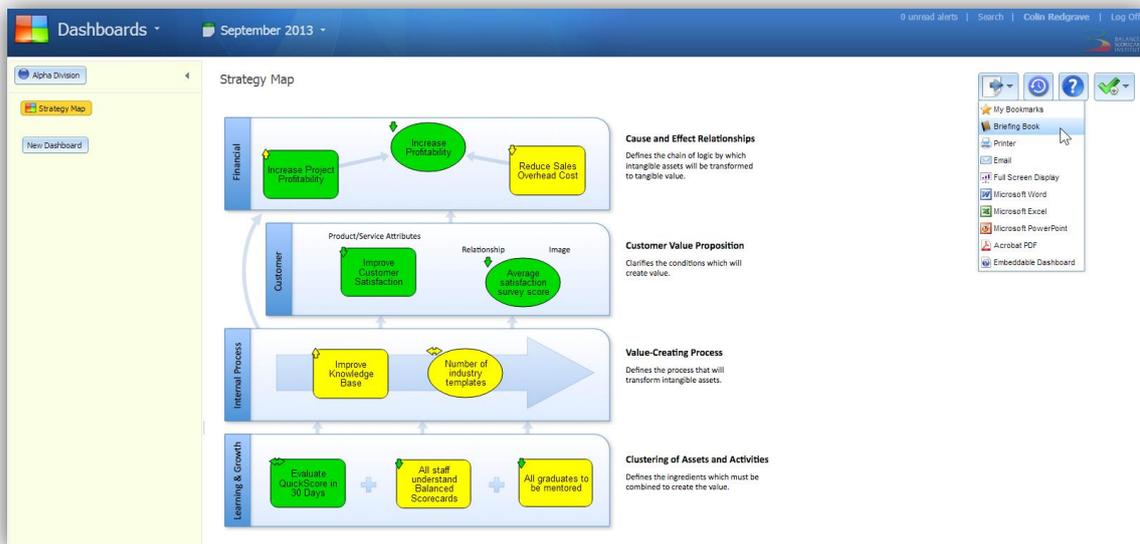


Briefing Books

Briefing Books provide a very powerful mechanism to export multiple screens of any type to a presentation. The screens can be viewed on-line or exported to PowerPoint, Word, PDF or Excel. Multiple briefing books can be created; typically you might see a monthly report, a divisional report, a suppliers report or a partners report. The latter two briefing books are especially interesting as suppliers and partners may not have access to your system and therefore you need a means to easily export and send information to them.

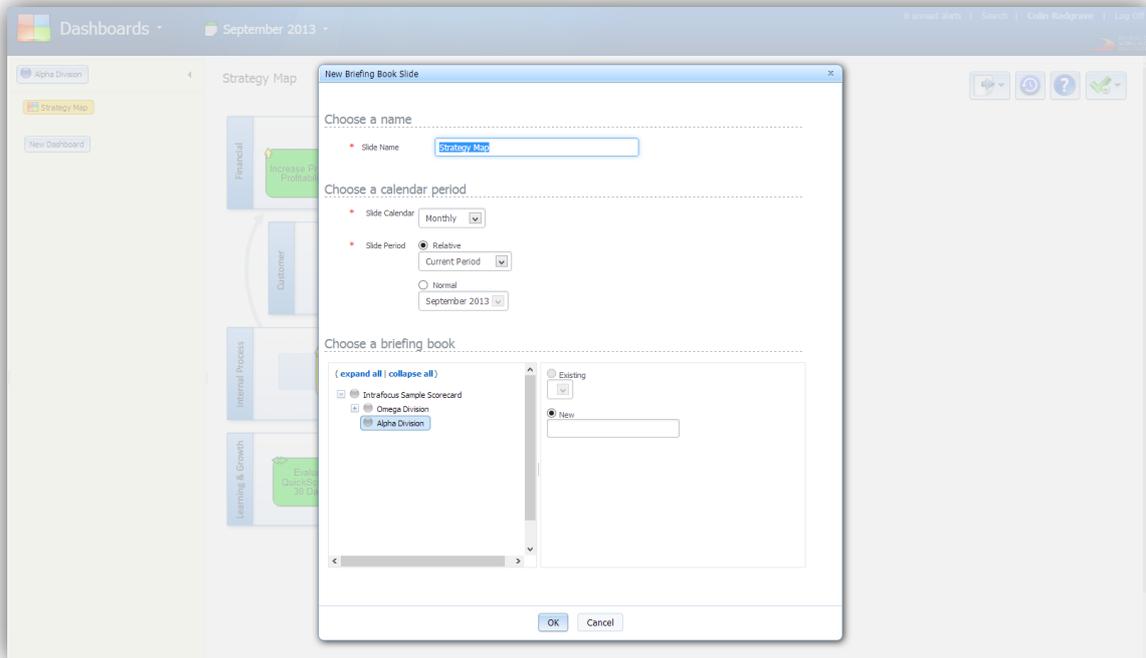
To create a briefing book, first go to a page in the system that you want to include in the book. For example, a Strategy Map. In the top left hand corner you will see a 'Send To' button. Click on the button and select 'Briefing Books' from the drop-down list:



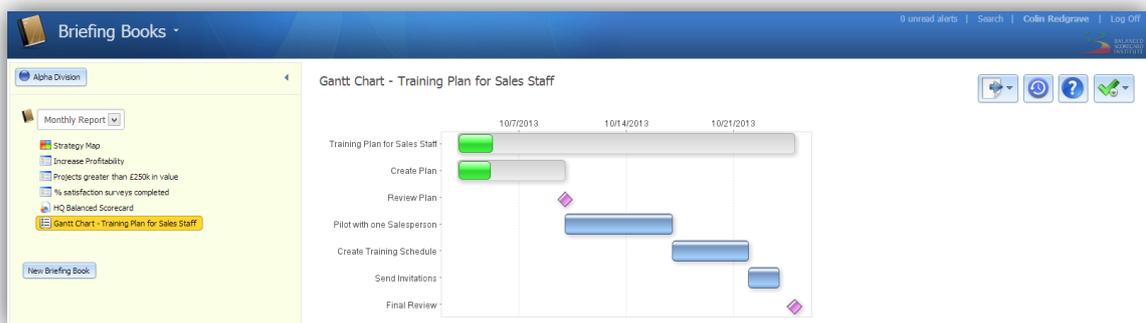
This will bring up a Briefing Book dialogue page (see below). On the dialogue page you will need to specify the following:

- **Slide Name** – this will default to the original slide name but can be changed.
- **Calendar Period** – this will default to the collection period but can be changed. You can also define a 'relative' period if you wish e.g. 3 months prior to the current date.
- **Choose a Briefing Book** – if this is the first Briefing book for the Organisation you have chosen, you will have to provide a name, for example 'Monthly Report'. You also have the option to add this object to an existing Briefingcards Book (if one exists). Simply select it from the drop-down list.

Click on the Organisation you want the Briefing Book to appear in and give it a name, click on OK and you will receive a notification in the top right hand corner that the Briefing book has been added.



Before going to look at the Briefing Book, go to a few more screens and repeat the process described above. Remember, you can add any screen to a Briefing Book. We suggest you do this for a couple of Performance Measures, a Report and the Initiative you have created while looking at previous Quick Start Guides. Then Go to Briefing Books by selecting it from the main drop-down menu, you will see a screen like this:



The Briefing Book list will appear on the left and the slide you have selected on the right. Click through the slides to view them.

Next, you may want to display all of the slides as an on-line demonstration or export them to a presentation. Click again on the Go To button on the top right of the screen. You will see the following set of options:

- My Bookmarks – send the screen to the Welcome Page and bookmark it
- Briefing Books – send the page to another Briefing Book
- Printer – Print the current page
- Email – email the current slide using your desktop e-mail system
- Full Screen Display – Open a new browser and display the whole book as a presentation

The following options do as the title suggests:

- Microsoft Word (slide only)
- Microsoft Excel (slide only)
- Microsoft PowerPoint (slide only)
- Microsoft Project (slide only)
- Acrobat PDF (slide only)
- Microsoft Word (entire workbook)
- Microsoft Excel (entire workbook)
- Microsoft PowerPoint (entire workbook)
- Microsoft Project (entire workbook)
- Acrobat PDF (entire workbook)
- JPEG Image

Each of the above will open the named application on your desktop and populate it with the slide or entire workbook.

Important Note: If you do not have the application on your desktop, then the results may be unpredictable.
