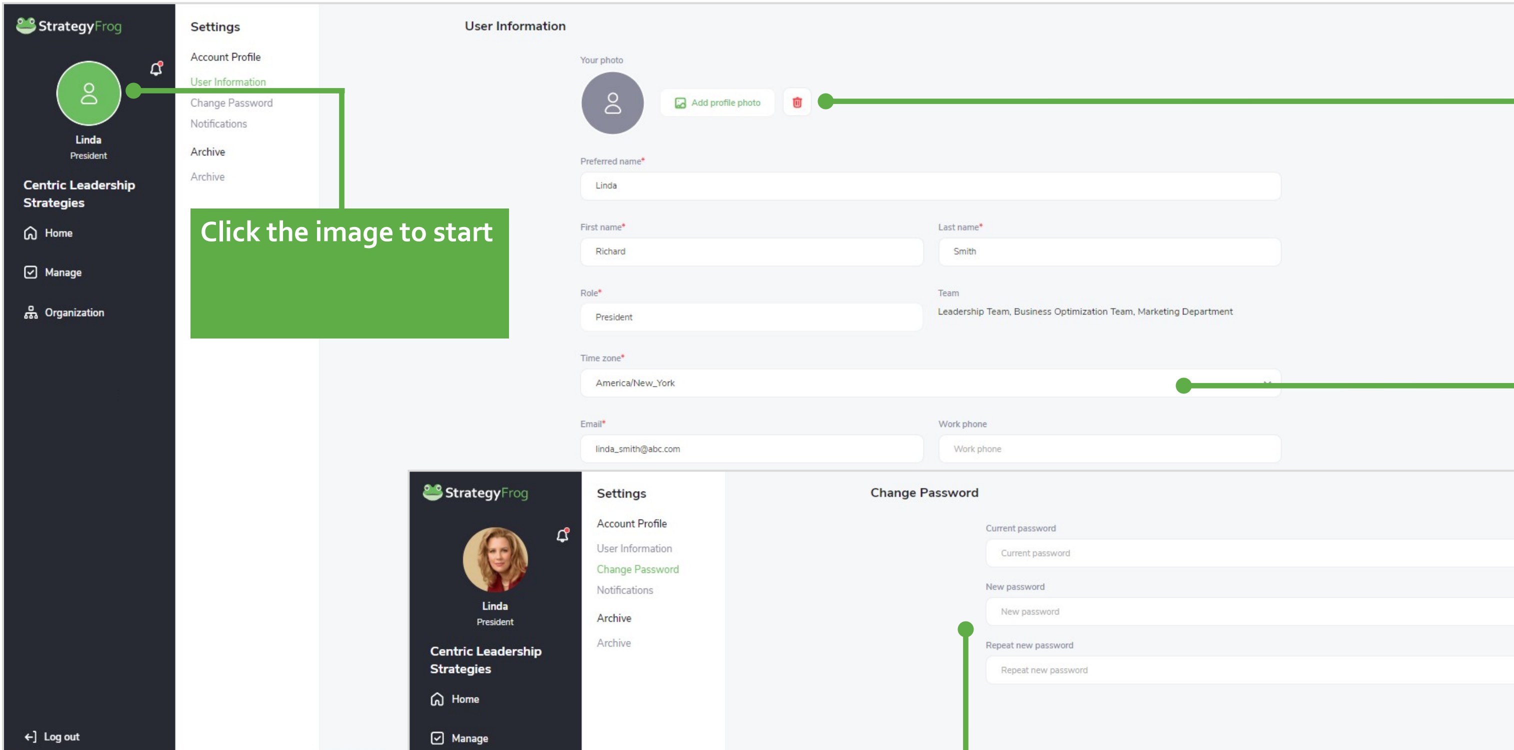
Quick Reference Guide (QRG): USER SETTINGS

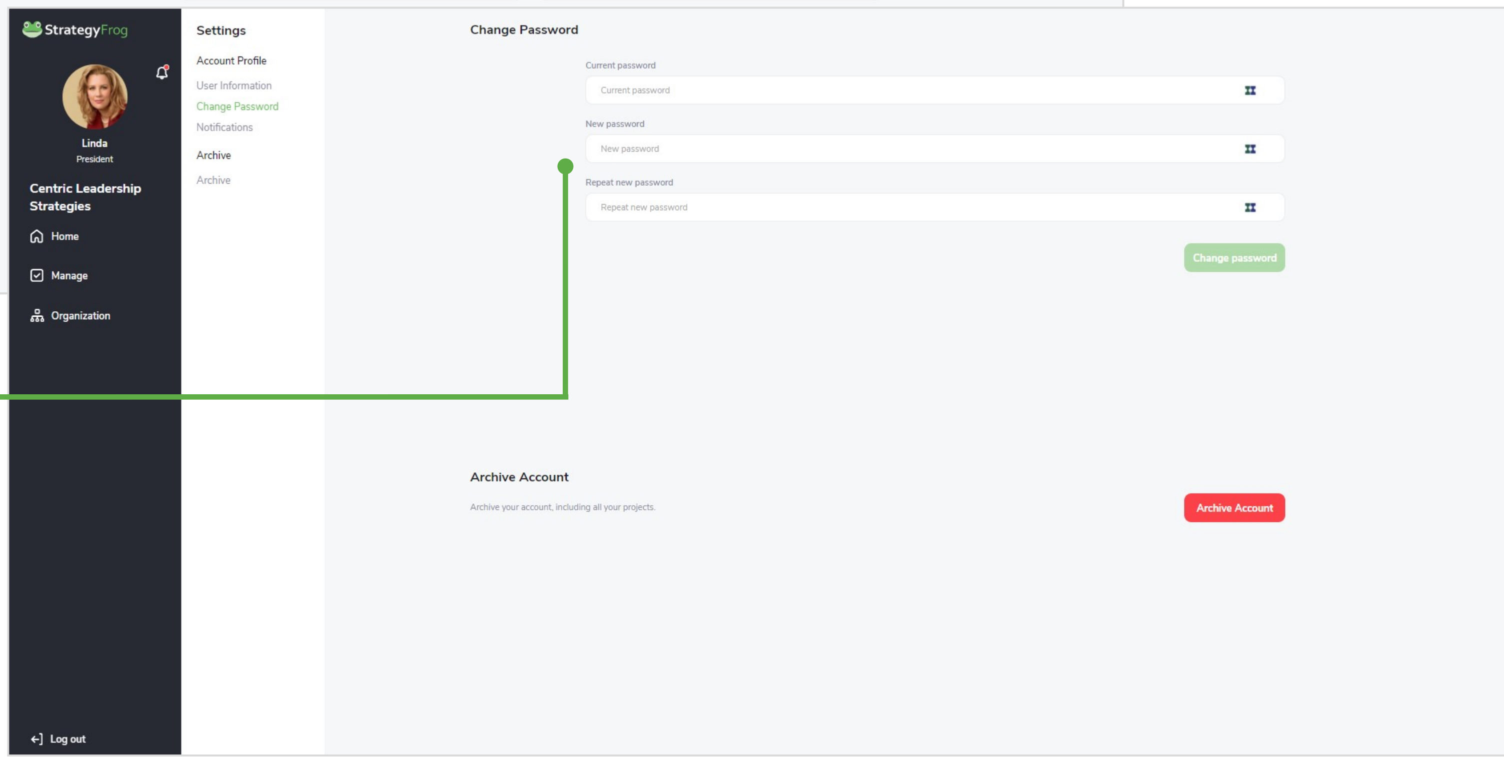
Adjust your USER SETTINGS to manage your work the way you want it



Click the image to start

Upload a photo so your peers can see you clearly.

Establish your time zone to set your work to the right time for you.

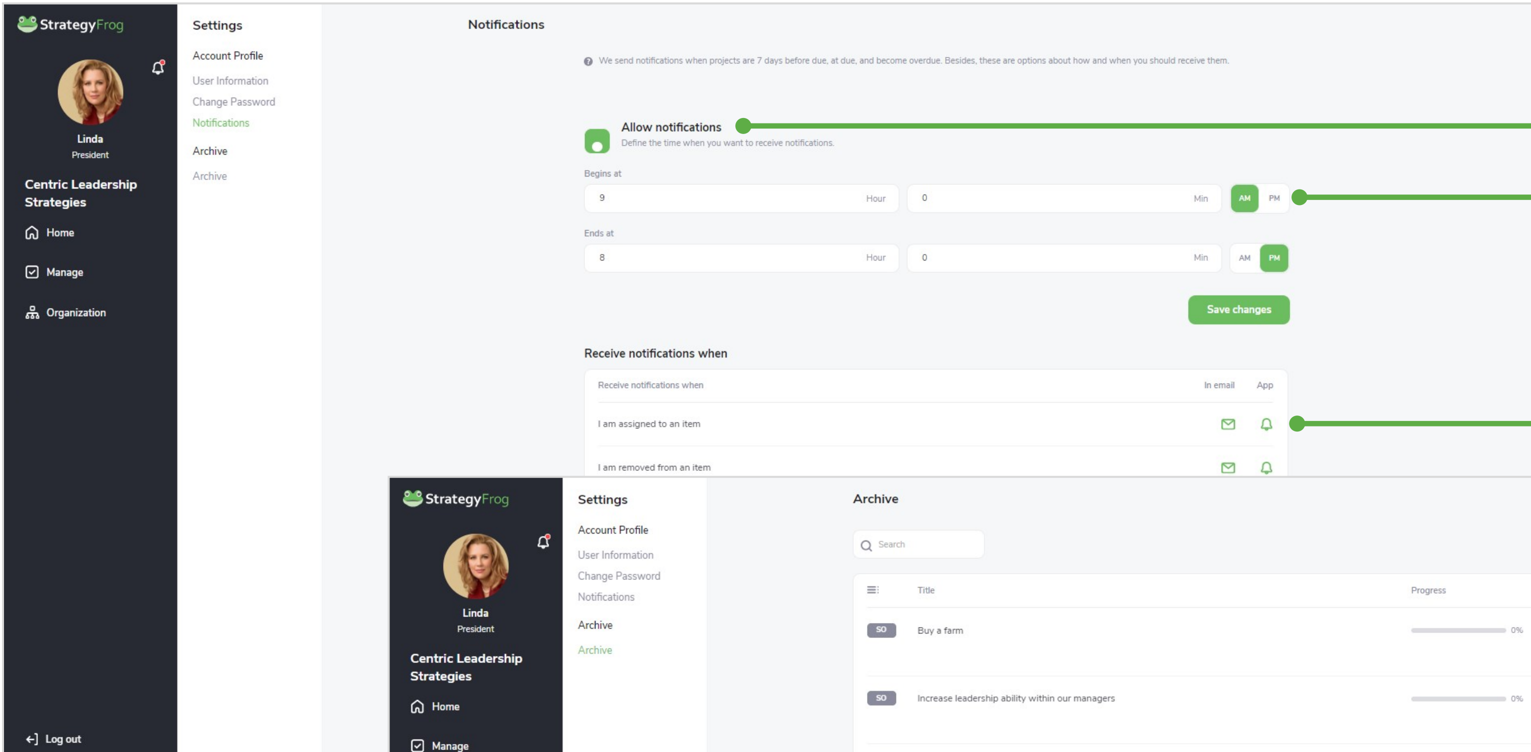


Change your password as needed.

Quick Reference Guide (QRG): USER SETTINGS

StrategyFrog

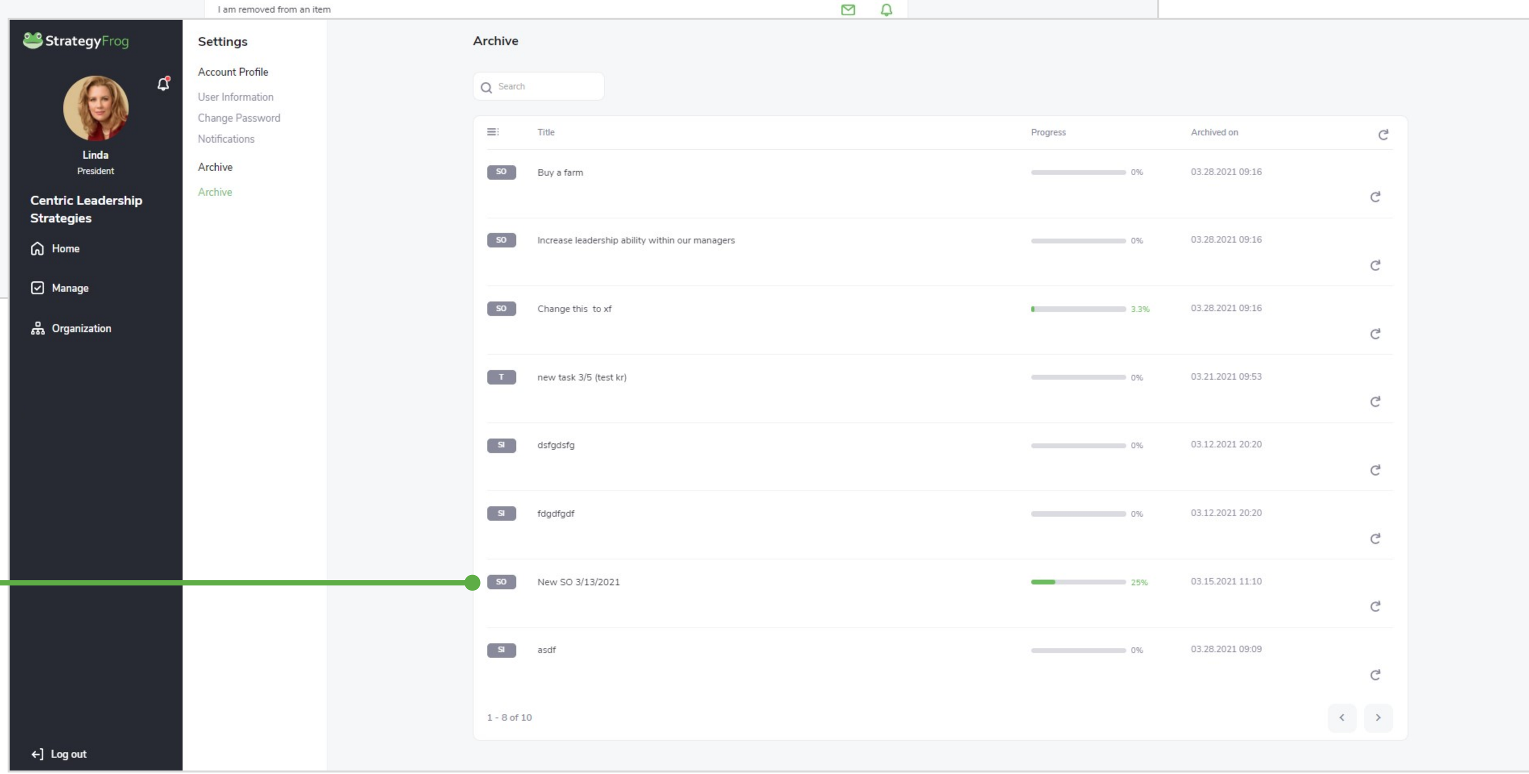
Adjust your USER SETTINGS to manage your work the way you want it



Allow notifications (or not).

Set when you want notifications to arrive.

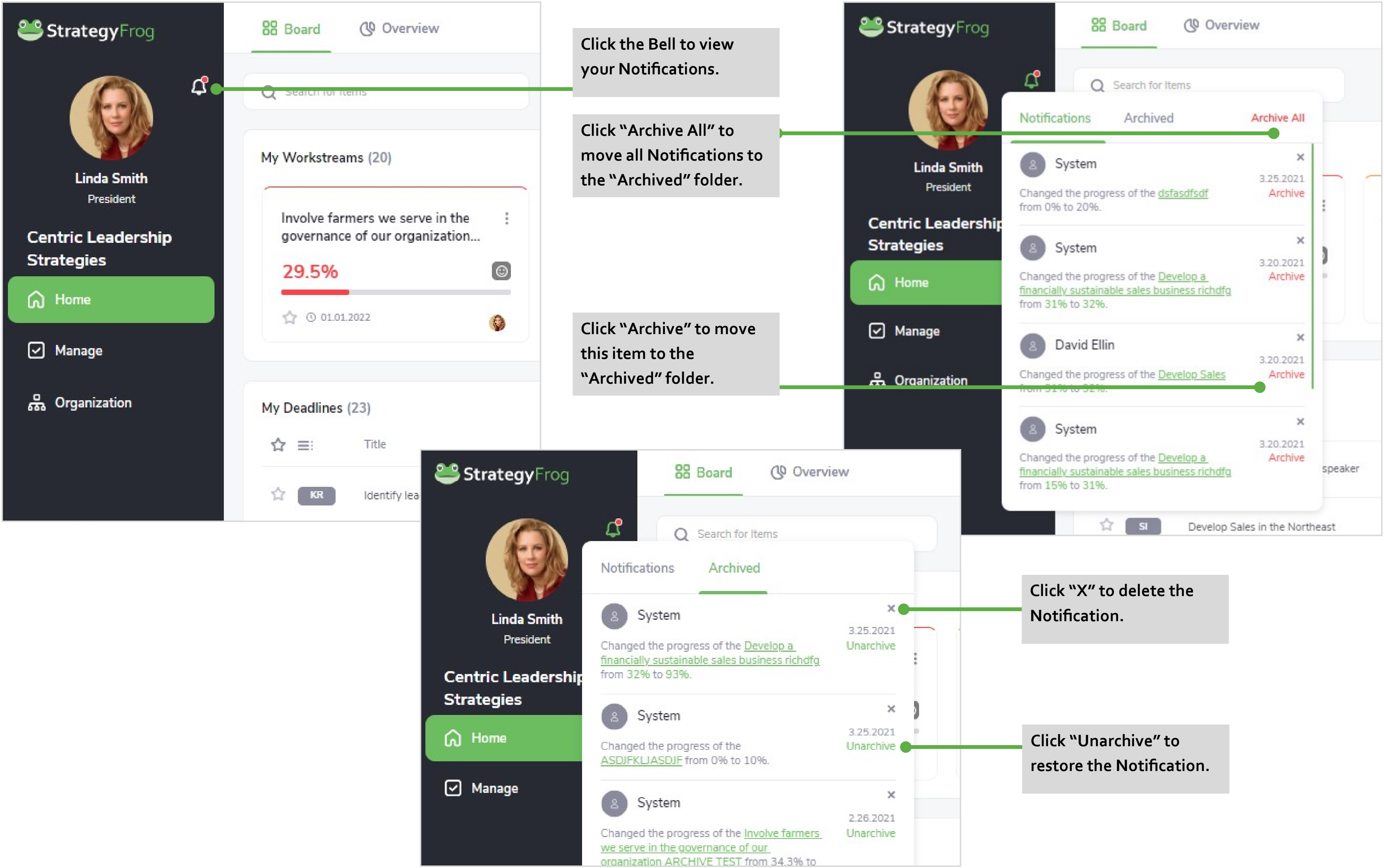
Determine what notifications you want (and how you want them delivered).



View (or unarchive) your archived work

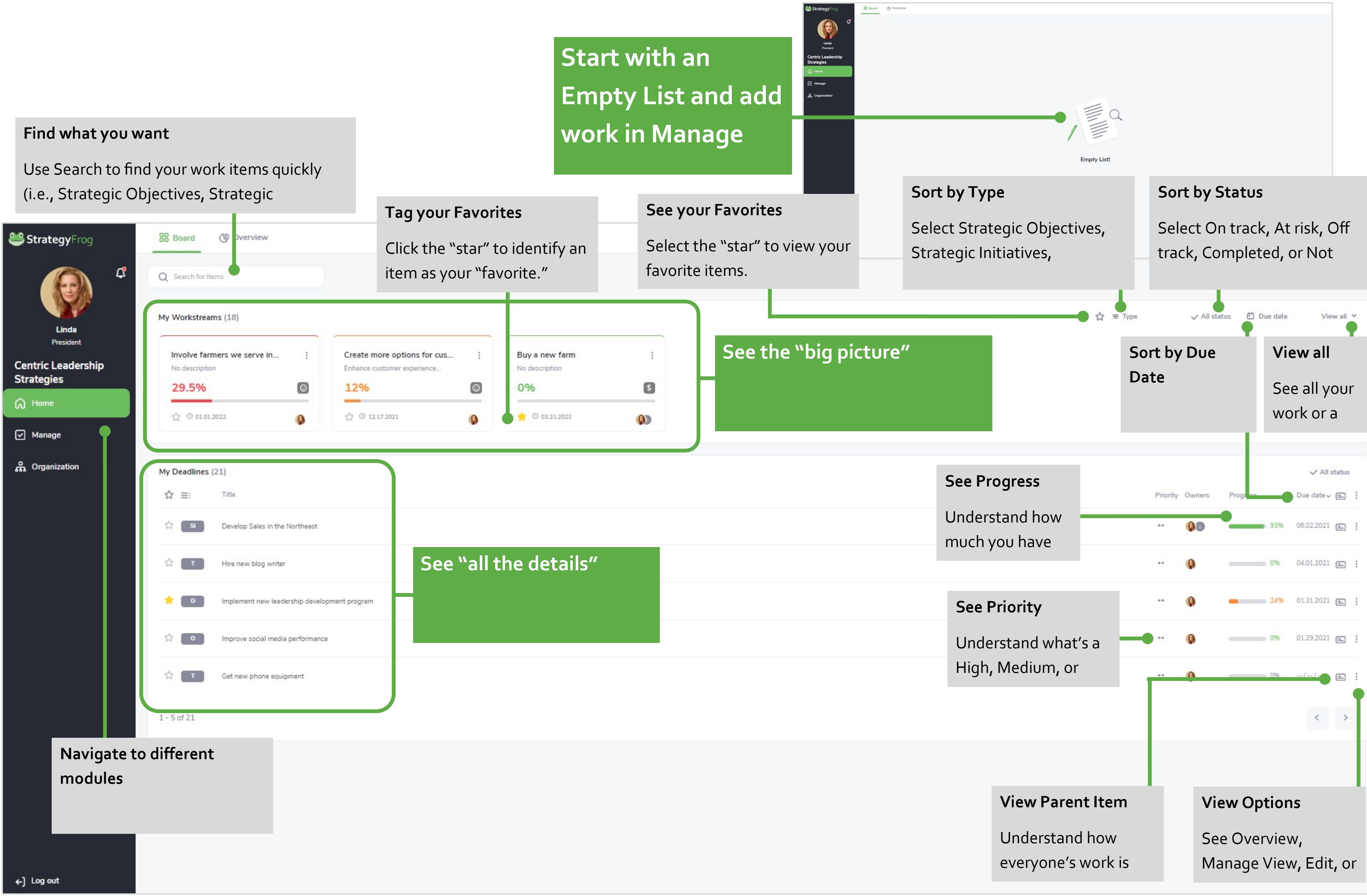
Quick Reference Guide (QRG): NOTIFICATIONS

Adjust your USER SETTINGS to manage your work the way you want it



Quick Reference Guide (QRG): HOME

A Use BOARD to see the "big picture" and all the "details" in one place



Start with an Empty List and add work in Manage

Find what you want

Use Search to find your work items quickly (i.e., Strategic Objectives, Strategic

Tag your Favorites

Click the "star" to identify an item as your "favorite."

See your Favorites

Select the "star" to view your favorite items.

Sort by Type

Select Strategic Objectives, Strategic Initiatives,

Sort by Status

Select On track, At risk, Off track, Completed, or Not

See the "big picture"

Sort by Due Date

View all

See all your work or a

See Progress

Understand how much you have

See "all the details"

See Priority

Understand what's a High, Medium, or

Navigate to different modules

View Parent Item

Understand how everyone's work is

View Options

See Overview, Manage View, Edit, or

Quick Reference Guide (QRG): HOME

StrategyFrog

B Use OVERVIEW to see data on work (yours and the organization)

Filter by Person

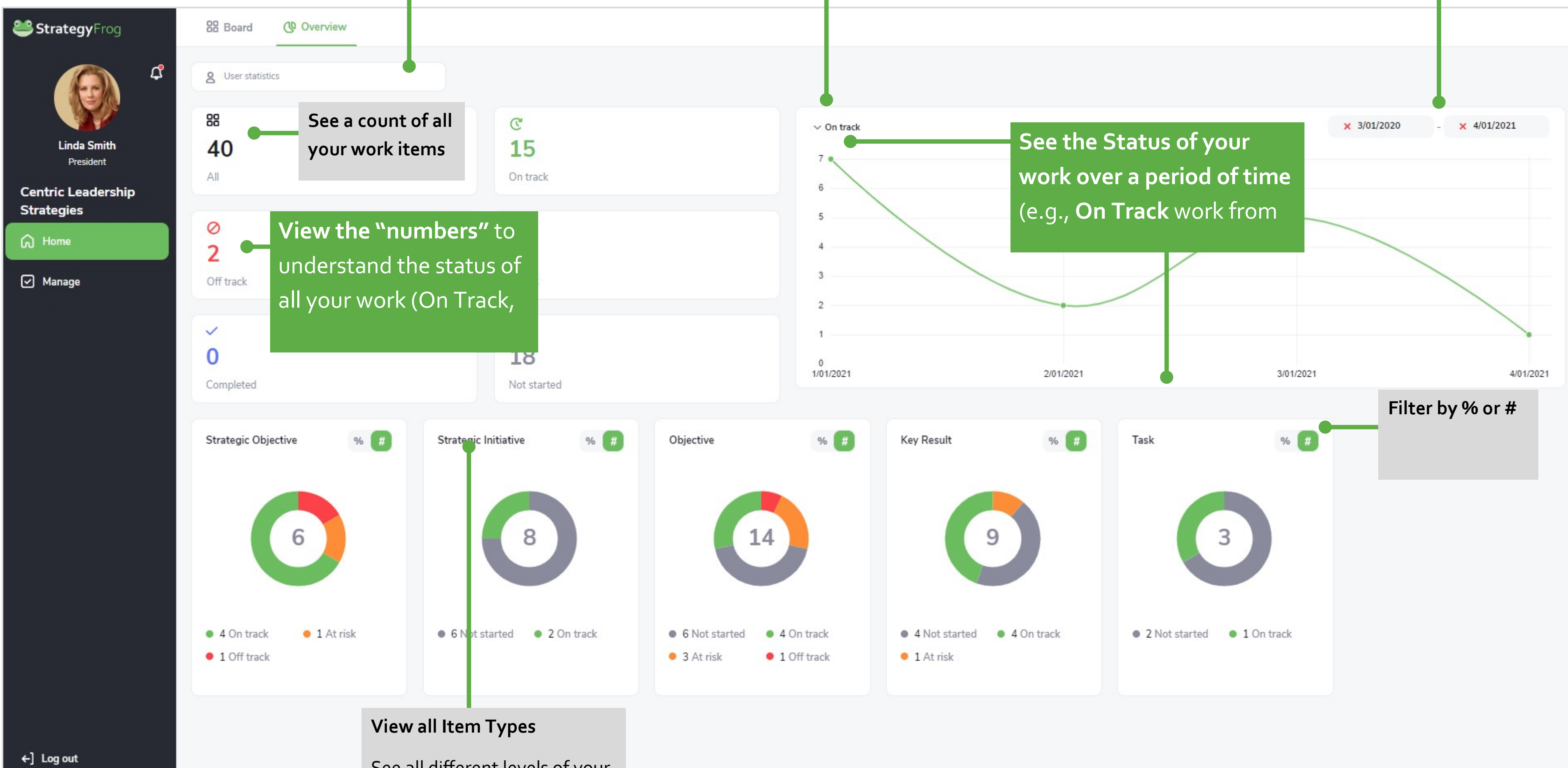
Review your work or others to understand

Filter by Status

Select On track, At risk, Off track, Completed, or Not started to see

Filter by Dates

Select the date range of the work you want to



See a count of all your work items

View the "numbers" to understand the status of all your work (On Track,

See the Status of your work over a period of time (e.g., On Track work from

Filter by % or #

View all Item Types

See all different levels of your work, from Organizational

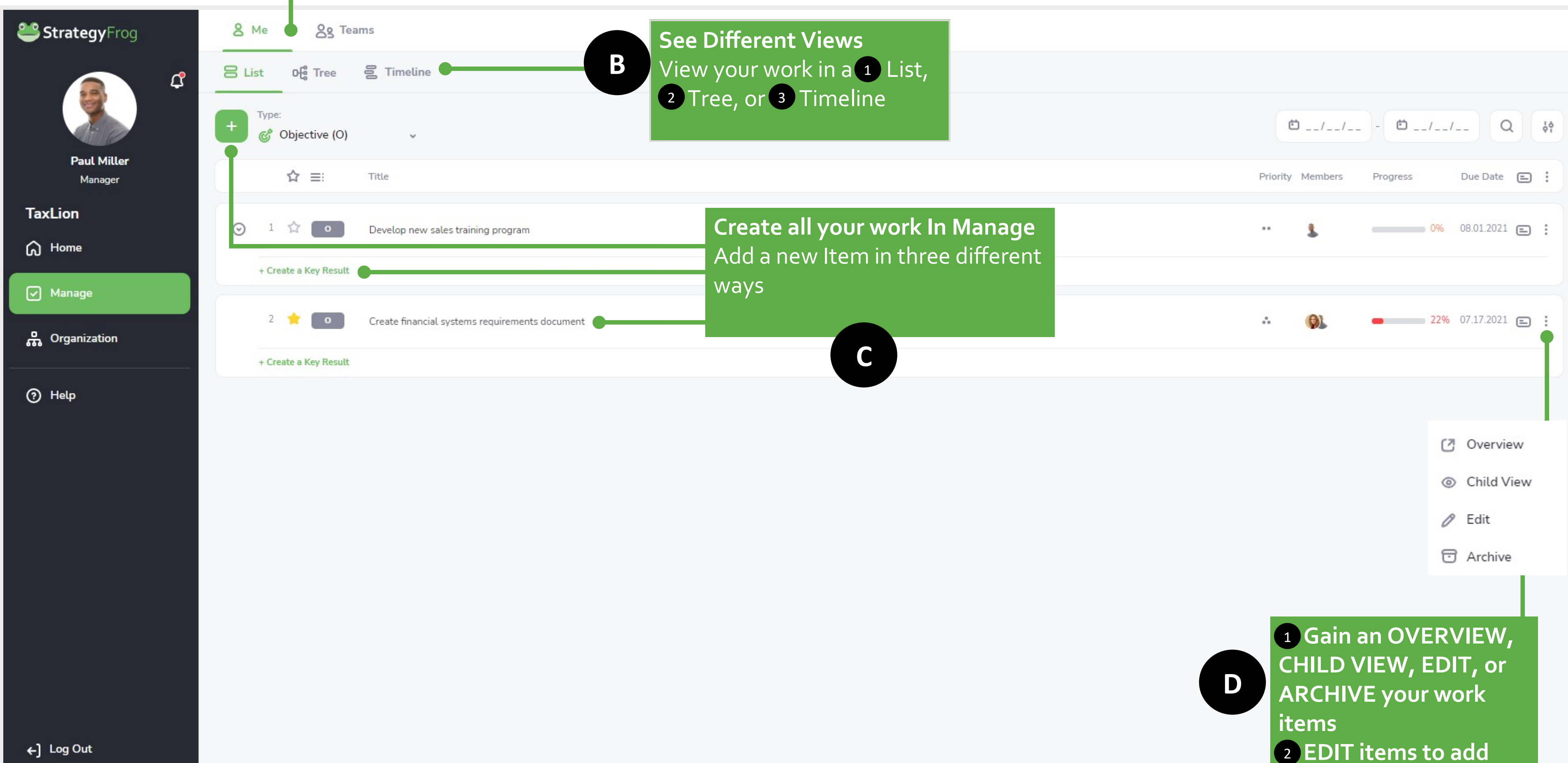
Improving Strategic Execution

Quick Reference Guide (QRG): MANAGE

StrategyFrog

Create, communicate, or update work in MANAGE for improved performance

A **View Work** (yours or any team in your organization)



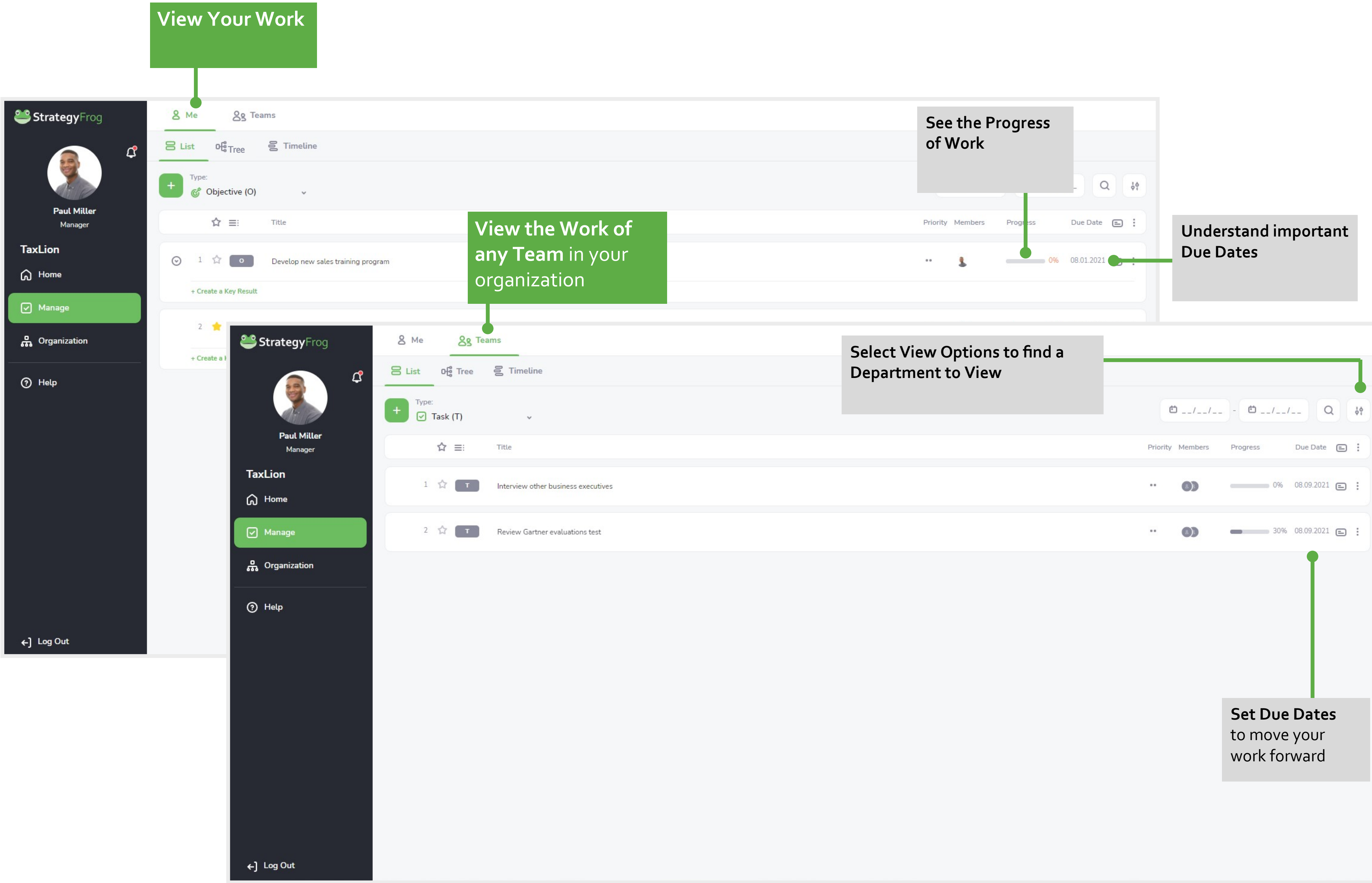
B **See Different Views**
View your work in a 1 List, 2 Tree, or 3 Timeline

C **Create all your work In Manage**
Add a new Item in three different ways

D 1 Gain an OVERVIEW, CHILD VIEW, EDIT, or ARCHIVE your work items
2 EDIT items to add more information

Quick Reference Guide (QRG): MANAGE

A View Work (yours or any teams in your organization) for greater transparency



Quick Reference Guide (QRG): MANAGE

StrategyFrog

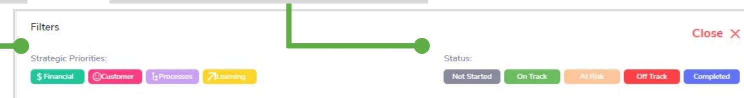
B1 Use LIST view to understand your work in greater detail

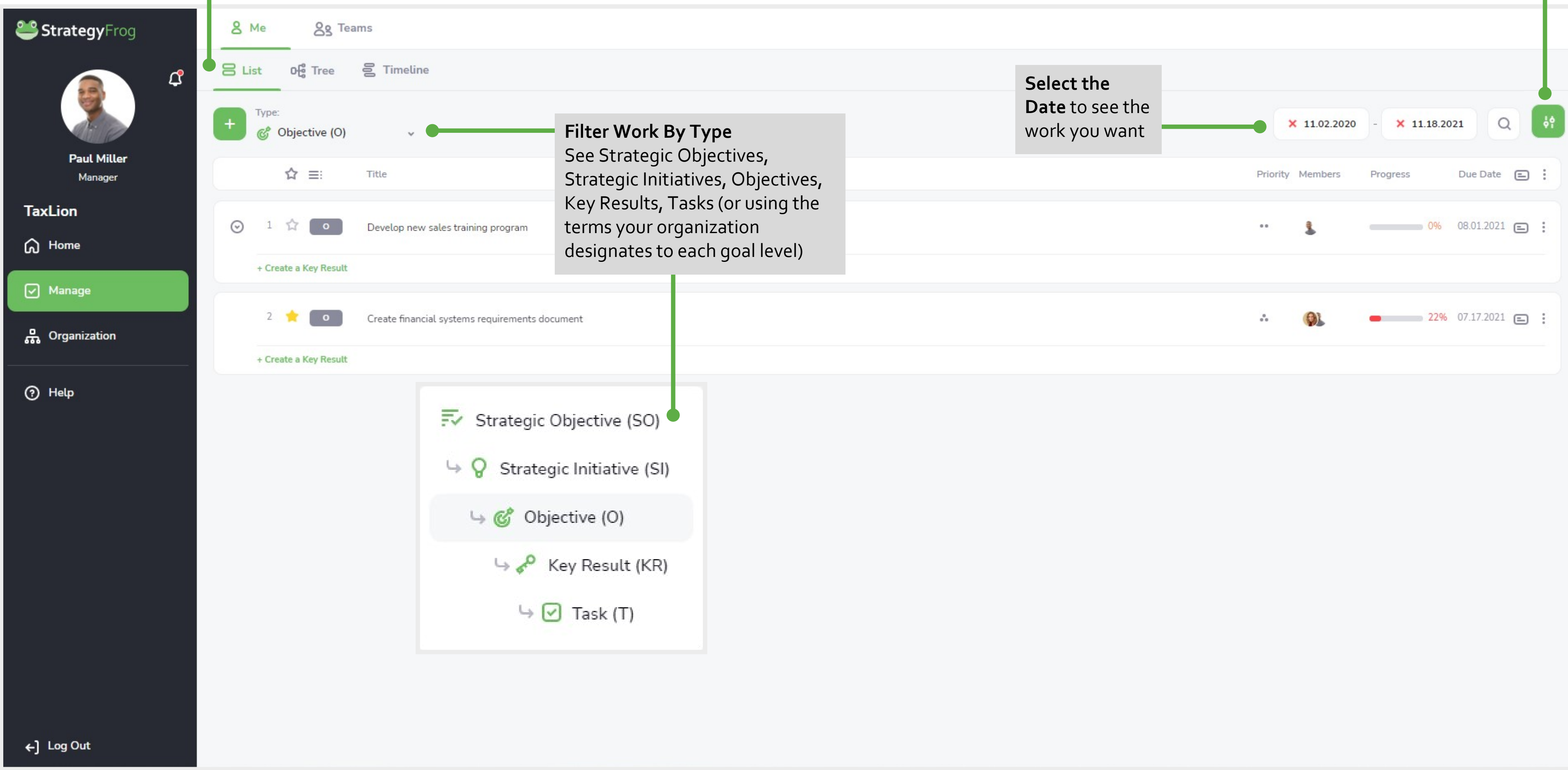
Filter work by Strategic Priorities
Select or deselect *Financial, Customer, Processes,* or *Learning* (or the perspectives your organization creates) to see what's important

Filter work by Status
Select or deselect *Not Started, On Track, At Risk Off Track,* or *Completed* to see where you are

Filter your Work to see what you want

Select List View





Select the Date to see the work you want

Filter Work By Type
See Strategic Objectives, Strategic Initiatives, Objectives, Key Results, Tasks (or using the terms your organization designates to each goal level)

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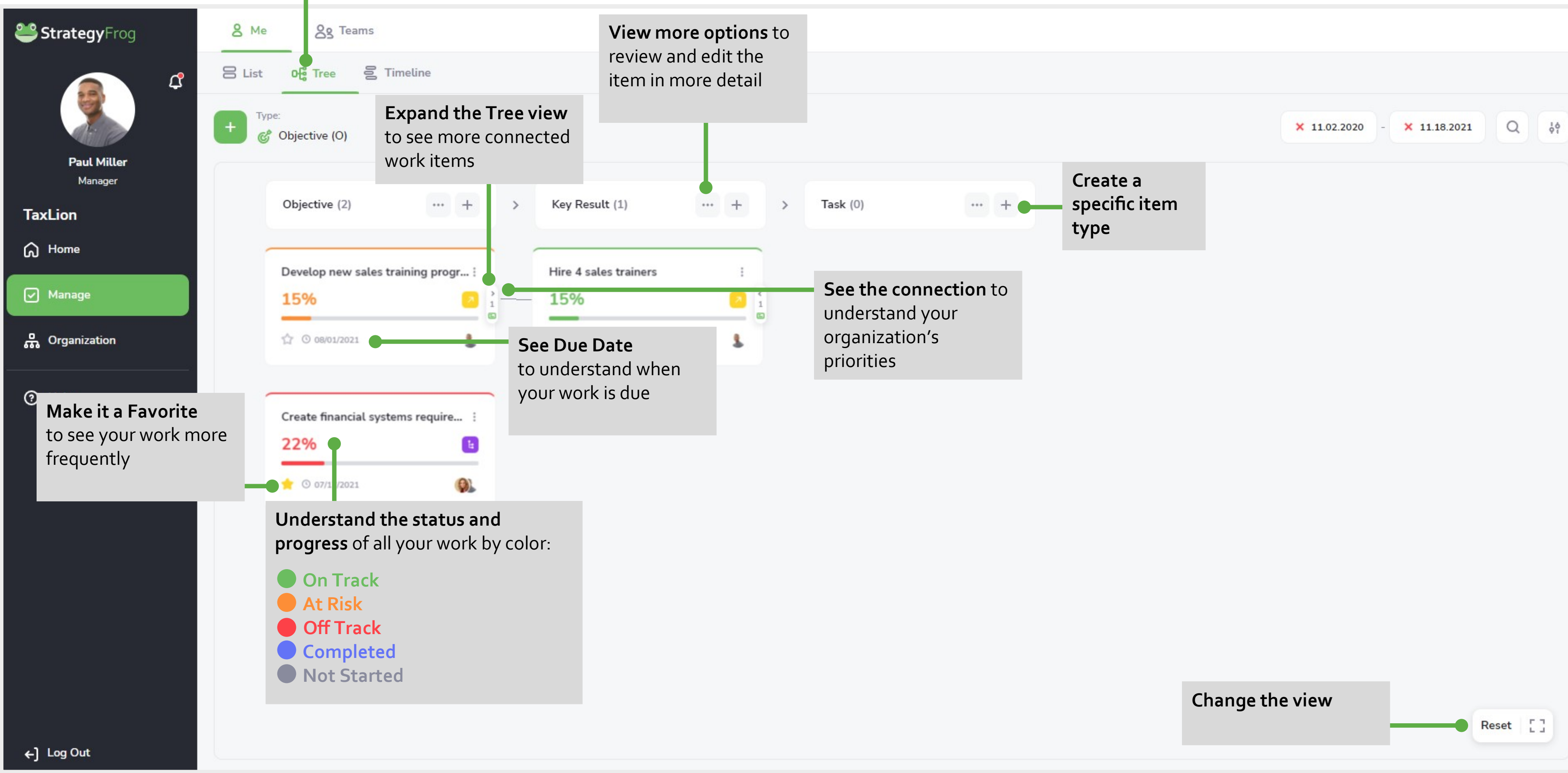
B2 Use TREE view to gain a visual understanding of how your work is connected

Select Tree View



Quick Reference Guide (QRG): MANAGE

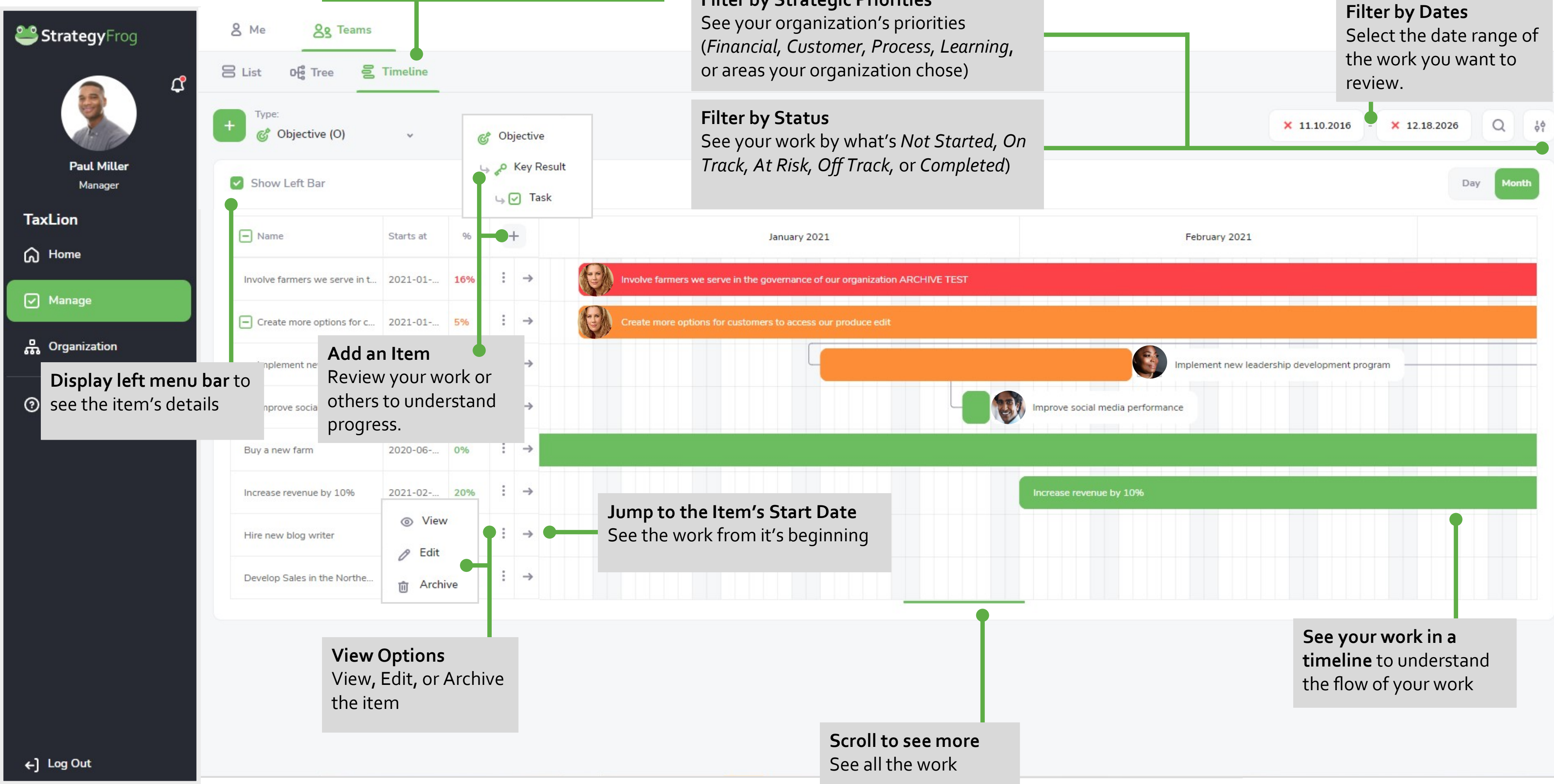
B3 Use Timeline View to understand your work's timeframe

Select Timeline View to get a big picture of your work (and see how work is connected)

Filter by Strategic Priorities
See your organization's priorities (*Financial, Customer, Process, Learning*, or areas your organization chose)

Filter by Dates
Select the date range of the work you want to review.

Filter by Status
See your work by what's *Not Started, On Track, At Risk, Off Track*, or *Completed*)



Add an Item
Review your work or others to understand progress.

Display left menu bar to see the item's details

Jump to the Item's Start Date
See the work from it's beginning

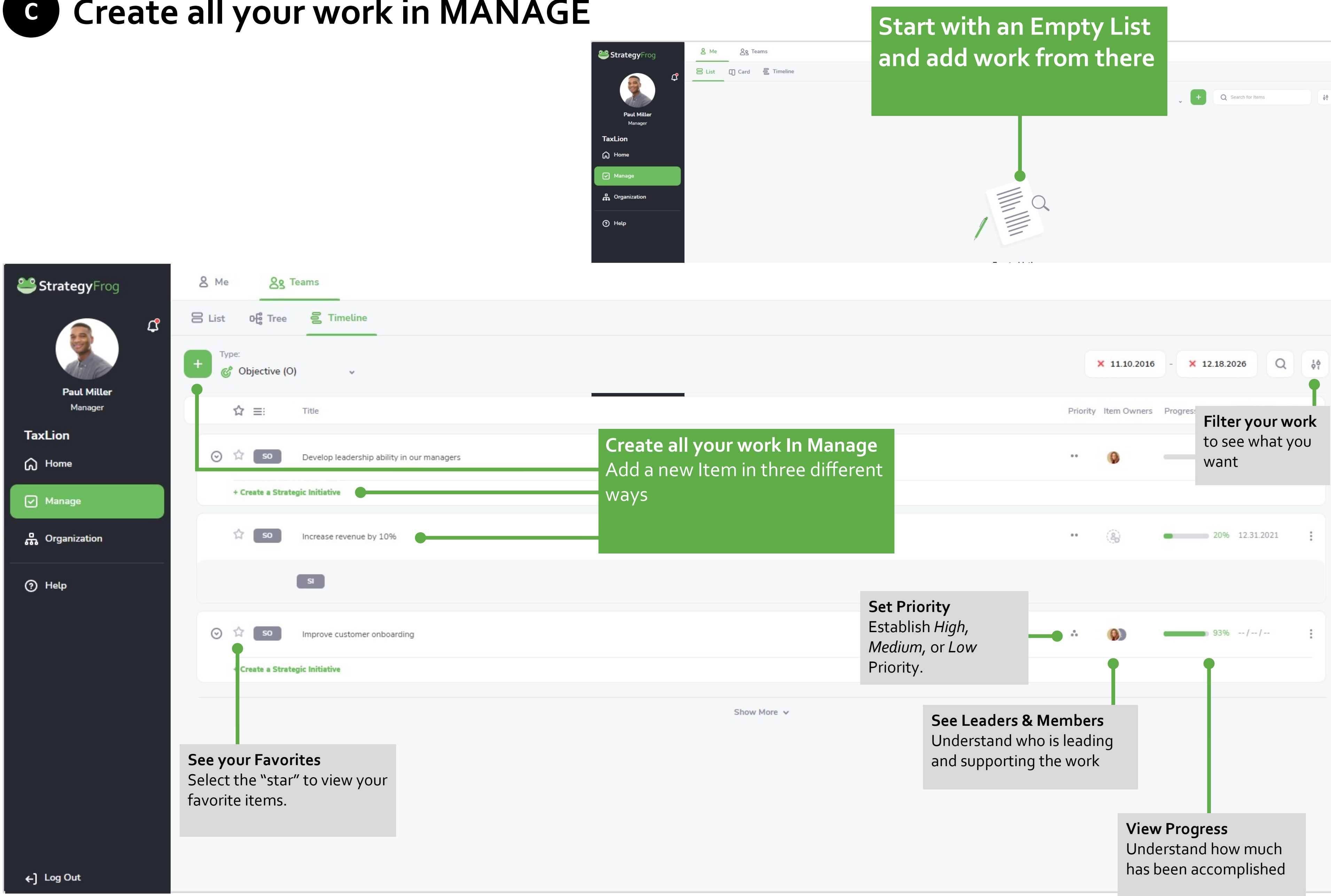
View Options
View, Edit, or Archive the item

Scroll to see more
See all the work

See your work in a timeline to understand the flow of your work

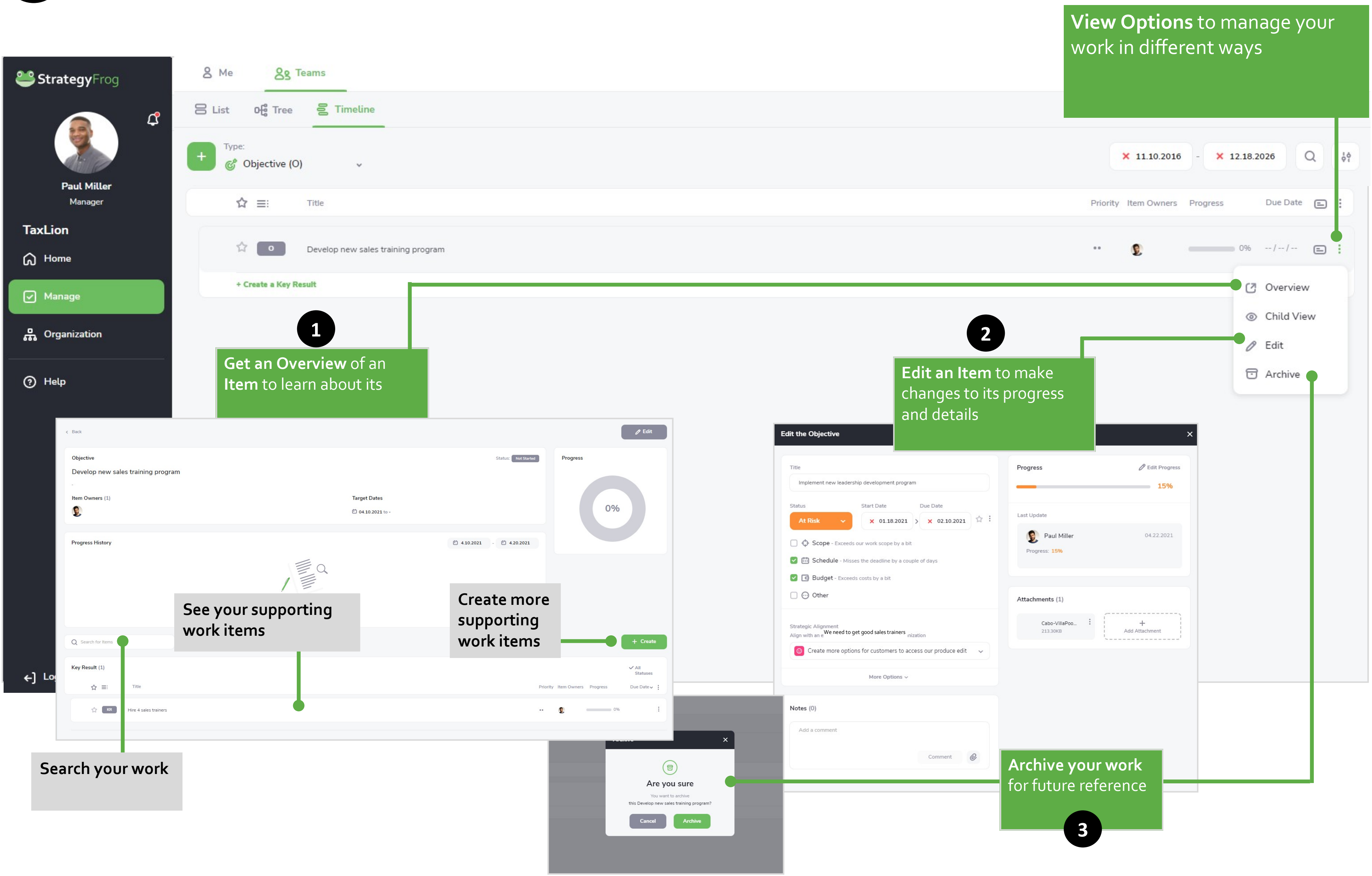
Quick Reference Guide (QRG): MANAGE

C Create all your work in MANAGE



Quick Reference Guide (QRG): MANAGE

D1 Gain an OVERVIEW, EDIT, or ARCHIVE your work items



Quick Reference Guide (QRG): MANAGE

D2 EDIT items to add more information