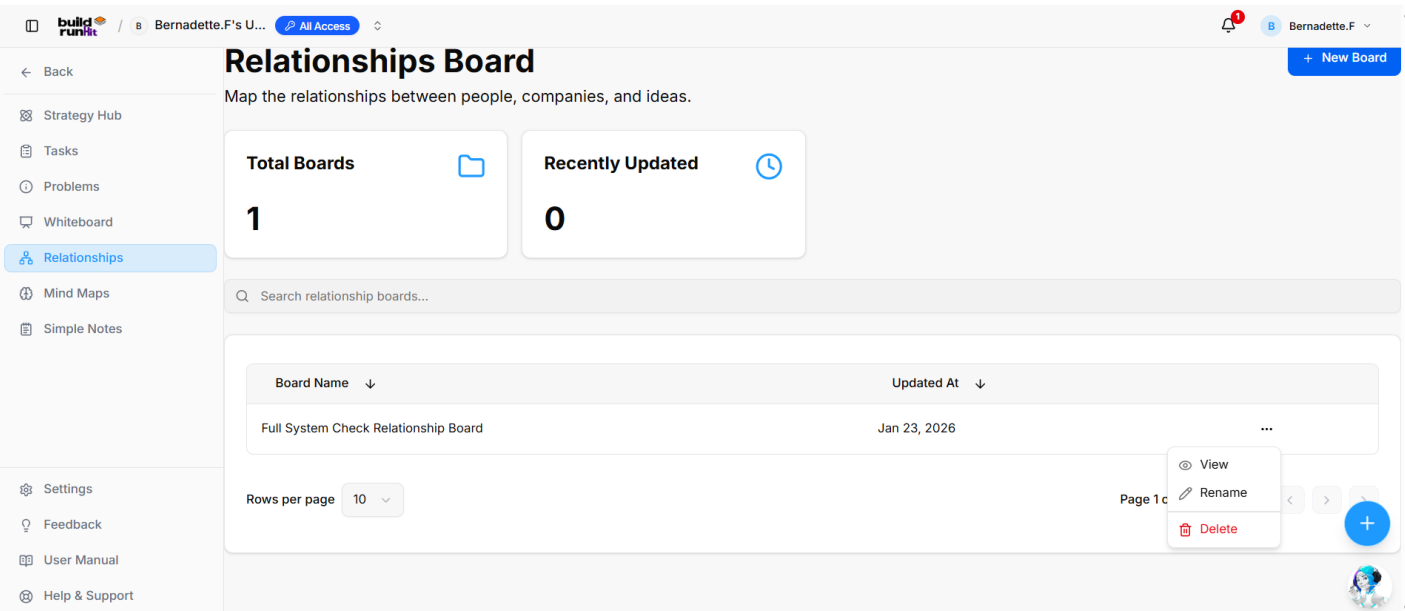


Strategy Relationship Sub-Section

Strategy Relationship Sub-Section



The **Strategy Relationship** sub-section allows you to map connections between people, companies, and ideas across your workspace.

Create New Relationship Board

Create New Relationship Board

×

Enter a name for your new relationship board. This will help you organize your work and collaborate with others.

Board Name *

Enter relationship board name

Cancel

Create Board

- **Open Modal:** Click the blue **+ New Board** button at the top right of the directory view.
- **Enter Board Name:** Type your title into the required **Board Name *** field (*Enter relationship board name*).
- **Confirm Creation:** Click **Create Board** to generate your board canvas, or select **Cancel** to close without saving.

Overview Metrics & Search

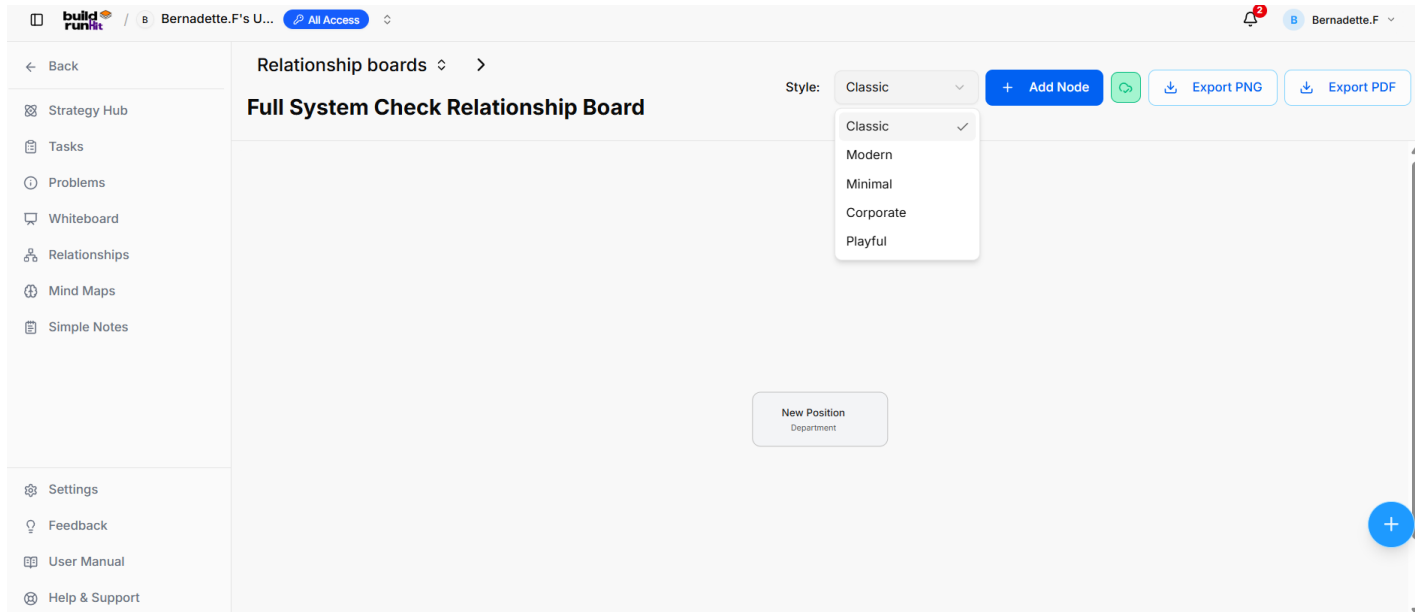
- **Total Boards:** Displays the total count of relationship boards created in your workspace.
- **Recently Updated:** Displays the number of relationship boards recently updated.
- **Search Bar:** Input field (*Search relationship boards...*) to filter boards by name.

Board Directory Table

- **Table Columns:** Displays existing boards organized under **Board Name** and **Updated At** headers (with sorting arrows).
- **Row Quick Menu (⋮):** Context menu on board rows providing options to:
 - **View:** Open the selected relationship board.
 - **Rename:** Change the title of the relationship board.
 - **Delete:** Permanently remove the relationship board.

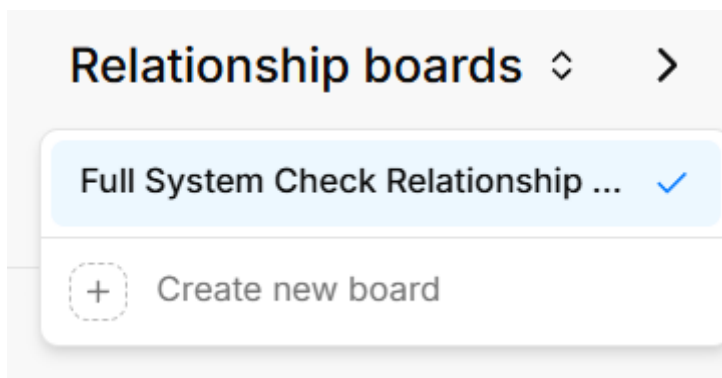
- **Pagination Controls:** Adjust items displayed per page via the **Rows per page** dropdown or step through pages using the pagination arrows.

Strategy Relationship



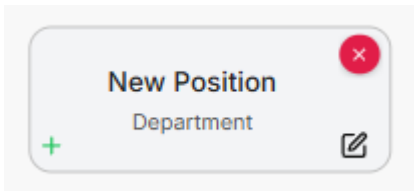
Board Header & Controls

- **Relationship Boards Selector:** Dropdown menu displaying the current active board (*Full System Check Relationship Board*), with an option to select **+ Create new board**.



- **Style Selector:** Dropdown menu to customize the visual theme of the diagram (*Classic, Modern, Minimal, Corporate, Playful*).
- **+ Add Node:** Primary button to add a standalone position or entity card to the canvas.
- **Export Options:** Action buttons to download the relationship diagram as **Export PNG** or **Export PDF**.

Node Elements & Action Controls



- **Position Card:** Represents individual entities, displaying a title (*New Position*) and subtitle (*Department*).
- **Delete Node (✕):** Red button at the top right of a node card to remove the item from the canvas.
- **Edit Node (Pencil Icon):** Located at the bottom right of a node card to update position and department labels.
- **Add Child Node (+):** Green plus icon at the bottom left of a node card to attach nested or subordinate nodes directly underneath.

Revision #3

Created 2026-05-21 11:15:45 UTC by Bernadette F

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