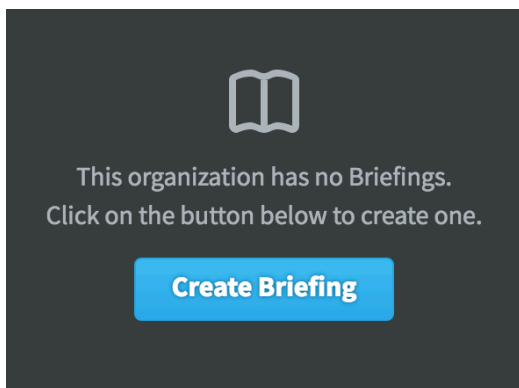




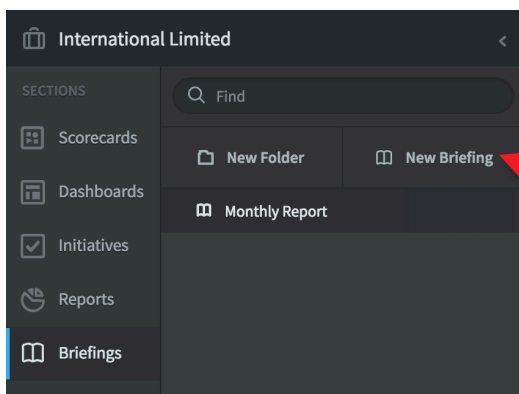
Briefings - 1

A Briefing is a collection of Dashboards, Reports, Initiatives and Scorecard elements that have been combined into a single Briefing document that can be displayed as an on-line presentation.

Together with Scorecards, Dashboards and Reports, **Briefing** can be added into an Organisation. First Click on the Briefcase icon and select an Organisation into which you want to add a **Briefing**.



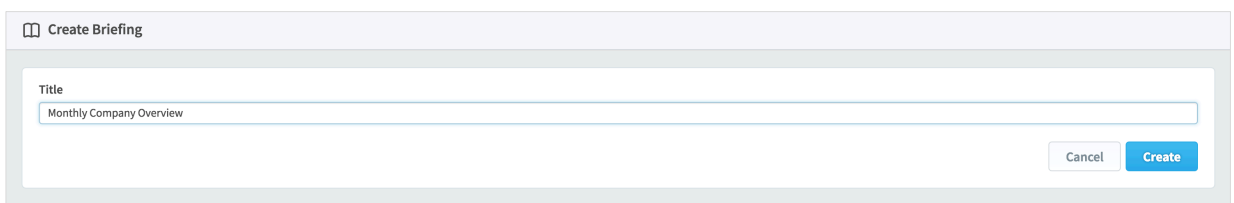
If this is the first Briefing in the Organisation selected, click on the blue **Create Briefing** button and miss the next step



If this is not the first Briefing in the Organisation selected, then click on **Edit** at the bottom of the menu list.

At the top of the menu list click on the **New Briefing** button

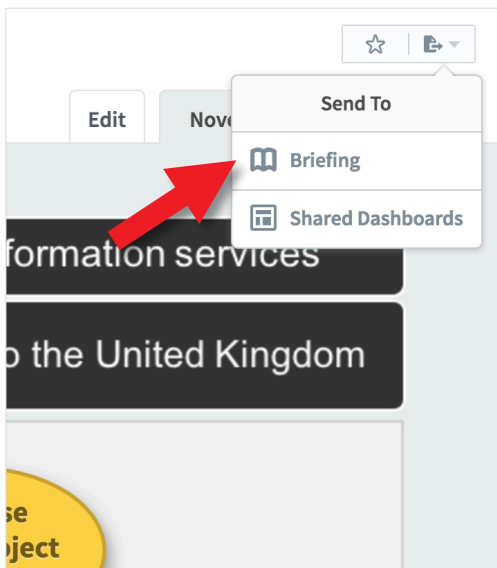
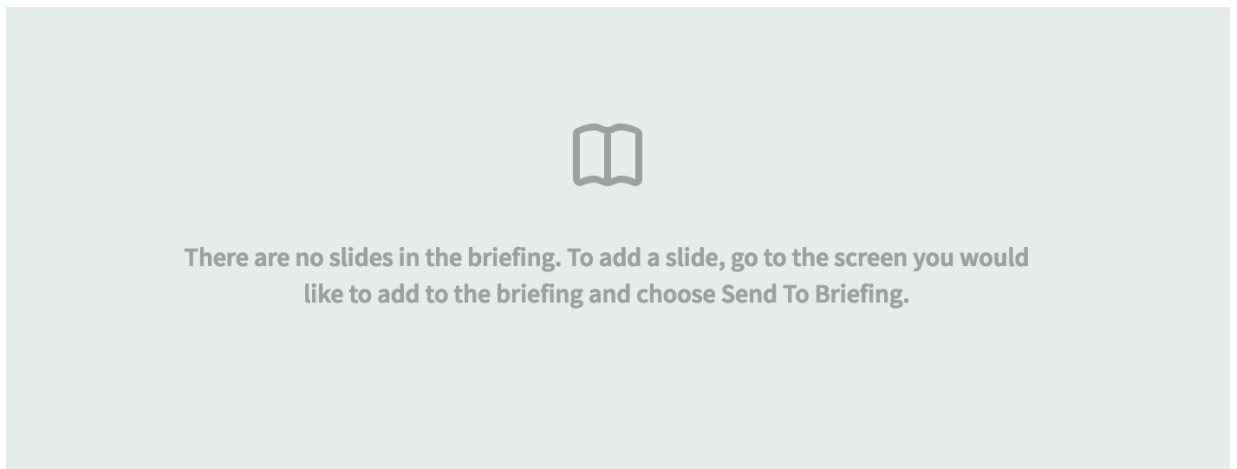
The **Create Briefing** dialogue will appear and you will be asked to give the Briefing a name. Enter the name and click **Create**.





Briefings - 2

Unlike other sections that you create within an Organisation, the elements for a Briefing have already been created. You will see the following Screen telling you what to do next:



First check you are in the Samples organisation by clicking on the **Briefcase** icon and selecting **Samples** from the Organisation list.

Next click on **Dashboards**, we are going to add two Dashboards to the Briefing we have created.

At the top right is the **Send To** button. Click on it and a drop-down will appear.

Click on Briefing and the **New Briefing Slide** dialogue will appear

i Briefings - 3

Unlike other sections that you create within an Organisation, the elements for a Briefing have already been created. You will see the following Screen telling you what to do next:

The screenshot shows a 'New Briefing Slide' dialog box. It has three main sections: 'CHOOSE NAME' with a 'Slide Name' input field containing 'Strategy Map'; 'CHOOSE A CALENDAR PERIOD' with 'By Date' and 'Relative' tabs and a 'Current Period' dropdown menu; and 'CHOOSE A BRIEFING' with two search bars and a list of options. The 'Samples' option is selected in the left-hand list, and 'Monthly Company Overview' is highlighted in the right-hand list. A red arrow points to 'Monthly Company Overview'. 'Cancel' and 'Save' buttons are at the bottom.

The first part of the dialogue box allows you to change the name of the slide. Leave it as Strategy map.

The second part of the dialogue box allows you to set the calendar period. Leave it as Current Period

The third part of the dialogue box allows you to select the **Briefing** into which you want the slide to appear.

In this example there is only one option, it is the **Briefing** you have just created.

Click on **Monthly Company Overview** and click **Save**

Go through these steps again and select a different **Dashboard**.

Do the same thing, but select an **Initiative**.

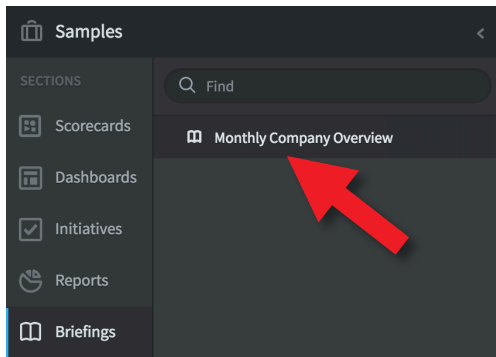
Do the same thing, but select a **Report**

When you have selected a few Dashboards, Initiatives and Reports and sent them to the **Briefing**, click on Briefing in the main menu



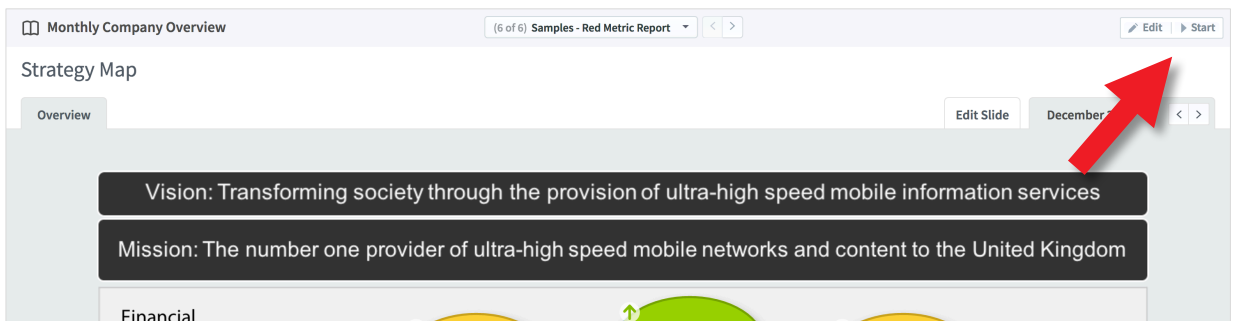
Briefings - 4

Check you are still in the Samples organisation by looking at the name next to the Briefcase at the top-left of the screen.



You will see the Briefing list in the second column. At the moment there is only one Briefing: Monthly Company Overview. Click on this Briefing and the first slide will appear to the right

At the top of the right hand panel you will see a slider-controller drop-down, by clicking on the **chevrons** or the **drop-down** you can go to any of the slides that have been previously sent to the briefing.



Click on the **Edit** button to edit the order of the slides or delete slides

Click on the **Start** button to go into presentation mode. While in presentation mode click on the **Stop** button to return to application mode.