# Dashboard Framework DITL Script

This demonstration shows an Executive Dashboard portal solution built on IBM Websphere portal and IBM Lotus Messaging. This customizable solution helps management view and analyze business results on a daily bases.

1. CEO – Bill Daniels.

1. Click on the CEO icon.

2. Bill Daniels logins into the dashboard. Click in the "User name" and "Password" fields to populate the data. Then, click on the "Sign In" button.
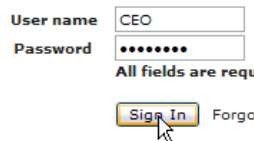
3. In the dashboard homepage Bill is provided a graphical easy important view of Key Performance Indicators or KPIs and Alerts that matter to his position and responsibilities. He clicks on the Edit icon to modify the KPIs.

4. He changes the Profit Overperforming metric to 15%. Click on the 10.0 % field to change its value.
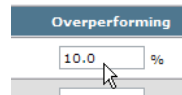
5. Then click on the "OK" button.

6. As with the KPIs portlet, the CEO can customize the Alerts portlet by clicking on the Edit icon and selecting the types of alerts he wants to receive and how he want to be notified. Click on the "Edit" icon.

7. Bill subscribes to Human Resources related to Promotions. Check the "Human Resource" checkbox.

8. And check the "Promotions" checkbox.

9. Click on the "OK" button to submit the changes.

10. When he clicks OK, the portlet dynamically reflects his selections and the new HR Promotions alerts are shown. Then, he decides to see the news on Mega Corporation. Click on the "Mega Corp just acquired Globe Networks" link.

11. Bills decides to delegate this issue with Mega Corp to a Sales VP, Miles Montgomery, asking him to put together a focus sales effort to come back the situation. He uses the "My Team" portlet to communicate with Miles. Bill clicks on Miles Montgomery and then clicks on the "Send E-mail…" option.

12. After sending and E-mail to Miles, Bills decides log out from his site. Click on the "Log Out" link.


## 2. Sales VP – Miles Montgomery.

1. Click on the Sales VP icon.

2. Miles Montgomery logins into his Executive dashboard. Click in the "User name" and "Password" fields to populate the data. Then, click on the "Sign In" button.

3. The first thing to know is how the portal has changed based upon Miles' role and personal preferences. Acting on Bill's directions, Mile proceeds to find a strong leader to have a competitive task force focus on beating Globe Networks. He also wants to find his best and happiest customers in the region to use his references. Mile clicks on the "Launch" button and then selects "HR" to continue.
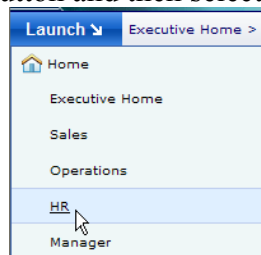

4. Checking out the HR portlets, Miles confirms his belief that hiring from outside would take to long and begins to search internally for a candidate. To do this, Miles clicks on the "Launch" button and then selects "Sales" to continue.
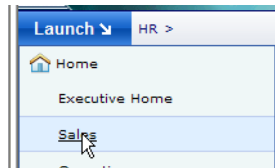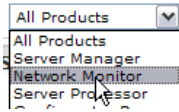

5. He will filter all of the data in the portlets from the Sales section of the dashboard both in this page and across pages. The first filter he selects is for Europe.
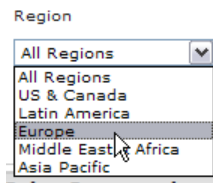
6. When data is filtered, note how the other portlets on the page are updated. The next filter he specifies is "Current and last 4 quarters".
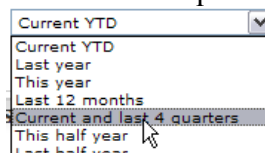
7. Lastly, he filters the "Network Monitor" product.

8. Miles clicks on the "Trend" tab from the Bookings portlet to see the data.

9. And then on the "Details" tab.

10. Miles now wants to view the tab Sales Team hoping to find someone in the task force.
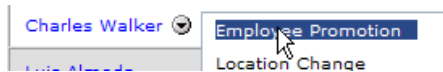

11. He sees the name of Charles Walker heading the list and decides that in addition to giving him the lead for this competitor task force, he should also promote him to a director.
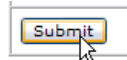

12. He clicks on the "Promote employee" link from his "Related Actions" portlet.

13. Then, Miles clicks on "Charles Walker" and selects "Employee Promotion" from the list.

14. To save time in this demonstration, we will now move on to the task of finding a list of top customers to use as reference accounts. Click on the "Submit" button to be sent back to the Sales Home page.
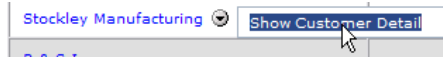

15. Miles selects the "Customers" tab.

16. He drills down to get a list of all customers who provide an overall customer satisfaction score outstanding.
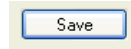
17. Miles clicks on "Stockley Manufacturing" and selects "Show Customer Detail" from the list.

18. He clicks on the "Excel" icon from the "Customer Satisfaction" portlet to export the data.

19. Then, Miles clicks on the "Save" button.

20. Once the data is saved, he would want to send it over to Charles Walker who now owns the task force. Miles close the pop up window by clicking on the X.

21. He decides to log out from his site. Click on the "Log Out" link.