Strategy Blocks

Training Guides

Administration

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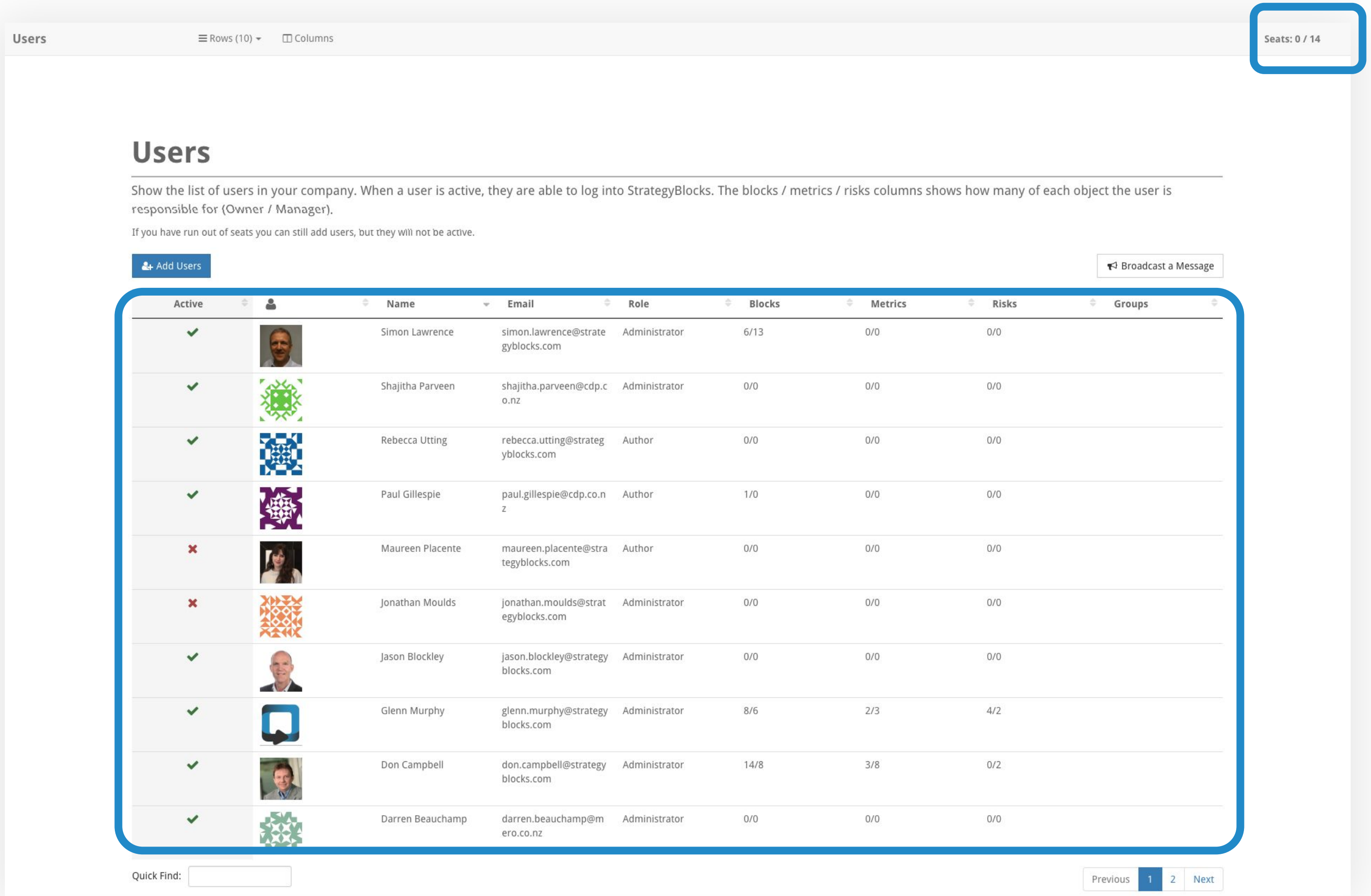


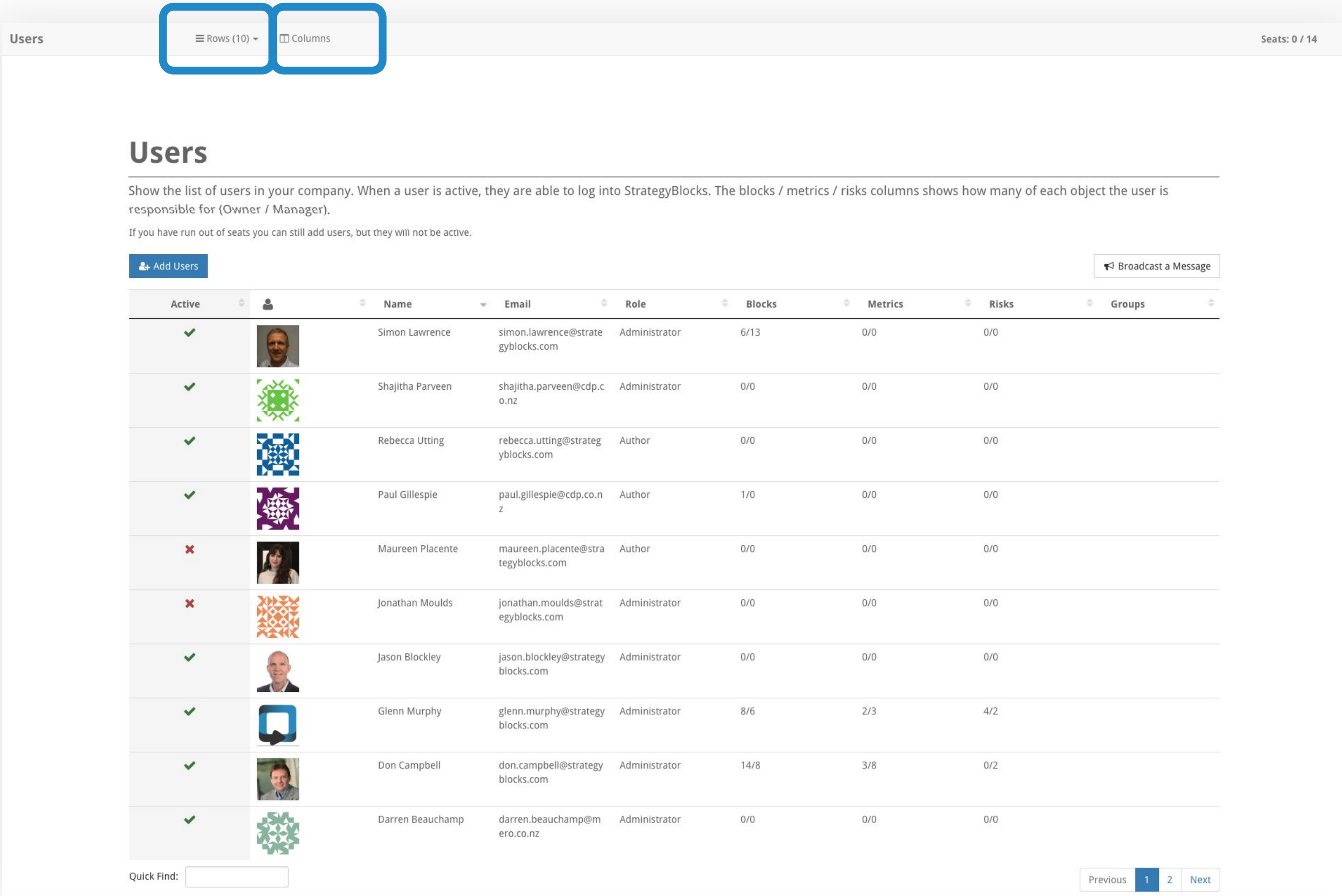
Active		Name	Email	Role	Blocks	Metrics	Risks	Groups
✔		Simon Lawrence	simon.lawrence@strategyblocks.com	Administrator	6/13	0/0	0/0	
✔		Shajitha Parveen	shajitha.parveen@cdp.co.nz	Administrator	0/0	0/0	0/0	
✔		Rebecca Utting	rebecca.utting@strategyblocks.com	Author	0/0	0/0	0/0	
✔		Paul Gillespie	paul.gillespie@cdp.co.nz	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	

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.

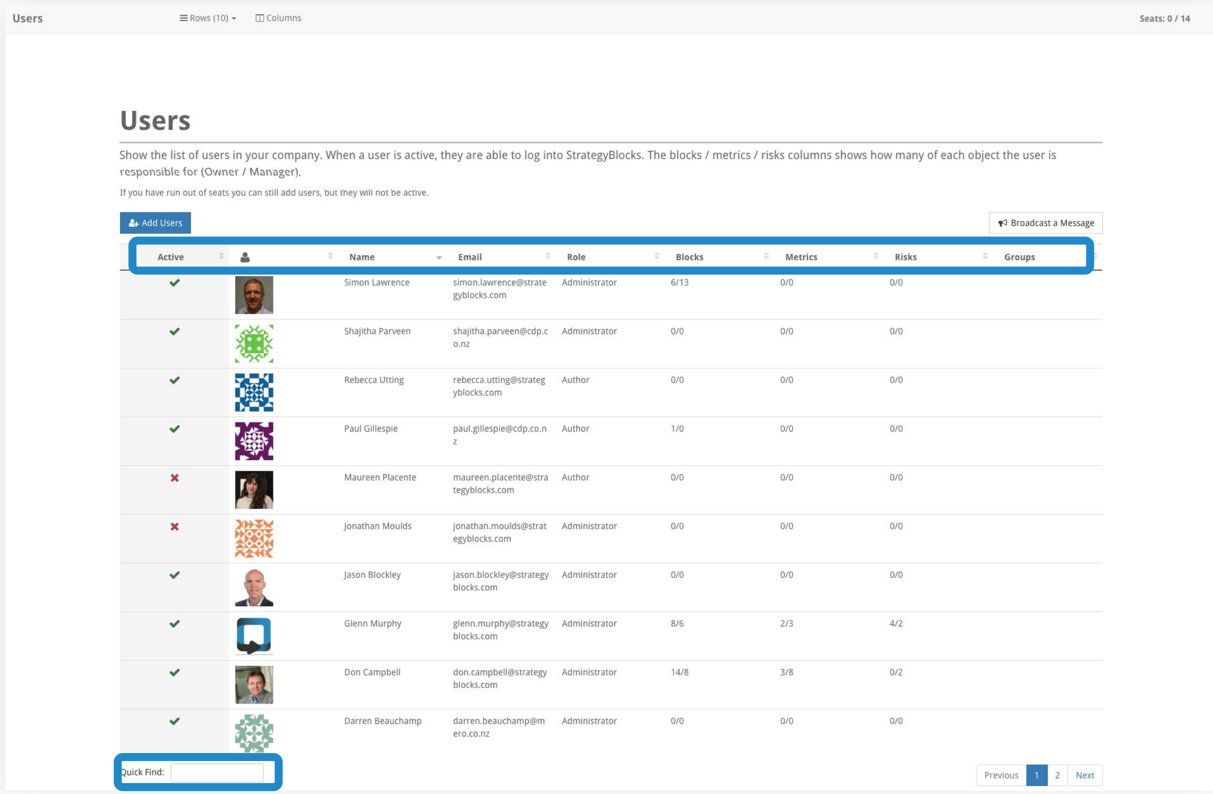
The users table shows all users that have been created, only users made active will draw down on the total available subscriptions.



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.



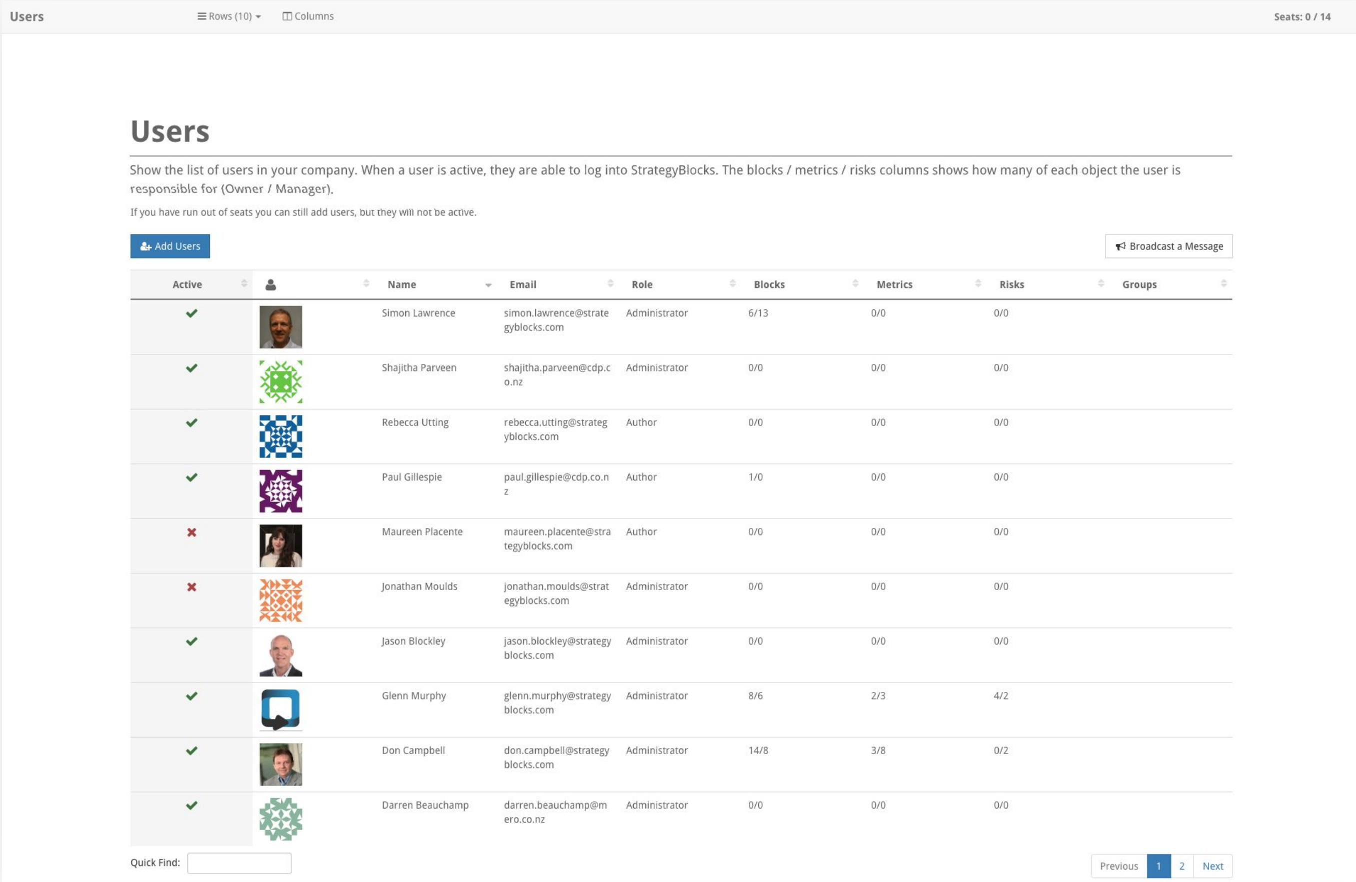
The User Table

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.



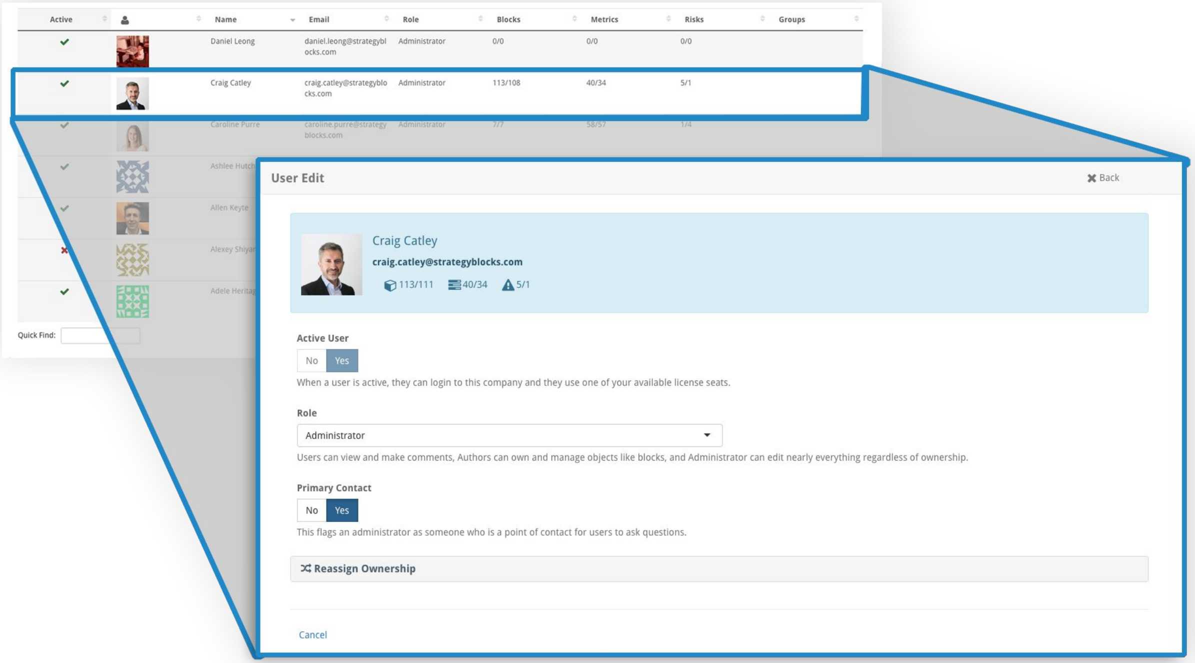
The User Table

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.

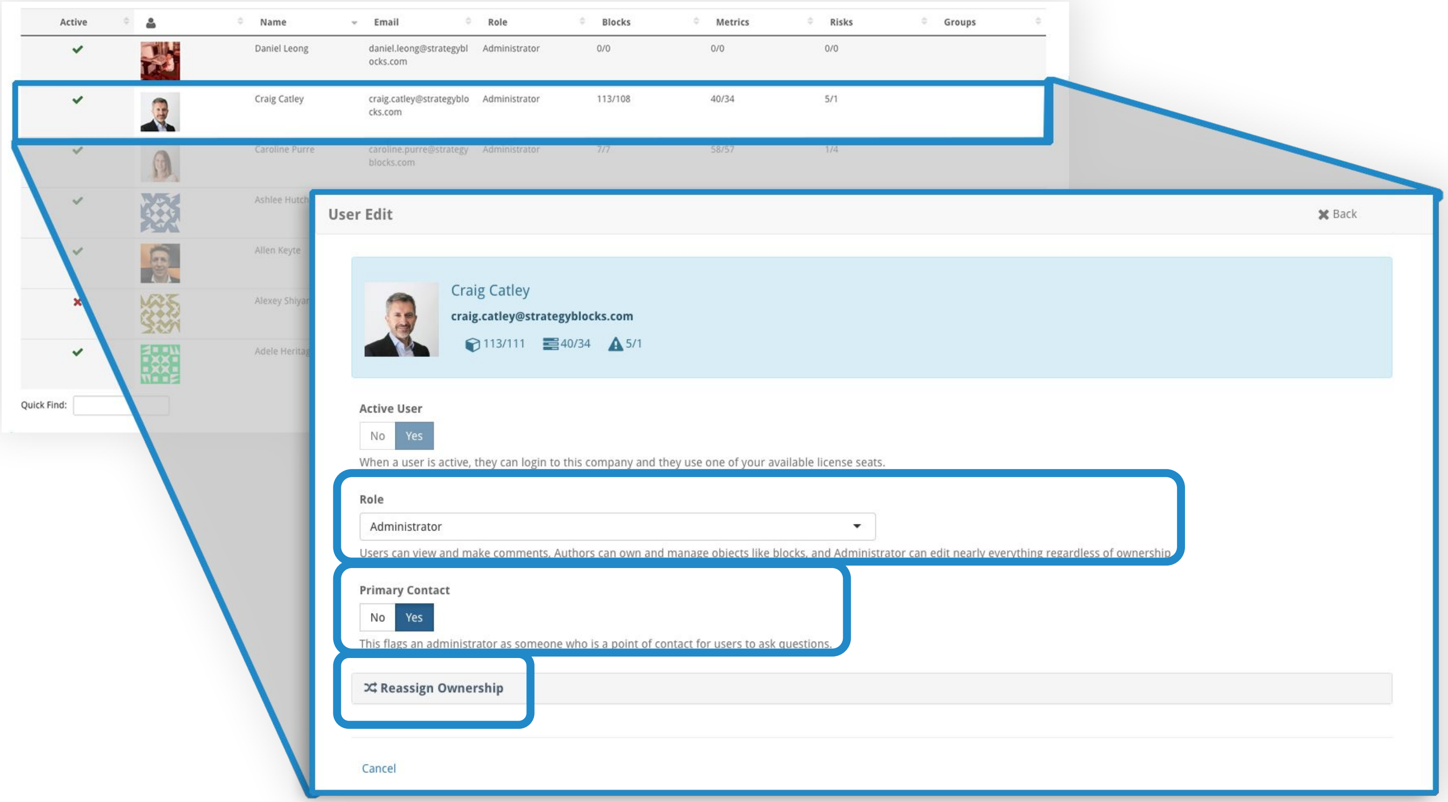
Select Create Users to save. Once saved users will automatically receive a welcome email and an email which will include their password.



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.

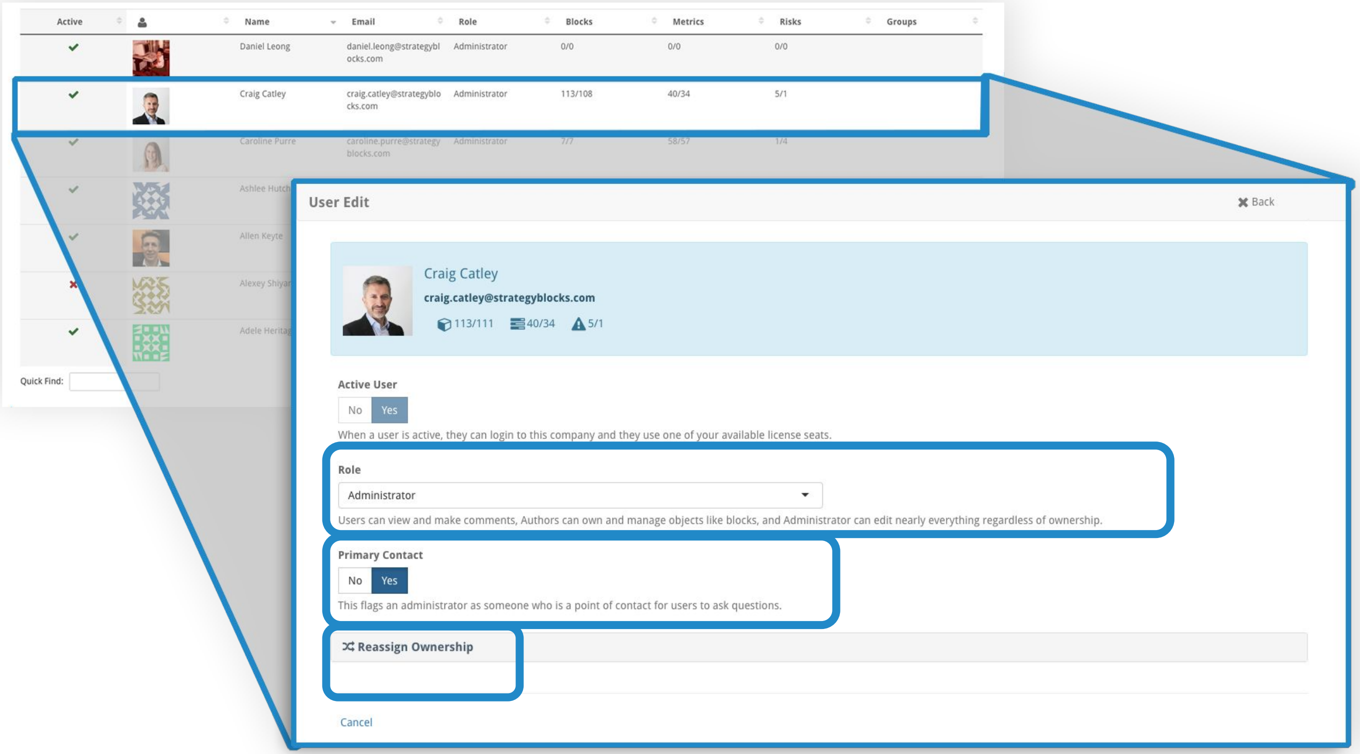


User Roles

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.



Reassign Ownership

Company Settings > Users > Select User

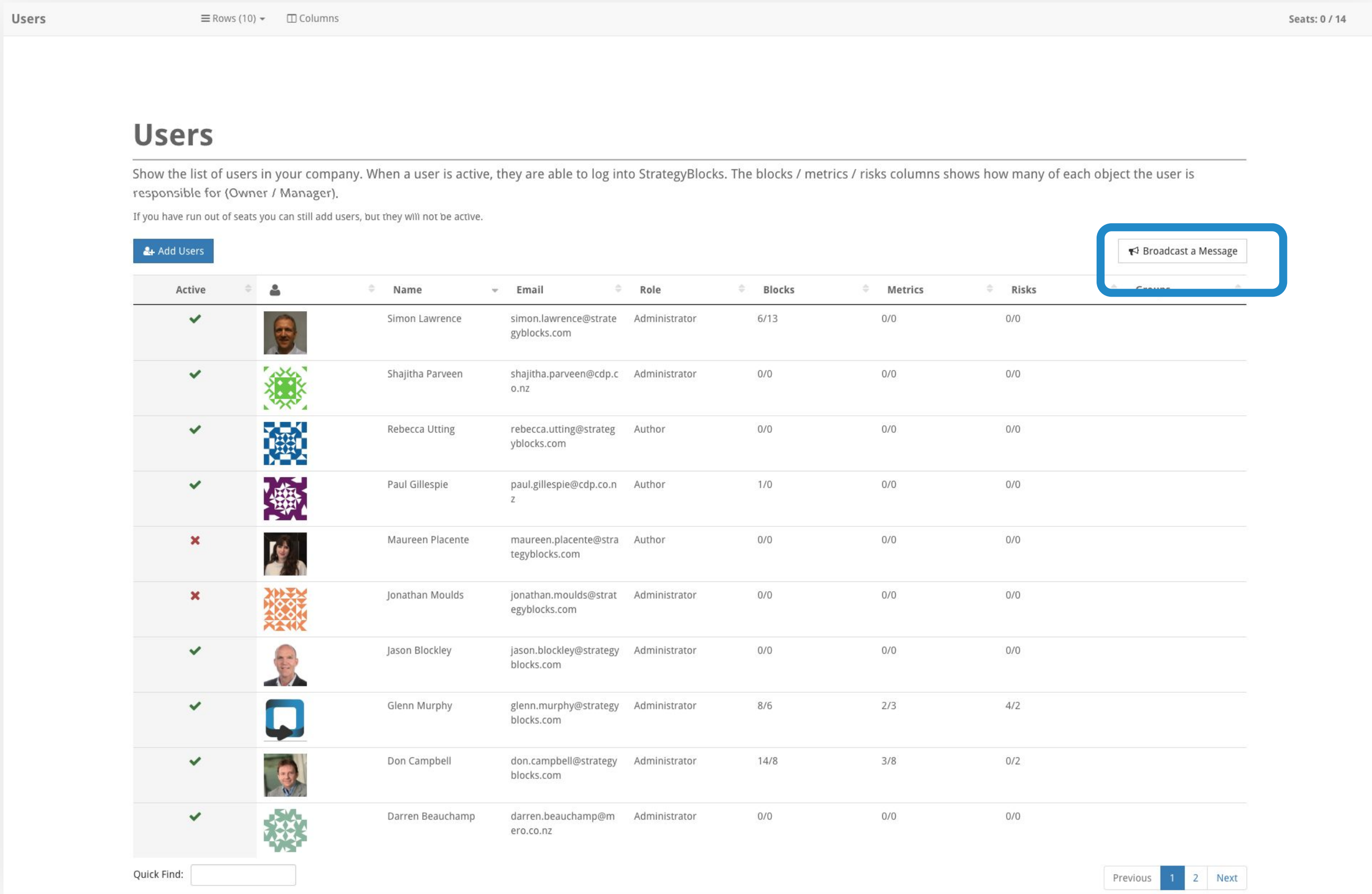
A user can not be deleted from the system if they own objects in the model (blocks, metrics, risks and exports). In order to delete a user (or reassign a current users objects), the Reassign Ownership can be used.

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



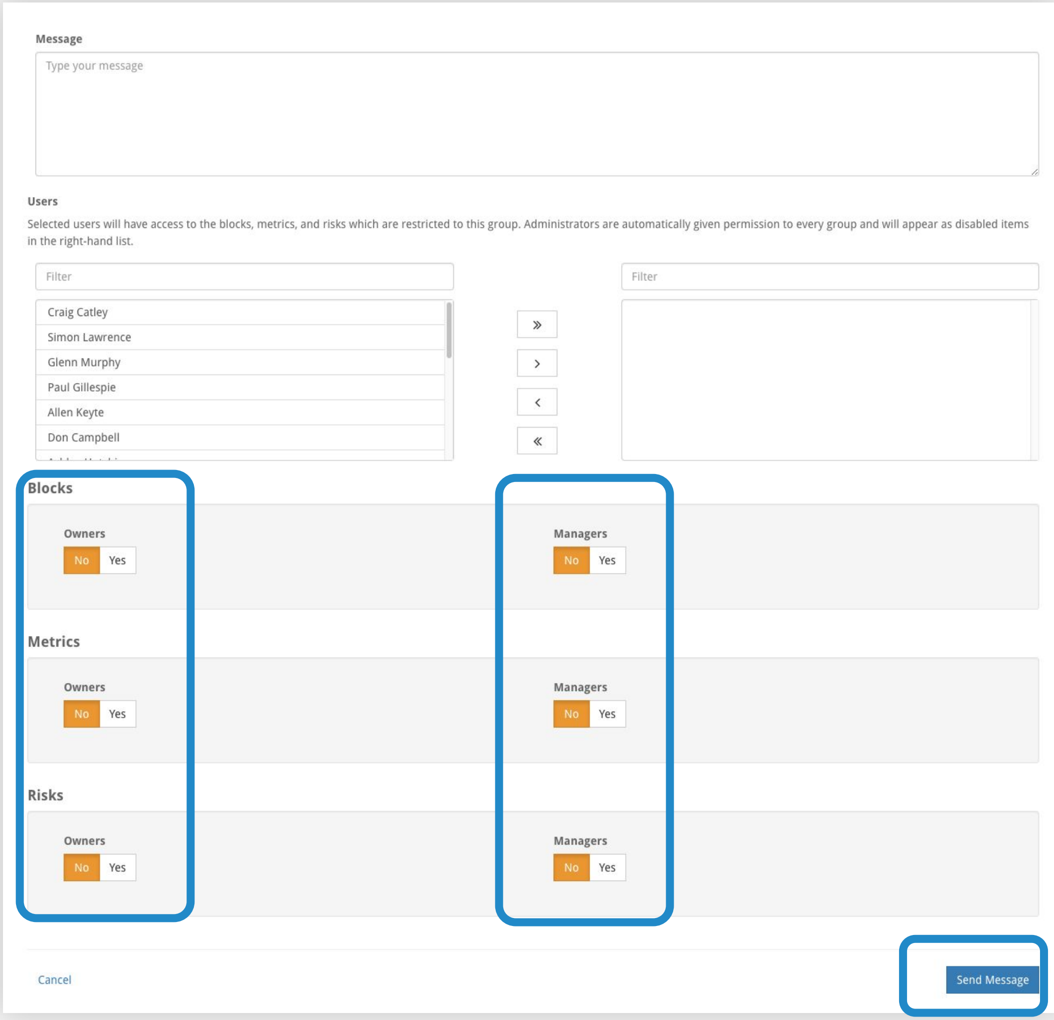
Broadcast Message

Company Settings > Users

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

StrategyBlocks

Training Guides



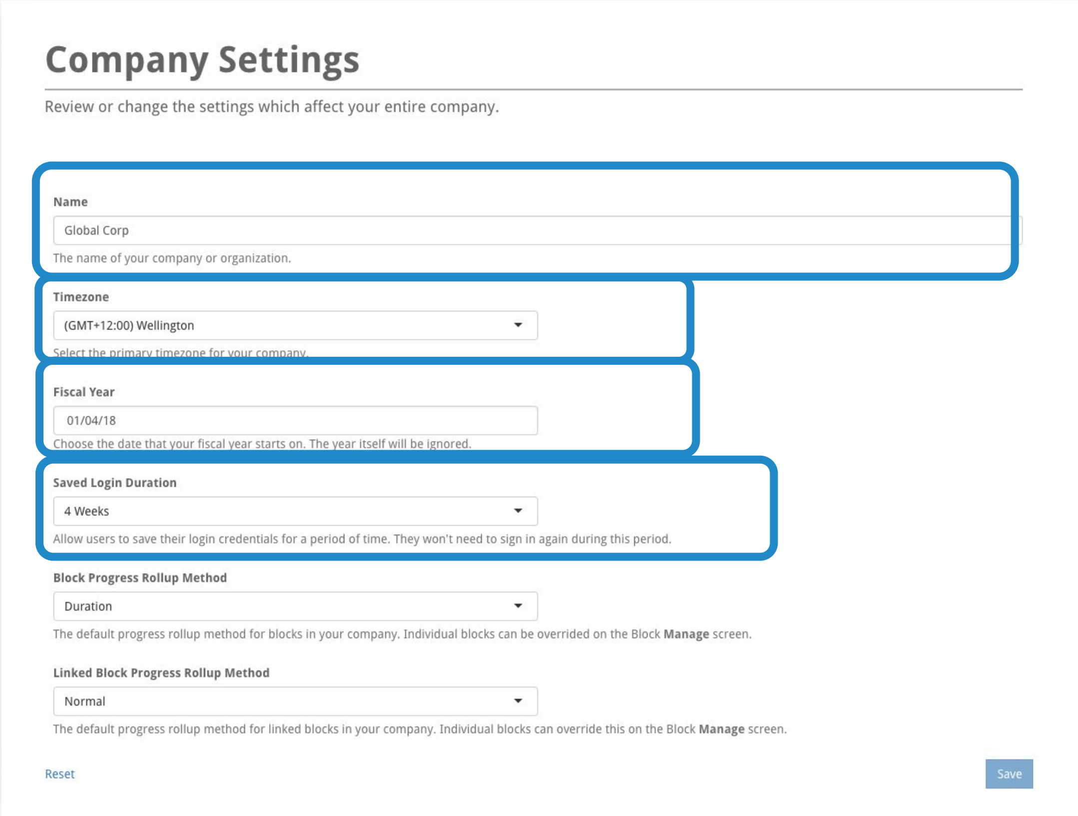
Broadcast Message

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.

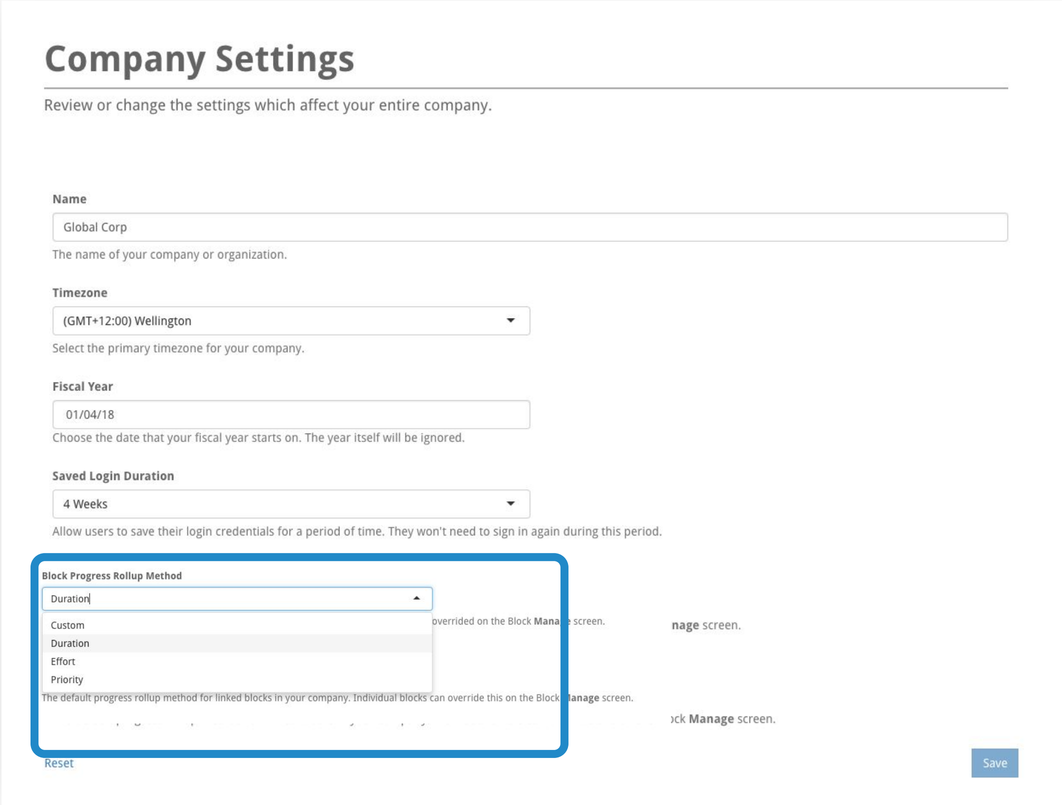


Company Settings

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.



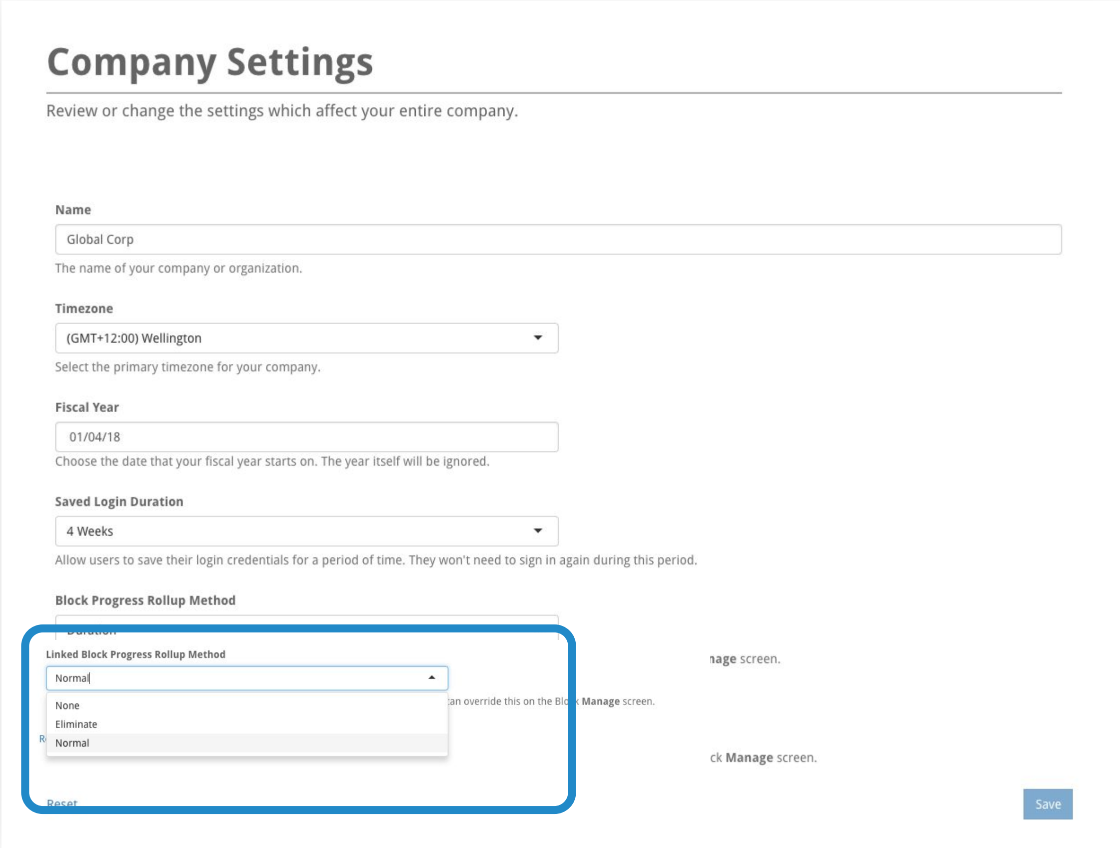
Company Settings

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.



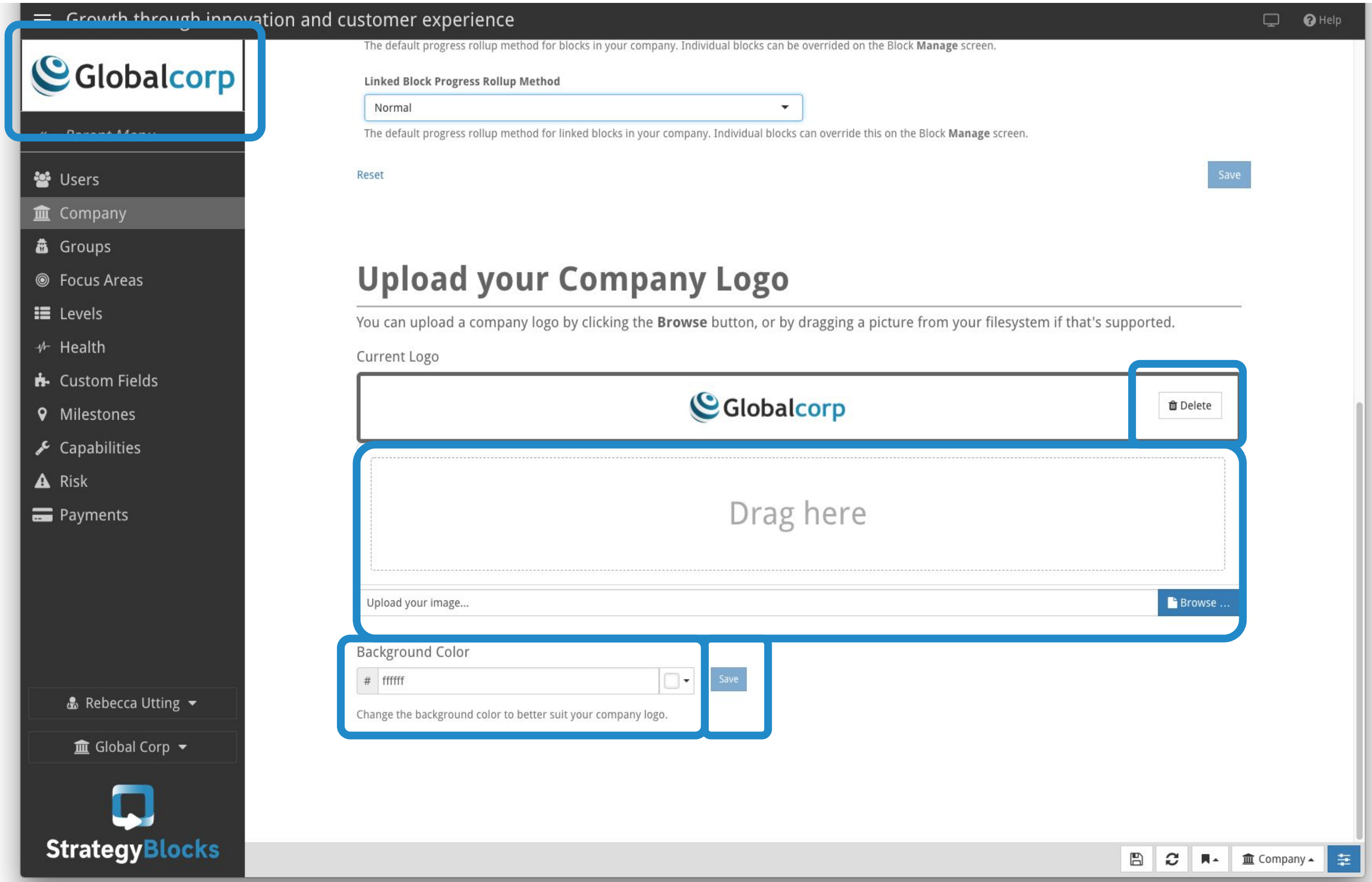
Company Settings

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.



Logo Upload

Company Settings > Company

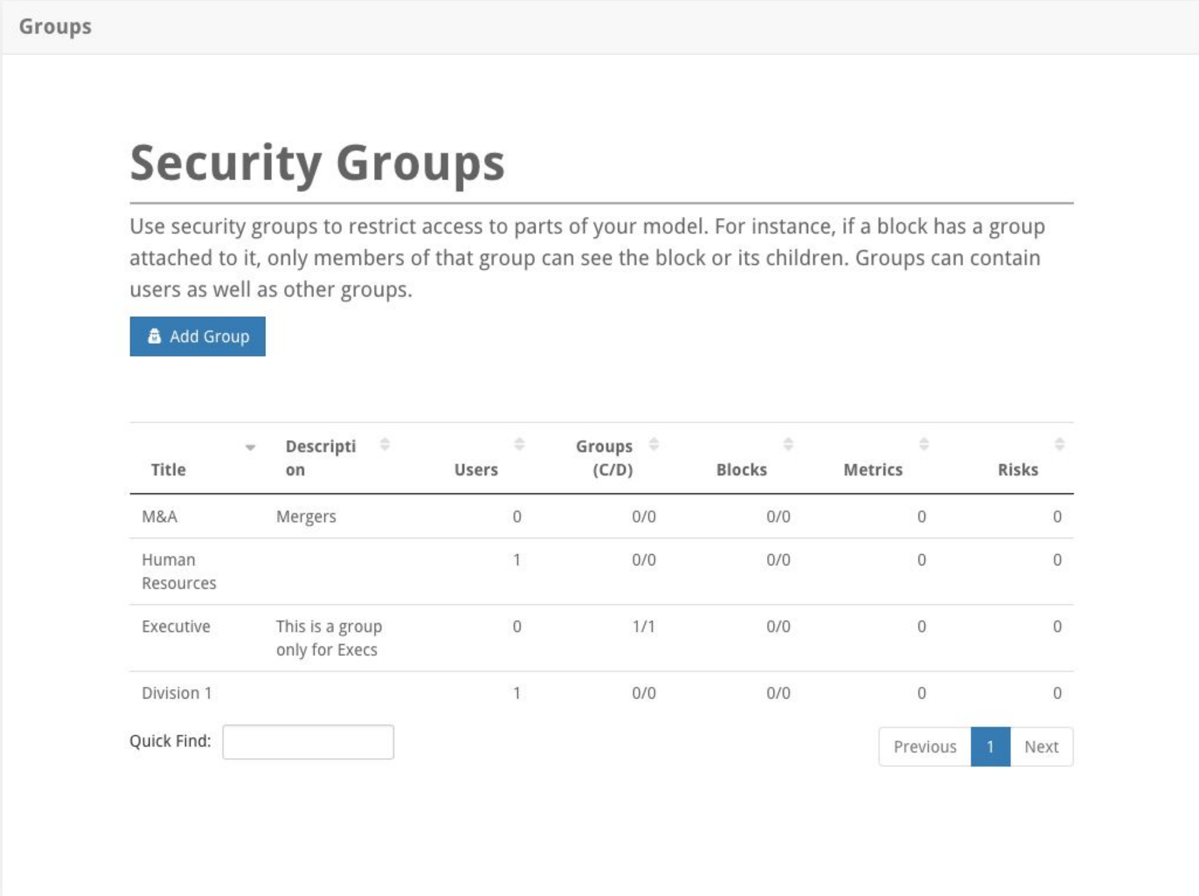
The logo appears in the top-left of the application and replaces the default StrategyBlocks logo.

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.


Groups

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:

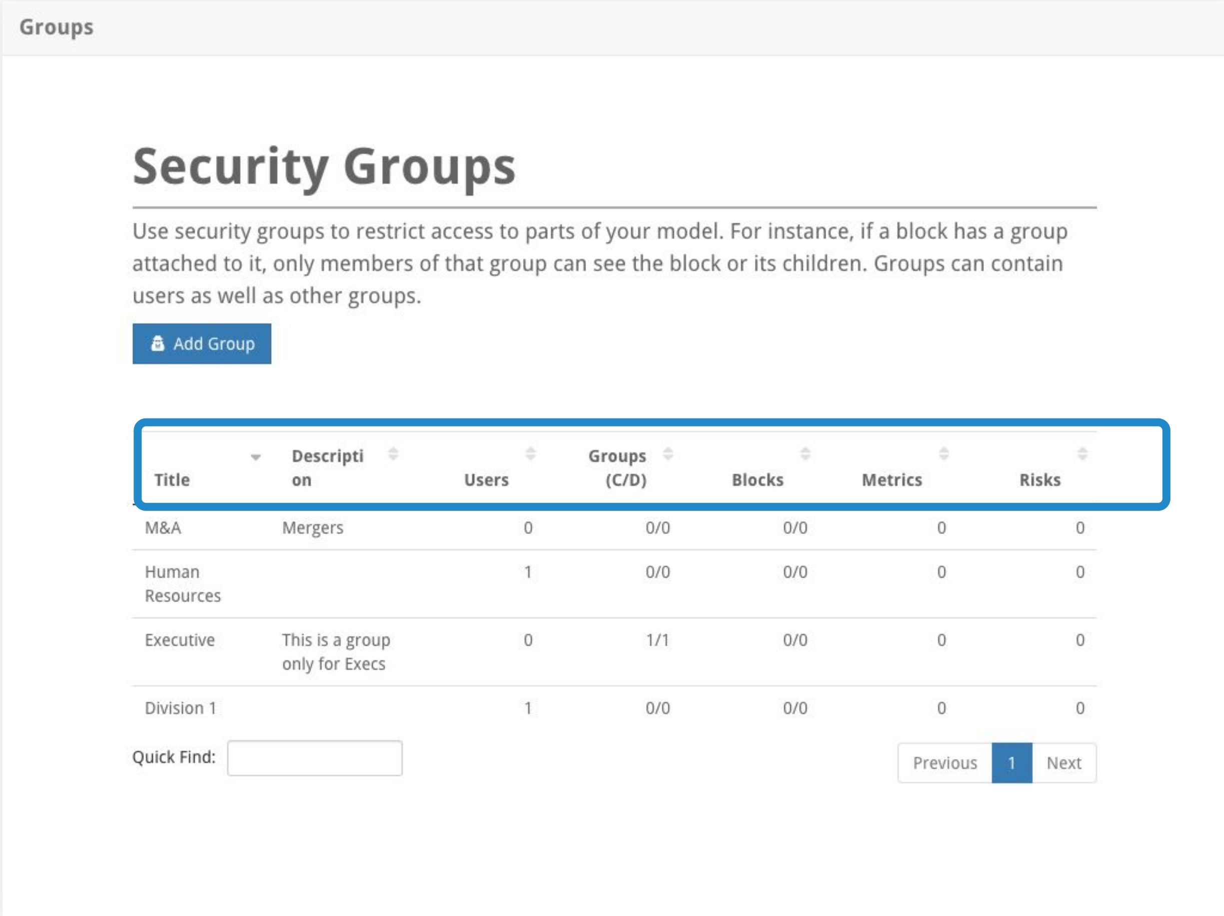
Previous 1 Next

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 calclated metrics, you can group the component pieces of the calculation as a way to hide them from view.



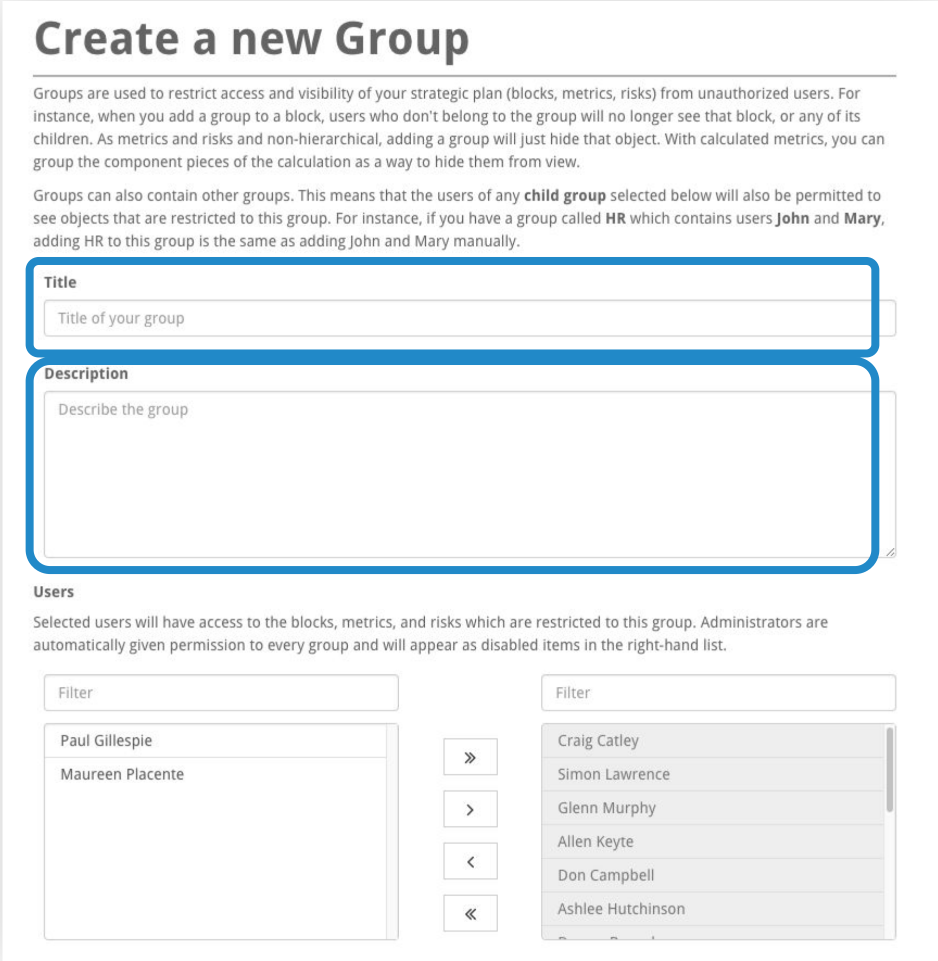
Security Groups

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

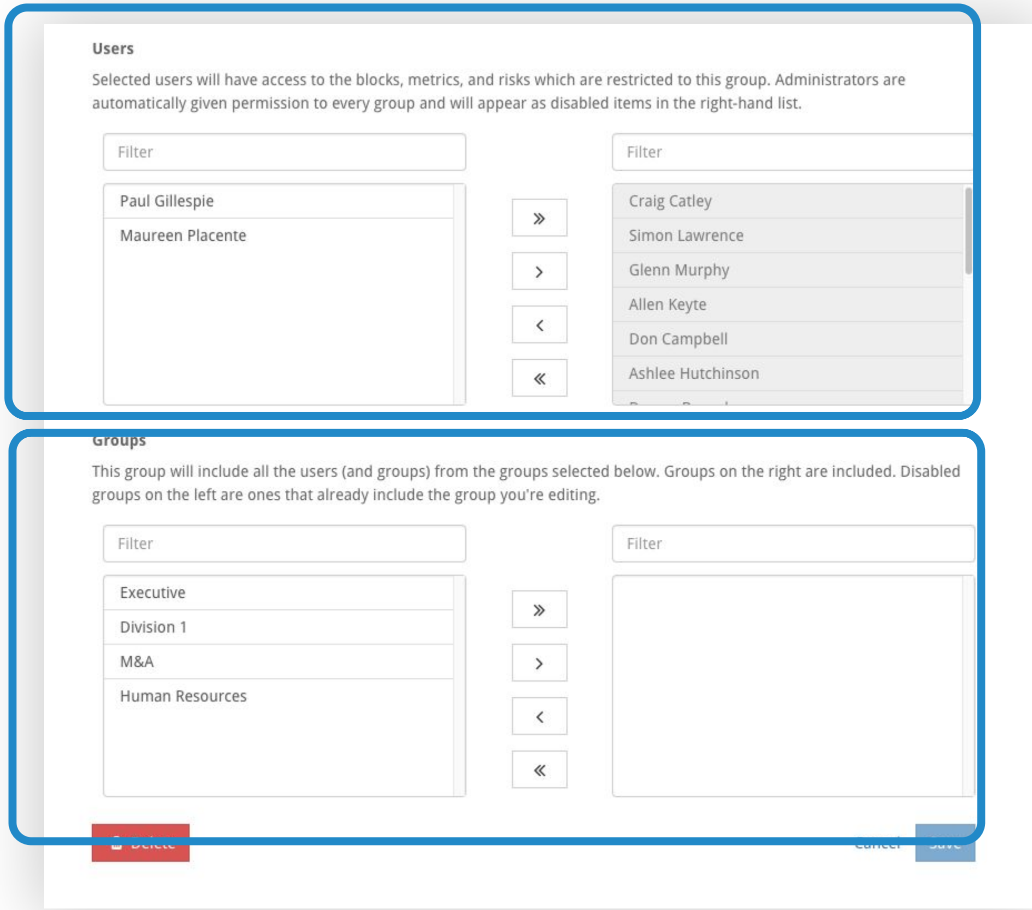


Add Group

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



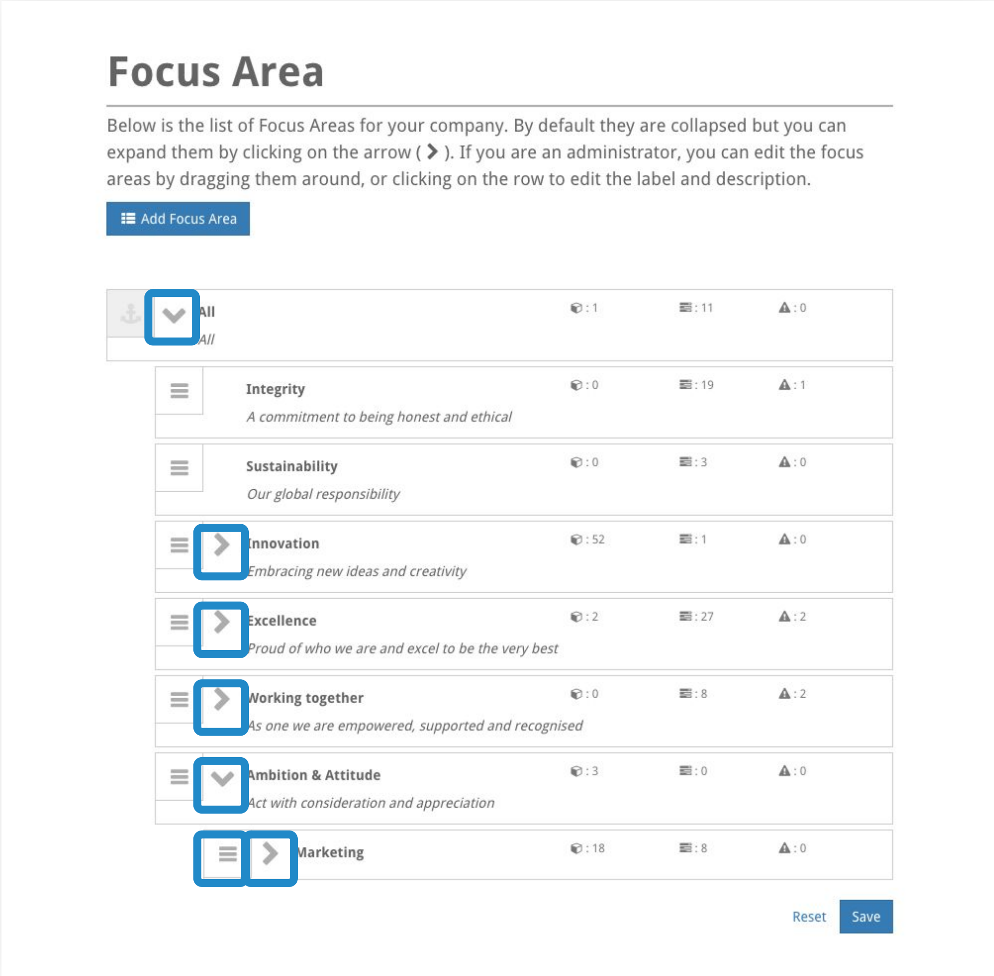
Add Group

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.

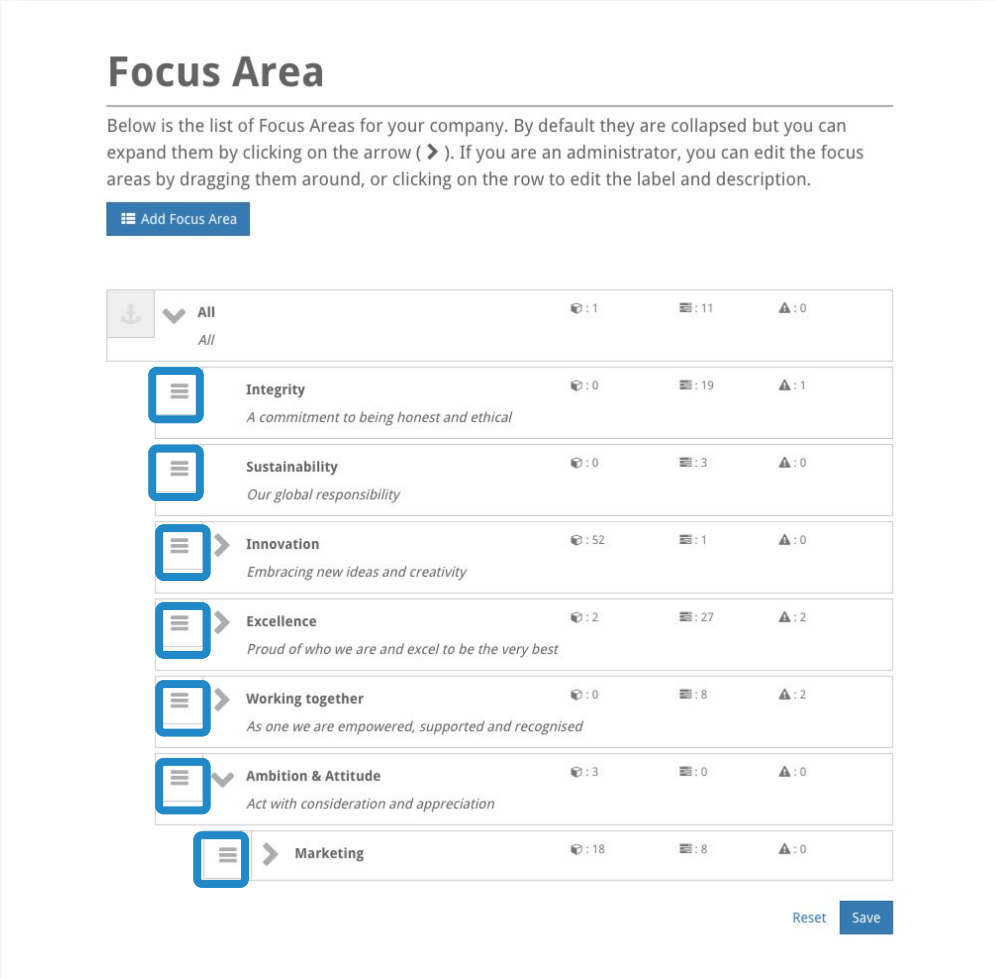


Focus Areas

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.

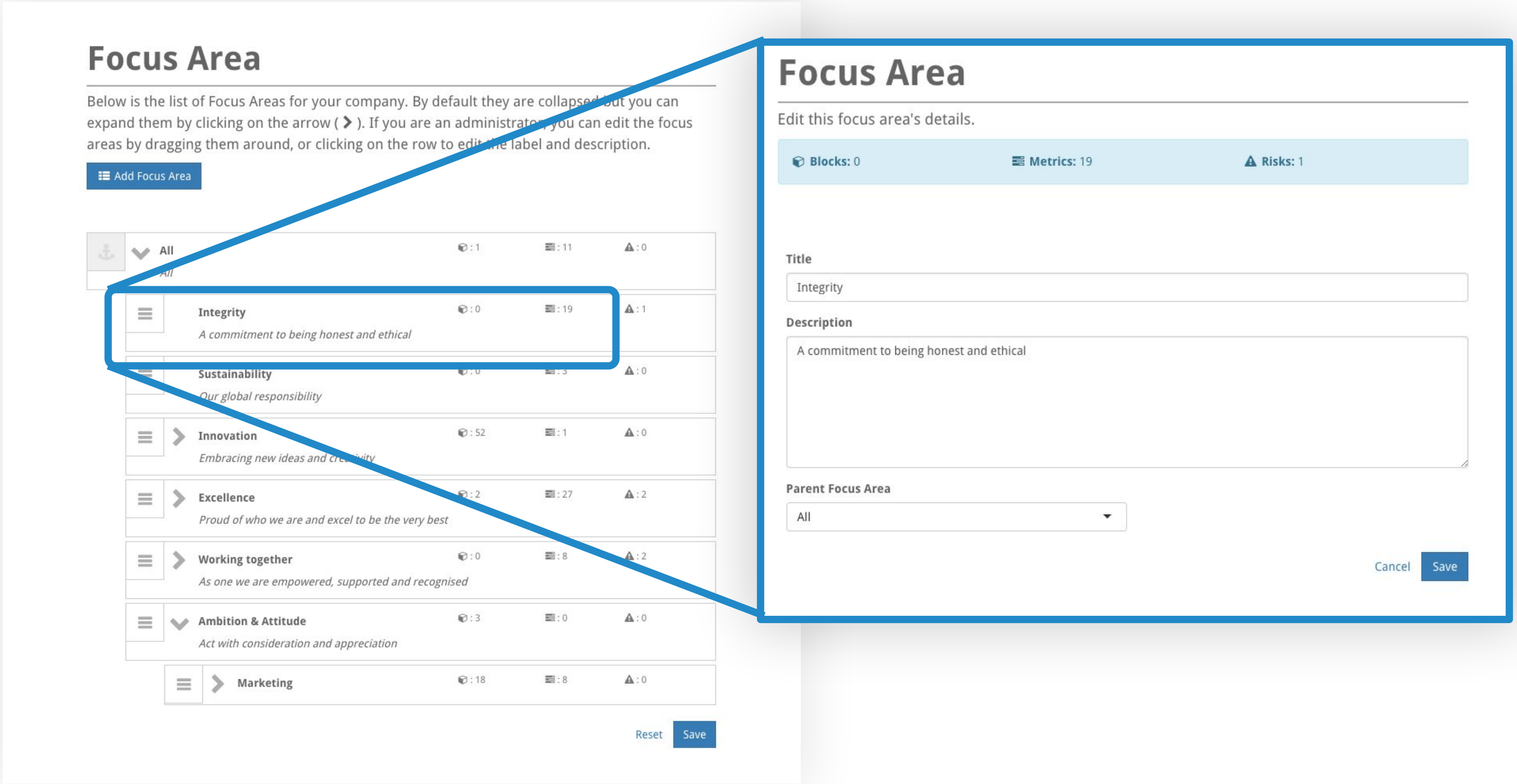
By default, focus areas are collapsed but they can be expanded by clicking the arrow icon. Therefore they can have other focus areas nested inside a parent. However this is an informal hierarchy, all objects must belong to a focus area classification, but the focus area hierarchy is not rigid.



Focus Areas

Company Settings > Focus Areas

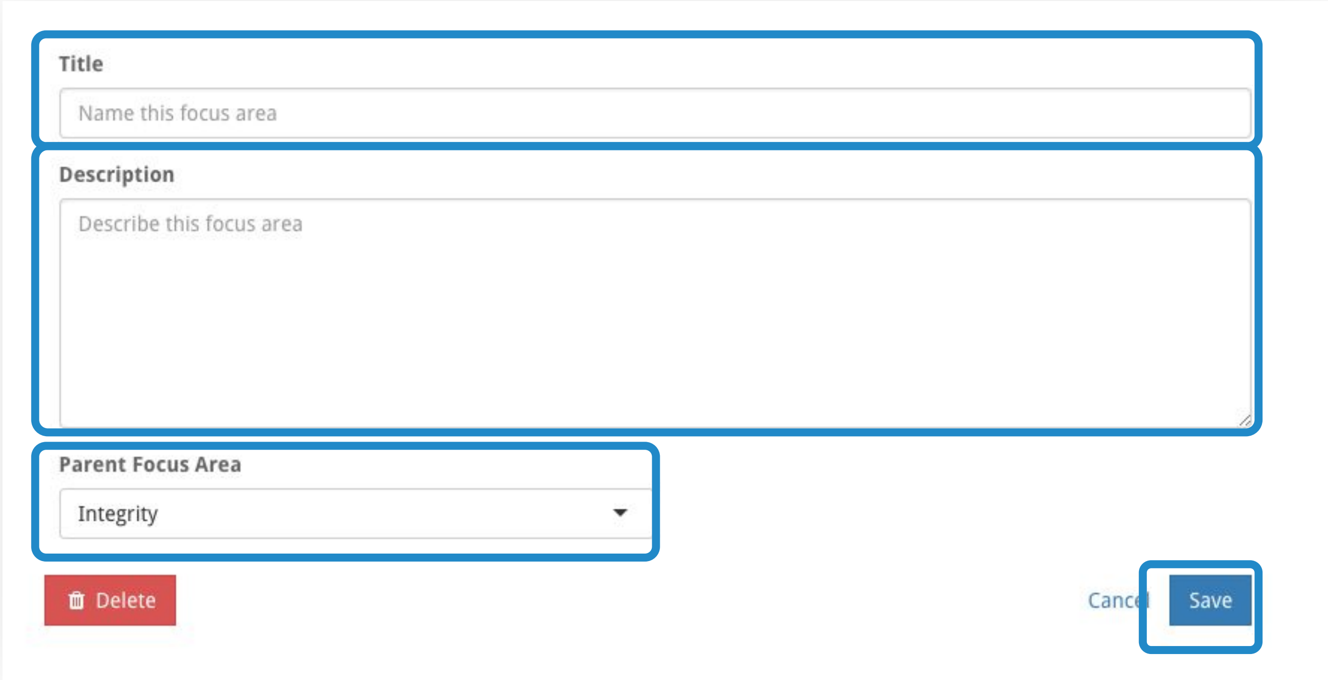
Administrators can re-order focus areas by using the lined icon to drag the rows into different positions and expand their hierarchy by using the arrow. The tables also displays the number of objects categorized within a focus area.



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.

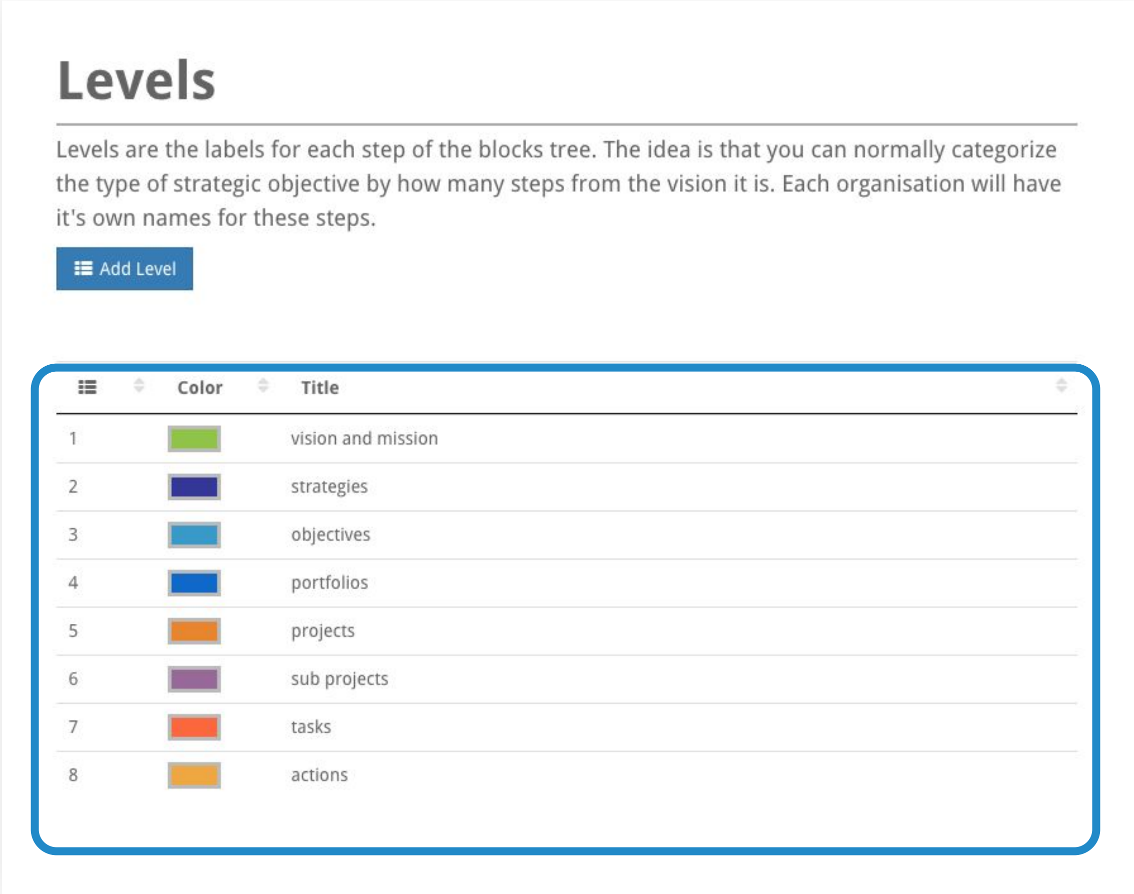


Add Focus Area

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.

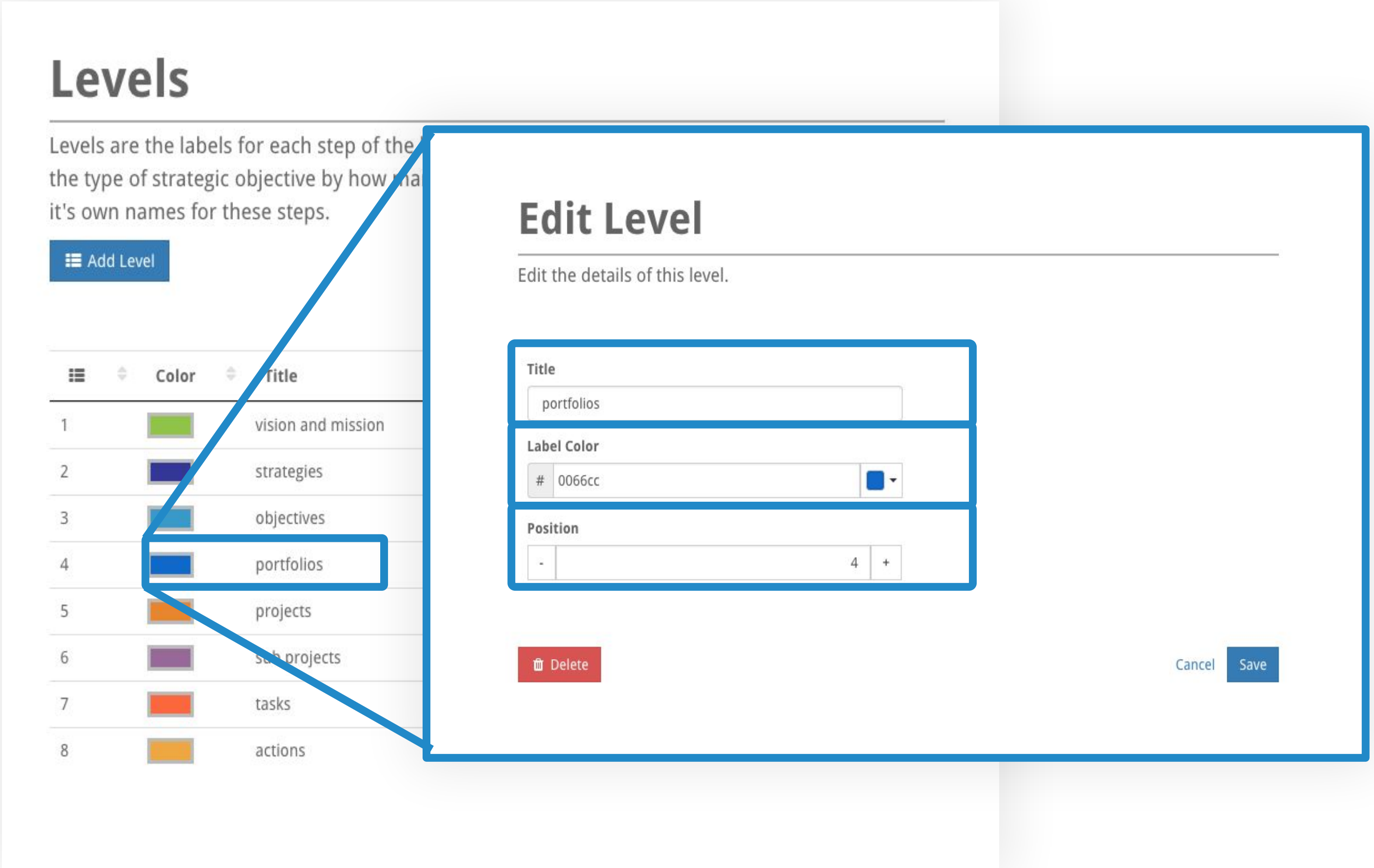
Select Save to retain your changes.



Levels

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.



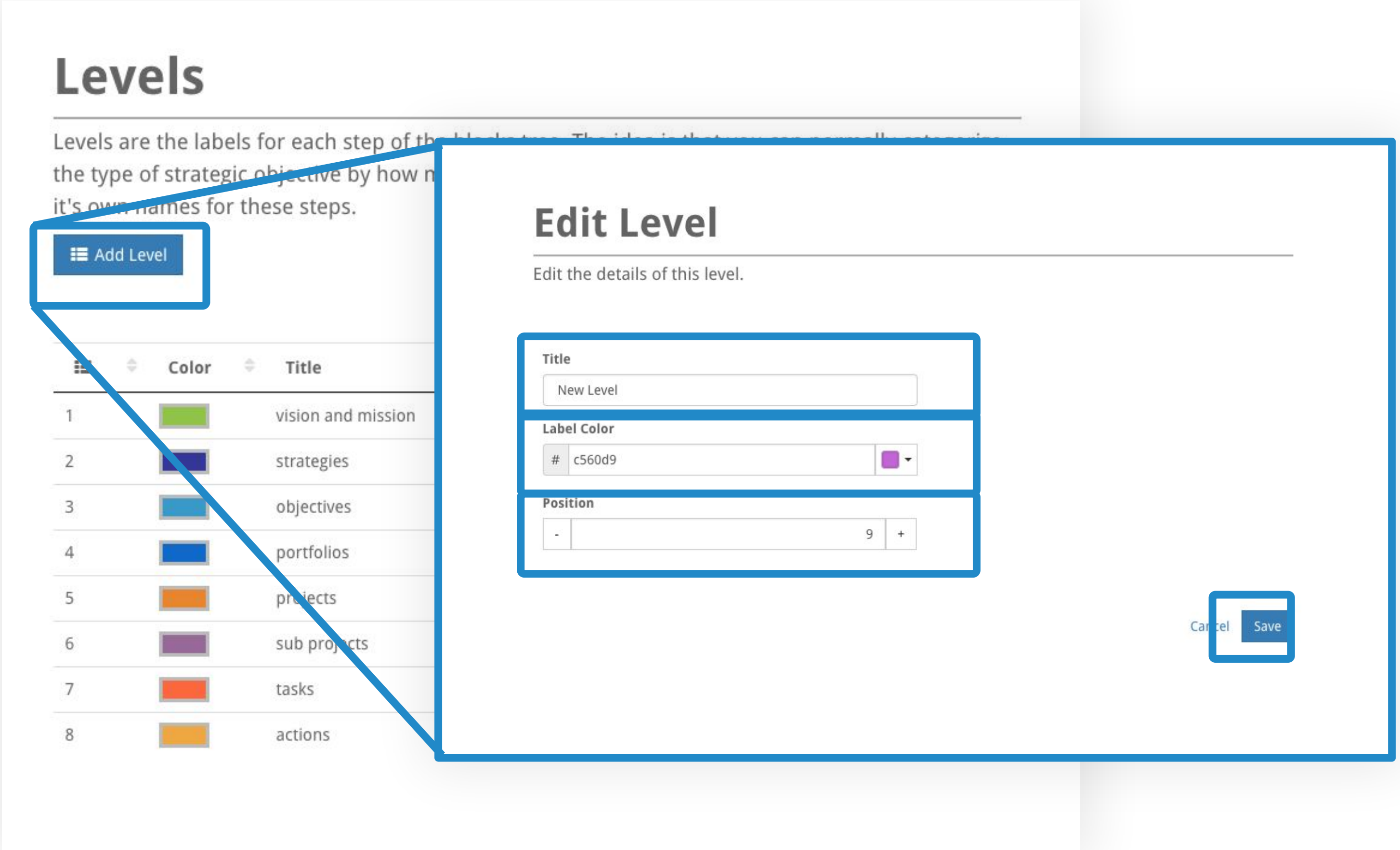
Edit a Level

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.



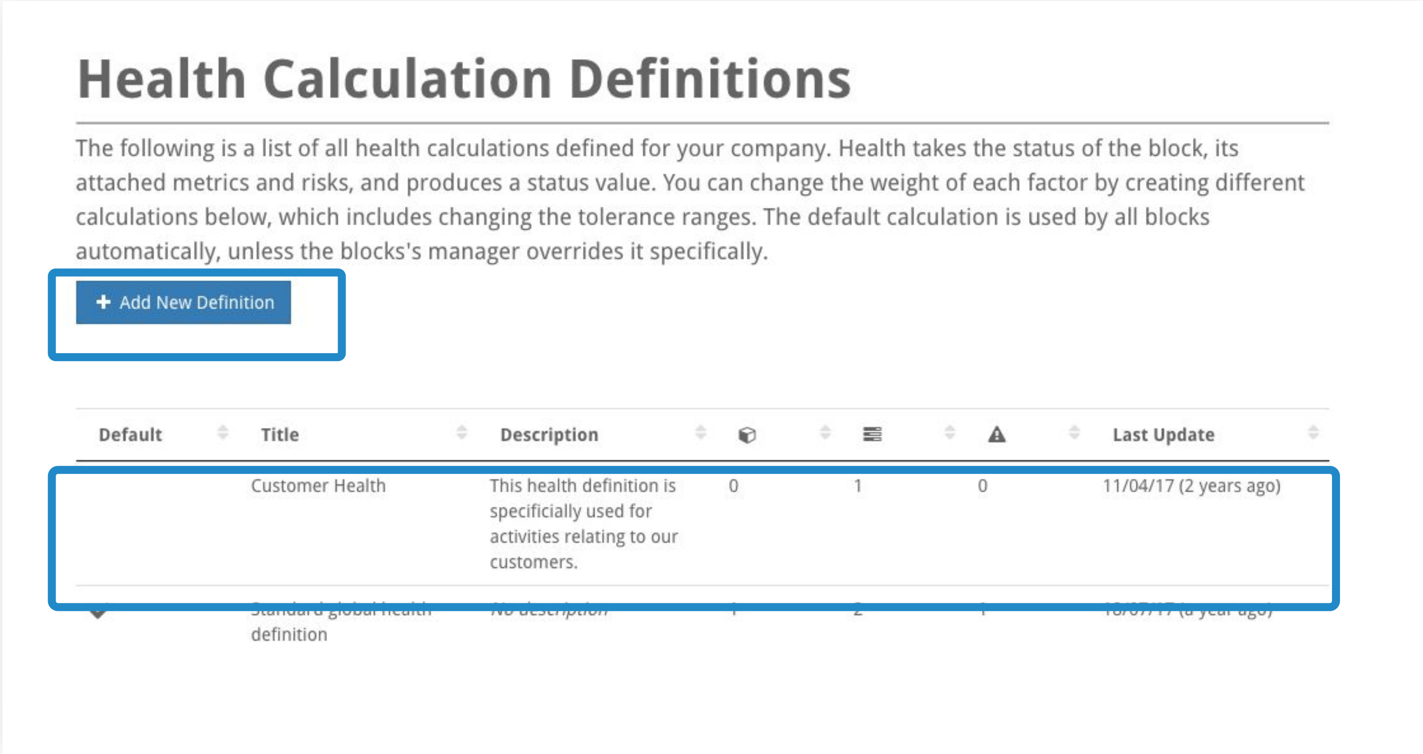
Add a Level

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.



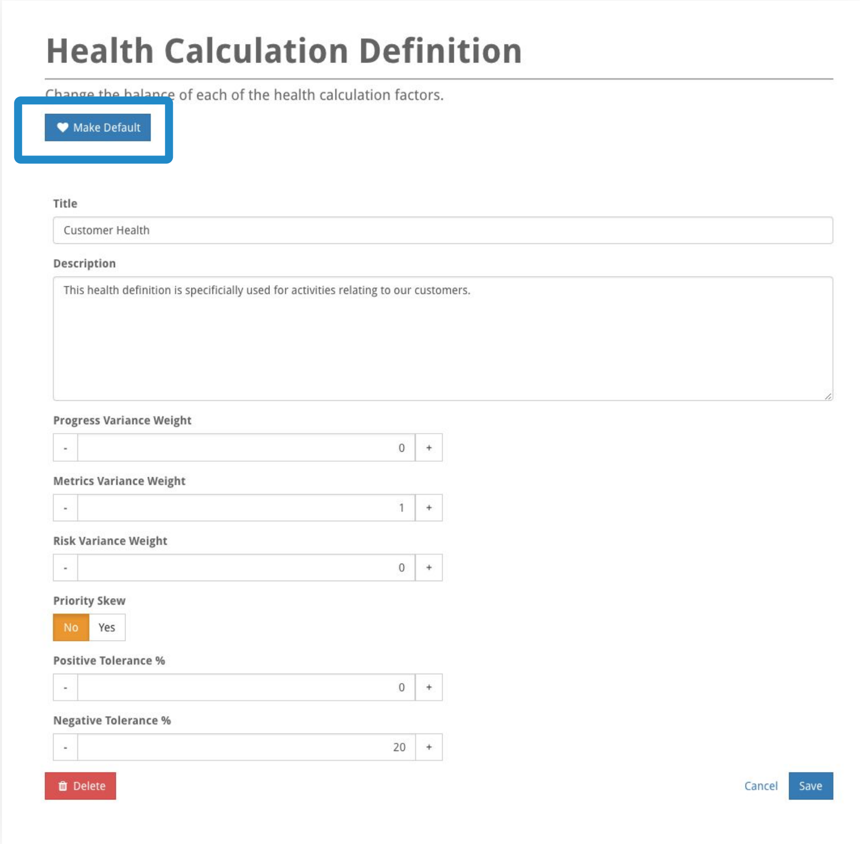
Strategic Health

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.

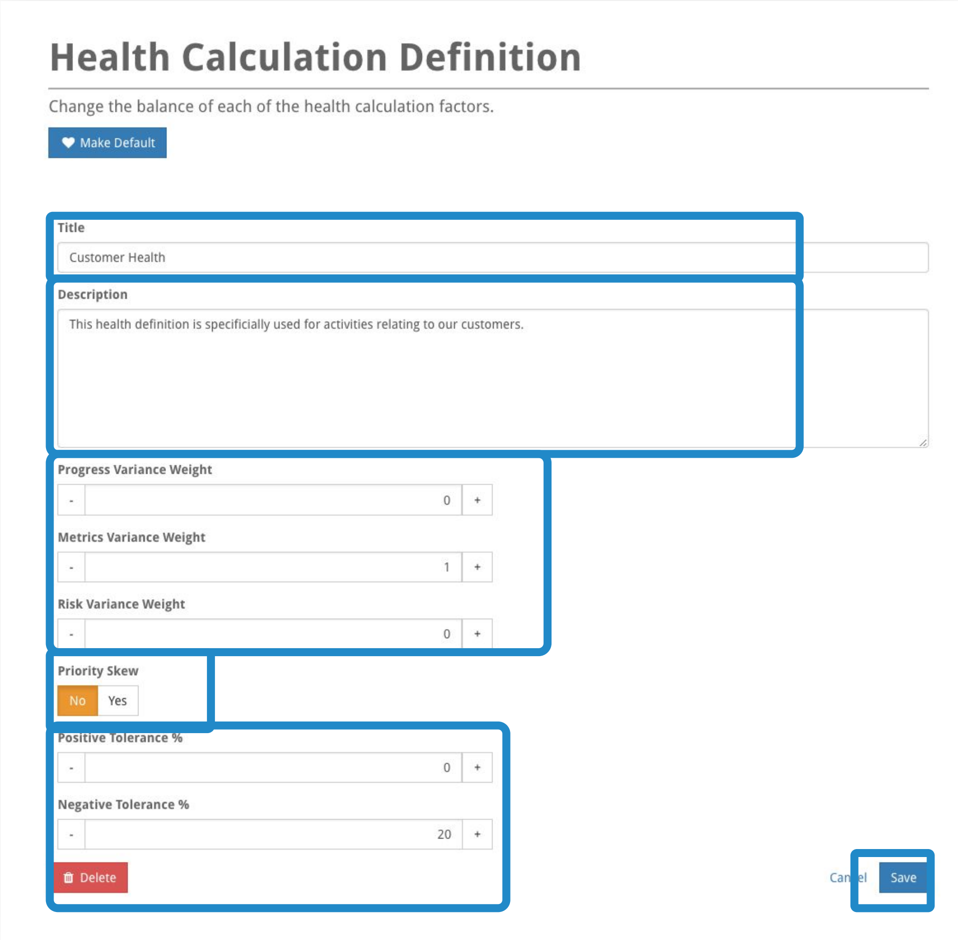


Add Health Calculation Definition

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 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

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.

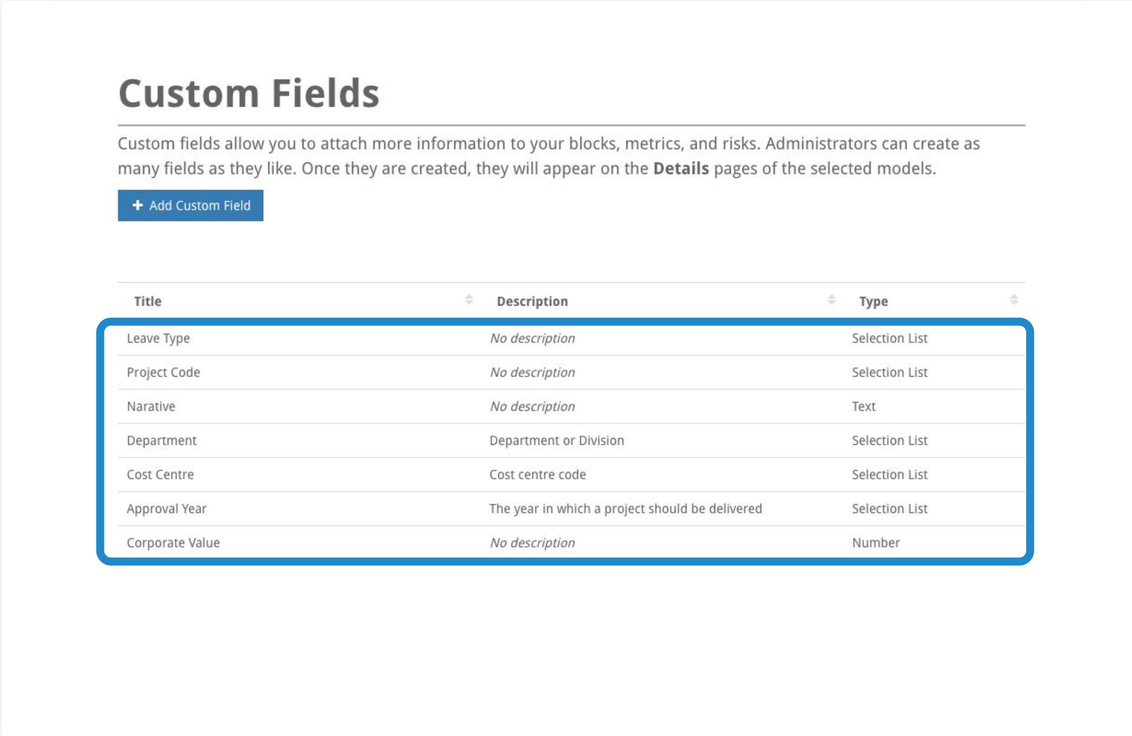
Tolerance Ranges

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

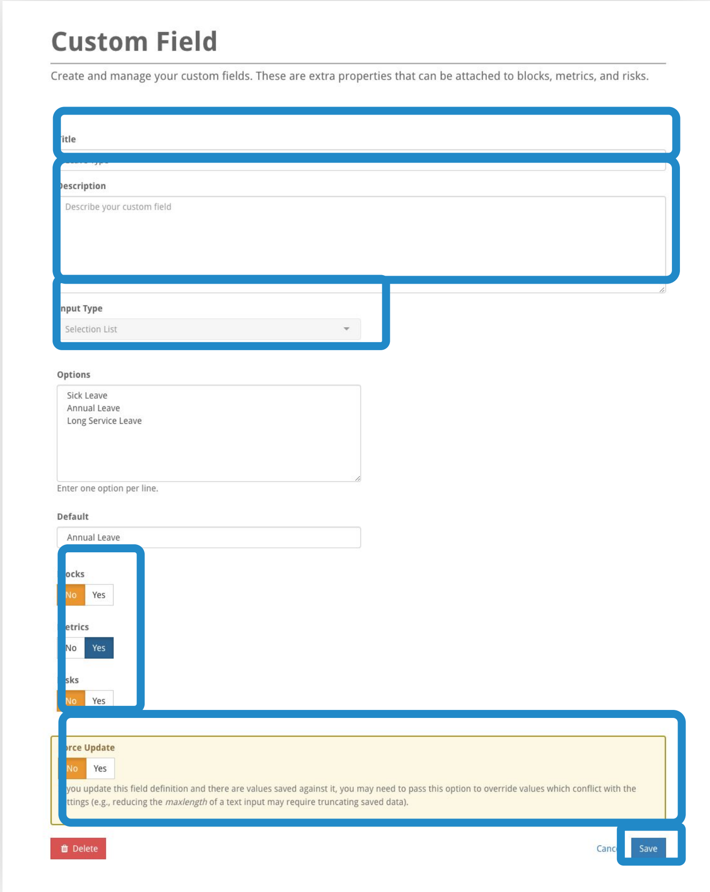
Custom Fields

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.

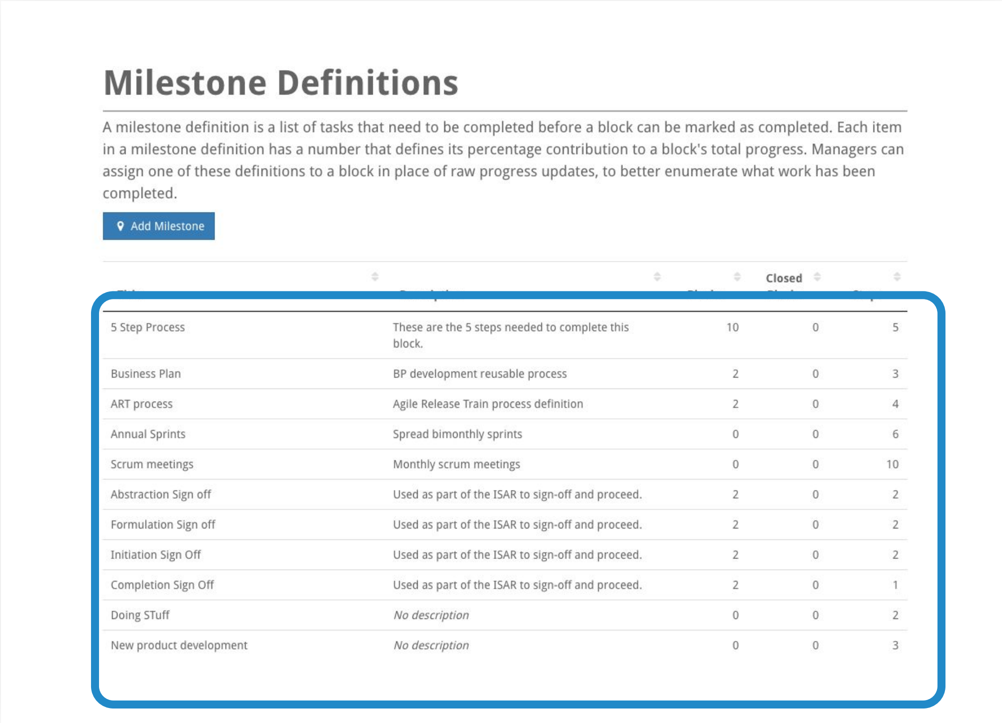


Custom Fields

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	*No description*	0	0	2
New product development	*No description*	0	0	3

Milestone Definitions

Company Settings > Milestones

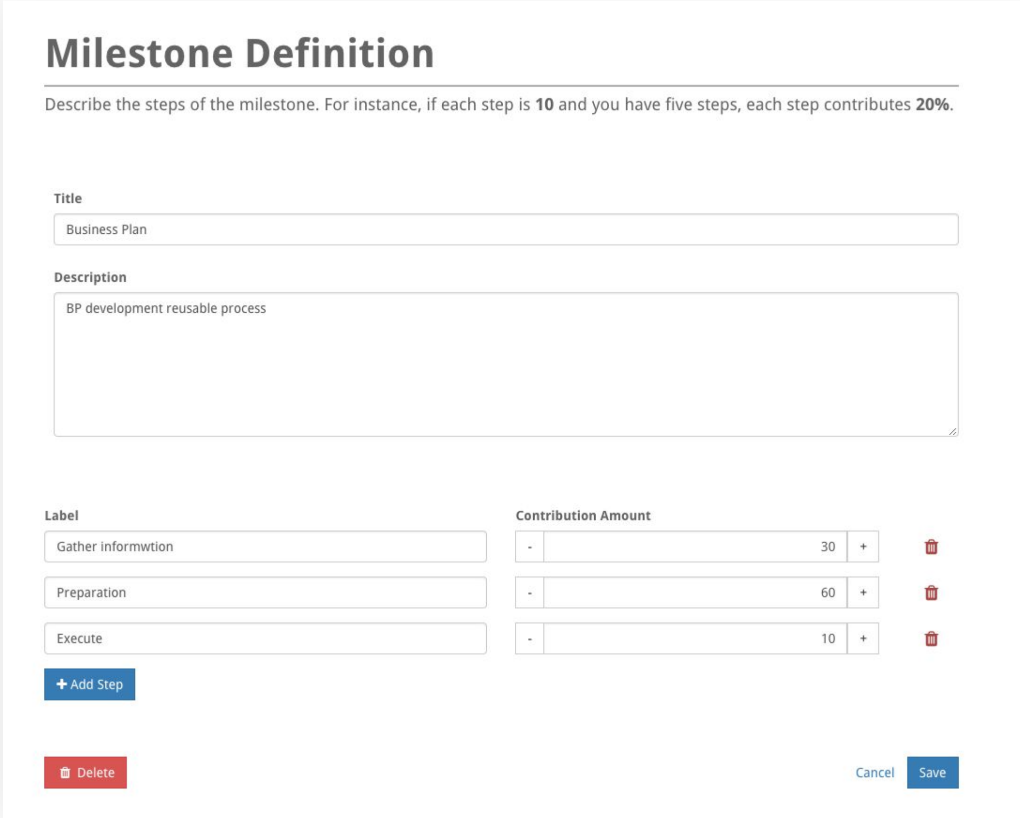
A milestone definition is a list of tasks that need to be completed before a block can be marked as 100% completed. Each item in a milestone definition has a number that defines its percentage contribution to a block's total progress. Managers can assign one of these definitions to a block(s) in place 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.

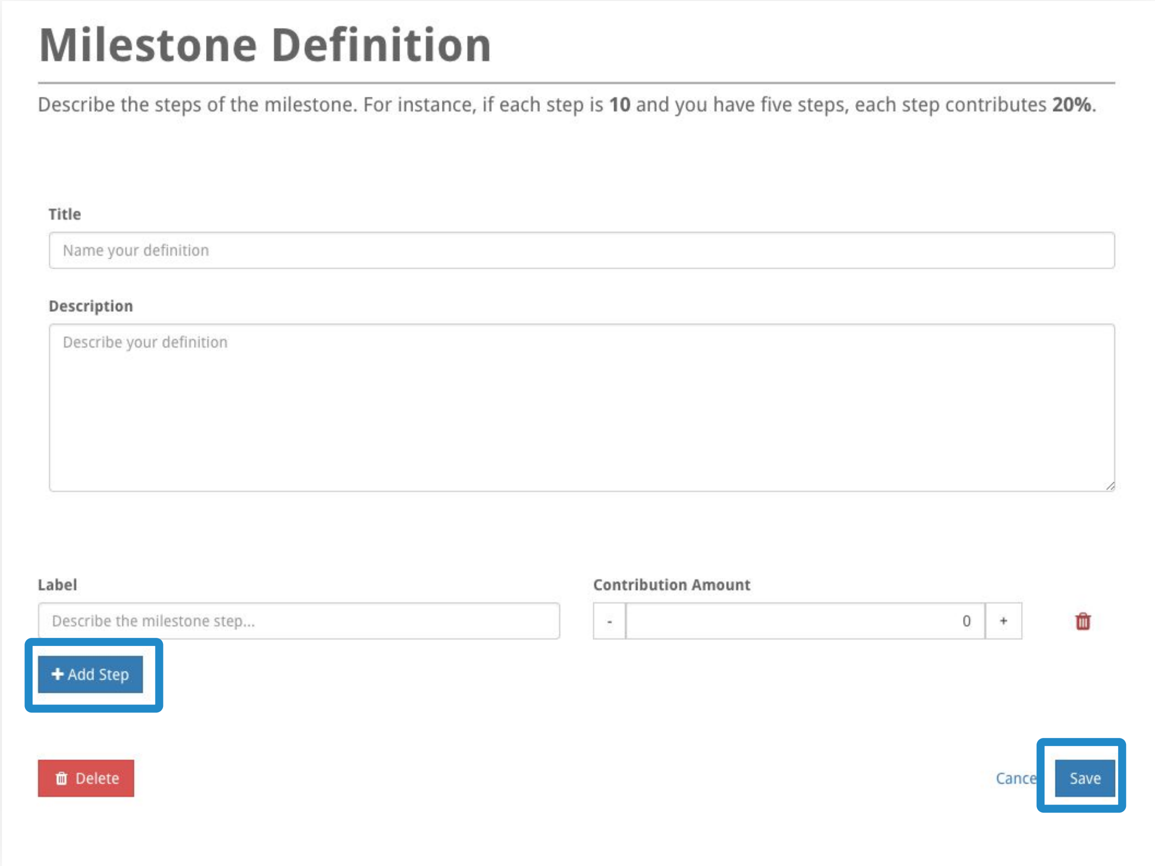


Edit Milestone Definition

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.

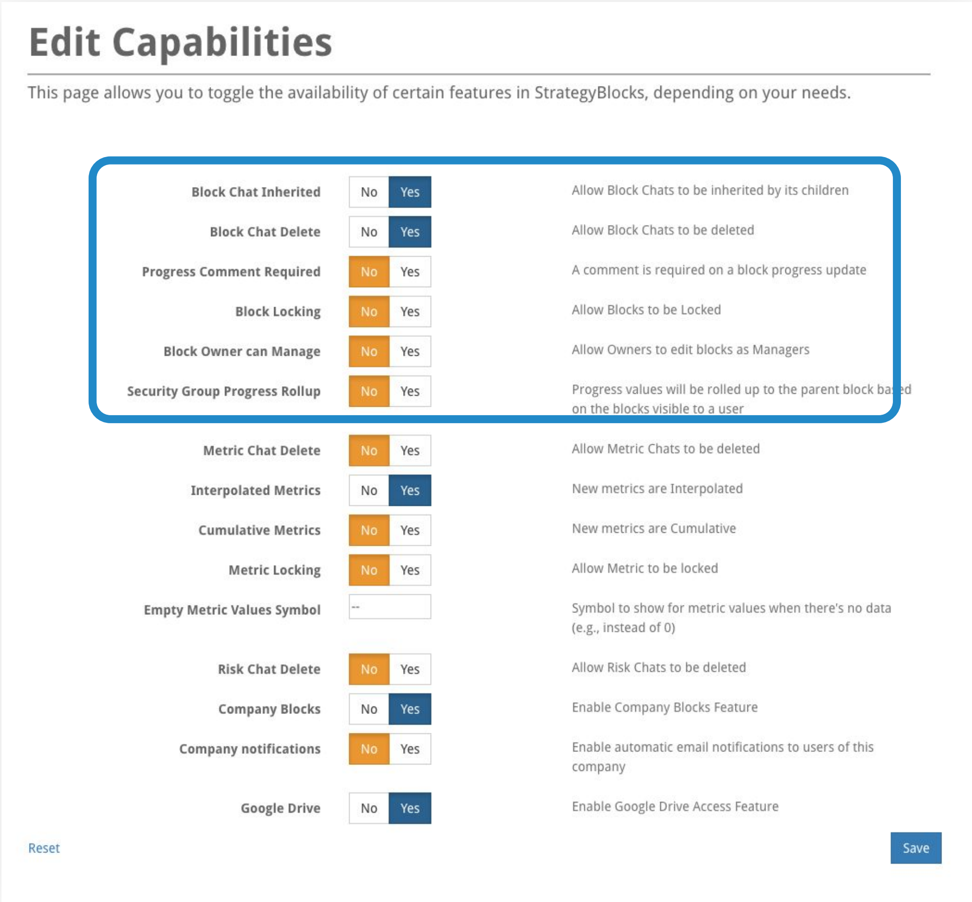


Add Milestone Definition

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.



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

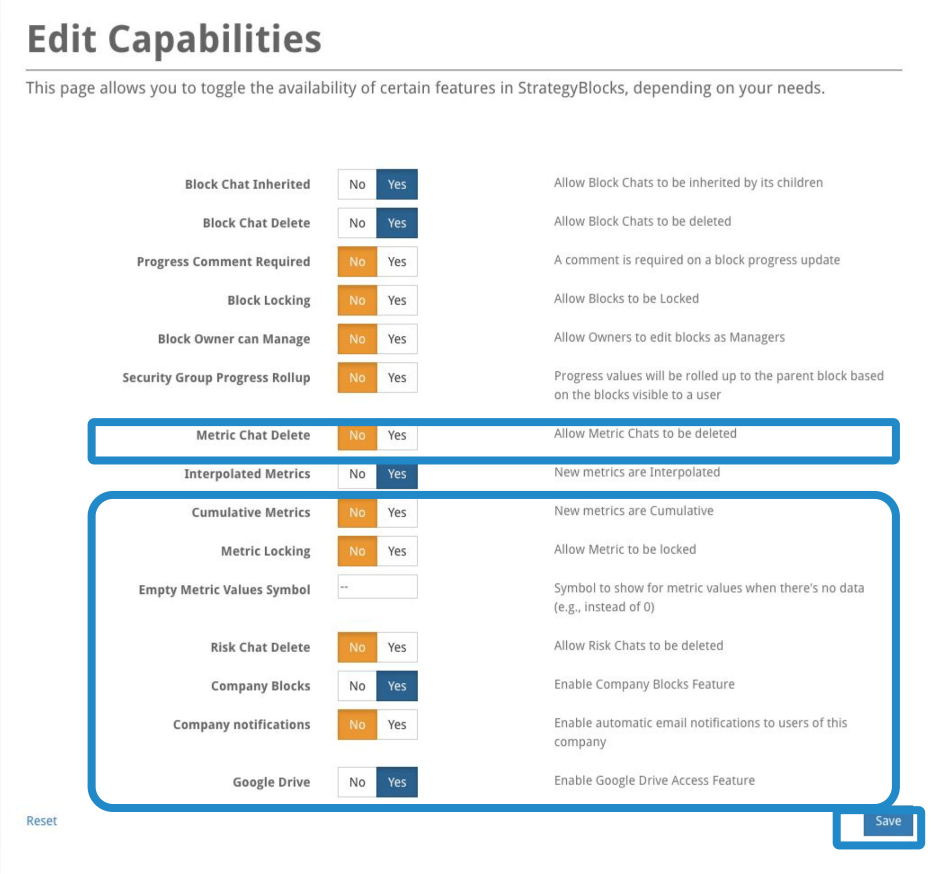
Block Locking - allow Blocks to be locked, until ready to operationalise the model

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

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 O)

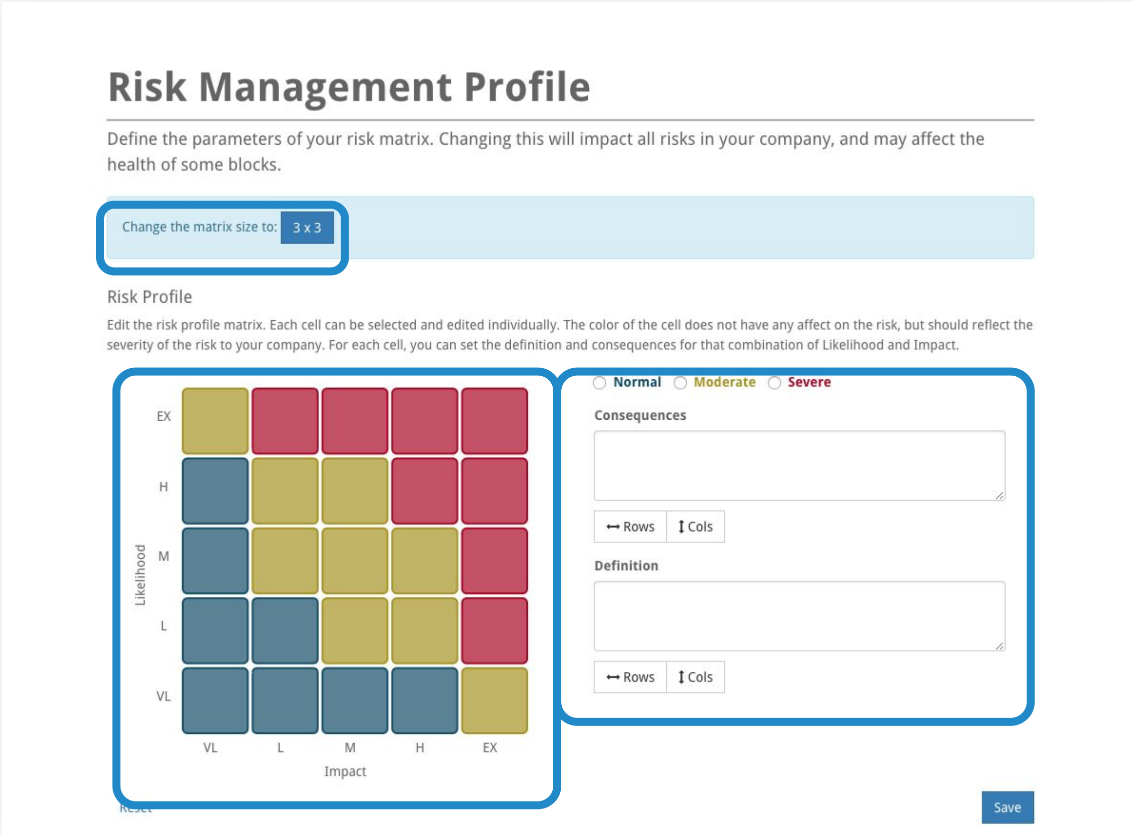
Risk Chat Delete - allow Risk Chats to be deleted

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.



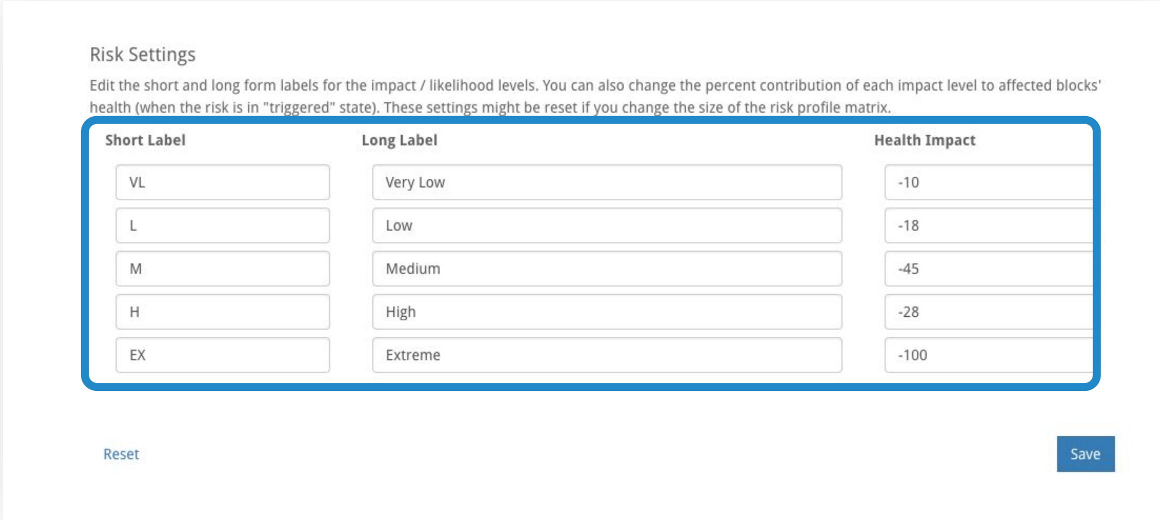
Risk Management

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.

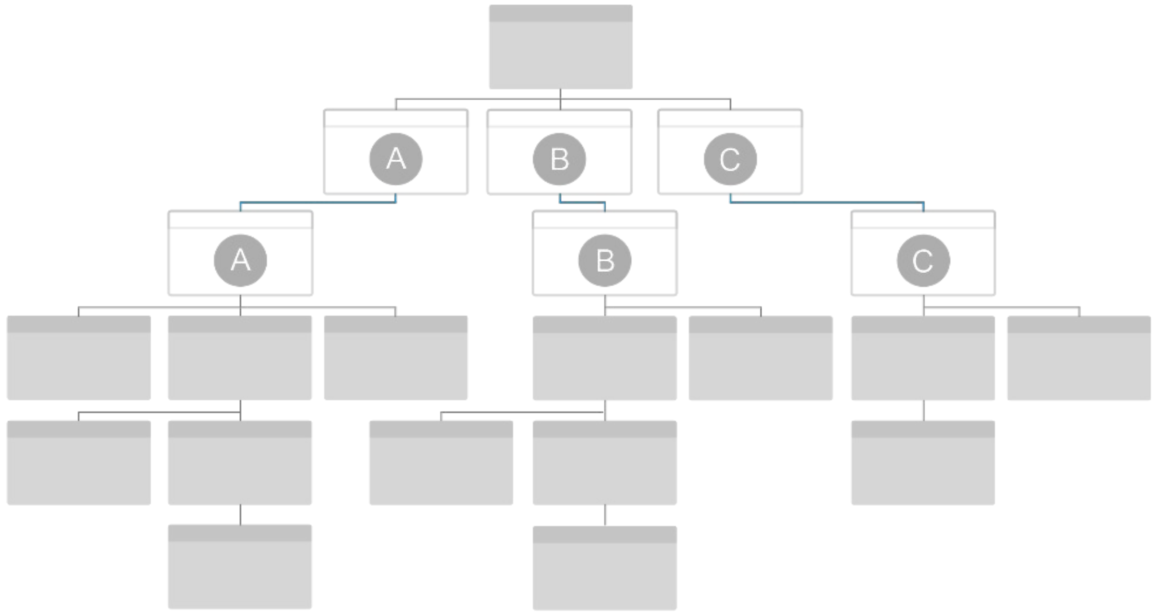


Risk Settings

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

Strategy Blocks

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