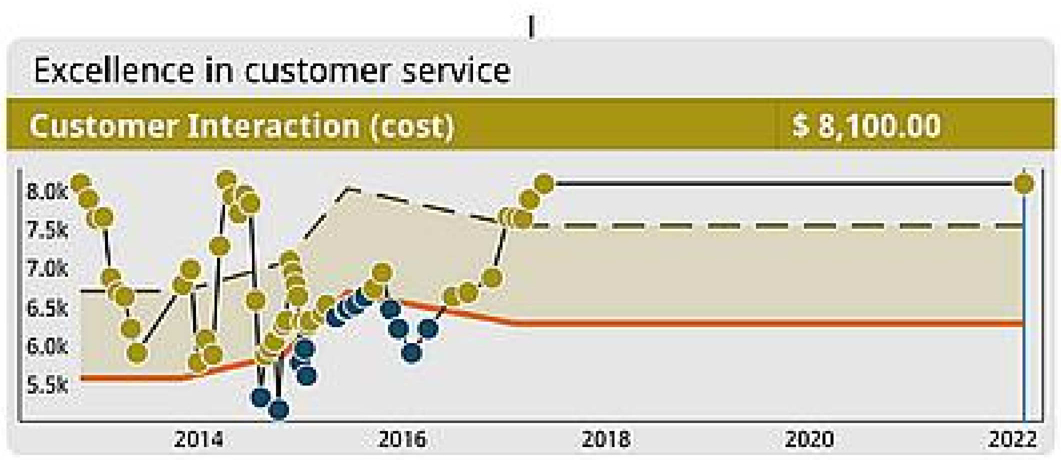


Health

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.

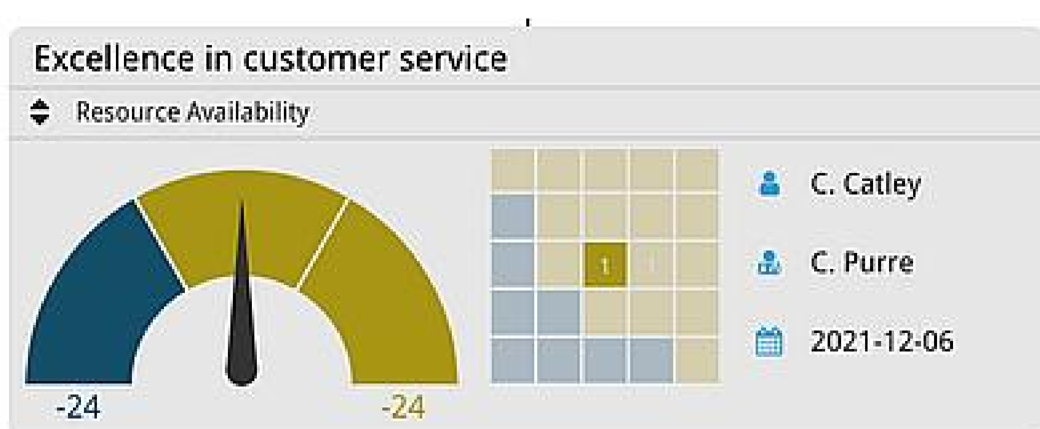
Metrics

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.

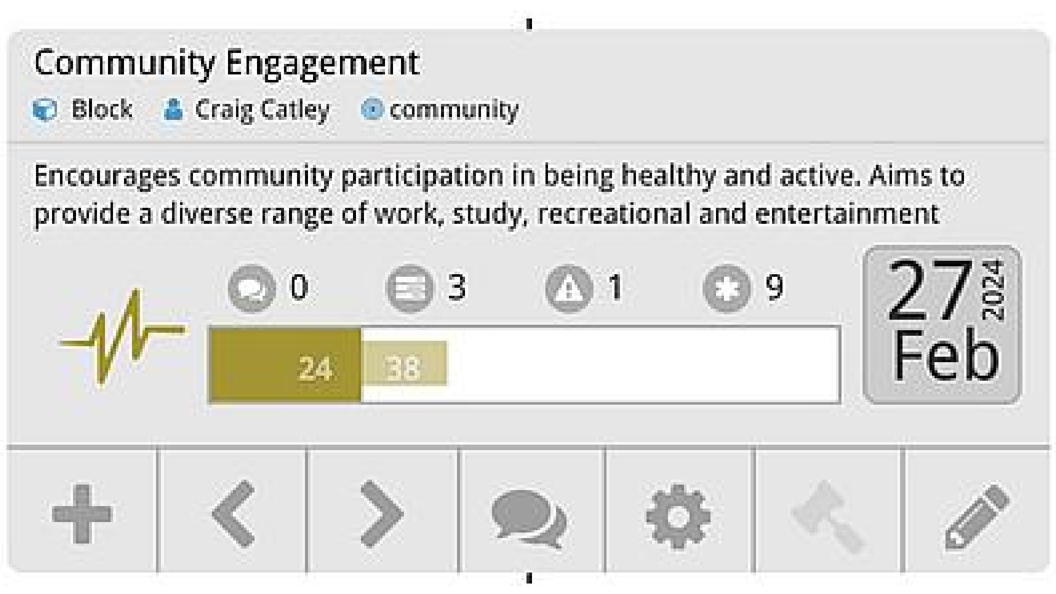


Overview

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.