



AVIONTÉ



Duplicating, Sharing, and Email Scheduling **INSIGHTS** Dashboards

Presented by Training & Development and Product



About Us



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The Agenda

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OBJECTIVES



Training Objectives

By the end of this training, you will...

1

Understand what the new features are and what they do in INSIGHTS

OVERVIEW

2

Understand where to access these new features in INSIGHTS

ACCESS

3

Understand how to use these new features in INSIGHTS

HOW TO



KEY TERMS



Key Terms

1

INSIGHTS – Avionté BOLD's latest business intelligence tool

2

Default Filters – Filters that have been configured as defaults

3

Bookmarks – Filter selections that are saved for quick access in the future

4

Duplicating – Making a copy of an existing dashboard

5

Sharing – Giving direct access to a duplicated dashboard

6

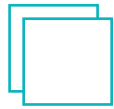
Email Scheduling – Scheduling a dashboard to be automatically emailed out



Overview



What are the New Features?



DUPLICATING

Copy and existing dashboard with custom filters and share with others



SHARING

Duplicated dashboards with custom filters can be shared with other INSIGHTS users



EMAIL SCHEDULING

Dashboards can be scheduled to be automatically emailed out to internal or external recipients

These features streamline your ability to access and share reporting data across your organization!



DUPLICATING DASHBOARDS

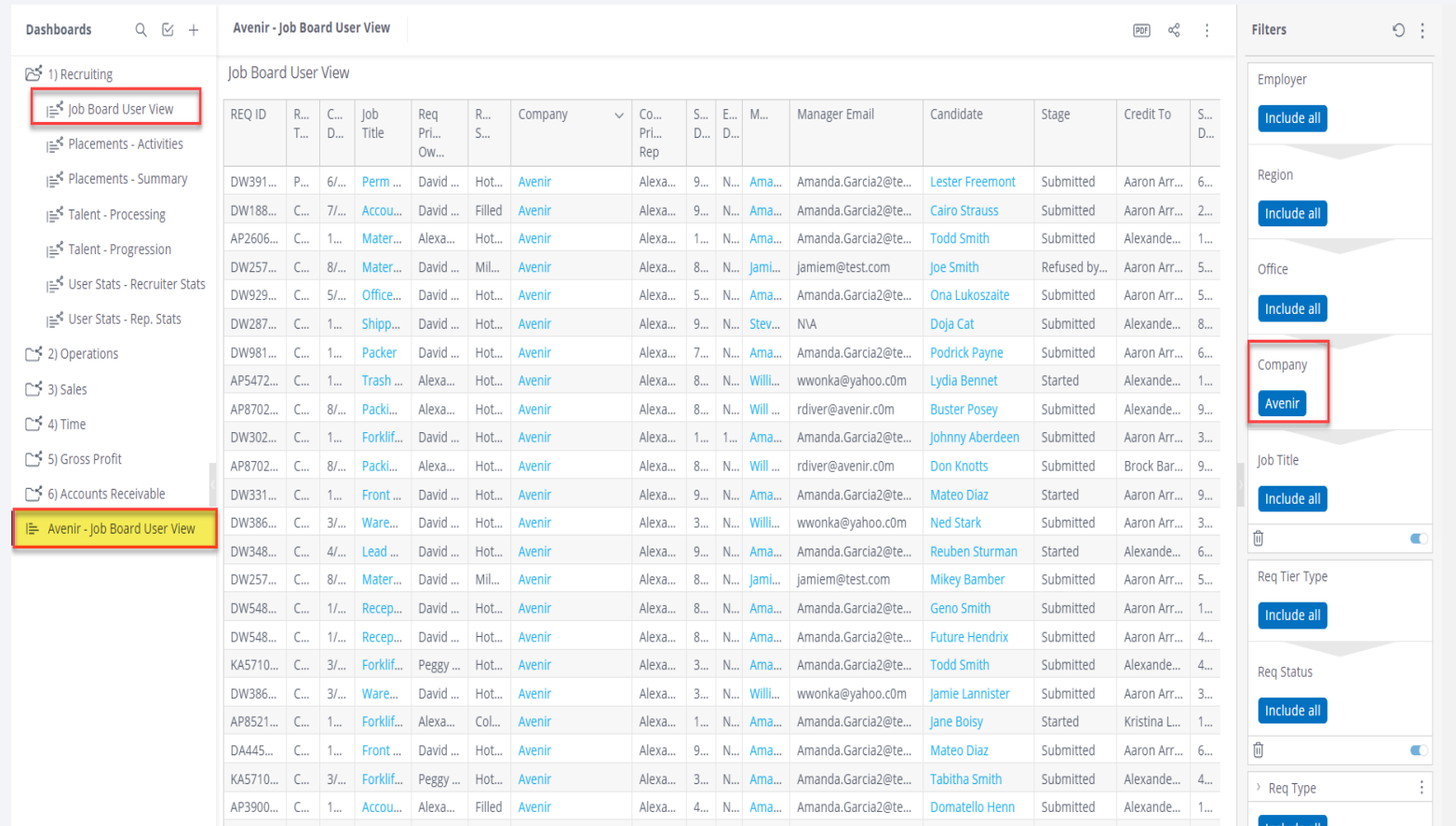


Duplicating Dashboards

What does this mean?

Duplicating dashboards allows you to make an additional copy of an existing INSIGHTS dashboard

- Accessed as a separate dashboard
- Filters can be customized
- No limit on duplications



The screenshot displays the 'Avenir - Job Board User View' dashboard. The main area contains a table of job requisitions with columns for REQ ID, R... T..., C... D..., Job Title, Req Pri... Ow..., R... S..., Company, Co... Pri... Rep, S... D..., E... D..., M..., Manager Email, Candidate, Stage, Credit To, and S... D... The table lists various requisitions such as DW391..., DW188..., AP2606..., DW257..., DW929..., DW287..., DW981..., AP5472..., AP8702..., DW302..., AP8702..., DW331..., DW386..., DW348..., DW257..., DW548..., DW548..., KA5710..., DW386..., AP8521..., DA445..., KA5710..., and AP3900... Each row includes details like job title, status, company, manager email, candidate name, and stage.

The left sidebar shows a navigation menu with categories: 1) Recruiting, 2) Operations, 3) Sales, 4) Time, 5) Gross Profit, and 6) Accounts Receivable. Under '1) Recruiting', 'Job Board User View' is highlighted with a red box. Under '6) Accounts Receivable', 'Avenir - Job Board User View' is highlighted with a yellow box.

The right sidebar contains filters for Employer, Region, Office, Company, Job Title, Req Tier Type, Req Status, and Req Type. The 'Company' filter is highlighted with a red box and shows 'Avenir' selected.



Why Duplicate Dashboards?



EMAIL SCHEDULING

Duplicated dashboards can be used for email scheduling



SHARING

Duplicated dashboards can be edited and shared internally



QUICK ACCESS

Duplicating provides access to dashboards with custom filters

Configure and share your **INSIGHTS** dashboards with duplicating!



DUPLICATING DASHBOARDS

How to Do It?

Users can duplicate dashboards in two places from the INSIGHTS platform

1. Hover over the dashboard name > click the 3 dots to the right of the name > “Duplicate”
2. Click the 3 dots in the upper-right corner of the dashboard results screen > “Duplicate”

1

The screenshot shows the 'Dashboards' menu in the 'Avenir - Job Board User View'. The menu lists several dashboards under '1) Recruiting'. The 'Job Board User View' dashboard is selected, and its context menu is open. The 'Duplicate' option is highlighted with a red box. Other options in the menu include 'Download', 'Restore Dashboard', and 'Embed code'. A secondary dropdown menu is visible over 'Duplicate', showing 'Duplicate Dashboard' and 'Duplicate Dashboard'.

2

The screenshot shows the 'Job Board User View' dashboard results screen. The table displays recruitment data with columns for REQ ID, Req Ty..., Cr... Da..., Job Title, Req Primary Owner, and Req Status. The 'Duplicate' option is highlighted in the upper-right corner of the dashboard results screen. A secondary dropdown menu is visible over 'Duplicate', showing 'Duplicate Dashboard' and 'Duplicate Dashboard'.

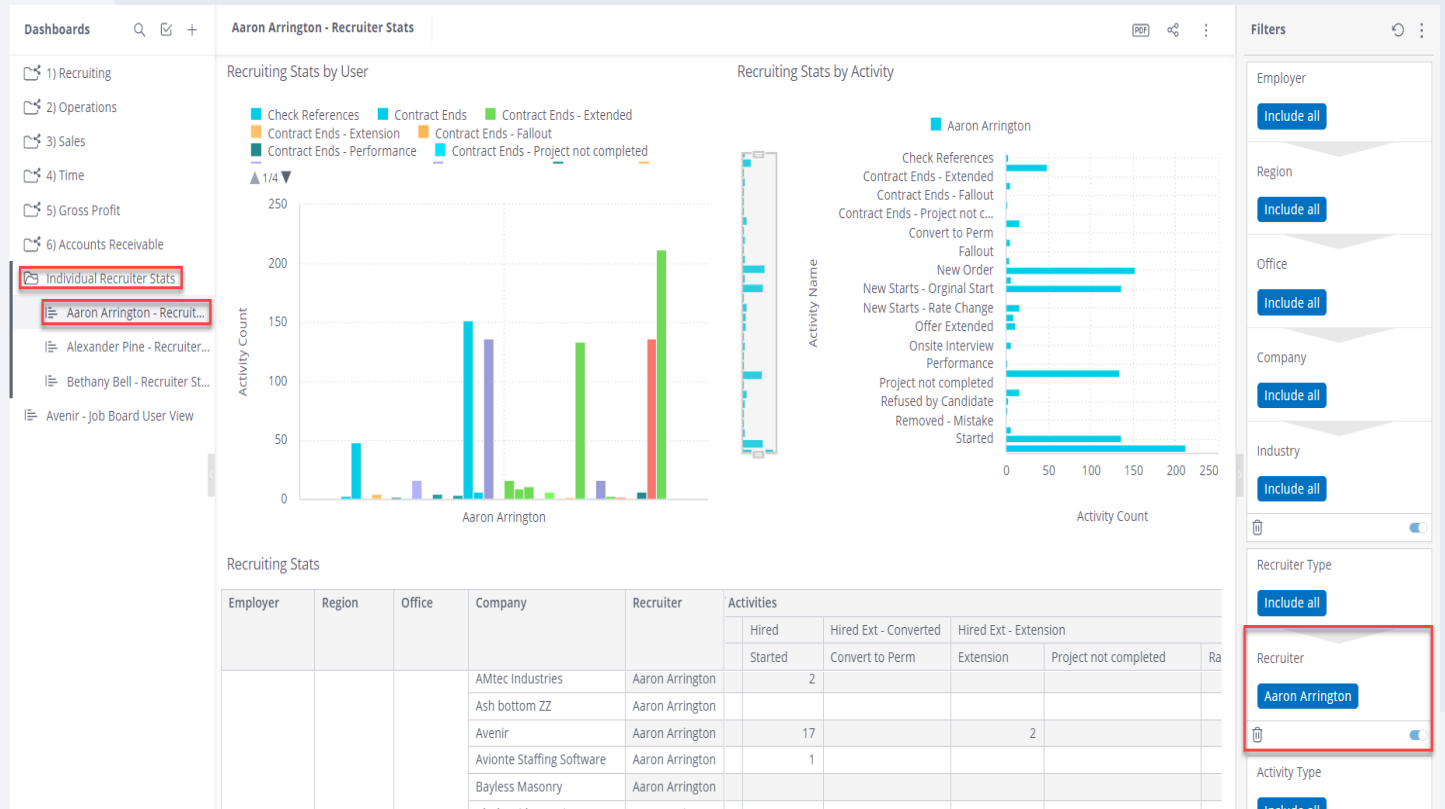
REQ ID	Req Ty...	Cr... Da...	Job Title	Req Primary Owner	Req Status
JN322163314	Con...	3/14...	Clerk	Jen Nadler	Open J...
JN322163314	Con...	3/14...	Clerk	Jen Nadler	Open J...
JN322163314	Con...	3/14...	Clerk	Jen Nadler	Open J...
JN322163314	Con...	3/14...	Clerk	Jen Nadler	Open J...
JN88624432	Con...	3/2/23	Clerk	Jen Nadler	Open J...
JN88624432	Con...	3/2/23	Clerk	Jen Nadler	Open J...
JN88624432	Con...	3/2/23	Clerk	Jen Nadler	Open J...



Recruiting (User Stats - Recruiter Stats)

You are a Recruiting Supervisor and want to analyze your recruiters' individual performance on a monthly basis

1. Run the "User Stats – Recruiter Stats" dashboard
2. Filter to the individual recruiter(s)
3. Duplicate and rename the dashboard for each recruiter
4. Re-visit and re-run these dashboards monthly to track your team's individual performance



Knowledge Check

True or False: Duplicated dashboards cannot be shared.

True

False



SHARING DASHBOARDS



SHARING DASHBOARDS

What does this mean?

Sharing allows users to take duplicated dashboards and directly share them with other BOLD INSIGHTS users

- Shows up under recipient's list
- Share with varying levels of access (view or designer)
- Can only be shared internally

The screenshot shows the BOLD INSIGHTS dashboard interface. On the left, there is a sidebar with a list of dashboards: 1) Recruiting, 2) Operations, 3) Sales, 4) Time, 5) Gross Profit, 6) Accounts Receivable, Individual Recruiter Stats, and Avenir - Job Board User View. The 'Avenir - Job Board User View' dashboard is selected and highlighted. A context menu is open over this dashboard, showing options: Rename, Duplicate, Delete, Share, and Download. The 'Share' option is highlighted with a red box, and a mouse cursor is pointing at it. The 'Share Dashboard' option is also visible below the 'Share' option.

REQ ID	Req Type
DW548647128	Contract to
DW143849622	EOR
DW3319811...	Contract
DW929637529	Contract
DW25797819	Contract



Why Share Dashboards?



COLLABORATION

Streamlines cross-departmental collaboration within organizations



PROVIDE VIEW ACCESS

Relevant data can be shared with users in a view only capacity



PROVIDE DESIGN ACCESS

Users provide design access to dashboards which allows other users to make changes

Sharing dashboards provides quick access to data for those who need it within your organization!



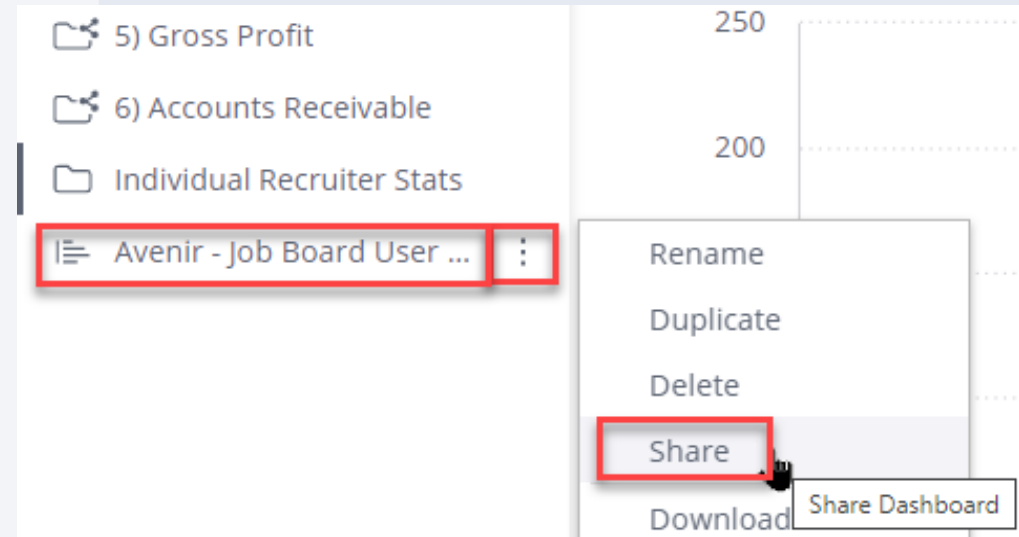
SHARING DASHBOARDS

How to Do It?

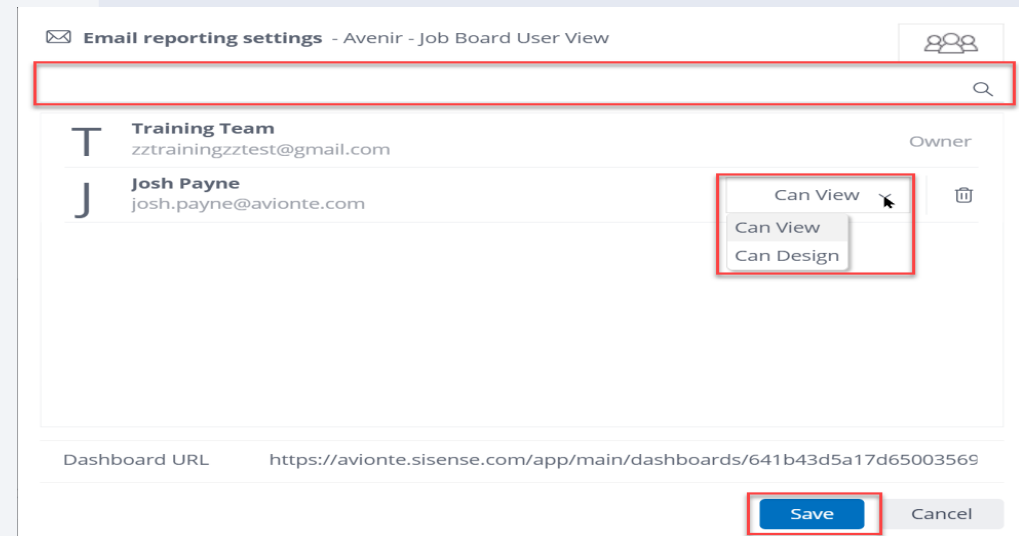
Method 1: Users can share duplicated dashboards from their dashboard list

1. Hover over a duplicated dashboard name > click the 3 dots to the right of the name > “Share”
2. Search for an INSIGHTS user to share with > adjust their level of access to the dashboard > “Save”

1



2



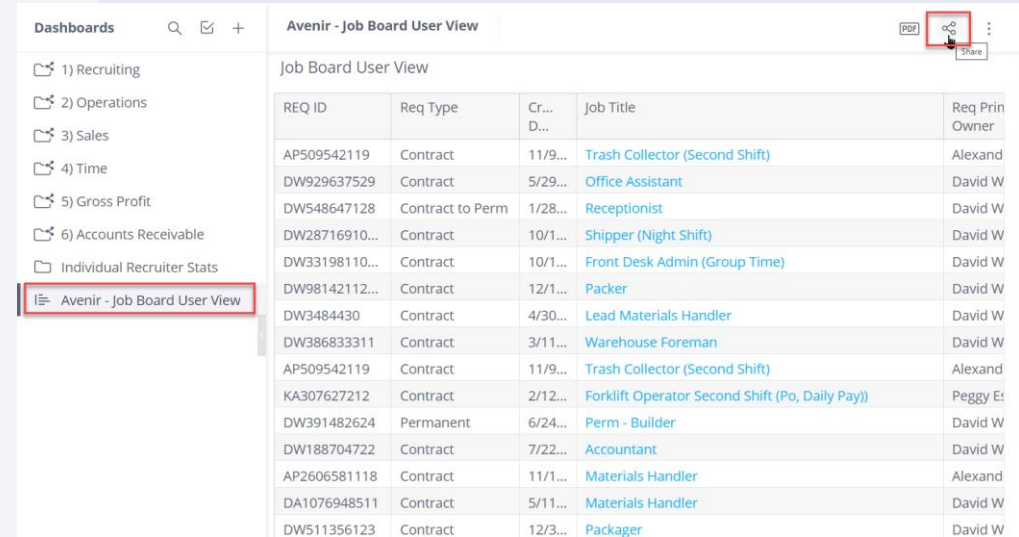
SHARING DASHBOARDS

How to Do It?

Method 2: Users can share duplicated dashboards from their dashboard itself

1. Click on a dashboard to view it > click the share icon in the upper right corner
2. Search for an INSIGHTS user to share with > adjust their level of access to the dashboard > “Save”

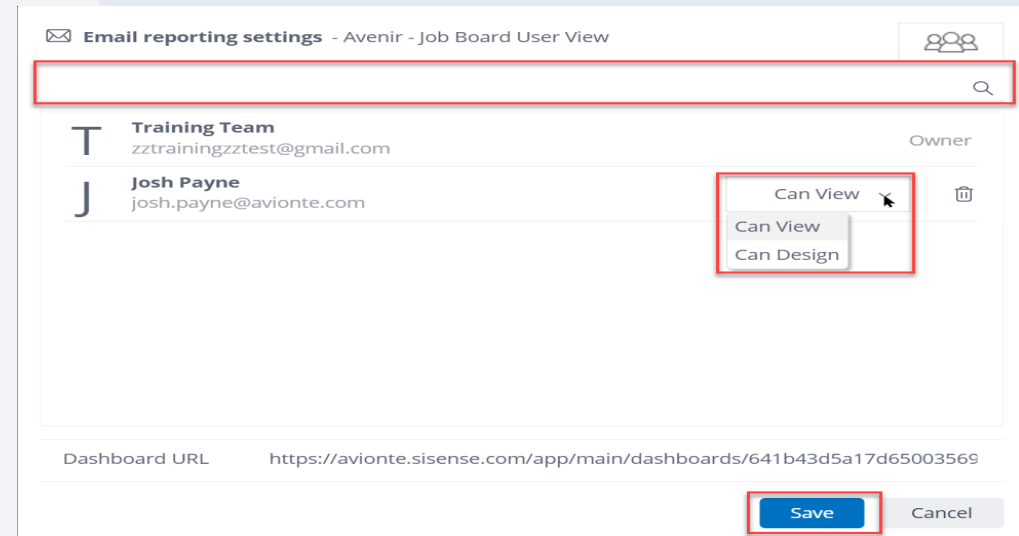
1



The screenshot shows a dashboard titled 'Avenir - Job Board User View'. On the left is a sidebar with a list of dashboards, including 'Avenir - Job Board User View' which is highlighted. The main area displays a table with columns: 'REQ ID', 'Req Type', 'Cr... D...', 'Job Title', and 'Req Prin Owner'. The table contains 18 rows of job requisition data. In the top right corner of the dashboard, there is a 'Share' icon (two overlapping circles) which is highlighted with a red box.

REQ ID	Req Type	Cr... D...	Job Title	Req Prin Owner
AP509542119	Contract	11/9...	Trash Collector (Second Shift)	Alexand
DW929637529	Contract	5/29...	Office Assistant	David W
DW548647128	Contract to Perm	1/28...	Receptionist	David W
DW28716910...	Contract	10/1...	Shipper (Night Shift)	David W
DW33198110...	Contract	10/1...	Front Desk Admin (Group Time)	David W
DW98142112...	Contract	12/1...	Packer	David W
DW3484430	Contract	4/30...	Lead Materials Handler	David W
DW386833311	Contract	3/11...	Warehouse Foreman	David W
AP509542119	Contract	11/9...	Trash Collector (Second Shift)	Alexand
KA307627212	Contract	2/12...	Forklift Operator Second Shift (Po, Daily Pay)	Peggy E
DW391482624	Permanent	6/24...	Perm - Builder	David W
DW188704722	Contract	7/22...	Accountant	David W
AP2606581118	Contract	11/1...	Materials Handler	Alexand
DA1076948511	Contract	5/11...	Materials Handler	David W
DW511356123	Contract	12/3...	Packager	David W

2



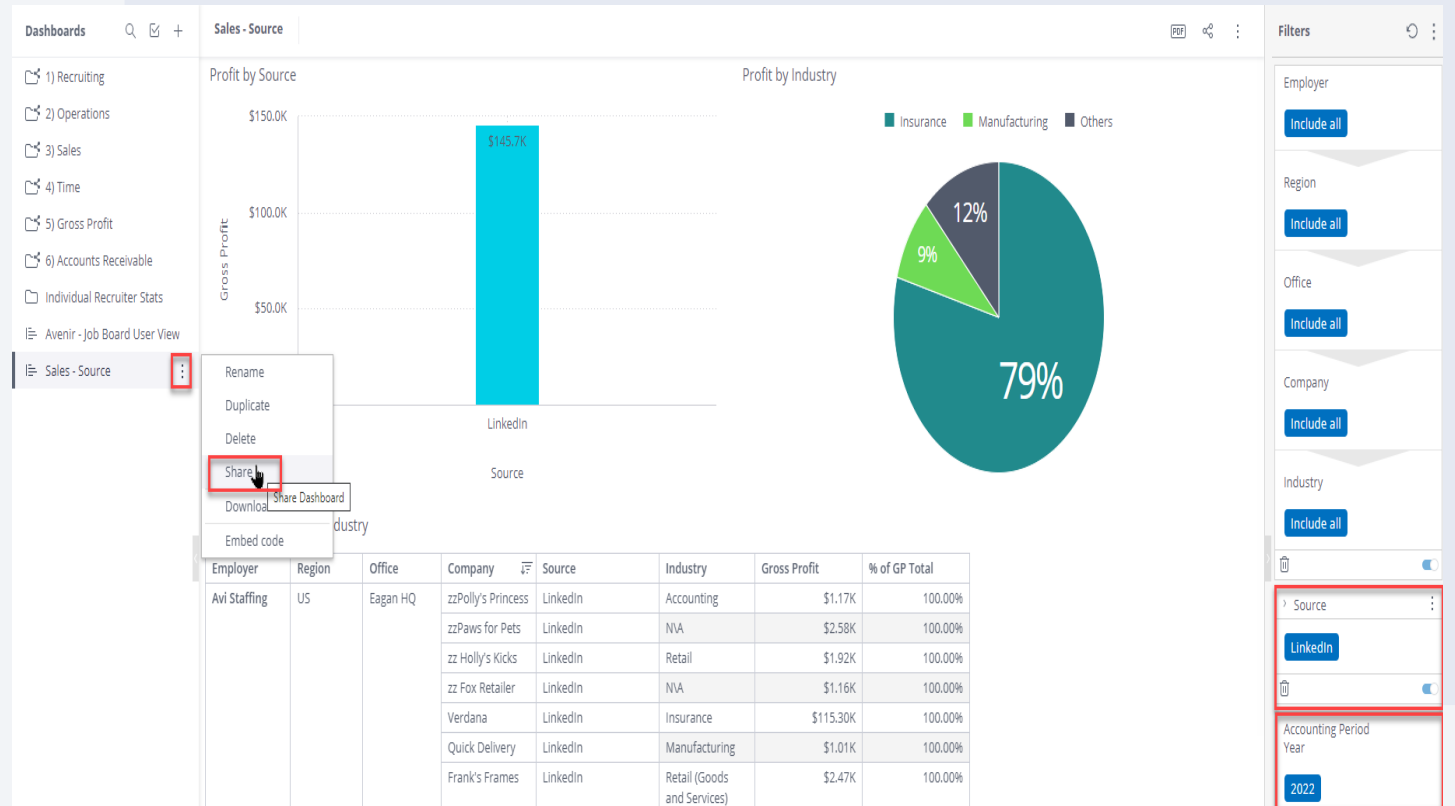
The screenshot shows the 'Email reporting settings' dialog box for the 'Avenir - Job Board User View' dashboard. At the top, there is a search bar. Below it, a list of users is shown: 'Training Team' (zztrainingzztest@gmail.com) and 'Josh Payne' (josh.payne@avionte.com). The 'Josh Payne' user is selected, and a dropdown menu is open showing three access level options: 'Can View', 'Can View', and 'Can Design'. The 'Can View' option is highlighted. At the bottom of the dialog, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted in red.



Gross Profit (Sales – Source)

In the upcoming weeks, you are tasked with conducting an analysis of your account with a paid job board (e.g. LinkedIn) to determine if the cost-revenue ratio is worth your staffing firm renewing your account the upcoming year

- Run the “Sales – Source” dashboard
- Filter to the individual job board
- Duplicate and rename the dashboard
- Share dashboard with stakeholders to determine next steps



Knowledge Check

Recipients of a shared dashboard can be granted dashboard access as a . . .

Viewer

Designer

All of the above



EMAIL SCHEDULING DASHBOARDS



What does this mean?

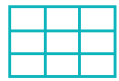
Email scheduling allows users to schedule duplicated dashboards to be automatically sent out via email

- Recipients can be internal or external
- Dashboard data can be shared in several formats (CSV, PDF, or Excel)
- Scheduled cadence can be configured from one time to monthly

The screenshot displays the 'Report Manager' interface. At the top, there are navigation tabs for 'Analytics', 'Pulse', and 'Report Manager', with 'Report Manager' being the active tab. Below this, the 'Content' section shows a report named 'Worktron Weekly Job Board'. A red box highlights a row with 'Dashboard' and 'Worktron - Job Board User View', which includes an edit icon and a dropdown arrow. Below the report name, there is a checkbox for 'Apply Custom Filters' and a blue button labeled 'Edit Report Filters' with an information icon. The 'Settings' section below has three tabs: 'Format', 'Recipients', and 'Schedule', with 'Schedule' being the active tab. Under 'Schedule', there is a checked 'Time Based' option. The 'Repeat every' dropdown is set to 'Week'. The 'Repeat on' section shows a row of days: S, M (highlighted in blue), T, W, T, F, S. The 'At' field is set to '12:00 PM'. The 'Time frame' section shows 'Starts' as 'Mar 22, 2023' and 'Ends' as 'Mar 23, 2023', both with dropdown arrows.



Why Email Schedule Dashboards?



DATA SHARING

Provides another outlet to share dashboard data in a variety of formats



AUTOMATE PROCESSES

The process for sharing dashboards on a scheduled basis is more streamlined



INTERNAL & EXTERNAL

Provides scheduled data sharing with both internal and external recipients

Email scheduling provides internal and external recipients with automatic data updates one time, hourly, daily, weekly, or monthly!



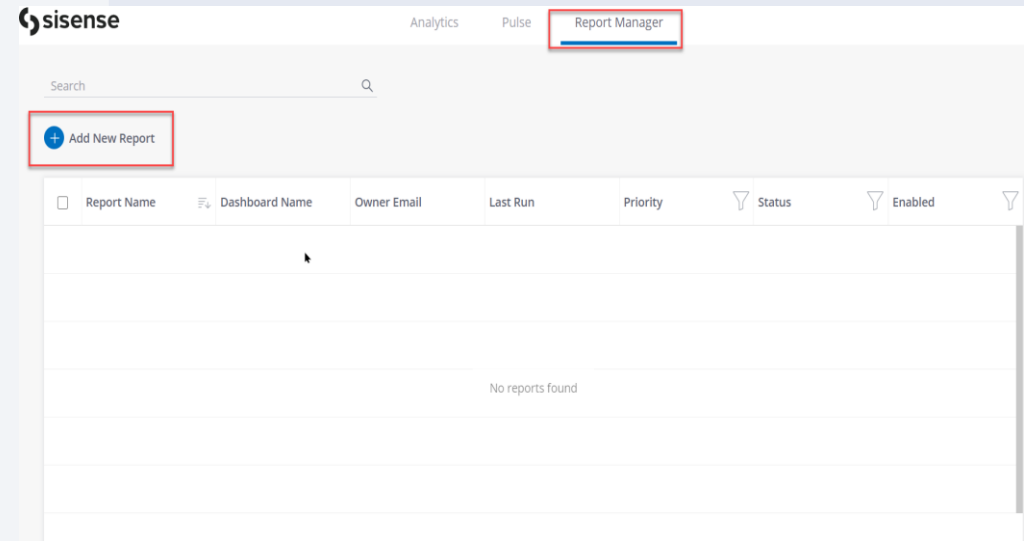
EMAIL SCHEDULING DASHBOARDS

How to Do It?

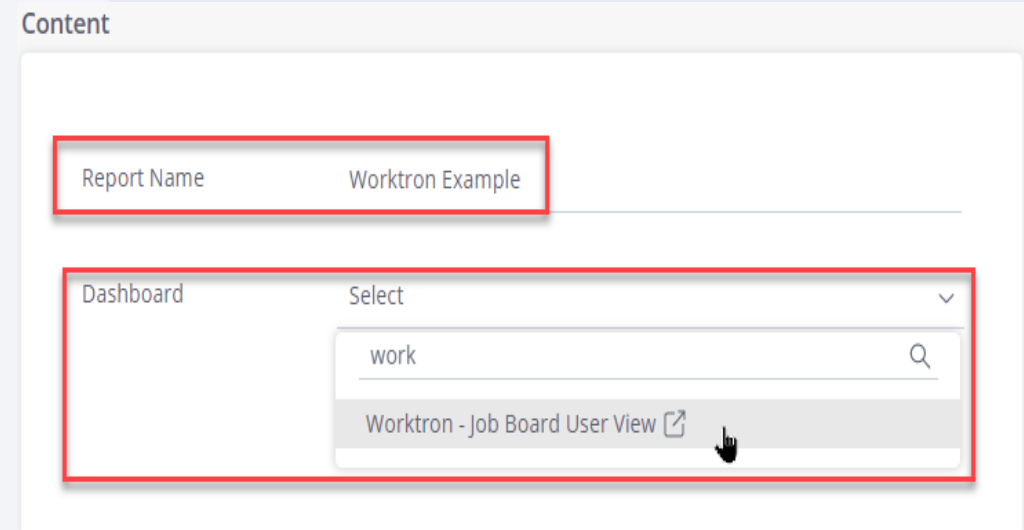
Users can schedule dashboards to be emailed out from the 'Report Manager' section of the INSIGHTS tool

1. Select 'Report Manager' > click 'Add New Report' from the dashboard
2. Name the report that you are going to schedule > select the dashboard

1



2



EMAIL SCHEDULING DASHBOARDS

Cont.

Users can schedule dashboards to be emailed out from the 'Report Manager' section of the INSIGHTS tool

3. Select the 'Format' setting > choose the file format(s) for the dashboard data
4. Search for and select an email to that the scheduled dashboards will be sent to

3

Settings

Format Recipients Schedule

Files Formats

- CSV (pivot and table widgets)
- Excel (pivot widgets)
- Excel (all dashboard widgets into a single file)
- PDF (dashboard)

4

Settings

Format Recipients Schedule

josh

J Josh Payne
josh.payne@avionte.com

Send error notification to ⓘ username1@mycompany.com, username2@mycompany.co



EMAIL SCHEDULING DASHBOARDS

Cont.

Users can schedule dashboards to be emailed out from the 'Report Manager' section of the INSIGHTS tool

5. Select the 'Time Based' option from the 'Schedule' section > choose how often you would like the schedule email to repeat
6. Select the time/date the dashboard will be emailed out > select 'Create Report'

5

Settings

Format Recipients **Schedule**

Time Based

Repeat every

At

One Time
One Time
Hours
Days
Week
Months

6

Settings

Format Recipients **Schedule**

Time Based

Repeat every One Time

At 12:00 PM

Starts Mar 15, 2023
Today
Select Date



Cont.

Users can schedule dashboards to be emailed out from the 'Report Manager' section of the INSIGHTS tool

7. From the "Report Manager" dashboard, users can view all current and previously scheduled emails – users can manually send emails from here

Analytics Pulse **Report Manager**

Search

+ Add New Report

<input type="checkbox"/>	Report Name	Dashboard Name	Owner Email	Last Run	Priority	Status	Enabled	
<input type="checkbox"/>	Worktron - Example	Worktron - Job Board User View	phil.martini@avionte.com	15 Mar 2023 12:00 PM	Normal	● Not Running	● On	⋮
<input type="checkbox"/>	time reg pdf	Hours - Regular Time pdf test	phil.martini@avionte.com	14 Mar 2023 11:03 AM	Normal	● Not Running	● Off	⋮
<input type="checkbox"/>	pdf test custom	Job Board User View - Sanders Supply Co.	phil.martini@avionte.com	14 Mar 2023 9:54 AM	Normal	● Not Running	● Off	⋮
<input type="checkbox"/>	pdf test	Job Board User View	phil.martini@avionte.com	14 Mar 2023 9:50 AM	Normal	● Not Running	● Off	⋮
<input type="checkbox"/>	sanders supply	Job Board User View - Sanders Supply Co.	phil.martini@avionte.com	01 Mar 2023 1:02 PM	Normal	● Not Running	● Off	⋮
<input type="checkbox"/>	A - test for sarat	A for sarat - Gross Profit By Company	phil.martini@avionte.com	07 Mar 2023 12:34 PM	Normal	● Not Running	● Off	⋮

6 Total reports

Show 10 rows on page



USE CASE EXAMPLE

Recruiting (Talent - Processing)

You are the head of a large staffing firm and are looking to assess your business by branch and send those metrics to your branch managers on a monthly basis

- Run the “Talent - Processing” dashboard
- Filter by individual branches
- Duplicate and rename the dashboards
- Schedule the dashboards to be emailed out to branch managers monthly



The scheduling configuration window shows the following settings:

- Format:** Recipients
- Schedule:** Time Based
- Repeat every: 1 Months
- Monthly on day: 1
- At: 09:00 AM
- Time frame: Starts Mar 20, 2023, Ends Never

Create Report



Knowledge Check

True or False: Users can schedule dashboards to be emailed to both internal and external recipients.

True

False



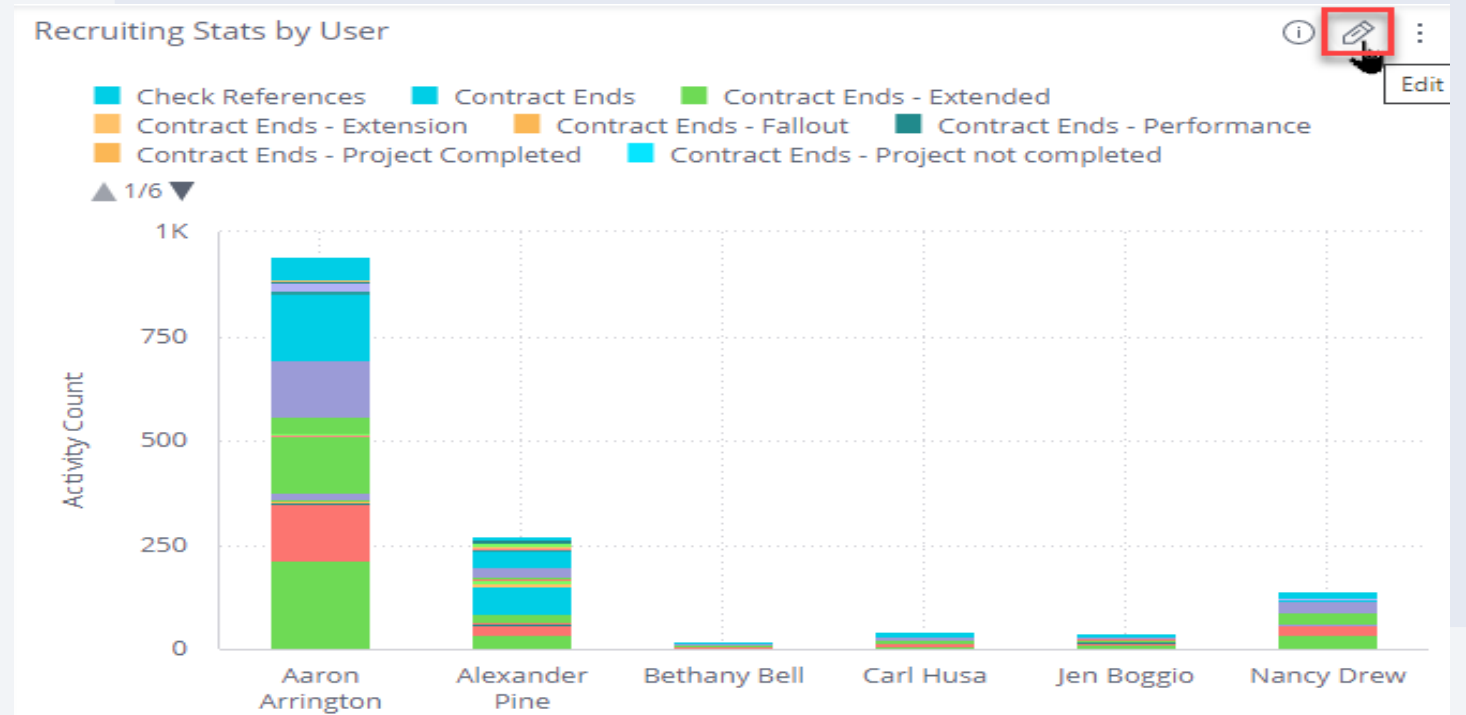
Other New Functionality



Edit and Configure Widgets

Within duplicated dashboards, clicking on the pencil icon will allow users to make changes to the appearance of widgets, for example:

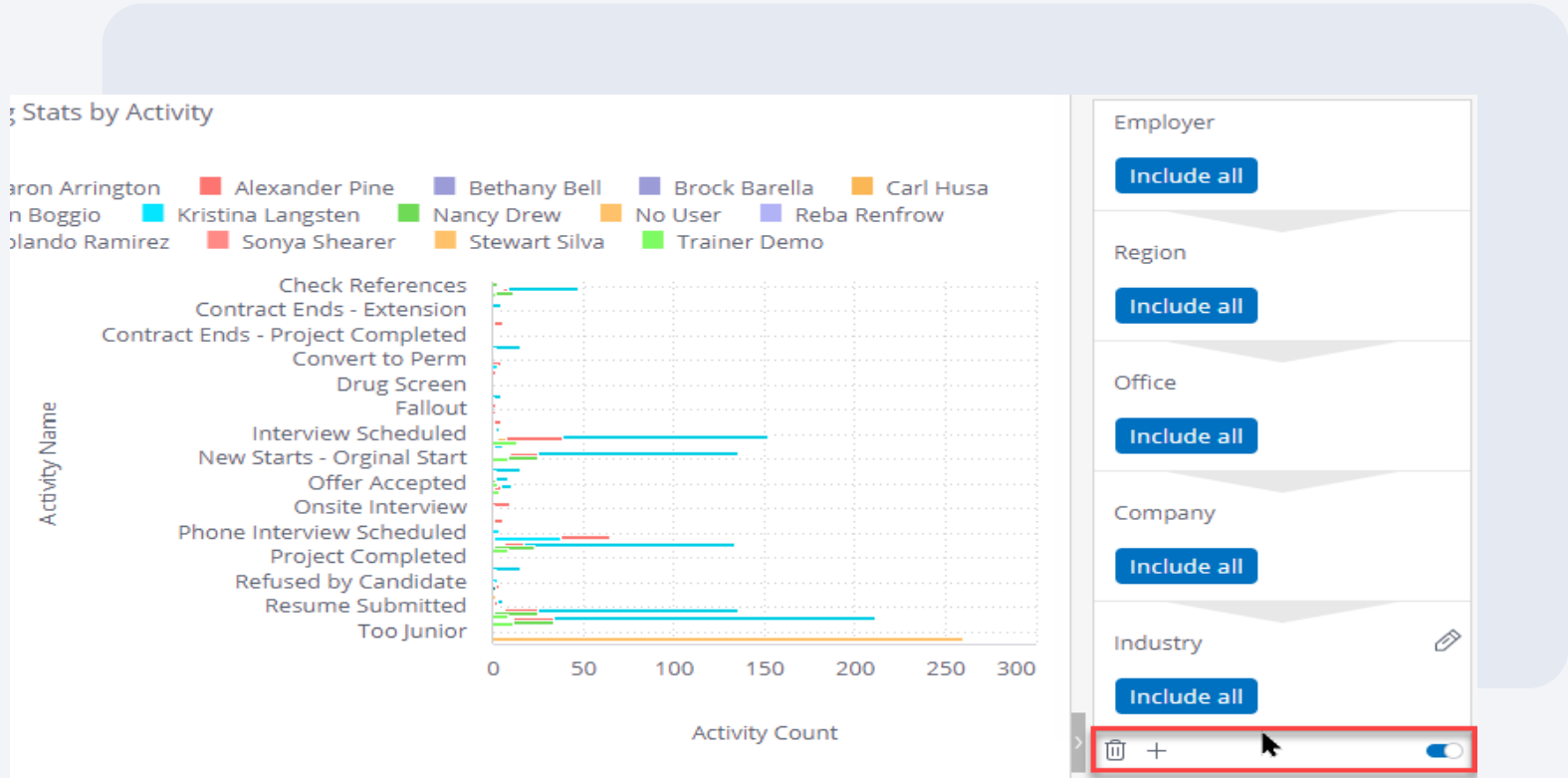
- Values can be added or disabled
- Graph/Table visuals (e.g. colors and labels) can be customized
- Graph/Table type cannot be changed



FILTERS

Modify Existing Filters

Within duplicated dashboards, the filters can be modified to adjust the data populating in the dashboard



USE CASE EXAMPLE

Operations (Job Board Forecast)

You are attempting to forecast potential revenue and gross profit for the jobs posted to your job board and need to trim down the results in the dashboard for ease of use

- Hover of the widget in the dashboard and click the edit button
- Disable unnecessary values/columns to narrow widget results
- Select “Apply” to update dashboard results

Employer	Region	Office	Company	Job ID	Job Title	Client Rep	
Avi Staffing	US	Eagan HQ	zzSord Enterprises	JN44243632	Clerk	Aaron Arrington	50
			zzSally's Shelves	JP54892928	Clerk	Bethany Bell	3
			zzPreston's Paper Supply	JP200641123	Clerk	Aaron Arrington	5
				JP61825019	Clerk	Aaron Arrington	6
			zzJalen's Plants	JN519103213	Clerk	Bethany Bell	30
			zzDavid's zzDesks	JP887741210	Warehouse Associate	Aaron Arrington	15
			zzChelsea's Plants	JN181178118	Clerk	Aaron Arrington	10
				JP168438120	Clerk	Aaron Arrington	1
				JP2342076120	Clerk 3 (Test)	Aaron Arrington	10
				JP5190607119	Clerk 3 (Test)	Aaron Arrington	10
				JP5766329123	Clerk 4 (Test)	Aaron Arrington	2
				JP72379120	Clerk	Aaron Arrington	1
				JP74821722	Clerk 4 (Test)	Aaron Arrington	2
				JP7724732119	Clerk 2 (Test)	Aaron Arrington	10
			zzCharm Industries	JN29126332	Clerk	Aaron Arrington	30

Office	Company	Job ID	Total Openings	it. week...	Est. Weekly Revenue	Est. Weekly Profit	Est. Total Revenue	Est. Total Profit
NVA	Avenir	RD7169271112	1	1	\$1,900.00	\$589.00	\$1,900.00	\$589.00
Austin	AMtec Industries	JK249138830	5					
	zzWalt's Washers	BF158107926	1					
Eagan HQ	zzTommy's zzTables	JN460185117	2	3	\$2,204.00	\$456.00	\$6,612.00	\$1,368.00
		JP95411411221	2	3	\$2,204.00	\$456.00	\$6,612.00	\$1,368.00
	zzTammy's zzTables	JP4079811129	2					
	zzStarbucks	LH101987510	1	14	\$763.80	\$108.30	\$10,693.20	\$1,516.20
	zzSord Enterprises	JN44243632	50					
	zzSally's Shelves	JP54892928	3					
	zzRugs By Rugby	JN570028111	20					
	zzPreston's Paper Supply	JP200641123	5					
		JP61825019	6					
	zzPolly's Princess	BF47637688	1					
	zzPolly's Plants	BF349708711	2	9	\$2,249.60	\$501.60	\$20,246.40	\$4,514.40
		BF477949728	1	0			\$1,200.00	\$1,200.00
		BF925099722	1					
	zzPets R Us	KA24430235	1	9	\$0.00	\$0.00	\$0.00	\$0.00
		KA33117234	1					
		KA613060777	1	0	\$991.60	\$197.40	\$7,024.40	\$1,641.60



DEMO



QUESTIONS?



Poll

Based on your experience during this training, how prepared do you feel to get started with these new features in INSIGHTS?

1 (not
confident)

2 (somewhat
confident)

3 (confident)

4 (very
confident)



THANK YOU!

