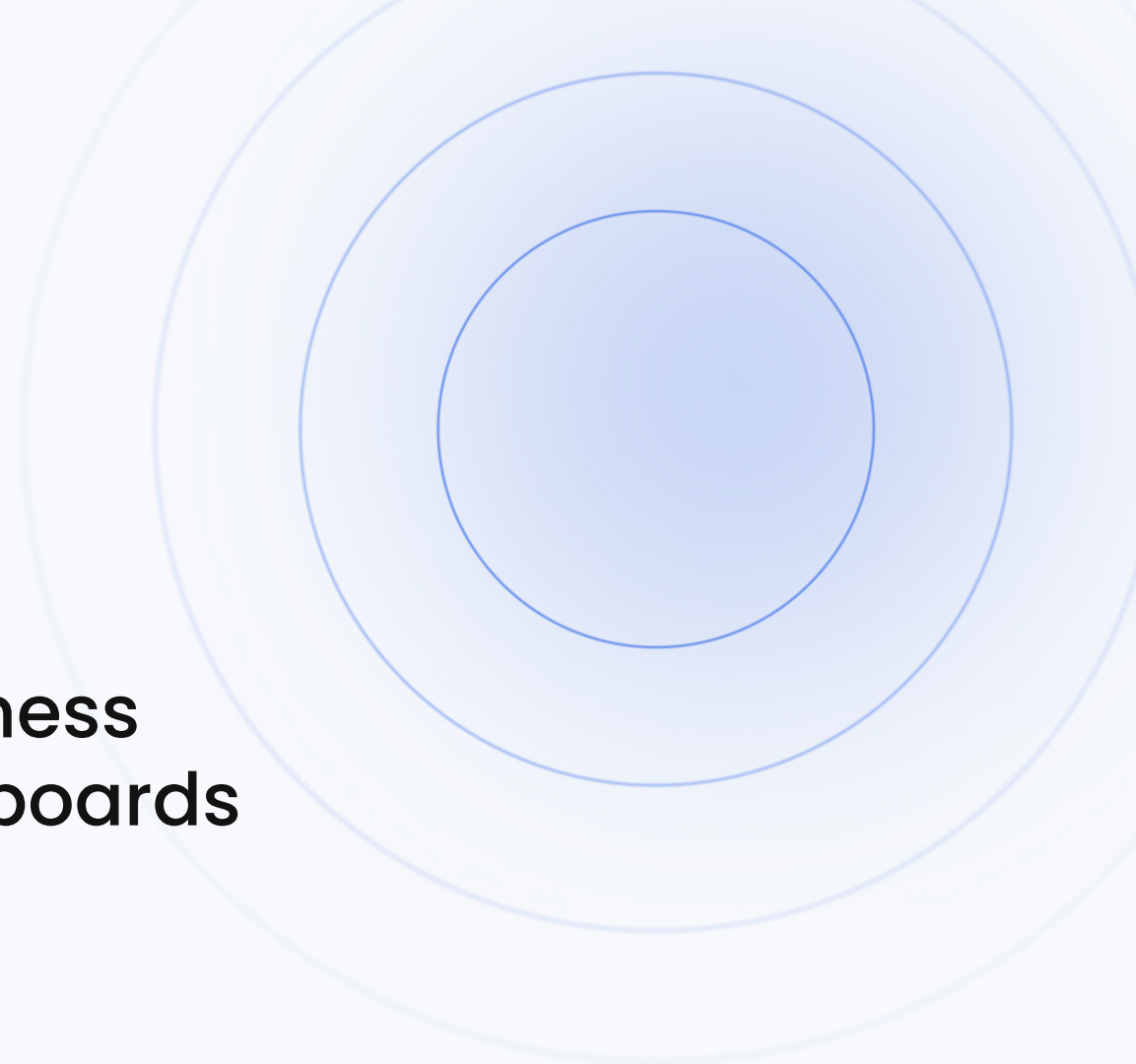




COMMUNITY OFFICE HOURS

Solutions for Business Intelligence Dashboards



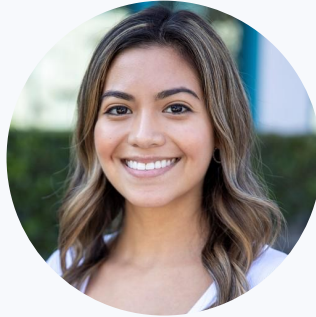
Housekeeping Items

- Today's session is recorded and will be posted in the AuditBoard Community
- CPE credits will not be issued today :(
- Live Demos are performed in a Demo Site
- Please use the Zoom Q/A function to submit questions



○ Introduction

Presenters



Elinni Veliz

Technical Implementation Manager,
AuditBoard

Agenda

- Introduction
- ABI Best Practices
- Limitations of Clone & Edit
- Practical Dashboarding Techniques
- Live Demonstrations
- Q&A and Resources

Poll Question #1

Have you used ABI Dashboarding before?

- A. Yes, I have!
- B. No, but I plan to
- C. No, my business uses their own reporting tools
- D. What is ABI?

AuditBoard Intelligence Best Practices

- Consider key strategic priorities and determine which ABI dashboards align most closely
- Consider the audience and tailor the dashboard to their needs and level of expertise
- Standard dashboards have been designed with our large and diverse client base in mind. Therefore, Clone & Edit may be used to customize dashboards to fit your reporting needs

Help Center Articles

- [List of Standard Dashboards](#)
- [Data Tables Mapped to Standard ABI Dashboards](#)
- [ABI Data Table Dictionary](#)
- [How to identify default field names from custom labels](#)

Limitations of Clone & Edit

The clone & edit feature includes all the capabilities as the Microsoft Power BI Web Editor.

- Cannot create new calculated fields
 - we can only summarize a single field (sum, average, count, etc.)
- Cannot create new measures
- Cannot add new data sources
- Changes or updates made to the standard dashboard will not cascade to the clone

Practical Dashboarding Techniques

- Don't put all information on one page. This will prevent overwhelming users and increase dashboard performance
- Use filters, slicers and drill through pages to allow users to interact with the dashboard
- Provide context by including titles, labels and annotations
- Keep it simple and focus on displaying key metrics prominently



Let's see
the demo

Q&A

New Community Events Page!

AUDITBOARD Community Discuss Product Resources Group Hubs Support Academy

Events
Community News
Community Resources

All community Search all content

AuditBoard Community > Resources > Events Options

UPCOMING EVENTS

- Office Hours** July 10th at 9AM PT
Community Office Hours: Solutions for Business Intelligence Dashboards
- Office Hours** July 17th at 9AM PT
Community Office Hours: Making The Most of AuditBoard Analytics
- Best Practices** July 23rd at 9AM PT (FREE CPE)
Best Practices Webinar: Managing Inventories Across the AuditBoard Platform
- Office Hours** July 24th at 9AM PT
Community Office Hours: WorkStream Fundamentals

Director-Led Live Training Sessions! **AUDITBOARD** Audit & Beyond 2024!

PAST RECORDINGS

Community Office Hours

(Recording) Office Hours: Users & Team Permissions - 6/26/24

During this recorded session, AuditBoard CSM Brian Arndt showcased how Team permissions function within the AuditBoard Environment. We reviewed the basic permission structure and concept, followed by a demonstration of how our Teams functionality wor...

2 weeks ago 0

Community Office Hours

(Recording) Office Hours: AuditBoard AI Use-Cases - 6/12/24

During this recorded session, Rekha Epili guided attendees through AuditBoard AI key use-cases and capabilities. She demo'd GenAI, Intelligent Recommendations & Customized Prompts. Attendees learned how to better streamline critical tasks within thei...

3 weeks ago 0

Labels

- AI (1)
- Best Practice (9)
- Configuration Changes (19)
- CrossComply (19)
- Demo (1)
- New Releases (1)
- OpsAudit (1)
- Past (16)
- SOXHUB (2)
- User & Role Management (16)
- Workstream (20)

SAVE THE DATE

AUDIT+ BEYOND

October 22-24, 2024

The Cosmopolitan of Las Vegas
Las Vegas, NV



Thank you.

Questions?

Email customersuccess@auditboard.com.