AUDITBOARD

COMMUNITY OFFICE HOURS

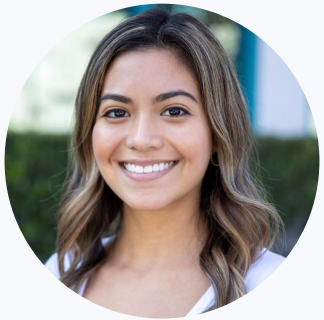
Solutions for Business Intelligence Dashboards

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

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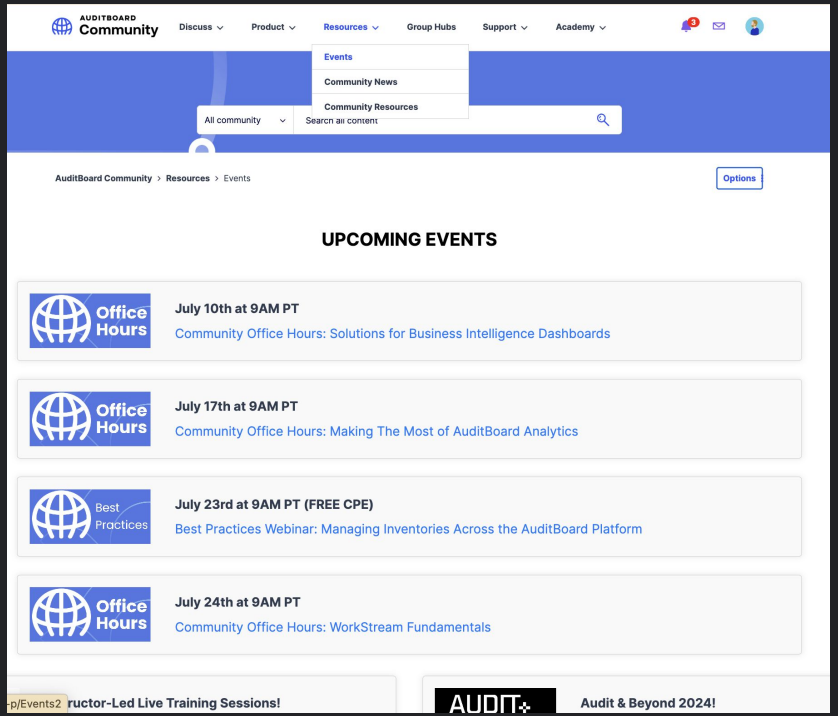
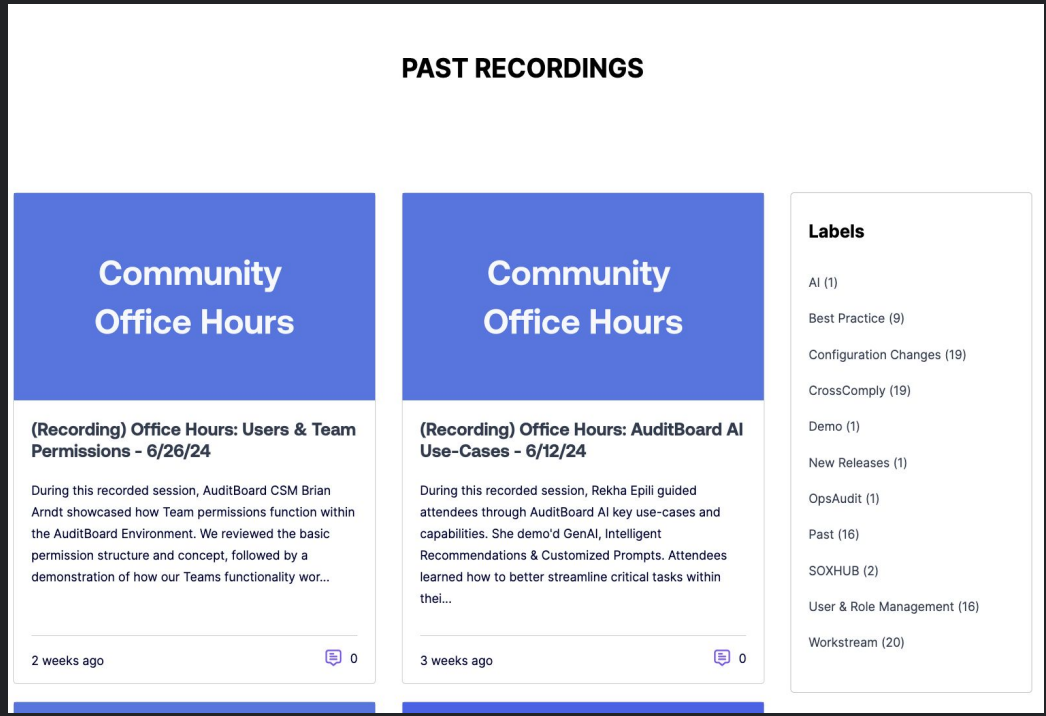
Q&A

New Community Events Page!





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SAVE THE DATE

AUDIT+ BEYOND

October 22-24, 2024

The Cosmopolitan of Las Vegas
Las Vegas, NV

Thank you.

Questions?

Email customersuccess@auditboard.com.

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