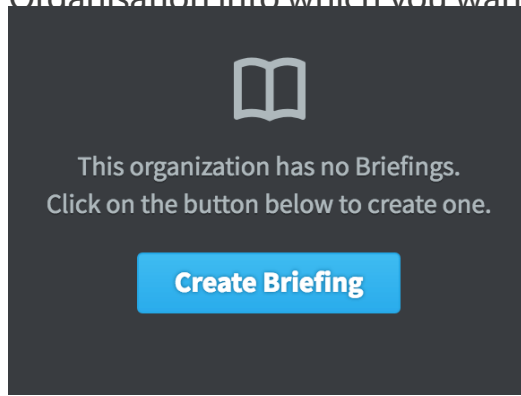




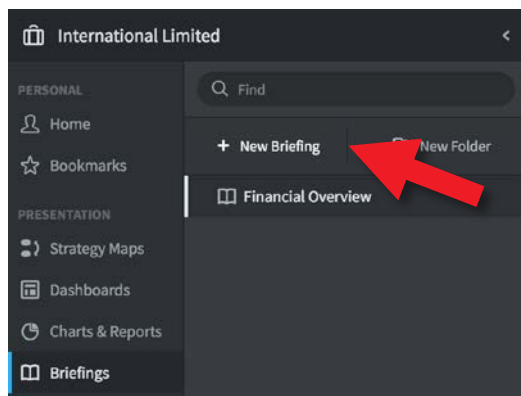
Briefings - 1

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 or exported as a document.

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**.

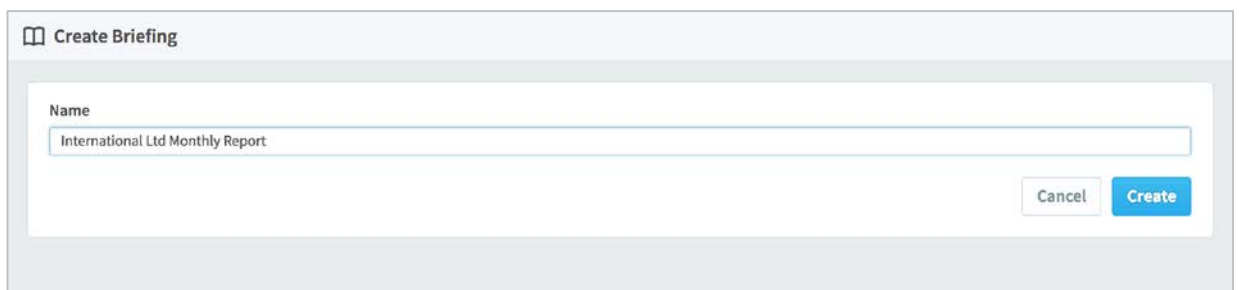


If this is the first Briefing in the Organisation selected, click on the blue **Create Briefing** button and miss the next step



If this is not the first Briefing in the Organisation selected, then click on + **New Briefing**

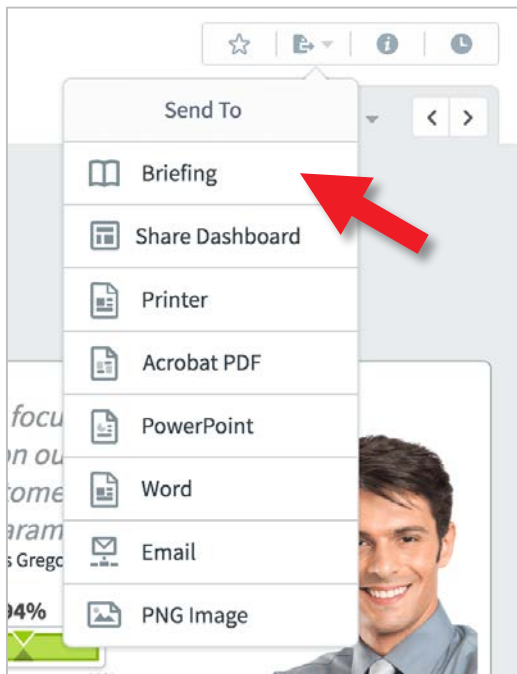
The **Create Briefing** dialogue will appear and you will be asked to give the Briefing a name. Enter the name and click **Create**.





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. Select **International Ltd - Overview** in the Dashboards list.

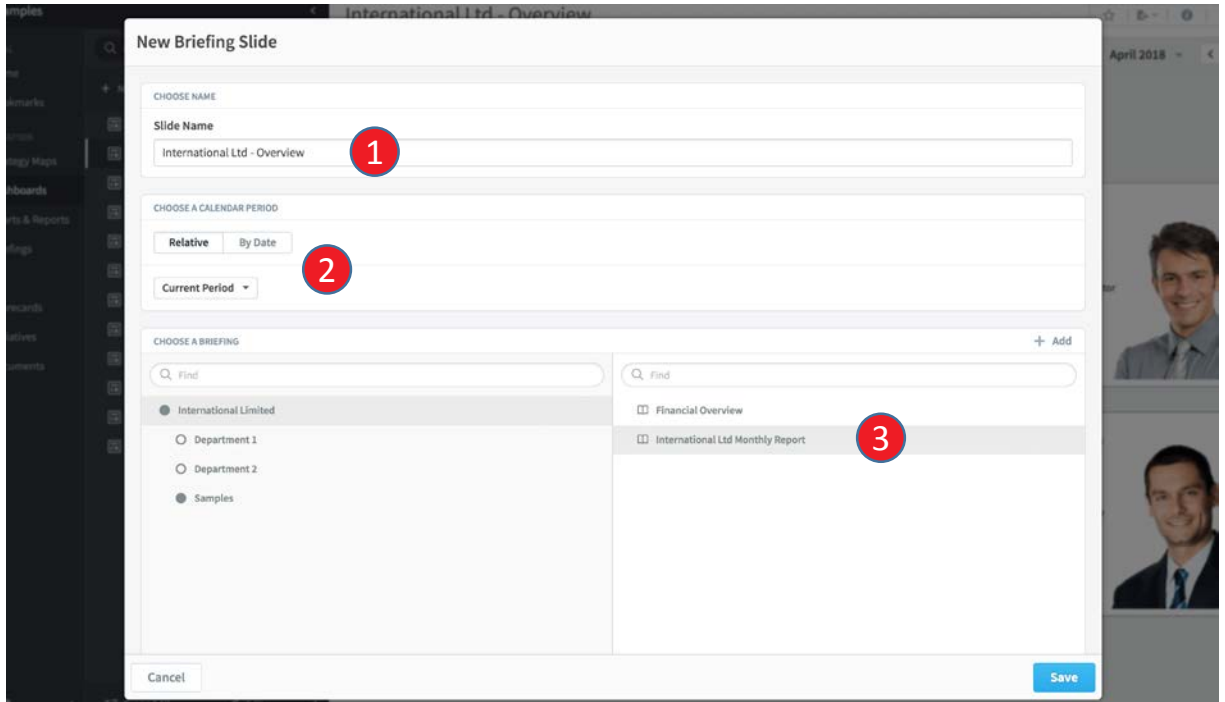
At the top right is the **Send To** button. Click on it and a drop-down will appear.

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



Briefings - 3

The **New Briefing Slide** dialogue will appear:



1. Name the slide as you want it to appear in the Briefing. Leave it as International Ltd - Overview for this example.
2. Set the calendar period. Leave it as Current Period.
3. Select the **Briefing** into which you want the slide to appear. Select International Limited on the left and select International Ltd Monthly Report on the right. Click on **Save**.

The dashboard will be saved in the Briefing List.

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 looking at the right **Organization** and then select **Briefings**.
Click on the briefing you have just created,

The screenshot shows the IntraFocus interface. On the left is a navigation sidebar with sections: PERSONAL (Home, Bookmarks), PRESENTATION (Strategy Maps, Dashboards, Charts & Reports, Briefings), and DATA (Scorecards, Initiatives, Documents). The main area displays the 'International Ltd Monthly Report' overview. It features four slides, each with a score, a quote, a metric bar chart, and a photo of a director:

- Financial**: Score: 7.7. Quote: "Profitability will always be our goal, but that doesn't mean we can't take the occasional risk". Metric: Net Profit (£32.1K). Photo: Carol Levine - Financial Director.
- Customer**: Score: 7.7. Quote: "Our focus will always be on our customers, customer satisfaction is paramount". Metric: Customer Satisfaction (94%). Photo: James Gregory - Marketing Director.
- Internal Processes**: Score: 5.7. Quote: "Continuous improvement and being the best at everything we do is what we strive for". Metric: % staff working with a mentor (82%). Photo: Frank Ankle - Operations Director.
- Organisational Capacity**: Score: 5.5. Quote: "Without the people in our business we are nothing. Respect for the individual is key". Metric: % Staff trained in product basics (80%). Photo: Raymond Channing - HR Director.

The first slide will be showing, you can click through the slides using the chevrons next to the slide drop-down list at the top.

This close-up highlights the controls at the top right of the briefing screen. A red arrow points to the settings gear icon. Other controls include an 'Edit' button with a pencil icon, a blue 'Start' button, a star icon, a share icon, an information icon, and a clock icon. Below these are controls for the current slide: 'Edit Slide', the date 'April 2018', and navigation chevrons.

Take special note of the **Briefing Controls** at the top-right of the screen.

Cog - send the entire presentation to a pdf or PowerPoint presentation (also shows audit history)

Edit - change the slide order and names of the slides. Delete slides.

Start - starts and stops a full screen presentation.