



Community Office Hours

Auditboard Integrations: Zero to Hero



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

Poll Question #1

Have you already setup an integration to Auditboard?

- A. Yes, multiple!
- B. Yes, one
- C. Yes, but I haven't set up any automations
- D. Not yet!

01



Introduction

Presenters



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Agenda

- Integrations 101
- Live demo in Auditboard Platform
- Q&A
- Additional Resources

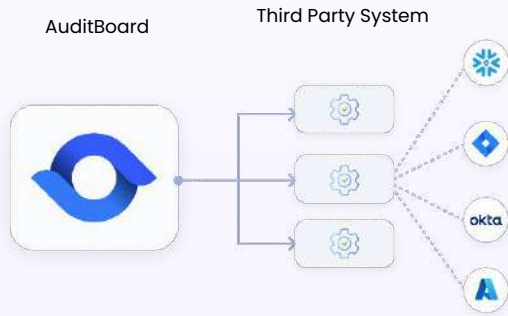


○ Integrations 101

Better Together – Platform Connectivity Options

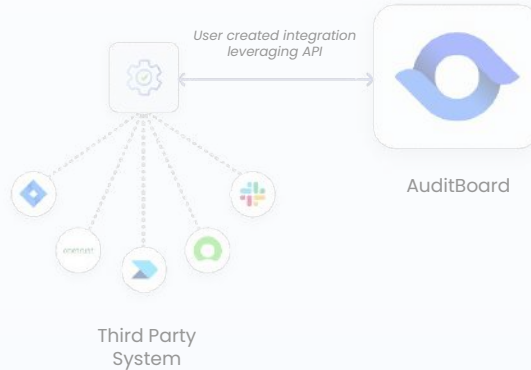
1 Out of the Box Integrations

Purpose-built connectors to 3rd party systems across a variety of use cases to support data exchange



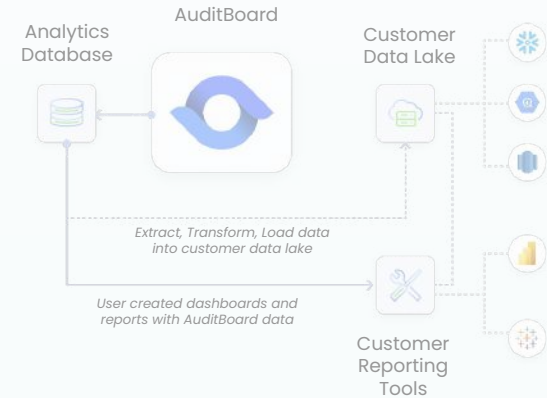
2 Do it Yourself with APIs

Leverage synchronous APIs for data transactions, including user provisioning through SCIM



3 Data Access

Construct reports and analysis on AuditBoard data with or without your own data lake



Why use Integrations?

- Save time by automatically moving data into the Auditboard Platform
- Easy to set up
- Get the data where you need it, when you need it
- Less room for human error

The screenshot displays the 'Automations' section of the Auditboard platform. At the top right, there is a '+ Add Automation' button. Below it, a dropdown menu is open for 'List S3 Buckets', which is marked as 'VERIFIED BY AUDITBOARD'. The description for this automation is 'List all S3 buckets owned by the provided credentials'. To the right of the description is a 'Run Workflow' button and a three-dot menu icon. Underneath, the 'Workflow Details' section shows the following information:

WORKFLOW SOURCE	List S3 Buckets Version 1
TYPE, SERVICE	Evidence Collection AWS S3 AWS S3 - Demo
LAST UPDATED	August 23, 2024 at 3:01 PM

Below this, the 'Last Run' section shows a 'SUCCESS' status. The 'RUN INITIATED' field indicates it was triggered by 'AuditBoard Support 730, August 23, 2024 at 3:01 PM'. The 'OUTPUTS' field shows a file named 'List S3 Buckets_30_30-run-on-2024-08-23T19-01-58.xlsx' with a download icon and the text 'Raw'.

Areas Available for Automation:

- Controls: upload testing information
- OpsAudits: upload audit information
- KRIs: load numerical data point
- KPIs: load numerical data point
- Evidence Requests: upload evidence
- Monitors: raise exceptions based on a customized threshold for controls and frameworks

SOXHUB

CONTROL	TESTING PHASE	LAST RUN
+ Add Automation Connection		

OpsAudit

AUDIT PROJECT	WORK STEP	LAST RUN
+ Add Automation Connection		

New Integrations for AEC (coming soon...)

The screenshot shows the AuditBoard website's navigation and integration categories. The top navigation bar includes 'Platform', 'Solutions', 'Customers', 'Company', 'Resources', 'Community', 'Login', and a 'Get Started' button. On the left, a 'Categories' sidebar lists various integration types, with 'HR, Payroll, and Directory (HRIS)' highlighted in blue. The main content area displays a grid of nine HRIS integration cards, each featuring a logo and the company name: ADP Workforce Now, BambooHR, Freshteam, Gusto, HR Cloud, HR Partner, HiBob, Humaans, and Justworks.

AUDITBOARD Platform Solutions Customers Company Resources Community Login [Get Started](#)

Categories

- Accounting
- BI & Data Warehouse Providers
- Content Providers
- Cloud Security
- Collaboration and Documentation
- CRM
- HR, Payroll, and Directory (HRIS)**
- Identity and Access Management
- Managed Devices
- Recruiting (ATS)
- Security Training

ADP
ADP Workforce Now

bamboohR
BambooHR

Freshteam
Freshteam

gusto
Gusto

HR HR Cloud
HR Cloud

HR Partner
HR Partner

bob
HiBob

Humaans
Humaans

Justworks
Justworks

Representative workflows with HRIS integrations

- BankInfo
- Benefit
- Company
- Dependent
- Employee
- Employee Payroll Run
- Employer Benefit
- Employment
- Group
- Location
- Pay Group
- Payroll Run
- Team
- Timeoff
- Timeoff Balance
- Timesheet Entry

Out of the box Integrations

- Most workflows contain a set of preset workflows
- Some are customizable (Snowflake, Alteryx)

Installed	Name	Description
<input type="checkbox"/> A. ▾	<input type="checkbox"/> All	<input type="checkbox"/> All
<input type="checkbox"/>	List Custom Roles	List Custom Roles
<input type="checkbox"/>	List Groups	List Groups
<input type="checkbox"/>	List Users	List Users
<input type="checkbox"/>	List Password Policies	List Okta Password Policies

Documentation Updates

Updated documentation for our most popular integrations coming soon, with more to follow!

<input type="checkbox"/>	 AmazonEC2FullAc...	AWS managed	Directly
<input type="checkbox"/>	 AmazonROSFullAc...	AWS managed	Directly
<input type="checkbox"/>	 AmazonS3FullAccess	AWS managed	Directly
<input type="checkbox"/>	 IAMFullAccess	AWS managed	Directly

1.2. Create Access Key

The following text captures steps for creating AWS Access Keys as of Aug 2024. Note that the Access Key will work for multiple AWS services and integrations as long as the Key has been given the necessary permission for the respective services.


On the user AWS Console screen above, you can click on Security credentials tab to review or create an access key for that user. You can also follow the link

```
https://{{region}}.console.aws.amazon.com/iam/home?region={{region}}#/users/details/{{userName}}?section=security_credentials
```

In the Access keys section, you can choose to create a new access key:

Access keys {1}

Use access keys to send programmatic calls to AWS from the AWS CLI, AWS Tools for PowerShell, AWS SDKs, or direct AWS API calls. You can have a maximum of two access keys (active or inactive) per user.

AKIASQWMVORJDWTPGQMX	Status
Description	 Active
-	Created
Last used	12 days ago
7 days ago	Last used service
Last used region	s3
us-east-1	

In the next screen, you can choose Third-party service option and click Next

IAM > Users > Admin > Create access key

Step 1

Access key best practices & alternatives [info](#)

Avoid using long-term credentials like access keys to improve your security. Consider the following use cases and alternatives.



• How to Enable

What do I need?

- Name of the integration
- Login credentials
- Role Permissions
- Team/User Assignment
- Contact support if permissions are unavailable

Name

Account Identifier

Username

Authentication Method

 ▼

↳ OAuth Client Id

↳ OAuth Client Secret

Warehouse

Database Name

Available Services

Search available services



Accelo

Accelo is a comprehensive CRM tool that helps businesses manage their client relationships and projects efficiently.

Install



ActiveCampaign, CRM

ActiveCampaign is a powerful CRM platform that enables businesses to automate their marketing and sales processes.

Install



Affinity

Affinity is a modern CRM solution designed to help businesses build and maintain strong relationships with their clients.

Install



AlexisHR

AlexisHR is an HR software designed for small to medium-sized businesses.

Install



Altera Payroll

Altera Payroll is a payroll software designed for businesses.

Install



Alteryx

Empower AuditBoard with Alteryx's advanced data analytics capabilities. Automate manual data requests and testing so you can spend more time on value add and time saving tasks.

Install

Let's see the demo

Additional Resources

- [AuditBoard Academy Course](#)
- [Help Center Guides](#)
- [Submit a Support Ticket](#)

Q&A

Customer Resources

Education



 **AUDITBOARD
ACADEMY**

Support



 **AUDITBOARD
Help Center**

Webinar Recording will be available
in the Community *(sent via Email)*

Connection



 **AUDITBOARD
COMMUNITY**

Thank you.

Questions?

Email customersuccess@auditboard.com.