



Strategy Blocks

Training Guides

Administration

1.0 | Agenda

1
Users

2
Company

3
Groups

4
Focus Areas

5
Levels

6
Health

7
Custom Fields

8
Milestones

9
Capabilities

10
Risk

11
Multiple Models

1.0

Users

Users

Show the list of users in your company. When a user is active, they are able to log into StrategyBlocks. The blocks / metrics / risks columns shows how many of each object the user is responsible for (Owner / Manager).

If you have run out of seats you can still add users, but they will not be active.

[Add Users](#) [Broadcast a Message](#)

Active	Name	Email	Role	Blocks	Metrics	Risks	Groups
✓	Simon Lawrence	simon.lawrence@strategyblocks.com	Administrator	6/13	0/0	0/0	
✓	Shajitha Parveen	shajitha.parveen@cdp.co.nz	Administrator	0/0	0/0	0/0	
✓	Rebecca Utting	rebecca.utting@strategyblocks.com	Author	0/0	0/0	0/0	
✓	Paul Gillespie	paul.gillespie@cdp.co.nz	Author	1/0	0/0	0/0	
✗	Maureen Placente	maureen.placente@strategyblocks.com	Author	0/0	0/0	0/0	
✗	Jonathan Moulds	jonathan.moulds@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓	Jason Blockley	jason.blockley@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓	Glenn Murphy	glenn.murphy@strategyblocks.com	Administrator	8/6	2/3	4/2	
✓	Don Campbell	don.campbell@strategyblocks.com	Administrator	14/8	3/8	0/2	
✓	Darren Beauchamp	darren.beauchamp@mero.co.nz	Administrator	0/0	0/0	0/0	

Quick Find:

Previous **1** 2 Next

User Management

Company Settings > Users

In the top right-hand corner of the screen is a count of active users 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.

Users

Seats: 0 / 14











Rows (10) Columns

Users

Show the list of users in your company. When a user is active, they are able to log into StrategyBlocks. The blocks / metrics / risks columns shows how many of each object the user is responsible for (Owner / Manager).

If you have run out of seats you can still add users, but they will not be active.

[Add Users](#) [Broadcast a Message](#)

Active		Name	Email	Role	Blocks	Metrics	Risks	Groups
✓		Simon Lawrence	simon.lawrence@strategyblocks.com	Administrator	6/13	0/0	0/0	
✓		Shajitha Parveen	shajitha.parveen@cdp.co.nz	Administrator	0/0	0/0	0/0	
✓		Rebecca Utting	rebecca.utting@strategyblocks.com	Author	0/0	0/0	0/0	
✓		Paul Gillespie	paul.gillespie@cdp.co.nz	Author	1/0	0/0	0/0	
✗		Maureen Placente	maureen.placente@strategyblocks.com	Author	0/0	0/0	0/0	
✗		Jonathan Moulds	jonathan.moulds@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓		Jason Blockley	jason.blockley@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓		Glenn Murphy	glenn.murphy@strategyblocks.com	Administrator	8/6	2/3	4/2	
✓		Don Campbell	don.campbell@strategyblocks.com	Administrator	14/8	3/8	0/2	
✓		Darren Beauchamp	darren.beauchamp@metro.co.nz	Administrator	0/0	0/0	0/0	

Quick Find:

Previous 1 2 Next

The User Table

Company Settings > Users

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.

Users

Show the list of users in your company. When a user is active, they are able to log into StrategyBlocks. The blocks / metrics / risks columns shows how many of each object the user is responsible for (Owner / Manager).

If you have run out of seats you can still add users, but they will not be active.

[Add Users](#) [Broadcast a Message](#)

Active	Profile Picture	Name	Email	Role	Blocks	Metrics	Risks	Groups
✓		Simon Lawrence	simon.lawrence@strategyblocks.com	Administrator	6/13	0/0	0/0	
✓		Shajitha Parveen	shajitha.parveen@cdp.co.nz	Administrator	0/0	0/0	0/0	
✓		Rebecca Utting	rebecca.utting@strategyblocks.com	Author	0/0	0/0	0/0	
✓		Paul Gillespie	paul.gillespie@cdp.co.nz	Author	1/0	0/0	0/0	
✗		Maureen Placente	maureen.placente@strategyblocks.com	Author	0/0	0/0	0/0	
✗		Jonathan Moulds	jonathan.moulds@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓		Jason Blockley	jason.blockley@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓		Glenn Murphy	glenn.murphy@strategyblocks.com	Administrator	8/6	2/3	4/2	
✓		Don Campbell	don.campbell@strategyblocks.com	Administrator	14/8	3/8	0/2	
✓		Darren Beauchamp	darren.beauchamp@mero.co.nz	Administrator	0/0	0/0	0/0	

Bulk Find:

Previous **1** 2 Next

The User Table

Company Settings > Users

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 table offers a **Quick Find** facility to locate a specific user, and page control to browse entries.

1.0

Users

Users

Show the list of users in your company. When a user is active, they are able to log into StrategyBlocks. The blocks / metrics / risks columns shows how many of each object the user is responsible for (Owner / Manager).

If you have run out of seats you can still add users, but they will not be active.

[Add Users](#) [Broadcast a Message](#)

Active	Name	Email	Role	Blocks	Metrics	Risks	Groups
✓	Simon Lawrence	simon.lawrence@strategyblocks.com	Administrator	6/13	0/0	0/0	
✓	Shajitha Parveen	shajitha.parveen@cdp.co.nz	Administrator	0/0	0/0	0/0	
✓	Rebecca Utting	rebecca.utting@strategyblocks.com	Author	0/0	0/0	0/0	
✓	Paul Gillespie	paul.gillespie@cdp.co.nz	Author	1/0	0/0	0/0	
✗	Maureen Placente	maureen.placente@strategyblocks.com	Author	0/0	0/0	0/0	
✗	Jonathan Moulds	jonathan.moulds@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓	Jason Blockley	jason.blockley@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓	Glenn Murphy	glenn.murphy@strategyblocks.com	Administrator	8/6	2/3	4/2	
✓	Don Campbell	don.campbell@strategyblocks.com	Administrator	14/8	3/8	0/2	
✓	Darren Beauchamp	darren.beauchamp@mero.co.nz	Administrator	0/0	0/0	0/0	

Quick Find:

Previous **1** 2 Next

The User Table

Company Settings > Users

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.

1.0

Users

Active	Name	Email	Role	Blocks	Metrics	Risks	Groups
<input checked="" type="checkbox"/>	Daniel Leong	daniel.leong@strategyblocks.com	Administrator	0/0	0/0	0/0	
<input checked="" type="checkbox"/>	Craig Catley	craig.catley@strategyblocks.com	Administrator	113/108	40/34	5/1	
<input checked="" type="checkbox"/>	Caroline Fure	caroline.fure@strategyblocks.com	Administrator	7/7	58/57	1/4	
<input checked="" type="checkbox"/>	Ashlee Hudson						
<input checked="" type="checkbox"/>	Allen Keyte						
<input checked="" type="checkbox"/>	Alexey Shup						
<input checked="" type="checkbox"/>	Adele Herli						

User Edit

Craig Catley
craig.catley@strategyblocks.com
113/111 40/34 5/1

Active User
 No Yes
When a user is active, they can login to this company and they use one of your available license seats.

Role
Administrator
Users can view and make comments, Authors can own and manage objects like blocks, and Administrator can edit nearly everything regardless of ownership.

Primary Contact
 No Yes
This flags an administrator as someone who is a point of contact for users to ask questions.

User Edit

Company Settings > Users > Select User

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.

1.0

Users

Active	Name	Email	Role	Blocks	Metrics	Risks	Groups
✓	Daniel Leong	daniel.leong@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓	Craig Catley	craig.catley@strategyblocks.com	Administrator	113/108	40/34	5/1	
✓	Caroline Furre	caroline.furre@strategyblocks.com	Administrator	77	58/37	1/4	
✓	Ashlee Hutchings						
✓	Allen Keyte						
✗	Alexey Shiyakov						
✓	Adele Heritani						

User Edit

Craig Catley
craig.catley@strategyblocks.com
113/111 40/34 5/1

Active User
 No Yes
When a user is active, they can login to this company and they use one of your available license seats.

Role
Administrator
Users can view and make comments. Authors can own and manage objects like blocks, and Administrator can edit nearly everything regardless of ownership.

Primary Contact
 No Yes
This flags an administrator as someone who is a point of contact for users to ask questions.

Reassign Ownership

Cancel

User Roles

Company Settings > Users > Select User

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 **Primary Contact** is an administrator who will receive notifications from StrategyBlocks and act as an internal contact for users.

Active	Name	Email	Role	Blocks	Metrics	Risks	Groups
✓	Daniel Leong	daniel.leong@strategyblocks.com	Administrator	0/0	0/0	0/0	
✓	Craig Catley	craig.catley@strategyblocks.com	Administrator	113/108	40/34	5/1	
✓	Caroline Purre	caroline.purre@strategyblocks.com	Administrator	7/7	58/57	1/4	
✓	Ashlee Hutchins						
✓	Allen Keyte						
✗	Alexey Shiyko						
✓	Adele Herlihy						

User Edit Back

Craig Catley
craig.catley@strategyblocks.com
113/111 40/34 5/1

Active User
 No Yes
 When a user is active, they can login to this company and they use one of your available license seats.

Role
 Administrator
 Users can view and make comments, Authors can own and manage objects like blocks, and Administrator can edit nearly everything regardless of ownership.

Primary Contact
 No Yes
 This flags an administrator as someone who is a point of contact for users to ask questions.

Reassign Ownership

Cancel

Reassign Ownership

Company Settings > Users > Select User

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.

1.0

Users

Users

Rows (10) Columns Seats: 0 / 14

Users

Show the list of users in your company. When a user is active, they are able to log into StrategyBlocks. The blocks / metrics / risks column shows how many of each object the user is responsible for (Owner / Manager).

If you have run out of seats you can still add users, but they will not be active.

[+ Add Users](#)

[Broadcast a Message](#)

Active	Name	Email	Role	Blocks	Metrics	Risks
✓	Simon Lawrence	simon.lawrence@strategyblocks.com	Administrator	6/13	0/0	0/0
✓	Shajitha Parveen	shajitha.parveen@cdp.co.nz	Administrator	0/0	0/0	0/0
✓	Rebecca Utting	rebecca.utting@strategyblocks.com	Author	0/0	0/0	0/0
✓	Paul Gillespie	paul.gillespie@cdp.co.nz	Author	1/0	0/0	0/0
✗	Maureen Placente	maureen.placente@strategyblocks.com	Author	0/0	0/0	0/0
✗	Jonathan Moulds	jonathan.moulds@strategyblocks.com	Administrator	0/0	0/0	0/0
✓	Jason Blockley	jason.blockley@strategyblocks.com	Administrator	0/0	0/0	0/0
✓	Glenn Murphy	glenn.murphy@strategyblocks.com	Administrator	8/6	2/3	4/2
✓	Don Campbell	don.campbell@strategyblocks.com	Administrator	14/8	3/8	0/2
✓	Darren Beauchamp	darren.beauchamp@mero.co.nz	Administrator	0/0	0/0	0/0

Quick Find:

Previous 1 2 Next

Broadcast Message

Company Settings > Users

Broadcast Message can be used to send an email message to the selected user (or users).

1.0

Users

Message

Type your message

Users

Selected users will have access to the blocks, metrics, and risks which are restricted to this group. Administrators are automatically given permission to every group and will appear as disabled items in the right-hand list.

Filter

Craig Catley
Simon Lawrence
Glenn Murphy
Paul Gillespie
Allen Keyte
Don Campbell

Filter

Blocks

Owners
 No Yes

Managers
 No Yes

Metrics

Owners
 No Yes

Managers
 No Yes

Risks

Owners
 No Yes

Managers
 No Yes

Cancel

Send Message

Broadcast Message

Company Settings > Users > Broadcast Message

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.

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

Company Settings

Company Settings > Company

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.

Company Settings

Review or change the settings which affect your entire company.

Name

The name of your company or organization.

Timezone

Select the primary timezone for your company.

Fiscal Year

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

Saved Login Duration

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

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

Company Settings

Company Settings > Company

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

Block Progress Rollup Method - 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.

Company Settings

Review or change the settings which affect your entire company.

Name

The name of your company or organization.

Timezone

Select the primary timezone for your company.

Fiscal Year

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

Saved Login Duration

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

Linked Block Progress Rollup Method

None

Eliminate

Normal

can override this on the Block Manage screen.

Block Manage screen.

Block Manage screen.

Company Settings

Company Settings > Company

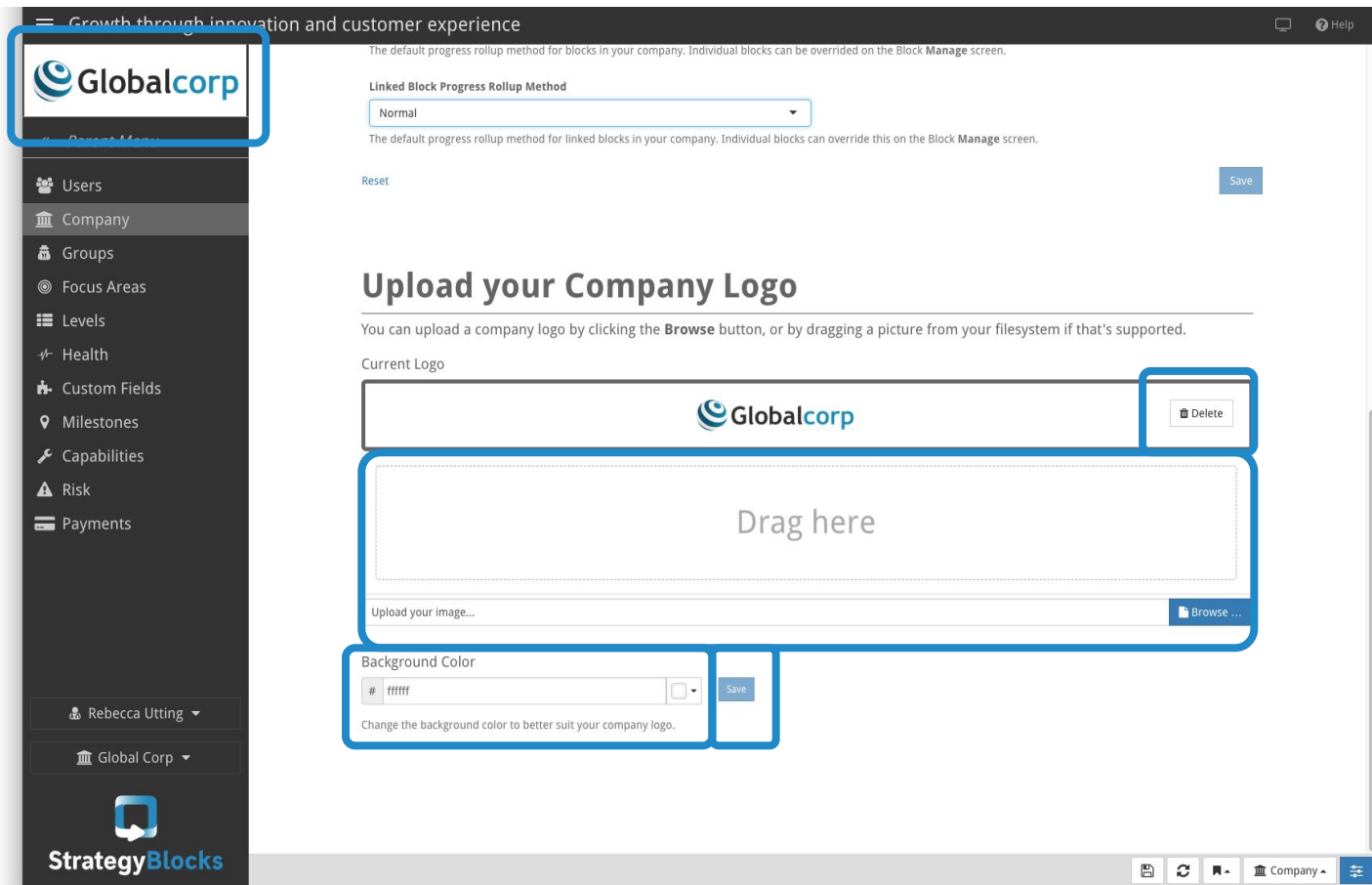
These settings enable the configuration of the entire model, and includes:

Linked Block 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.

2.0

Company



Logo Upload

Company Settings > Company

The logo appears in the top-left of the application and replaces the default StrategyBlocks logo.

You can change the logo in the [Company](#) screen under [Company Settings](#).

Use [Delete](#) to remove the existing logo, browse (a file on your computer) to or drag in a new logo.

Set the [Background Color](#) to change the background color to better suit your company's branding.

Select [Save](#) to retain your choice.



Security Groups

Use security groups to restrict access to parts of your model. For instance, if a block has a group attached to it, only members of that group can see the block or its children. Groups can contain users as well as other groups.

[Add Group](#)

Title	Description	Users	Groups (C/D)	Blocks	Metrics	Risks
M&A	Mergers	0	0/0	0/0	0	0
Human Resources		1	0/0	0/0	0	0
Executive	This is a group only for Execs	0	1/1	0/0	0	0
Division 1		1	0/0	0/0	0	0

Quick Find:

Previous **1** Next

Security Groups

Company Settings > Groups

Groups are used to restrict access and visibility of objects in the strategic plan (blocks, metrics, risks) from unauthorized 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.

Security Groups

Use security groups to restrict access to parts of your model. For instance, if a block has a group attached to it, only members of that group can see the block or its children. Groups can contain users as well as other groups.

[Add Group](#)

Title	Description	Users	Groups (C/D)	Blocks	Metrics	Risks
M&A	Mergers	0	0/0	0/0	0	0
Human Resources		1	0/0	0/0	0	0
Executive	This is a group only for Execs	0	1/1	0/0	0	0
Division 1		1	0/0	0/0	0	0

Quick Find:

Previous **1** Next

Security Groups

Company Settings > Groups

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.

The security table displays:

- **Title** - the name of the group
- **Description** - a brief description
- **Users** - the number of users included in the group
- **Groups (C/D)** - the number of groups included in the group, children groups (C), and total descendant groups (D)
- **Blocks** - the number of blocks added to a group directly / the number of blocks that have inherited a group
- **Metrics** - the number of metrics contained in the group
- **Risks** - the number of risks contained in the group

Create a new Group

Groups are used to restrict access and visibility of your strategic plan (blocks, metrics, risks) from unauthorized 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 also contain 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. For instance, if you have a group called **HR** which contains users **John** and **Mary**, adding HR to this group is the same as adding John and Mary manually.

Title

Description

Users

Selected users will have access to the blocks, metrics, and risks which are restricted to this group. Administrators are automatically given permission to every group and will appear as disabled items in the right-hand list.

- Paul Gillespie
- Maureen Placente

- Craig Catley
- Simon Lawrence
- Glenn Murphy
- Allen Keyte
- Don Campbell
- Ashlee Hutchinson

»

>

<

«

Add Group

Company Settings > Groups > Add Group

Selecting the [Add Group](#) button will allow the creation of a new group. The following attributes can be configured:

- **Title** – Name of the group
- **Description** – Longer description for the group

Users

Selected users will have access to the blocks, metrics, and risks which are restricted to this group. Administrators are automatically given permission to every group and will appear as disabled items in the right-hand list.

Filter

Paul Gillespie
Maureen Placente

»
>
<
«

Filter

Craig Catley
Simon Lawrence
Glenn Murphy
Allen Keyte
Don Campbell
Ashlee Hutchinson

Groups

This group will include all the users (and groups) from the groups selected below. Groups on the right are included. Disabled groups on the left are ones that already include the group you're editing.

Filter

Executive
Division 1
M&A
Human Resources

»
>
<
«

Cancel Save

Add Group

Company Settings > Groups > Add Group

Selecting the [Add Group](#) button will allow the creation of a new group. The following attributes can be configured:



- **Users** – Selected users will have access to the blocks, metrics, and risks which are restricted to this group. NB: Administrators are automatically given permission to every group and will appear as disabled items (greyed out) in the right-hand list.
- **Groups** – The group will include all the users and any groups selected. Groups listed on the right are included. Disabled groups on the left are groups that already include the group you're editing.

Select [Save](#) to retain your group.

Focus Area

Below is the list of Focus Areas for your company. By default they are collapsed but you can expand them by clicking on the arrow (▶). If you are an administrator, you can edit the focus areas by dragging them around, or clicking on the row to edit the label and description.

[Add Focus Area](#)

  All All	👁️: 1	☰: 11	⚠️: 0
☰ Integrity <i>A commitment to being honest and ethical</i>	👁️: 0	☰: 19	⚠️: 1
☰ Sustainability <i>Our global responsibility</i>	👁️: 0	☰: 3	⚠️: 0
☰ ▶ Innovation <i>Embracing new ideas and creativity</i>	👁️: 52	☰: 1	⚠️: 0
☰ ▶ Excellence <i>Proud of who we are and excel to be the very best</i>	👁️: 2	☰: 27	⚠️: 2
☰ ▶ Working together <i>As one we are empowered, supported and recognised</i>	👁️: 0	☰: 8	⚠️: 2
☰ ▼ Ambition & Attitude <i>Act with consideration and appreciation</i>	👁️: 3	☰: 0	⚠️: 0
☰ ▶ Marketing	👁️: 18	☰: 8	⚠️: 0

[Reset](#) [Save](#)

Focus Areas

Company Settings > Focus Areas









Focus Areas group objects (blocks, metrics or risks) together, they form broad strategic categories. These areas of focus don't specifically describe what the organization 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. However this is an informal hierarchy, all objects must belong to a focus area classification, but the focus area hierarchy is not rigid.

Focus Area

Below is the list of Focus Areas for your company. By default they are collapsed but you can expand them by clicking on the arrow (>). If you are an administrator, you can edit the focus areas by dragging them around, or clicking on the row to edit the label and description.

[Add Focus Area](#)

		👤: 1	📄: 11	⬆️: 0
	▼ All <i>All</i>			
	Integrity <i>A commitment to being honest and ethical</i>	👤: 0	📄: 19	⬆️: 1
	Sustainability <i>Our global responsibility</i>	👤: 0	📄: 3	⬆️: 0
	Innovation <i>Embracing new ideas and creativity</i>	👤: 52	📄: 1	⬆️: 0
	Excellence <i>Proud of who we are and excel to be the very best</i>	👤: 2	📄: 27	⬆️: 2
	Working together <i>As one we are empowered, supported and recognised</i>	👤: 0	📄: 8	⬆️: 2
	Ambition & Attitude <i>Act with consideration and appreciation</i>	👤: 3	📄: 0	⬆️: 0
	Marketing	👤: 18	📄: 8	⬆️: 0

[Reset](#) [Save](#)

Focus Areas

Company Settings > Focus Areas

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 categorized within a focus area.

Focus Area

Below is the list of Focus Areas for your company. By default they are collapsed but you can expand them by clicking on the arrow (>). If you are an administrator you can edit the focus areas by dragging them around, or clicking on the row to edit the label and description.

[Add Focus Area](#)

		👁️: 1	📊: 11	⚠️: 0
📄 All				
☰	Integrity <i>A commitment to being honest and ethical</i>	👁️: 0	📊: 19	⚠️: 1
☰	Sustainability <i>Our global responsibility</i>	👁️: 0	📊: 3	⚠️: 0
☰ >	Innovation <i>Embracing new ideas and creativity</i>	👁️: 52	📊: 1	⚠️: 0
☰ >	Excellence <i>Proud of who we are and excel to be the very best</i>	👁️: 2	📊: 27	⚠️: 2
☰ >	Working together <i>As one we are empowered, supported and recognised</i>	👁️: 0	📊: 8	⚠️: 2
☰ >	Ambition & Attitude <i>Act with consideration and appreciation</i>	👁️: 3	📊: 0	⚠️: 0
☰ >	Marketing	👁️: 18	📊: 8	⚠️: 0

[Reset](#) [Save](#)

Focus Area

Edit this focus area's details.

👁️ Blocks: 0

📊 Metrics: 19

⚠️ Risks: 1

Title

Integrity

Description

A commitment to being honest and ethical

Parent Focus Area

All

[Cancel](#)

[Save](#)

Edit Focus Areas


[Company Settings](#) > [Focus Areas](#) > [Select Row](#)

Administrators can edit the focus area ([Title](#), [Description](#) and [Parent Focus Area](#)) of each by selecting a row. Individual focus areas can also be deleted from this screen.

Title

Description

Parent Focus Area

 Delete

Cancel **Save**

Add Focus Area

Company Settings > Focus Areas > Add Focus Area

An administrator can add a new focus area by selecting the [Add Focus Area](#) button. Enter the [Title](#), [Description](#), and choose a [Parent Focus Area](#) for the new category.

Select [Save](#) to retain your changes.

Levels

Levels are the labels for each step of the blocks tree. The idea is that you can normally categorize the type of strategic objective by how many steps from the vision it is. Each organisation will have it's own names for these steps.

 Add Level

	 Color	 Title
1		vision and mission
2		strategies
3		objectives
4		portfolios
5		projects
6		sub projects
7		tasks
8		actions

Levels

Company Settings > Levels

Levels form the hierarchical structure of the model; these labels describe the decomposition of strategy from the highest to lowest most granular level. As the strategy cascades down through these levels, each lower level should describe fully the parent activity described in the level above. This decomposition of strategy can be as deep as required, and labels are completely customizable to accept the terminology used by the organization.

Levels

Levels are the labels for each step of the process. They are used to define the type of strategic objective by how many steps it has and its own names for these steps.

[Add Level](#)

	Color	Title
1		vision and mission
2		strategies
3		objectives
4		portfolios
5		projects
6		sub-projects
7		tasks
8		actions

Edit Level

Edit the details of this level.

Title

portfolios

Label Color

0066cc

Position

-

4

+

Delete

Cancel Save

Edit a Level

Company Settings > Levels > Select a Row

Individual levels can be edited by clicking on the row you want to alter. An administrator can edit the **Title**, choose a **Label Color**, and select a **Position** in the hierarchy. Other levels will be demoted or promoted accordingly.









To delete a level, select the **Delete** button on the bottom left of the screen.

Select **Save** to retain your changes.

Levels

Levels are the labels for each step of the hierarchy. The idea is that users can all recognize the type of strategic objective by how many levels it is. Each level has its own names for these steps.

[Add Level](#)

	Color	Title
1		vision and mission
2		strategies
3		objectives
4		portfolios
5		projects
6		sub projects
7		tasks
8		actions

Edit Level

Edit the details of this level.

Title

Label Color



Position

[Cancel](#)

[Save](#)

Add a Level

Company Settings > Levels > Add Level

To add a new level, select [Add Level](#).

You can then add a [Title](#), choose a [Label Color](#), and select a [Position](#) for the row.

Select [Save](#) to retain your changes.

Health Calculation Definitions

The following is a list of all health calculations defined for your company. Health takes the status of the block, its attached metrics and risks, and produces a status value. You can change the weight of each factor by creating different calculations below, which includes changing the tolerance ranges. The default calculation is used by all blocks automatically, unless the blocks's manager overrides it specifically.

[+ Add New Definition](#)

Default	Title	Description					Last Update
	Customer Health	This health definition is specifically used for activities relating to our customers.	0	1	0		11/04/17 (2 years ago)
	Standard global health definition	No description	1	2	1		10/07/17 (4 year ago)

Strategic Health

Company Settings > Health

Health is a customizable 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 organization (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.

Select [Add New Definition](#) to create a new health calculation definition that can used by block managers.

To edit a definition, select a row.

Health Calculation Definition

Change the balance of each of the health calculation factors.

[♥ Make Default](#)

Title

Description

Progress Variance Weight

Metrics Variance Weight

Risk Variance Weight

Priority Skew
 No Yes

Positive Tolerance %

Negative Tolerance %

[Delete](#) [Cancel](#) [Save](#)

Add Health Calculation Definition

Company Settings > Health > Add New Definition

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.

The default definition for the organization can be selected by selecting a definition and clicking [Make Default](#).

Edit Health Calculation Definition

Company Settings > Health > Select Row

An administrator can base health on four variables:

- **Progress:** progress variance of the block
- **Metrics:** variance of all attached KPIs
- **Risks:** impact of all attached & triggered risks
- **Priority:** a variance skewing based on the block's priority

Health Calculation Definition

Change the balance of each of the health calculation factors.

♥ Make Default

Title

Description

This health definition is specifically used for activities relating to our customers.

Progress Variance Weight

Metrics Variance Weight

Risk Variance Weight

Priority Skew

No Yes

Positive Tolerance %

Negative Tolerance %

Delete

Cancel
Save

Title - a name for the definition

Description - a longer textual description of the calculation

Progress, Metrics and Risk Variance Weight – weight the three factors in terms of how important they are to a block's health

Priority Skew - allows the blocks priority to skew the result

High priority blocks will be skewed to be more positive or more negative. Low priority blocks will be less positive and less negative.

Tolerance Ranges

Positive - (blue) over a defined integer

Negative - (red) below a defined integer

Warning - (yellow) between these 2 values

Select **Save** to retain your definition.

Custom Fields

Custom fields allow you to attach more information to your 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 models.

[+ Add Custom Field](#)

Title	Description	Type
Leave Type	No description	Selection List
Project Code	No description	Selection List
Narative	No description	Text
Department	Department or Division	Selection List
Cost Centre	Cost centre code	Selection List
Approval Year	The year in which a project should be delivered	Selection List
Corporate Value	No description	Number

Custom Fields

Company Settings > Custom Fields

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.

The Custom Fields table lists the field title, longer description and type of field.

Selecting an item from the table allows the field properties to be edited.

Custom Field

Create and manage your custom fields. These are extra properties that can be attached to blocks, metrics, and risks.

Title

Description
Describe your custom field

Input Type
Selection List

Options
Sick Leave
Annual Leave
Long Service Leave

Enter one option per line.

Default
Annual Leave

Blocks
No Yes

Metrics
No Yes

Risks
No Yes

Force Update
No Yes

If you update this field definition and there are values saved against it, you may need to pass this option to override values which conflict with the settings (e.g., reducing the `maxlength` of a text input may require truncating saved data).

Delete Cancel Save

Custom Fields

Company Settings > Custom Fields > Add Custom Field

Title - the field title

Description - a longer textual description of the calculation

Input Type - the type of field (drop-down selection list, test, date or numeric).

Note: Input Type can not be edited once the custom field has been created.

Blocks, Metrics or Risks - object attachment

Force Update - will force any edits to that Custom Field where it is in use.

Select **Save** to retain changes. Custom Fields can also be deleted from this screen.

Milestone Definitions

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.

[Add Milestone](#)

			Closed	
5 Step Process	These are the 5 steps needed to complete this block.	10	0	5
Business Plan	BP development reusable process	2	0	3
ART process	Agile Release Train process definition	2	0	4
Annual Sprints	Spread bimonthly sprints	0	0	6
Scrum meetings	Monthly scrum meetings	0	0	10
Abstraction Sign off	Used as part of the ISAR to sign-off and proceed.	2	0	2
Formulation Sign off	Used as part of the ISAR to sign-off and proceed.	2	0	2
Initiation Sign Off	Used as part of the ISAR to sign-off and proceed.	2	0	2
Completion Sign Off	Used as part of the ISAR to sign-off and proceed.	2	0	1
Doing STuff	<i>No description</i>	0	0	2
New product development	<i>No description</i>	0	0	3

Milestone Definitions

[Company Settings](#) > [Milestones](#)

A milestone definition is a list of tasks that need to be completed before a block can be marked as 100% 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(s) in place of raw progress updates, to better enumerate what work has been completed. Milestones can be completed in any order and are not intended to be sequential.

The Milestone Definitions table includes:

- **Definition Title, Description**
- **Blocks** - the number of current blocks using that milestone definition
- **Closed Blocks** - the number of closed blocks using that milestone definition
- **Steps** - the number of milestone steps that make up the milestone

Select a row from the table to edit a milestone.

Selecting the [Add Milestone](#) button will enable the creation of a new definition.

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

Description

Label

Contribution Amount



Edit Milestone Definition

Company Settings > Milestones > Select Row

Selecting a row of the table will allow steps to be added from the [Add Step](#) button, edited and each steps contribution amount to be adjusted.

Milestones can be deleted, and changes saved.

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

Description

Label

Contribution Amount

Add Milestone Definition

Company Settings > Milestones > Add Milestone

A title and optional description can be added. Using the [Add Step](#) button allows the creation of additional rows of separate steps. The contribution amount can be any integer, the value given to each step is proportional to the overall total e.g. if each step is 10 and there are 5 steps, each step contributes 20%.

Select [Save](#) to retain the definition.

Edit Capabilities

This page allows you to toggle the availability of certain features in StrategyBlocks, depending on your needs.

Block Chat Inherited	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Allow Block Chats to be inherited by its children
Block Chat Delete	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Allow Block Chats to be deleted
Progress Comment Required	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	A comment is required on a block progress update
Block Locking	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Blocks to be Locked
Block Owner can Manage	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Owners to edit blocks as Managers
Security Group Progress Rollup	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Progress values will be rolled up to the parent block based on the blocks visible to a user
Metric Chat Delete	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Metric Chats to be deleted
Interpolated Metrics	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	New metrics are Interpolated
Cumulative Metrics	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	New metrics are Cumulative
Metric Locking	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Metric to be locked
Empty Metric Values Symbol	--	Symbol to show for metric values when there's no data (e.g., instead of 0)
Risk Chat Delete	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Risk Chats to be deleted
Company Blocks	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Enable Company Blocks Feature
Company notifications	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Enable automatic email notifications to users of this company
Google Drive	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Enable Google Drive Access Feature

Reset

Save

Capabilities

Company Settings > 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. Those capabilities are:

Blocks Chat Inherited - allow Block Chats to be inherited by child blocks

Block Chat Delete - allow Block Chats to be deleted

Progress Comment Required - a comment is required before saving a block progress update

Block Locking - allow Blocks to be locked, until ready to operationalise the model

Block Owner can Manage - allow Owners to edit blocks as Managers

Security Group Progress Rollup - progress values will be rolled up to the parent block based only on the blocks visible to a user

Edit Capabilities

This page allows you to toggle the availability of certain features in StrategyBlocks, depending on your needs.

Block Chat Inherited	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Allow Block Chats to be inherited by its children
Block Chat Delete	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Allow Block Chats to be deleted
Progress Comment Required	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	A comment is required on a block progress update
Block Locking	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Blocks to be Locked
Block Owner can Manage	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Owners to edit blocks as Managers
Security Group Progress Rollup	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Progress values will be rolled up to the parent block based on the blocks visible to a user
Metric Chat Delete	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Metric Chats to be deleted
Interpolated Metrics	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	New metrics are Interpolated
Cumulative Metrics	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	New metrics are Cumulative
Metric Locking	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Metric to be locked
Empty Metric Values Symbol	--	Symbol to show for metric values when there's no data (e.g., instead of 0)
Risk Chat Delete	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Allow Risk Chats to be deleted
Company Blocks	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Enable Company Blocks Feature
Company notifications	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Enable automatic email notifications to users of this company
Google Drive	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Enable Google Drive Access Feature

Reset Save

Capabilities

Company Settings > Capabilities

Metric Chat Delete - allow Metric Chats 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

Empty Metric Values Symbol - symbol to show for metric values when there's no data (e.g. -- instead of 0)

Risk Chat Delete - allow Risk Chats 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

Google Drive - enable Google Drive Access Feature

Select **Save** to retain your changes.

Risk Management Profile

Define the parameters of your risk matrix. Changing this will impact all risks in your company, and may affect the health of some blocks.

Change the matrix size to: 3 x 3

Risk Profile

Edit the risk profile matrix. Each cell can be selected and edited individually. The color of the cell does not have any effect 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.

Normal
 Moderate
 Severe

Consequences

Definition

Save

Risk Management

Company Settings > Risk

Defining the parameters of the organizations risk management profile is primarily managed within the [risk matrix](#).

The matrix itself can be comprised of either 9 (3x3) cells or 25 (5x5) cells. The risk profile matrix can be customized: each cell can be selected and edited individually (as either [normal](#), [moderate](#) or [severe](#)).

Note: The color of the cell does not have any effect on the risk but should reflect the severity of the risk to the organization. For each cell, an Administrator can set the definition and consequences for that combination of Likelihood and Impact. These descriptions can be quickly copied across the rows or columns using the controls.

Risk Settings

Edit the short and long form labels for the impact / likelihood levels. You can also change the percent contribution of each impact level to affected blocks' health (when the risk is in "triggered" state). These settings might be reset if you change the size of the risk profile matrix.

Short Label	Long Label	Health Impact
<input type="text" value="VL"/>	<input type="text" value="Very Low"/>	<input type="text" value="-10"/>
<input type="text" value="L"/>	<input type="text" value="Low"/>	<input type="text" value="-18"/>
<input type="text" value="M"/>	<input type="text" value="Medium"/>	<input type="text" value="-45"/>
<input type="text" value="H"/>	<input type="text" value="High"/>	<input type="text" value="-28"/>
<input type="text" value="EX"/>	<input type="text" value="Extreme"/>	<input type="text" value="-100"/>

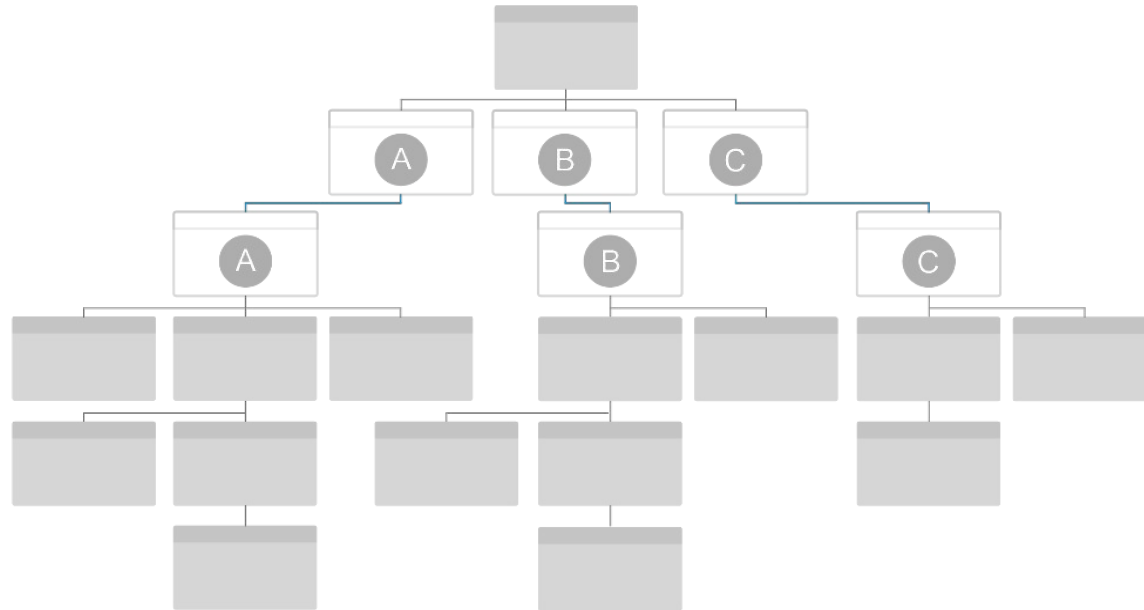
[Reset](#) [Save](#)

Risk Settings

Company Settings > Risk

Both the short and long form labels for the impact/likelihood levels and be customized 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.



Separate Models (Linked Trees)

Alternatively (or in combination) with the use of groups, parts of a value tree can be screened/hidden through the use of different model that link the trees of completely separate departments or external entities.

Within StrategyBlocks, you have the ability to belong to multiple companies. A B2B Block is a block that can be added from one of your companies to another in order to monitor its status of these separate entities.

In this scenario each model is separate, each with their own tree hierarchy and potentially (although not necessarily) their own users. An umbrella model is created to span all the contributing company models e.g. Subsidiary a... Subsidiary n. All contributing to an umbrella holding company model. This would provide the greatest level of separation and autonomy.

B2B Block (Linked Company)

1. An additional model(s) is created (performed by StrategyBlocks Support)
2. The **Company Blocks Toggle** is then enabled from the **Capability** options
3. Selected (or all) users can be added to the new environment
4. The new model will become available to be selected from the users list of available companies
5. A block owner can then create a **B2B Block** from the **Add Blocks** dropdown menu
6. The top block of the selected **B2B Block** will become a leaf block of the current value tree
7. Progress from the intercompany block will be rolled up in the parent structure



Get in touch
with us



info@strategyblocks.com



www.strategyblocks.com



facebook.com/StrategyBlocks



linkedin.com/company/strategyblocks-ltd



[@StrategyBlocks](https://twitter.com/StrategyBlocks)



youtube.com/user/strategyblocks