OFFICIAL USER MANUAL · EDITION 2026

StratexHub

User Manual

From Sign-Up to Reporting · A complete walkthrough

Strategy · Portfolio · Initiatives · KPIs · Benefits
Risks · Governance · Reports · Analytics · BU Insights

PREPARED FOR ENTERPRISE CUSTOMERS

Audience: Executives, EPMO leaders, BU heads, Initiative owners
Document scope: End-to-end product walkthrough with annotated screenshots

stratexhub.io

Foreword

Welcome to StratexHub — the enterprise strategy execution platform that aligns vision, initiatives, KPIs, benefits, risks and governance in a single operating system. This manual takes you from your very first sign-up through configuring your business units, entering live data, and reading the executive reports that drive your quarterly reviews.

Each section is paired with an annotated screenshot taken from the live product. Where relevant, we highlight which Business Unit (BU) role is expected to maintain the data and how the information flows downstream into dashboards and committee reports.

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Business Unit Departments — Who Updates What

Every record in StratexHub is owned by a Business Unit (BU). The mapping below is the default operating model — your administrator can tailor it under EPMO · Business Units.

BU Code	Department	Primary Owner Role	Data They Maintain
BU-GRP	Group / Corporate	Portfolio Lead	Vision, Strategic Themes, Pillars, Master KPIs
BU-RET	Retail	BU Head · Initiative Owner	Customer initiatives, channel KPIs, retail benefits
BU-OPS	Operations	BU Head · Project Manager	Supply-chain projects, operational risks, throughput KPIs
BU-TECH	Technology	BU Head · Initiative Owner	Platform programmes, cyber risks, engineering KPIs
BU-SUS	Sustainability & ESG	BU Head · Initiative Owner	Net-zero initiatives, ESG KPIs, regulatory benefits
BU-APAC	APAC Region	Portfolio Lead	Regional rollups, market-entry initiatives, FX-adjusted benefits

1. Getting Started — Sign Up & Sign In

Your StratexHub journey starts at the secure sign-in page. New customers can request access or start a trial; returning users sign in with email + password or a magic link.

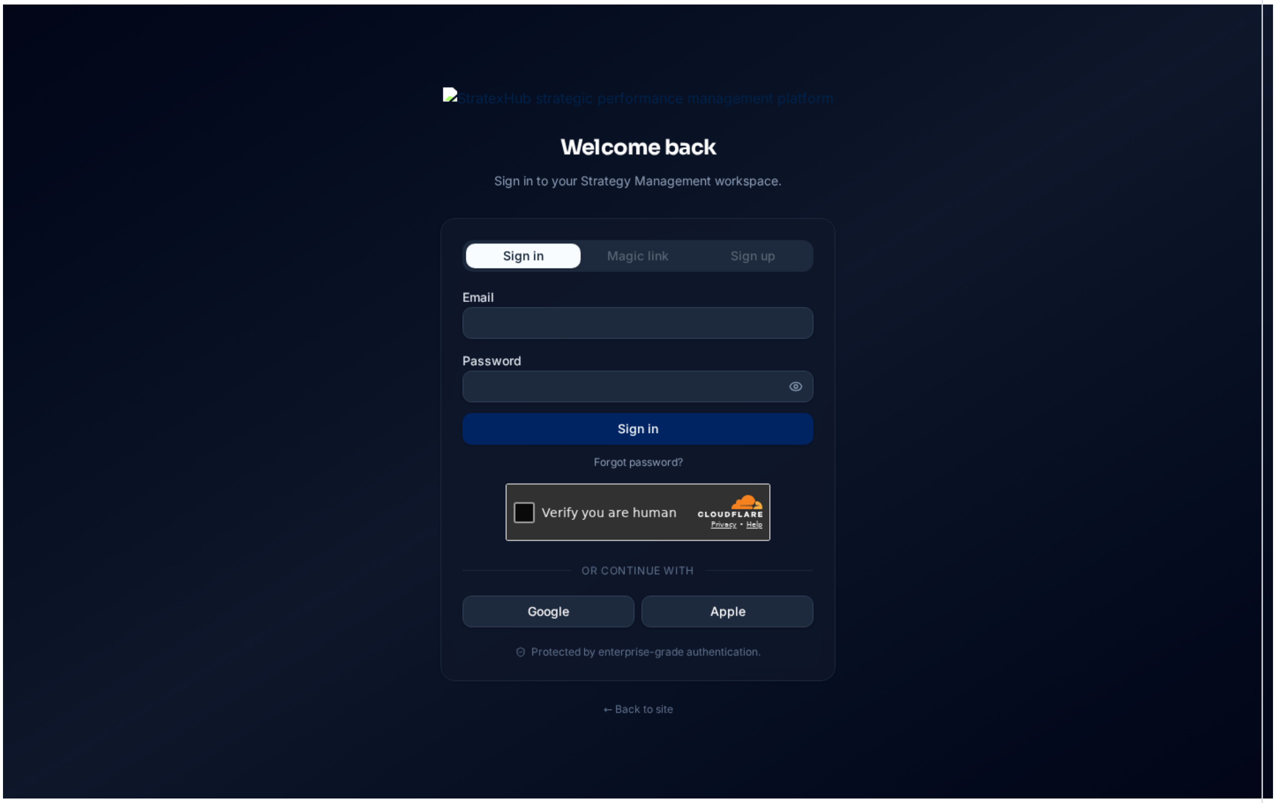

Figure — Getting Started — Sign Up & Sign In

How to use this page

- Open the URL provided by your administrator (e.g. yourcompany.stratexhub.io).
- Choose **Sign Up** for a new account or **Sign In** if you already have credentials.
- Enter your work email — verification is sent within seconds.
- First-time users land on the Dashboard with a guided tour overlay.

BU ownership

Owner: Individual user (self-service). Admin assigns BU on first login.

2. The Dashboard

The Dashboard is your daily command centre. It surfaces portfolio health, KPI trend, in-flight initiatives, top risks and benefits realisation in one scrollable canvas.

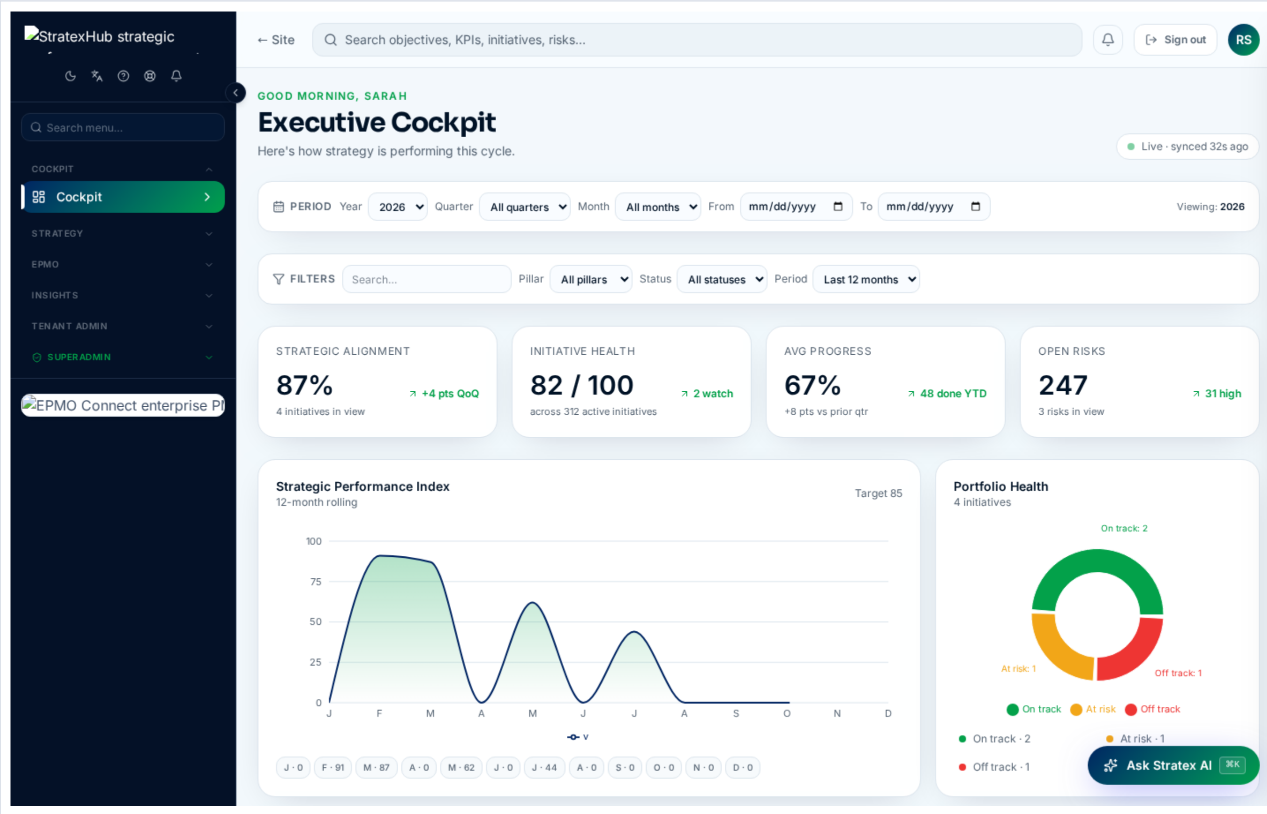

Figure — The Dashboard

How to use this page

- Use the period filter (top-right) to switch between Month, Quarter and YTD views.
- Click any KPI tile to drill into its trend, owner and underlying actuals.
- The **Heat-map** panel colours pillars by status (Green / Amber / Red).
- Use the BU filter to narrow the entire dashboard to a single Business Unit.

BU ownership

Owner: All roles read; EPMO refreshes the period close monthly.

3. Strategy Map

The Strategy Map is the visual contract between Vision, Pillars, Objectives and Initiatives. It is the single source of truth used at every quarterly review.

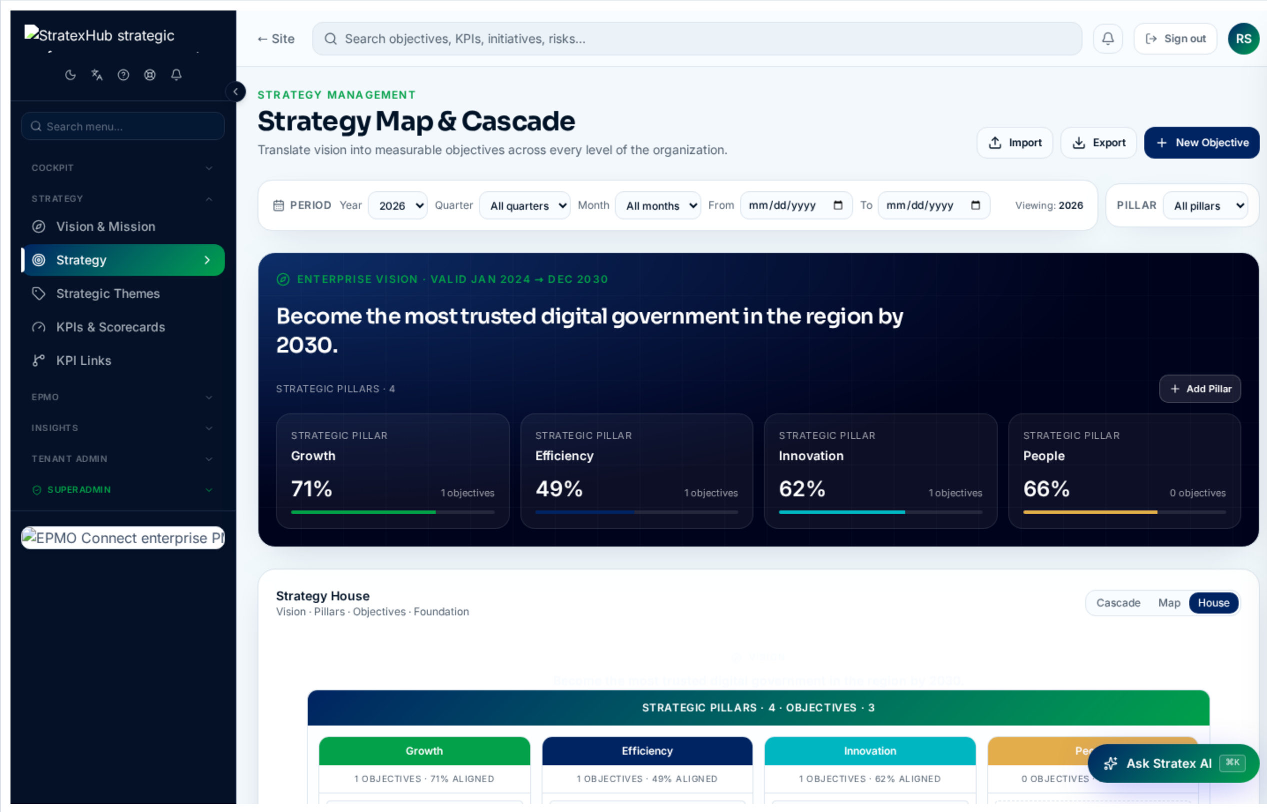

Figure — Strategy Map

How to use this page

- Pillars are the columns; Objectives are the cards within each pillar.
- Click any card to open the Objective sheet — owners, KPIs and child initiatives.
- Use **Edit Map** (top-right) to re-order pillars or add new objectives.
- Every change is captured in the Audit log and surfaces in the Change-Requests queue.

BU ownership

Owner: BU-GRP · Portfolio Lead (curates). BU Heads propose changes via Change Requests.

4. Vision, Mission & Values

Anchor your strategy in a clear statement of intent. The Vision page hosts your long-term north-star, mission statement, core values and the 3- to 5-year aspirations.

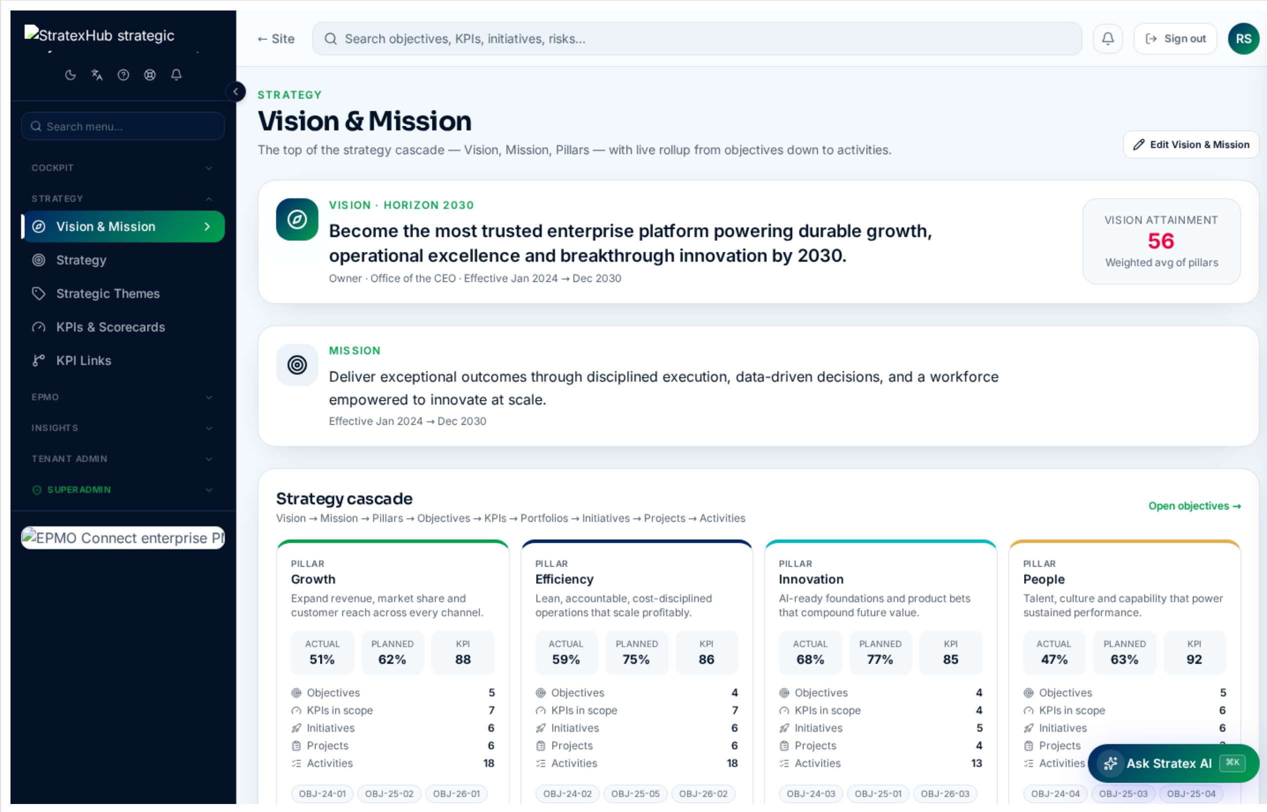

Figure — Vision, Mission & Values

How to use this page

- Edit the Vision narrative inline — versions are kept for audit.
- Attach a supporting PDF (e.g. the board-approved strategy deck).
- Linked Pillars appear at the bottom — click to jump to the Strategy Map.

BU ownership

Owner: BU-GRP · Executive Sponsor.

5. Portfolio

The Portfolio page rolls every initiative, programme and project into one financial and delivery view, with filters for BU, Pillar, Stage-Gate and Risk.

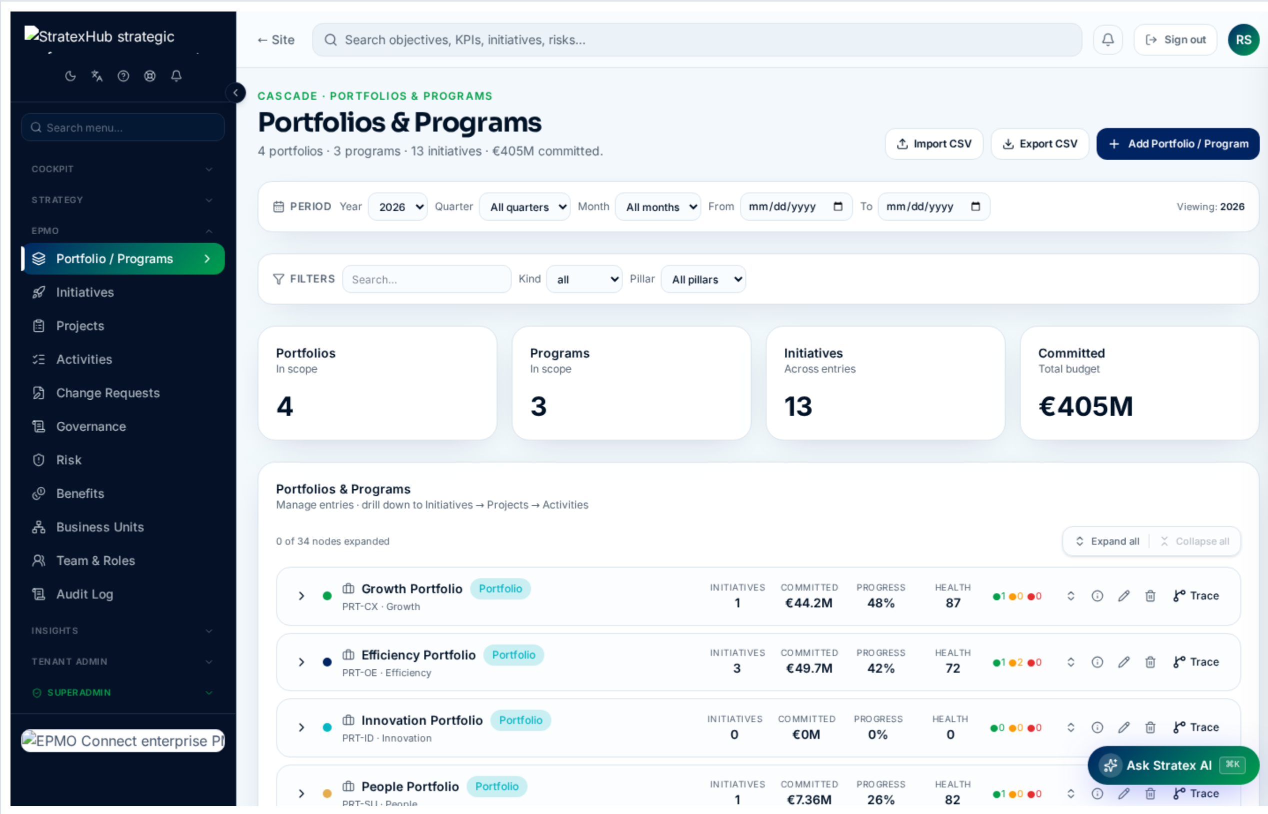

Figure — Portfolio

How to use this page

- Switch between **Bubble**, **Table** and **Timeline** tabs.
- Bubble size = total budget; colour = RAG status; X-axis = expected benefit.
- Export the visible view to CSV using the toolbar.

BU ownership

Owner: EPMO + BU Portfolio Leads.

6. Initiatives

Initiatives are the workhorses of execution. Each initiative has an owner, target benefit, linked KPIs, milestones and a budget envelope.

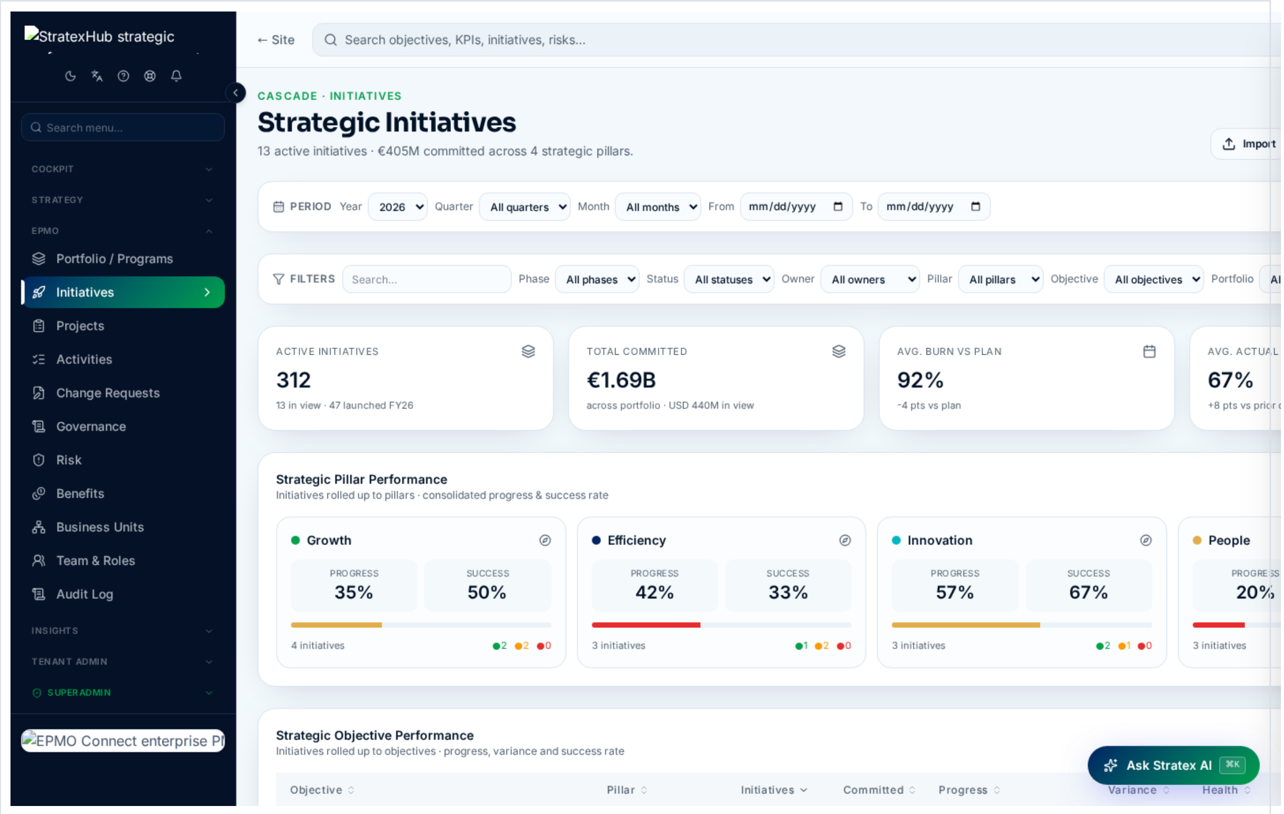

Figure — Initiatives

How to use this page

- Click **+ New Initiative**, choose the parent Objective and assign a BU.
- Add milestones with planned and actual dates — these power the timeline view.
- Link KPIs that this initiative will move; the contribution % drives benefit calc.

BU ownership

Owner: Initiative Owner (per BU). Approved by BU Head via Governance workflow.

7. Projects

Projects are the delivery vehicles inside an initiative. They hold scope, schedule, RAID and resourcing data.

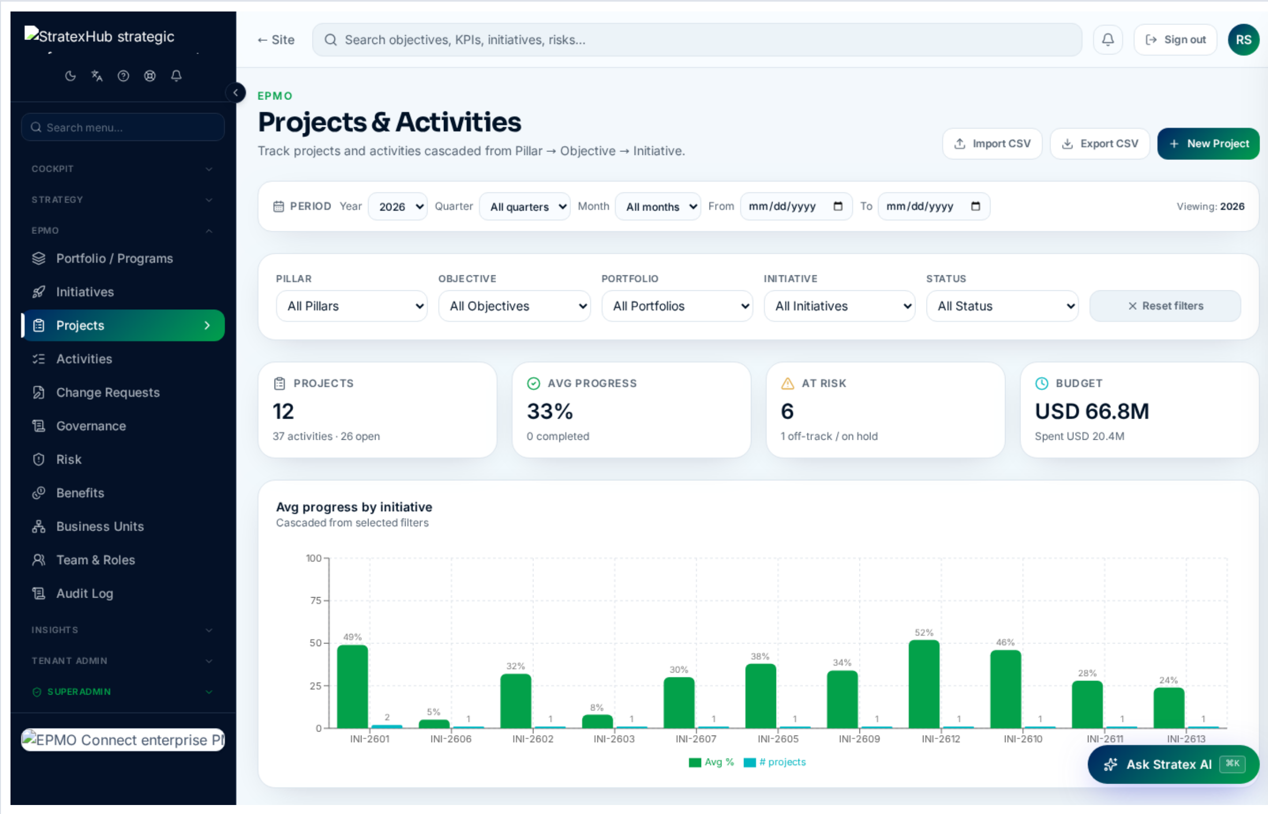

Figure — Projects

How to use this page

- Open a project to manage scope statement, milestones and stage-gates.
- Use the **RAID** tab for risks, assumptions, issues and dependencies.
- Status updates submitted weekly feed the Dashboard RAG aggregate.

BU ownership

Owner: Project Manager. Reviewed by Initiative Owner.

8. Activities

Activities are the lowest level of work — the tasks that execute a project milestone. They are typically owned by team members and updated weekly.

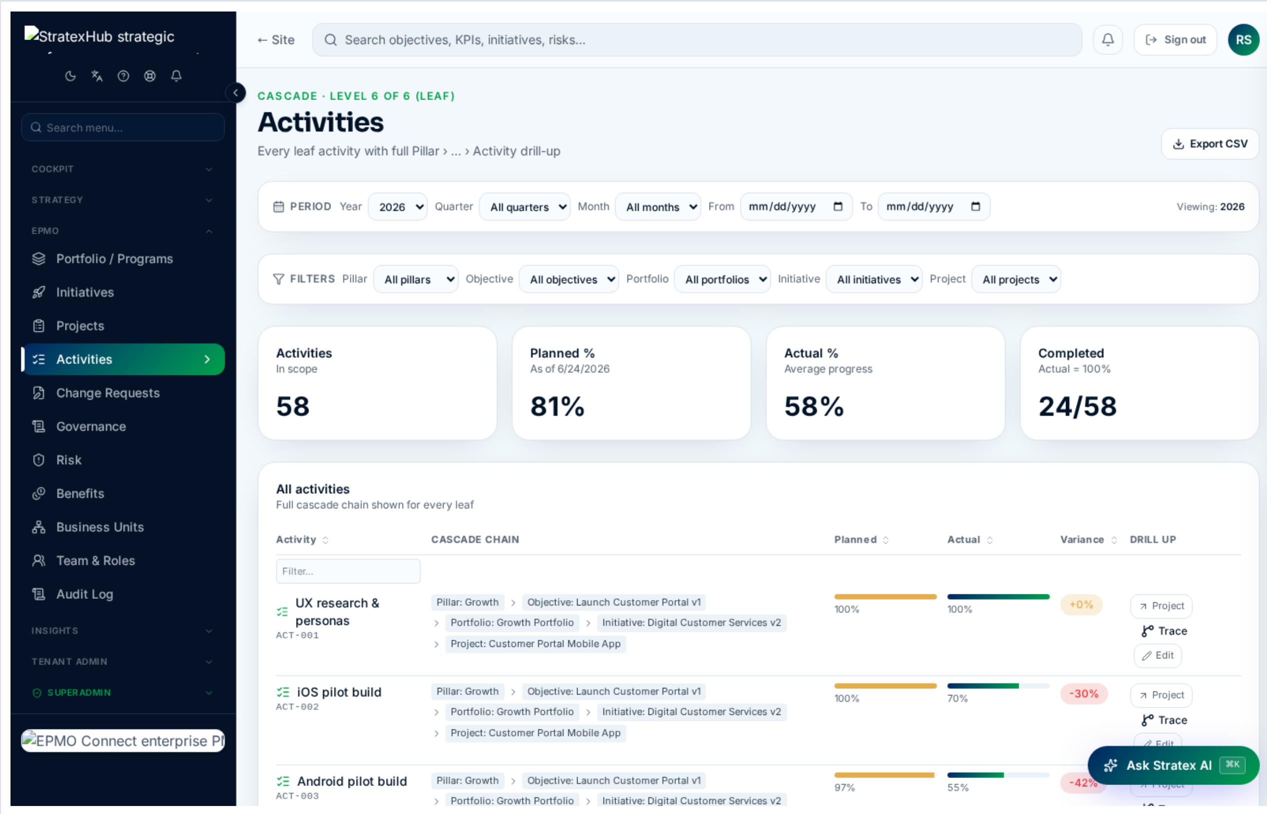

Figure — Activities

How to use this page

- Add activities under a milestone with planned start, end and effort.
- Drag-and-drop activities to re-sequence on the Kanban view.
- Completion % feeds upward into milestone, project and initiative progress.

BU ownership

Owner: Activity Owner. Aggregated to Project Manager.

9. KPIs

KPIs are the quantitative pulse of your strategy. The KPI registry stores definitions, targets, baselines, calculation rules and refresh cadence.

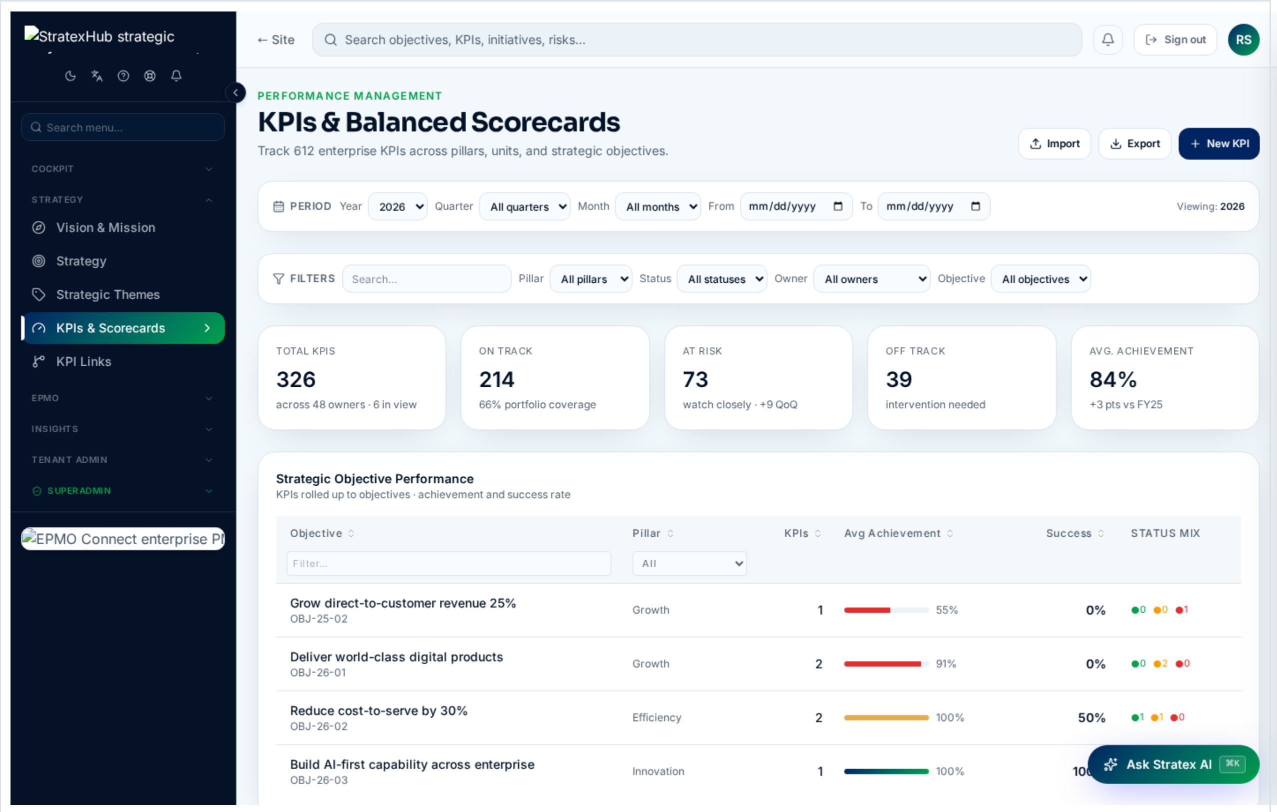

Figure — KPIs

How to use this page

- Use **+ New KPI** and pick a unit (%, currency, count, ratio).
- Set the period (monthly / quarterly) and the target curve.
- Enter **Actuals** in the Actuals tab — variance is computed instantly.

BU ownership

Owner: KPI Owner (per BU). Validated by Finance for monetary KPIs.

10. KPI Links

KPI Links show the wiring between initiatives, projects, benefits and the KPIs they influence — essential for explaining cause-and-effect at the board.

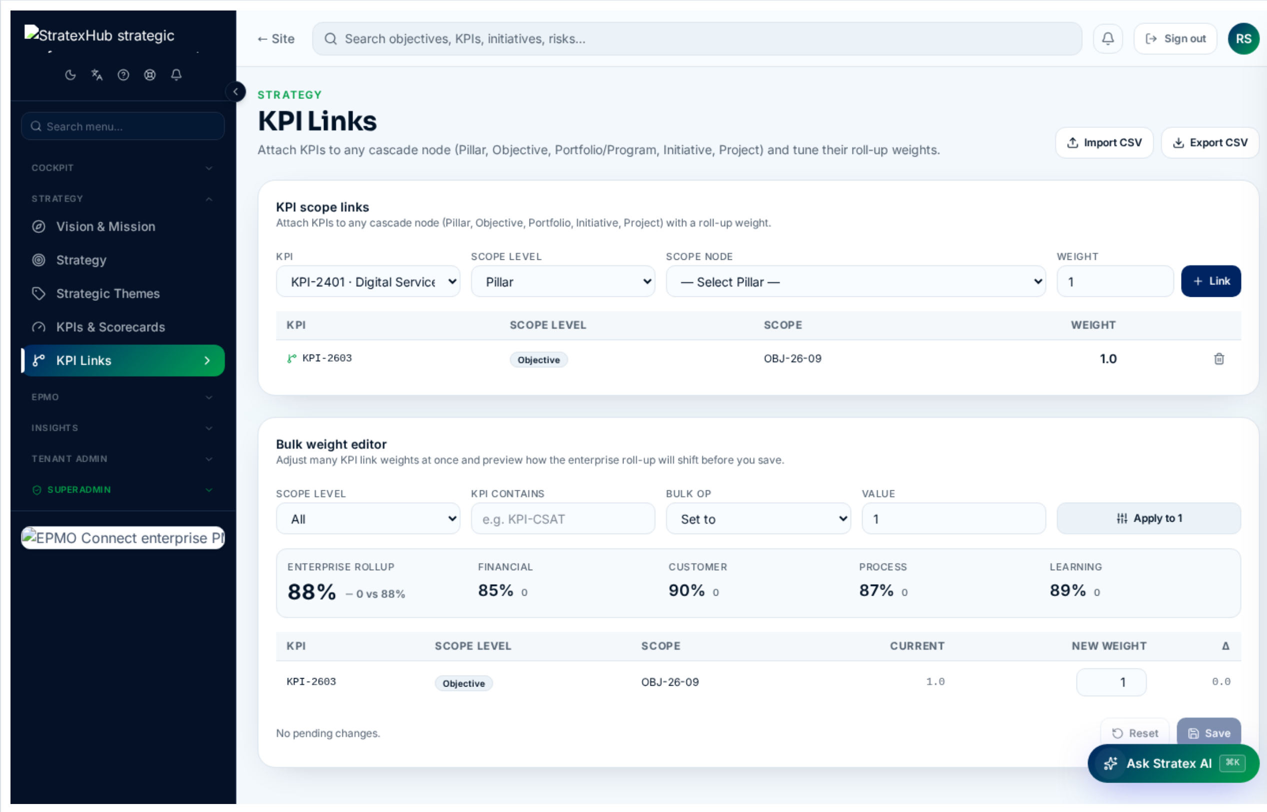

Figure — KPI Links

How to use this page

- Open a KPI to see all upstream initiatives and downstream benefits.
- Use **+ Link** to attach an initiative with its contribution %.
- Total contributions across initiatives should sum to 100% per KPI.

BU ownership

Owner: Portfolio Lead curates. Initiative Owners propose links.

11. Benefits Realisation

Benefits Realisation tracks the value promised, planned and delivered by every initiative — in money, time, risk reduction or customer outcome.

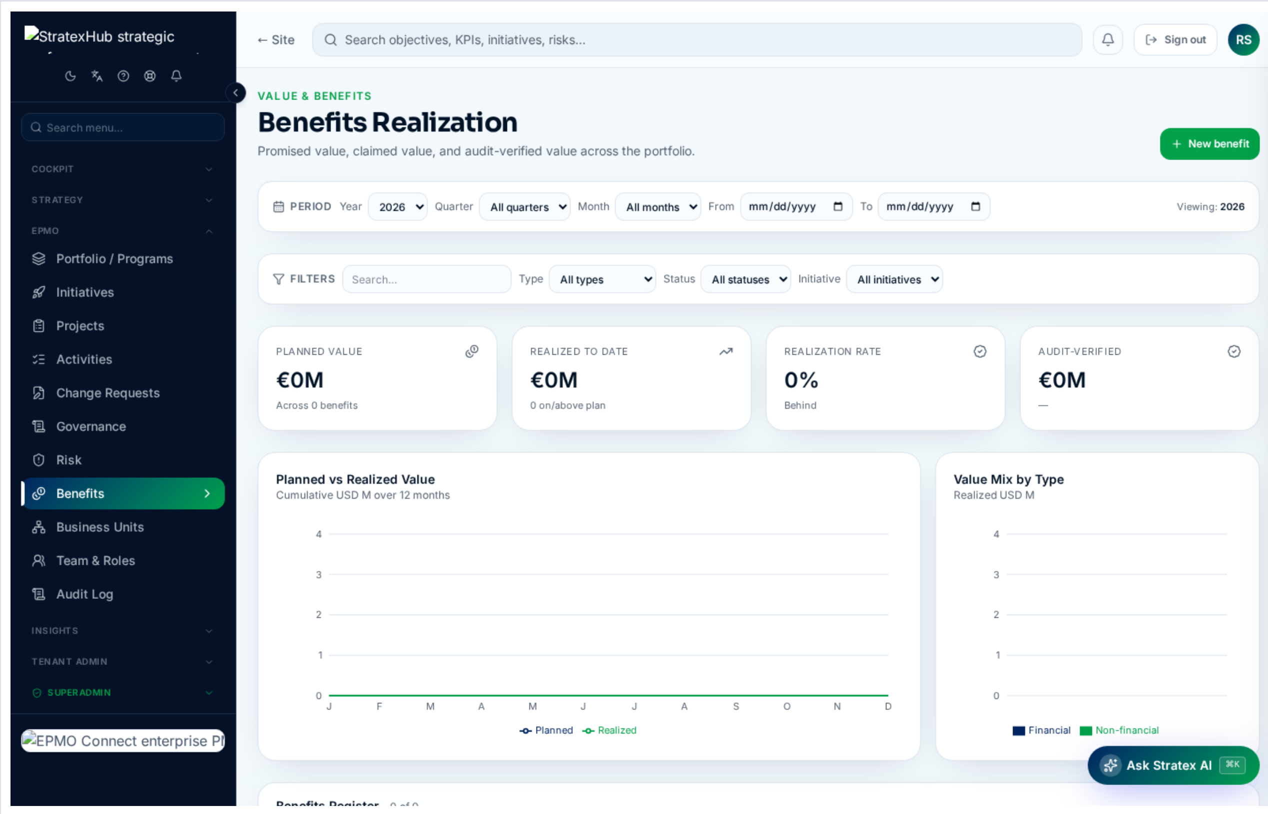

Figure — Benefits Realisation

How to use this page

- Capture a benefit type (Financial / Non-financial), value and realisation curve.
- Mark **Forecast** vs **Actual** by month — the gap drives the variance chart.
- Benefits are signed-off at gate-reviews by the BU Head.

BU ownership

Owner: Initiative Owner. Signed-off by BU Head + Finance.

12. Risks

The Risk register is integrated with initiatives, projects and KPIs. Likelihood × Impact drives the heat-map and the residual risk after mitigation.

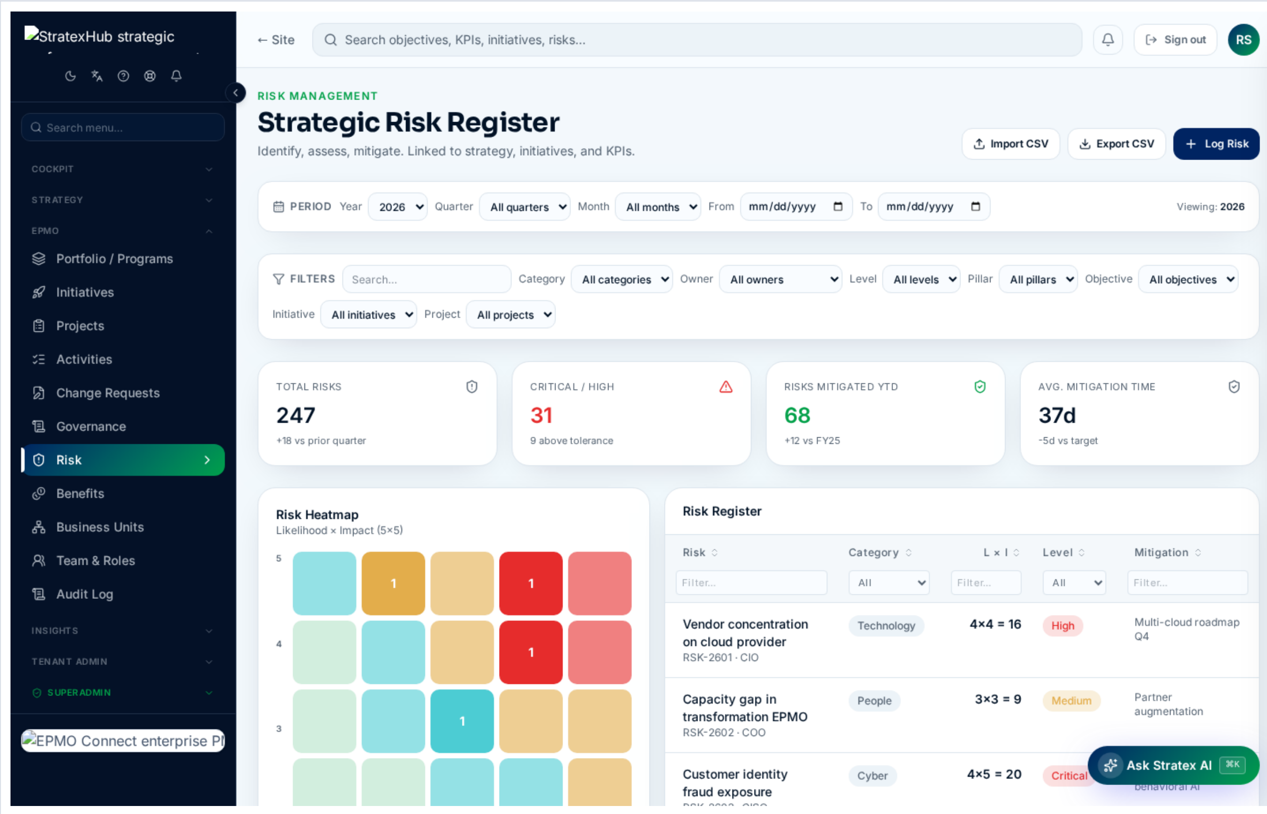

Figure — Risks

How to use this page

- Log a risk with category, owner, likelihood and impact (1–5).
- Add mitigation actions with due dates — overdue actions escalate automatically.
- Top-25 risks appear in the Executive report.

BU ownership

Owner: Risk Owner (per BU). Reviewed monthly by Risk Committee.

13. Governance Workflow

Governance is the approval backbone — every material change passes through a configurable workflow with delegation, hold/resume and audit trail.

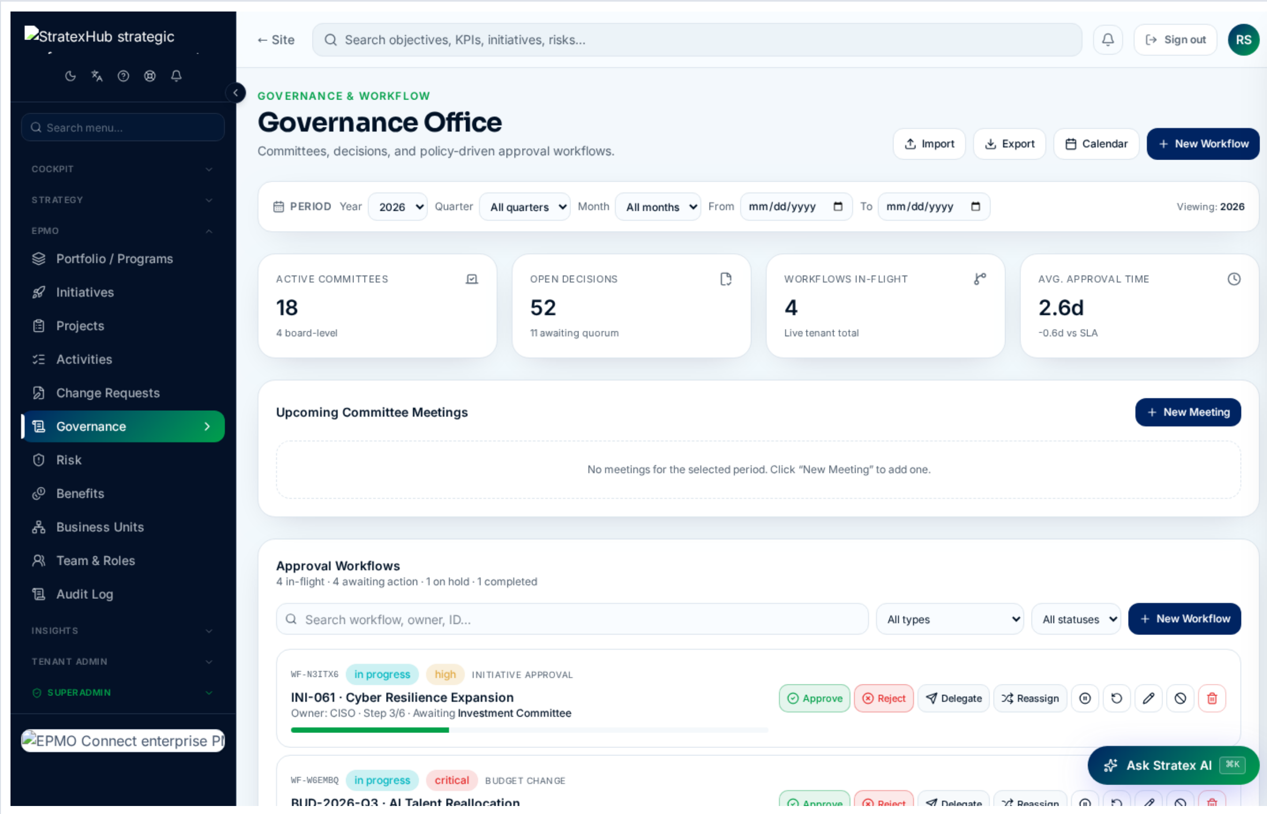

Figure — Governance Workflow

How to use this page

- Submit a workflow from any record using **Request Approval**.
- Approvers receive an in-app notification and optional email.
- Use **Delegate** or **Reassign** when an approver is unavailable.

BU ownership

Owner: EPMO defines workflow templates. BU Heads approve in their domain.

14. Change Requests

Any user can raise a Change Request against any record — the governance workflow is the only approval gate, ensuring full traceability without per-field permissions.

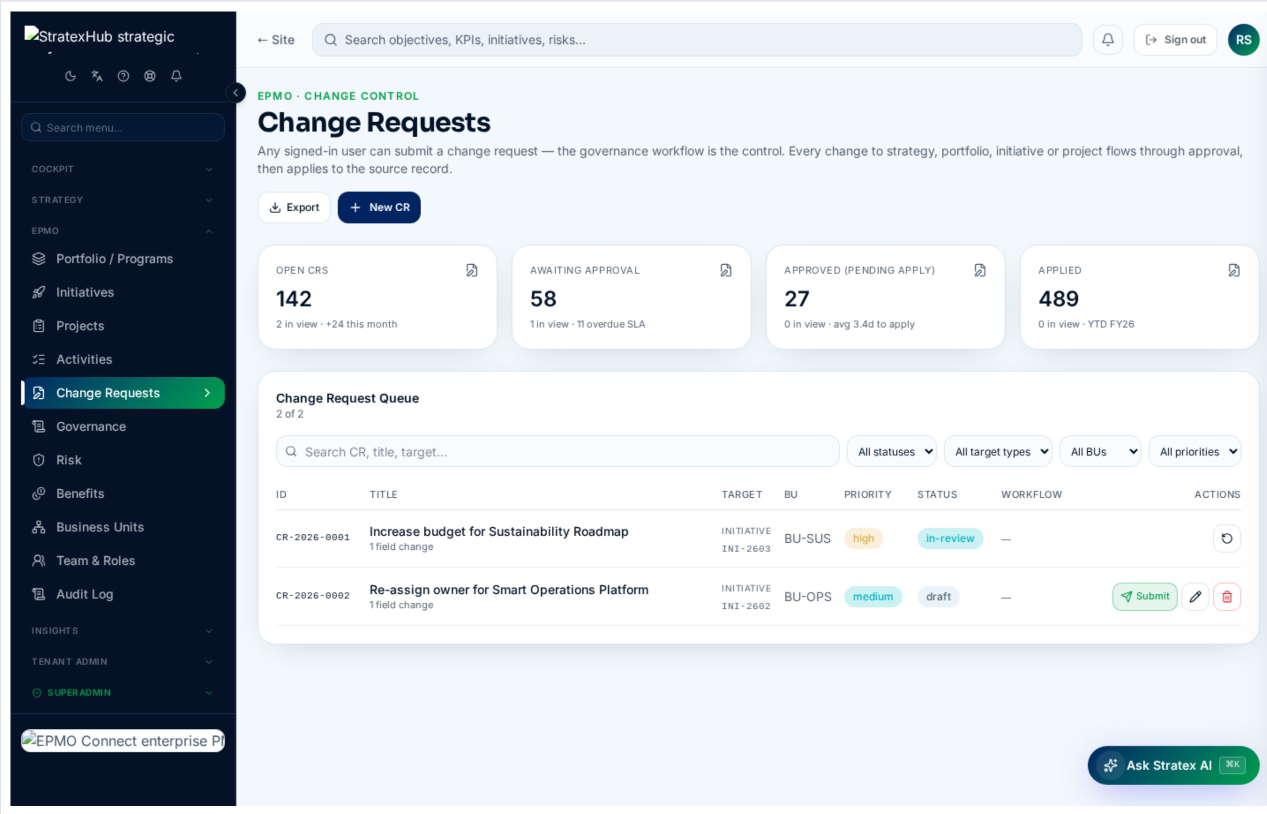

Figure — Change Requests

How to use this page

- From any record, click **Propose Change**.
- Describe the change, attach evidence and select the workflow.
- Status flows: Submitted → In Review → Approved/Rejected → Applied.

BU ownership

Owner: Any signed-in user. Routed by workflow template.

15. Reports

The Reports module ships ready-made executive packs — Quarterly Review, Board Pack, Benefits Statement, Risk Digest — exportable to PDF and PowerPoint.

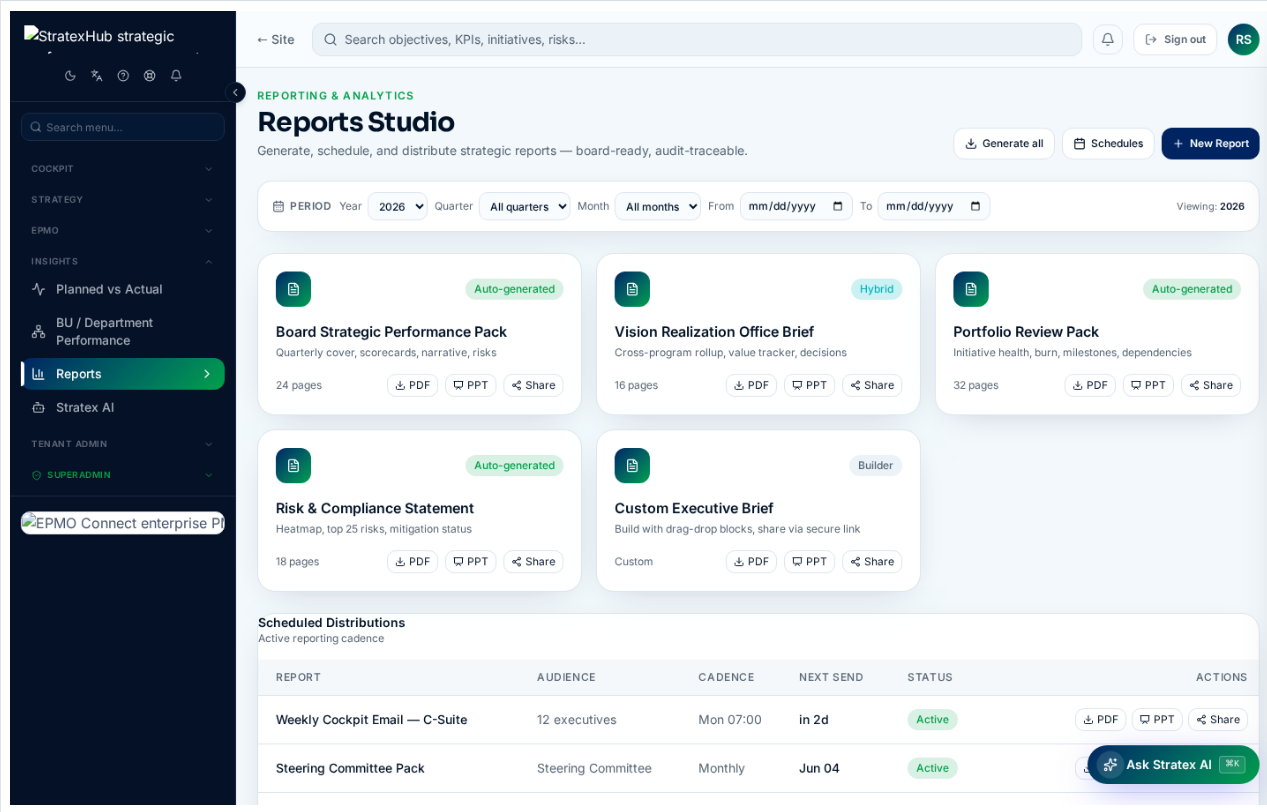

Figure — Reports

How to use this page

- Pick a template, set the period and BU scope.
- Preview live; charts pull from the same data as the Dashboard.
- Export to PDF — the file lands in your downloads folder.

BU ownership

Owner: EPMO publishes. BU Heads sign off before distribution.

16. Analytics

Analytics is the self-serve corner — pivot KPI actuals, benefits, risk and delivery data across BU, Pillar, Quarter and Owner dimensions.

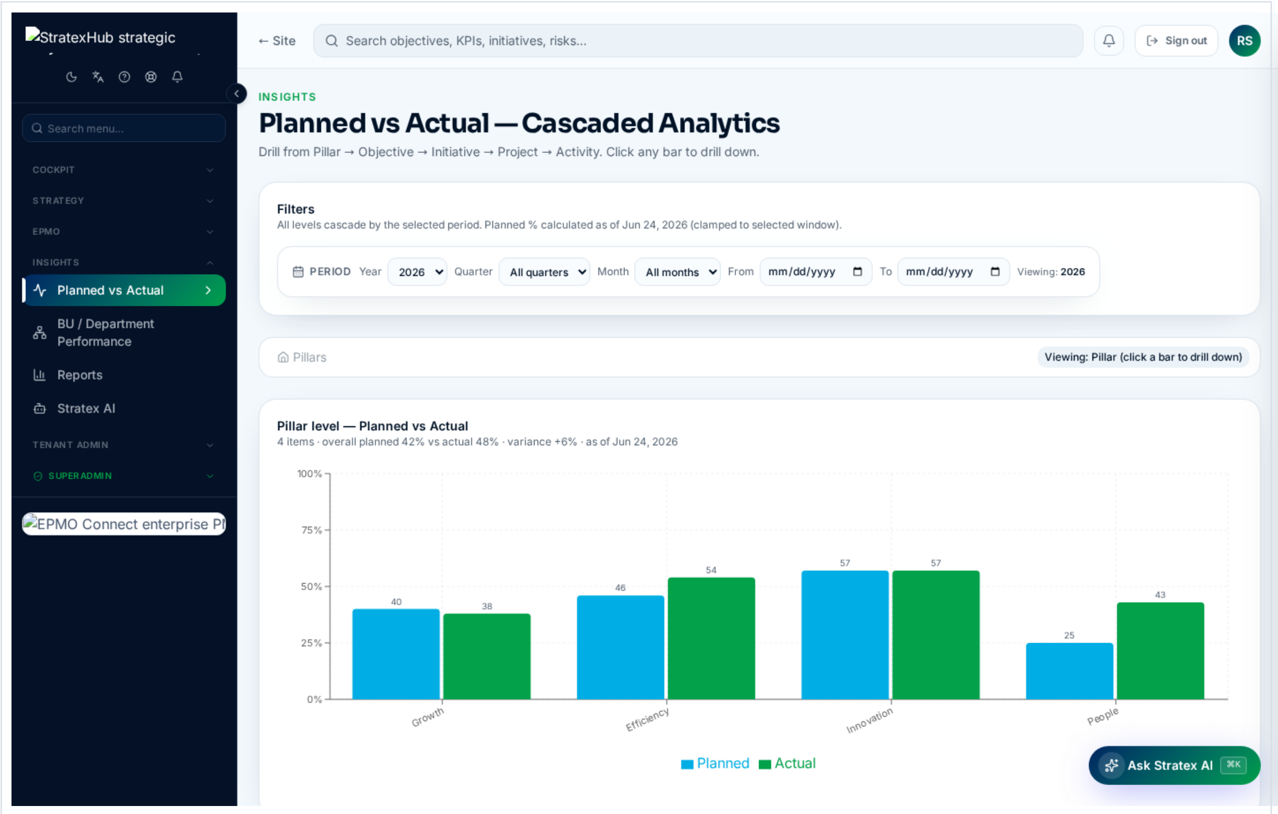

Figure — Analytics

How to use this page

- Drag dimensions onto rows/columns; pick a measure.
- Save a view to reuse it in your next review meeting.
- Drill-through opens the underlying records.

BU ownership

Owner: All roles. Power-users in EPMO maintain saved views.

17. BU Insights

BU Insights is the per-BU scorecard — initiatives, KPIs, benefits, risks and headcount filtered to a single Business Unit for the BU Head's monthly review.

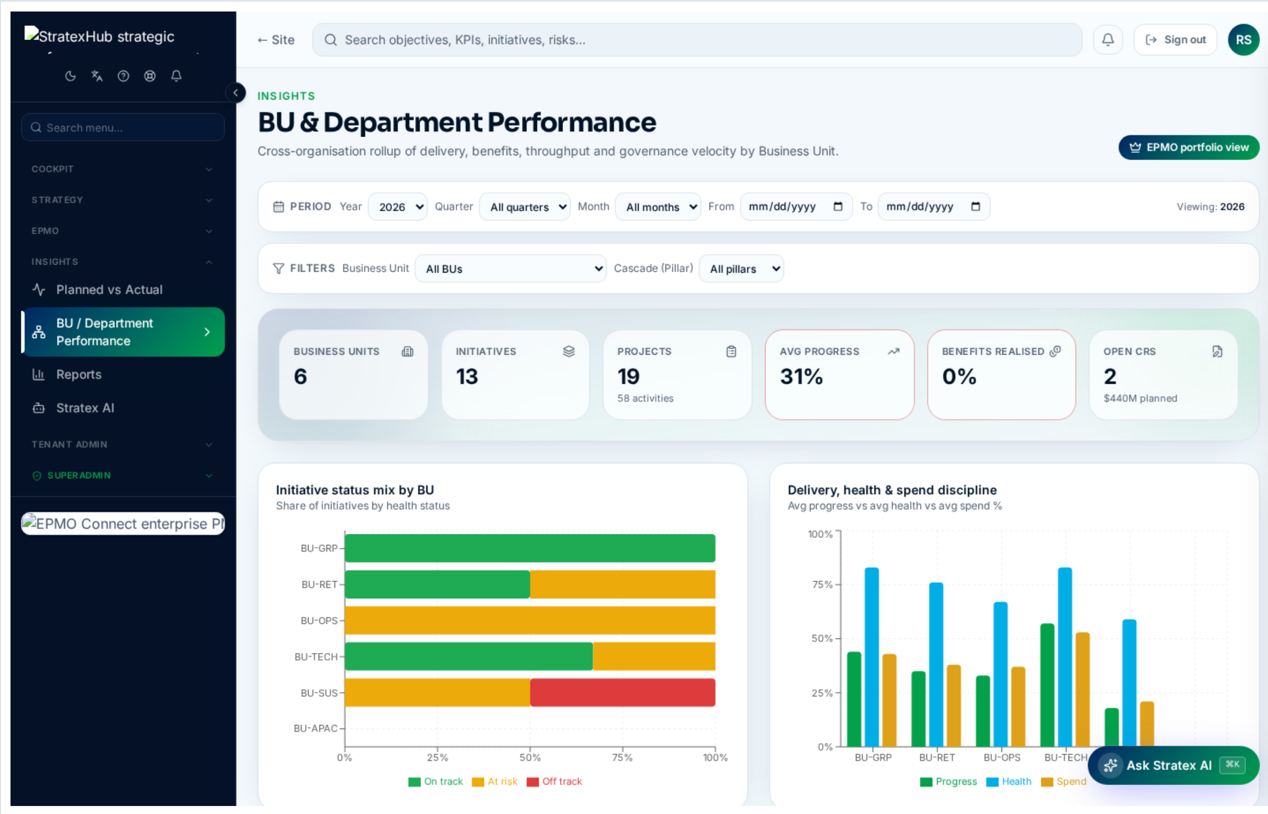

Figure — BU Insights

How to use this page

- Pick a BU from the left rail (only the active group expands).
- Sections collapse independently — focus on KPIs or Risks as needed.
- Click **Open in Reports** to generate a printable pack.

BU ownership

Owner: BU Head reads. Initiative Owners refresh data inputs.

18. Business Units (EPMO)

The Business Units registry is the organisational backbone. Every record in StratexHub is owned by a BU, which drives filters, rollups and access patterns.

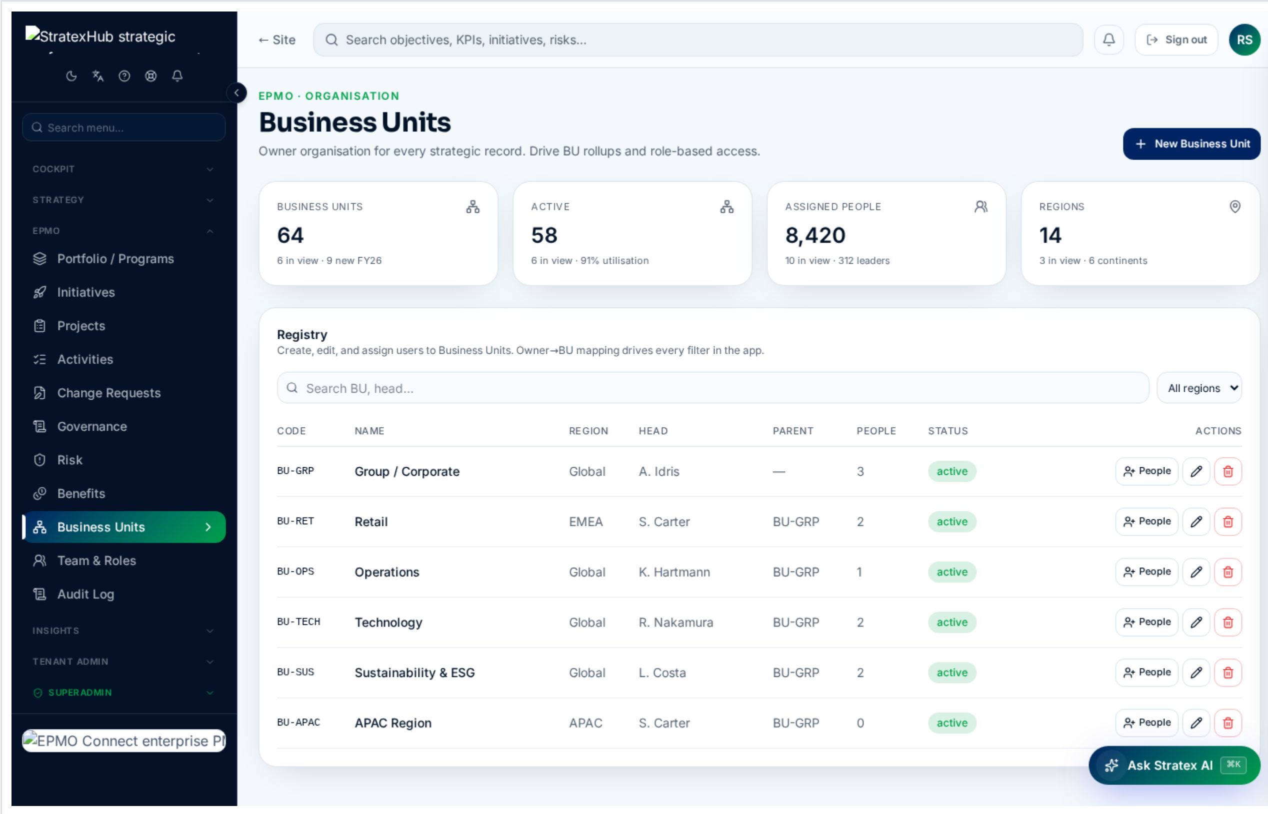

Figure — Business Units (EPMO)

How to use this page

- Use **+ New Business Unit** to create a BU with a code, region and head.
- Click **People** to assign users with their role (BU Head, Initiative Owner…).
- Parent BU enables multi-level rollups (e.g. APAC → Group).

BU ownership

Owner: EPMO Admin.

19. Team & Roles

The Team page lists every user, their email, plan seat and role assignments. Plan seat limits are enforced at invite time.

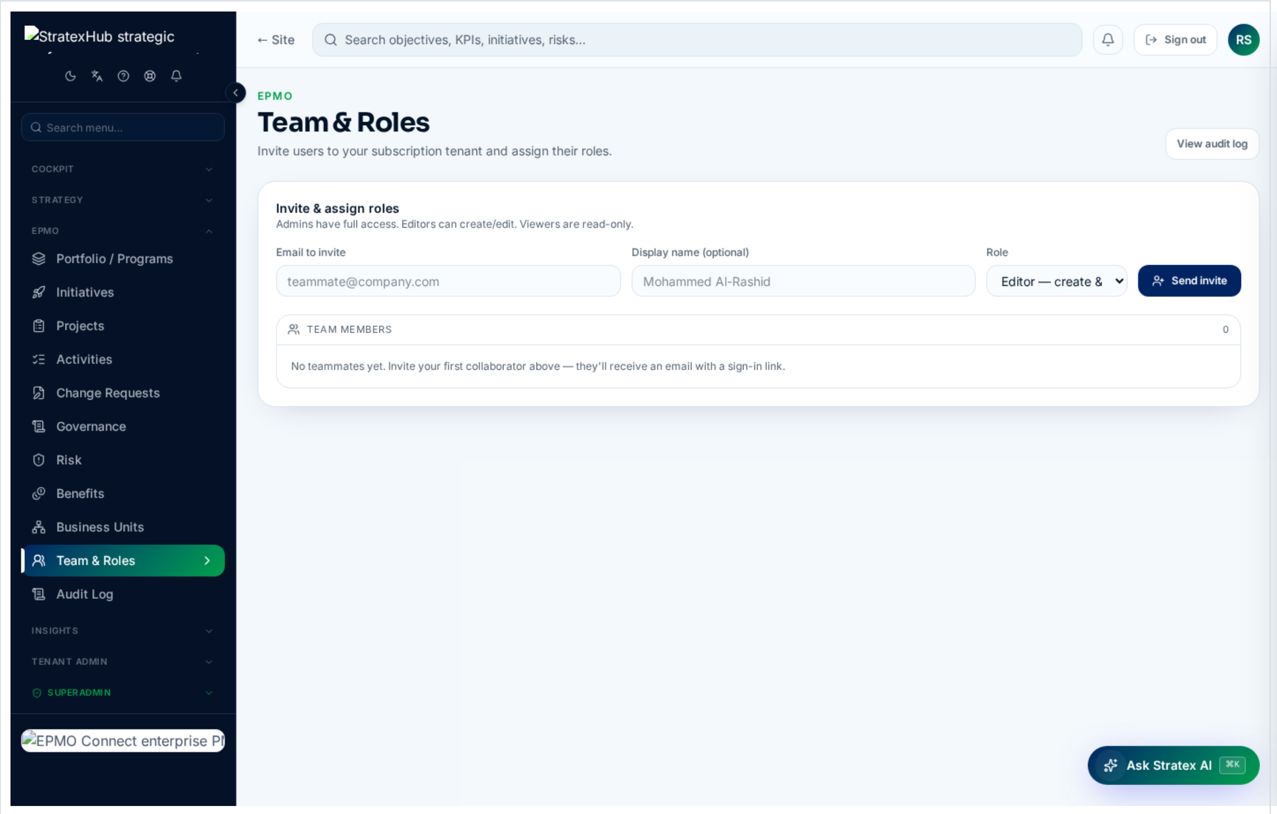

Figure — Team & Roles

How to use this page

- Click **Invite**, enter email + role; the invitee receives a magic link.
- Edit a user to change role or BU assignment.
- Deactivate frees a seat under your plan.

BU ownership

Owner: EPMO Admin / Account Owner.

20. Strategic Themes

Themes are the long-running narratives (e.g. Digital, Net-Zero, Customer-Centricity) that group pillars and objectives across multiple horizons.

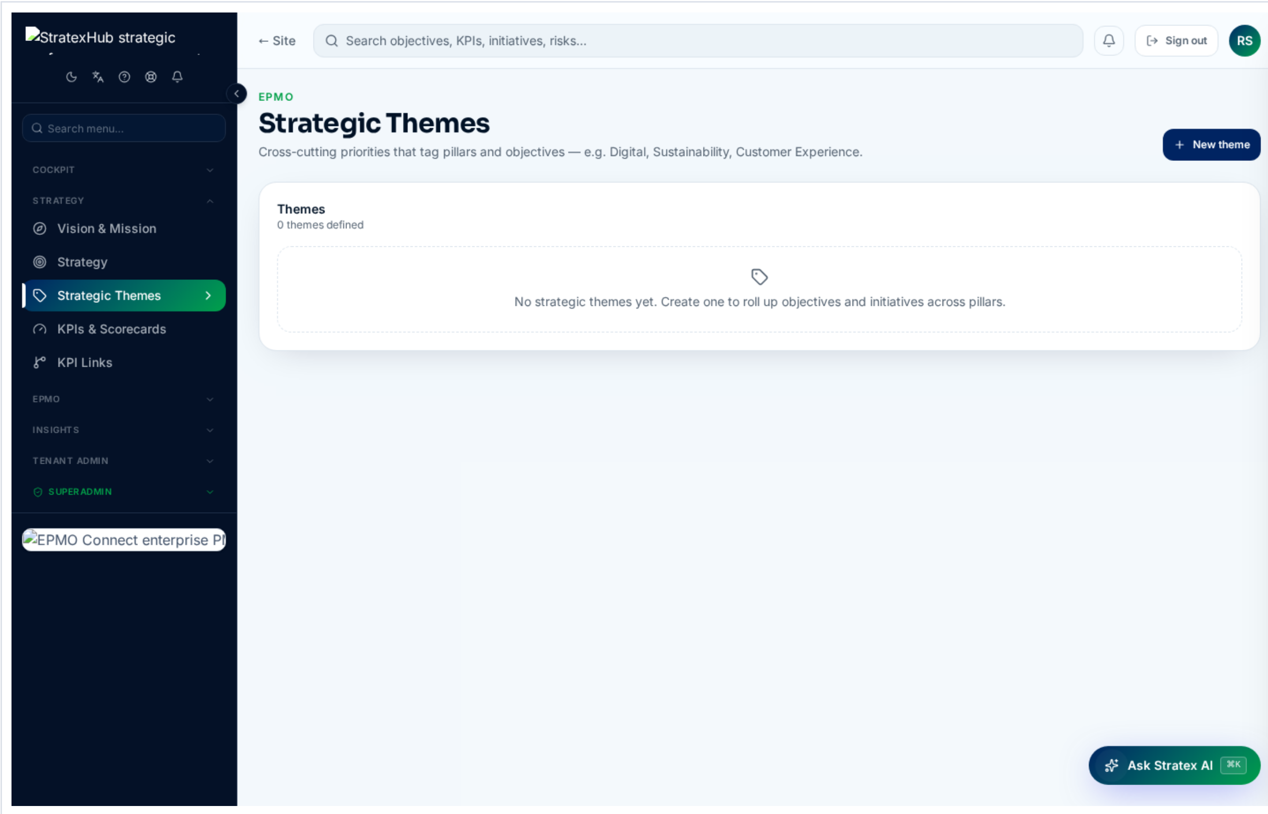

Figure — Strategic Themes

How to use this page

- Create a Theme with a colour and short description.
- Tag Pillars and Initiatives — the theme cascades downward.
- Themed views are available across Dashboard, Portfolio and Reports.

BU ownership

Owner: BU-GRP · Portfolio Lead.

21. Audit Log

Every create, update, delete, approval and login is captured in an immutable audit log filterable by user, entity, action and time range.

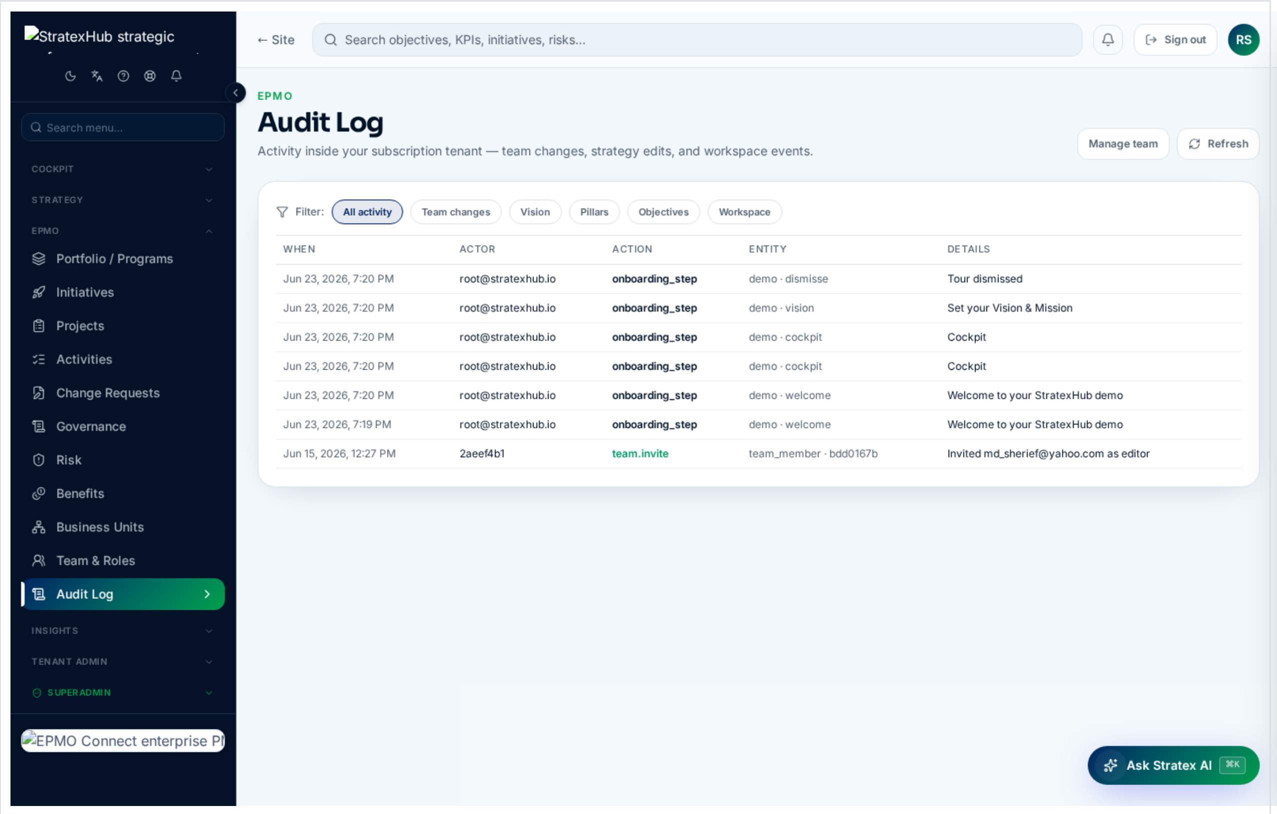

Figure — Audit Log

How to use this page

- Filter by user or entity to investigate a specific change.
- Export to CSV for external compliance review.
- Logs are retained per your plan's retention policy.

BU ownership

Owner: EPMO Admin · Compliance.

22. Profile & Settings

Manage your personal profile, password, notification preferences and the email channels you want StratexHub to use.

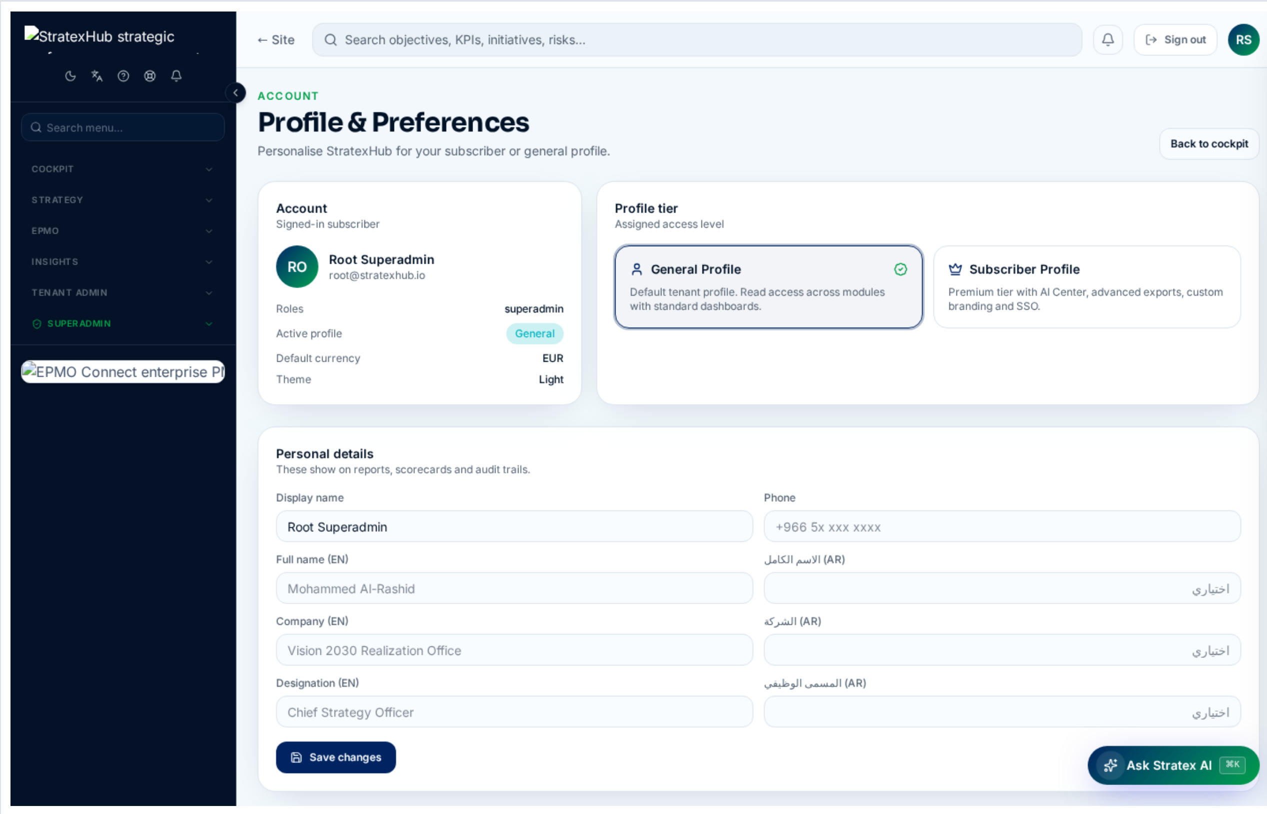

Figure — Profile & Settings

How to use this page

- Update display name, photo and time zone.
- Toggle in-app bell vs email for each event type.
- Connect calendar (Outlook) to sync committee meetings.

BU ownership

Owner: Each user.

23. AI Copilot

The AI Copilot answers natural-language questions across your portfolio — “Which BU has the most overdue benefits?”, “Summarise the top 5 risks in Operations”.

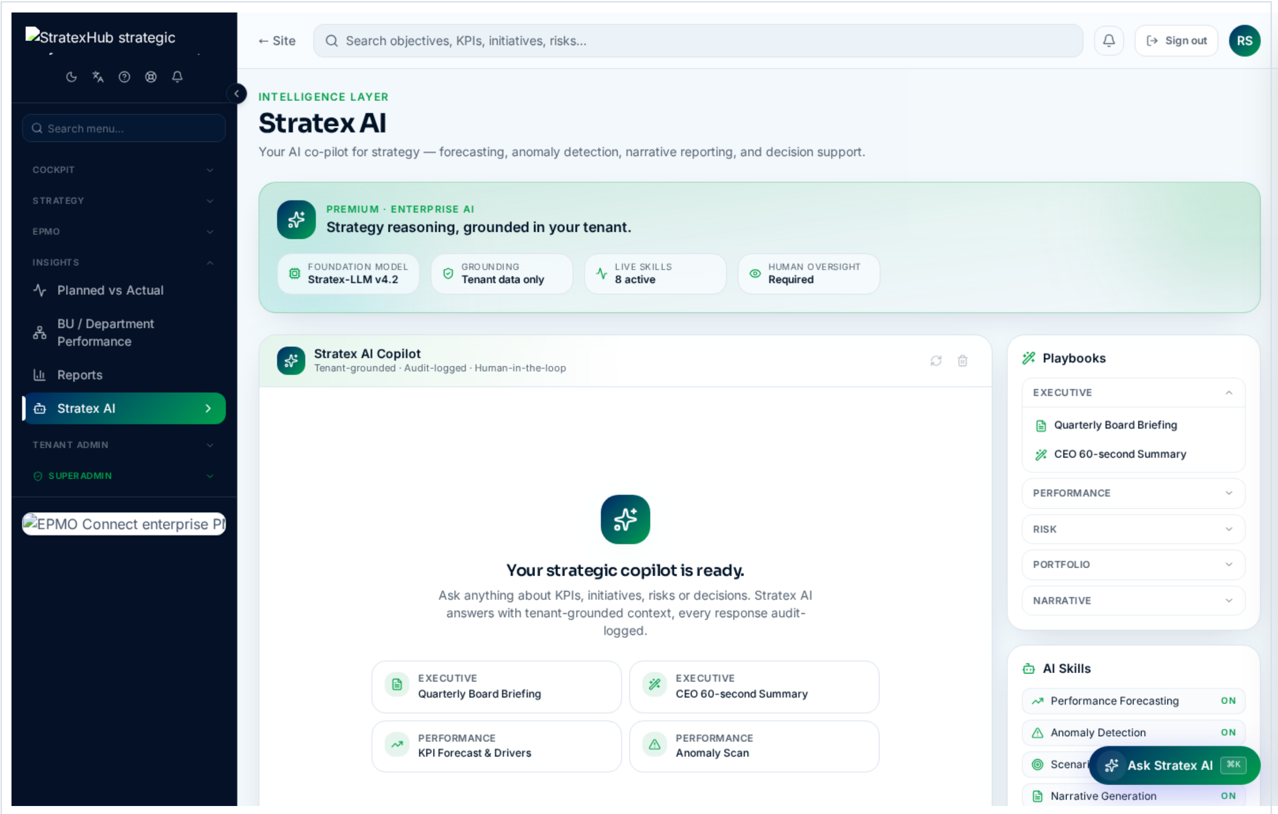

Figure — AI Copilot

How to use this page

- Open the Copilot from the floating action button on any page.
- Ask in plain English; answers cite the records they used.
- Pin a question to your Dashboard for recurring reviews.

BU ownership

Owner: All roles. Available on Business plan and above.

End-to-End Journey at a Glance

Sign Up → Set up Business Units → Capture Vision → Build Strategy Map → Create Initiatives & Projects → Define KPIs & Benefits → Log Risks → Submit Change Requests through Governance → Review Dashboard & Analytics → Publish Reports.

Need help?

Email **support@stratexhub.io** or open the AI Copilot from any page. Enterprise customers have a named Customer Success Manager — see your welcome email.