



AVIONTÉ



Legacy BI (Business Intelligence) System Upgrade

Presented by Training & Development and Product



About Us



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The Agenda

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2

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Definition of the Upgrade

4

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5

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6

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8

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OBJECTIVES



Training Objectives

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

1

Understand what this upgrade is and how it differs from Legacy BI.

DEFINITION

2

Understand why this upgrade is happening.

PURPOSE

3

Understand how to grant access and run reporting from this upgrade.

HOW TO



KEY TERMS



Key Terms

1

Legacy BI – Avionté’s original business intelligence portal

2

INSIGHTS – Avionté’s latest business intelligence portal (includes front and back office data)

3

BI Upgrade – Business intelligence upgrade for Legacy BI clients

4

Standard Reports – Analyze reports that all BOLD customers have access to

5

BOLD Analyze Reports – 92 Extra BOLD analyze reports included in INSIGHTS



DEFINITION



The Legacy BI System Upgrade is...



An upgrade of the Legacy
Business Intelligence tool



Access to an improved
Business Intelligence
experience



Not an optional upgrade –
users cannot opt out

Access to an improved, more scalable reporting infrastructure.



What has Improved with This Upgrade?



Dashboards provide an improved user experience



Users now have self-service capabilities with granting and restricting access



Dashboard permissions can be granted or restricted based on individual user or user role

No more submitting tickets to get your users access to your BI tool!



What has Remained the Same with This Upgrade?



Reporting capabilities and
data within BOLD



Email scheduling and sharing
dashboards



Duplication and customization
of dashboards

All data will be maintained with this upgrade!



How is This Upgrade Different?



Dashboards will be located within the Analyze Menu > INSIGHTS submenu



Additional capabilities such as bookmarking and email scheduling to external recipients



Upgrade includes self-serviced & role-based permissions

Same data with an improved user experience!



Knowledge Check

Can BOLD users opt out of this upgrade?

Yes, this upgrade
is optional.

No, this upgrade
is mandatory.



PURPOSE



Why is this Upgrade Happening?



To provide access to an improved and more scalable BI experience



To improve user experience through self-service and dashboard permissions



To increase security of data via the ability to grant or limit access

Improved user experience and security for Avionté customers.



REPORTING DATA

After this upgrade...

The reporting data that was accessed in each Legacy BI dashboard will be available via either a standard report or in an upgraded dashboard

Type	Name of Legacy BIV1 Dashboard	How to Access	Report, Folder Dashboard Name
Folder Name	Folders / Dashboards		
Standard Report	Job Board	Yes - as a report	Job Board Forecast
INSIGHTS Dashboard	Candidate Source Metrics	Yes - as a widget	Operations User Stats - Web Apply
Standard Report	Hired Candidate Forecast	Yes - as a report	Contractor Forecast
Standard Report	Job Board Stats	Yes - as a report	Job Board Insight
INSIGHTS Dashboard	Job Board User View	Yes - as INSIGHTS dashboard	Recruiting Job Board User View
Folder Name	Metrics		
INSIGHTS Dashboard	Rep Submittal Ratios	Yes - as INSIGHTS dashboard	Recruiting User Stats - Rep Stats
Folder Name	Operational		
Standard Report	Active Contractor	Yes - as a report	Active Consultant
Standard Report	BackOffice Commissions	Yes - as a report	Backoffice Commissions
Standard Report	Consultant Spend	Yes - as a report	Consultant Spend
Standard Report	Contractor Markup	Yes - as a report	Contractor Markup
Standard Report	Declined Candidates	Yes - as a report	Declined Candidates
Standard Report	Duplicate Applicant Report	Yes - as a report	Duplicate Talent
Standard Report	EEO	Yes - as a report	Equal Employment Opportunity
Standard Report	GP By Company	Yes - available in reports	BackOffice Commissions
Standard Report	Hiring Stats	Yes - as a report	Hiring Stats
INSIGHTS Dashboard	Job Board Forecast	Yes - as INSIGHTS dashboard	Operations Job Board Forecast
INSIGHTS Dashboard	KPI - 1st occurrence	Yes - as INSIGHTS dashboard (Combined)	Operations User Stats - Summary
INSIGHTS Dashboard	KPI - All Occurrence	Yes - as INSIGHTS dashboard	Operations User Stats - Summary

Source: [Legacy BI \(Business Intelligence\) System Upgrade](#)



Comparison - Legacy Dashboard vs. Standard Report

Legacy BI: Hired Candidate Forecast Dashboard

Hired Candidate Forecast Apr 3, 2023 1:30:01 AM PDF Filters

ReqID	Job Title	Company	Consultant	Hired Date	Burden	Est Revenue	Est Cost	Est GP
JP1831234210	General Lab...	Hook & Crane ...	zzBenny zzB...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzBernard z...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzBo zzBates	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzCarl zzCar...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzCorbin zz...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzFred zzFel...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzHallie zzH...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzHarry zzH...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzHenry zzH...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzLenny zzL...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzMandy zz...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzMarty zzM...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzPatrick zz...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzRon zzRyan	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzSammy zz...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzStephanie...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzStephen z...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzThelma zz...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzTina zzTh...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00
			zzTori zzTho...	2/28/23	15.00%	\$4,655,312.00	\$3,692,144.00	\$963,168.00

Filters

Tier Type: Include all

Tier: Include all

Hired Date: To 4/3/23

Req Type: Include all

Company: Hook & Crane Construction

Job Title: Include all

System Upgrade: Contractor Forecast Report

Contractor Forecast Report > Contractor Forecast Details Requisition ID, Job Title, ... Report Filters

Requisition	# Bill	Total Pay	Hired Date	Burden	Cost of Serv.	Gross Profit	Total Est Ho.	Placement E.	Total Est Rev.	Total Est Co.	Total Est GP
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
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JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
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JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
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JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00
JP1831234210	0.00	\$800.00	2023-02-28	15.00%	\$920.00	\$240.00	160528	\$0.00	\$4,655,312.00	\$3,692,144.00	\$963,168.00

Total Items: 35 Export To Excel

Forecast Chart

Forecast Chart For Contractors working now until invalid date

Amount

04/03/2023 04/03/2023

— Total Revenue
— Cost of Service
— Gross Profit

Report Filters

Division: All

Region: All

Office: All

Company: Hook & Crane Construction

Contractor Rep: All

Sales Rep: All

Job Type: All

Job Status: All

Job Title: %

Date End: Apr 3, 2023

Run Report



Reporting Data

After this upgrade...

The reporting data that was accessed in each Legacy BI dashboard will be available via either a standard report or in an upgraded dashboard

INSIGHTS Dashboard	KPI - All Occurrence	Yes - as INSIGHTS dashboard	Operations User Stats - Summary
Standard Report	Purchase Order Report	Yes - as a report	Purchase Order
Standard Report	Snapshot and Snapshot - Addl Columns	Yes - as a report	Contractor Snapshot Open Position Snapshot
INSIGHTS Dashboard	User Stats - Author	Yes - as INSIGHTS dashboard	Operations User Stats - Author
INSIGHTS Dashboard	User Stats - Credit to	Yes - as INSIGHTS dashboard	Operations User Stats - Credit To
INSIGHTS Dashboard	Web Apply Referral	Yes - as INSIGHTS dashboard	Operations User Stats - Web Apply
Standard Report	Commission Allocation	Yes - as a report	Backoffice Commission
Standard Report	Starts and Ends	Yes - available in reports	Starts Reports
Standard Report	Turnover AQ	Yes - as a report	Turnover
Folder Name	Recruiting		
Standard Report	Applicant Marketing	Yes - as a report	Applicant Marketing
INSIGHTS Dashboard	Applicant Progression	Yes - as INSIGHTS dashboard	Recruiting Talent - Progression
INSIGHTS Dashboard	Candidate Processing	Yes - as INSIGHTS dashboard	Recruiting Talent - Processing
INSIGHTS Dashboard	Daily Web App Activity	Yes - as a widget	Operations User Stats - Web Apply
INSIGHTS Dashboard	Recruit Stats	Yes - as INSIGHTS dashboard	Recruiting User Stats - Recruiter Stats
Folder Name	Sales		
INSIGHTS Dashboard	Sales Perf. Dashboard	Yes - as INSIGHTS dashboard	Sales Sales Stats - Sales Rep
INSIGHTS Dashboard	Sales Stats	Yes - as INSIGHTS dashboard	Sales Sales Stats - Activities
INSIGHTS Dashboard	Sales Stats - Job Activities	Yes - as INSIGHTS dashboard	Sales Sales Stats - Job Activities

Source: [Legacy BI \(Business Intelligence\) System Upgrade](#)

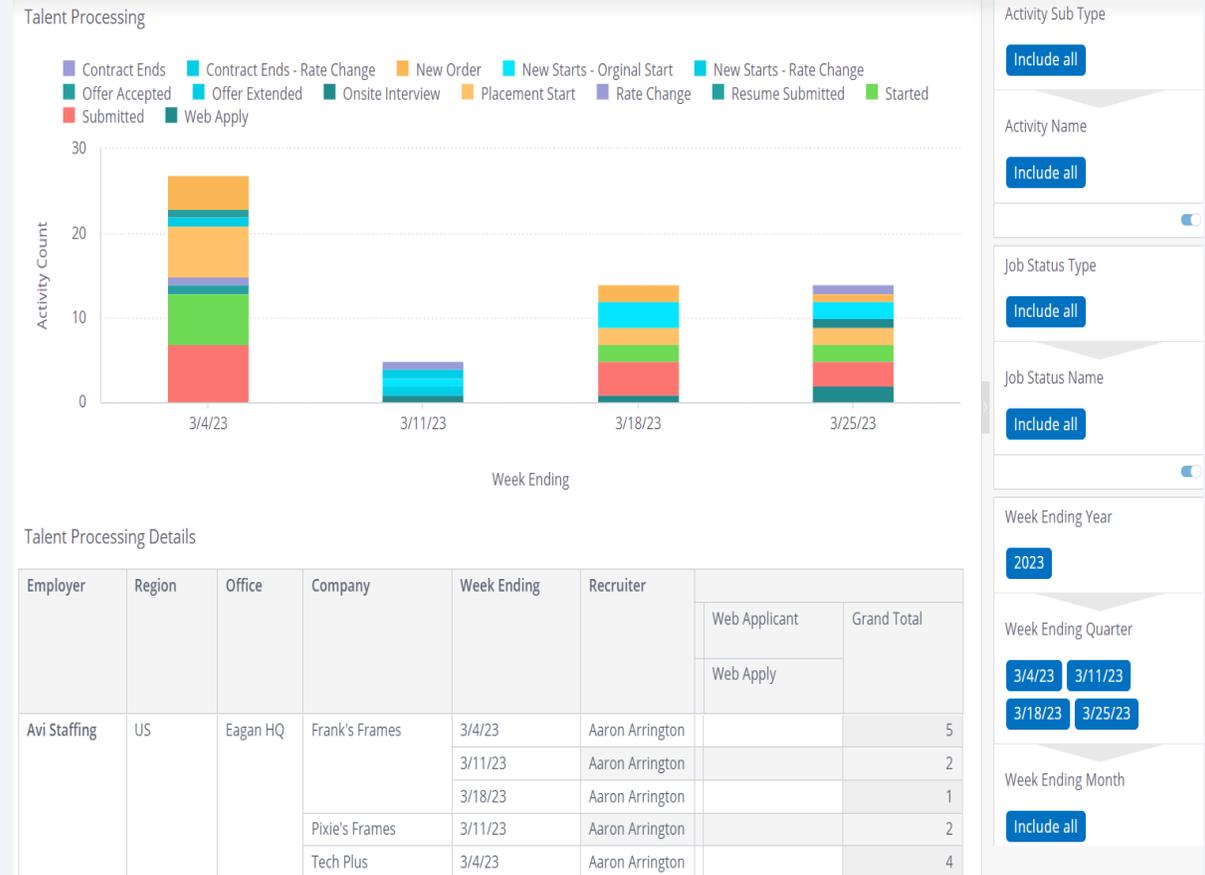


Comparison - Legacy Dashboard vs. Upgraded Dashboard

Legacy BI: Candidate Processing Dashboard



System Upgrade: Talent Processing Dashboard



SELF SERVICE

After this upgrade...

Through the INSIGHTS Admin utility tile, BOLD administrators will provide access to this new BI experience to their individual users or user groups

INSIGHTS Groups

Group Name:
Josh Test

User Groups

Admin BackOffice FrontOffice Sales Team

Users

zzJosh

zzJosh zzTest

Dashboards in this Group

Search Dashboards

Folder: Sales Select All:

Opportunity & Tracking Revenue and Activity

Sales Stats - Activities Sales Stats - Job Activities

Sales Stats - Sales Rep

Folder: Recruiting

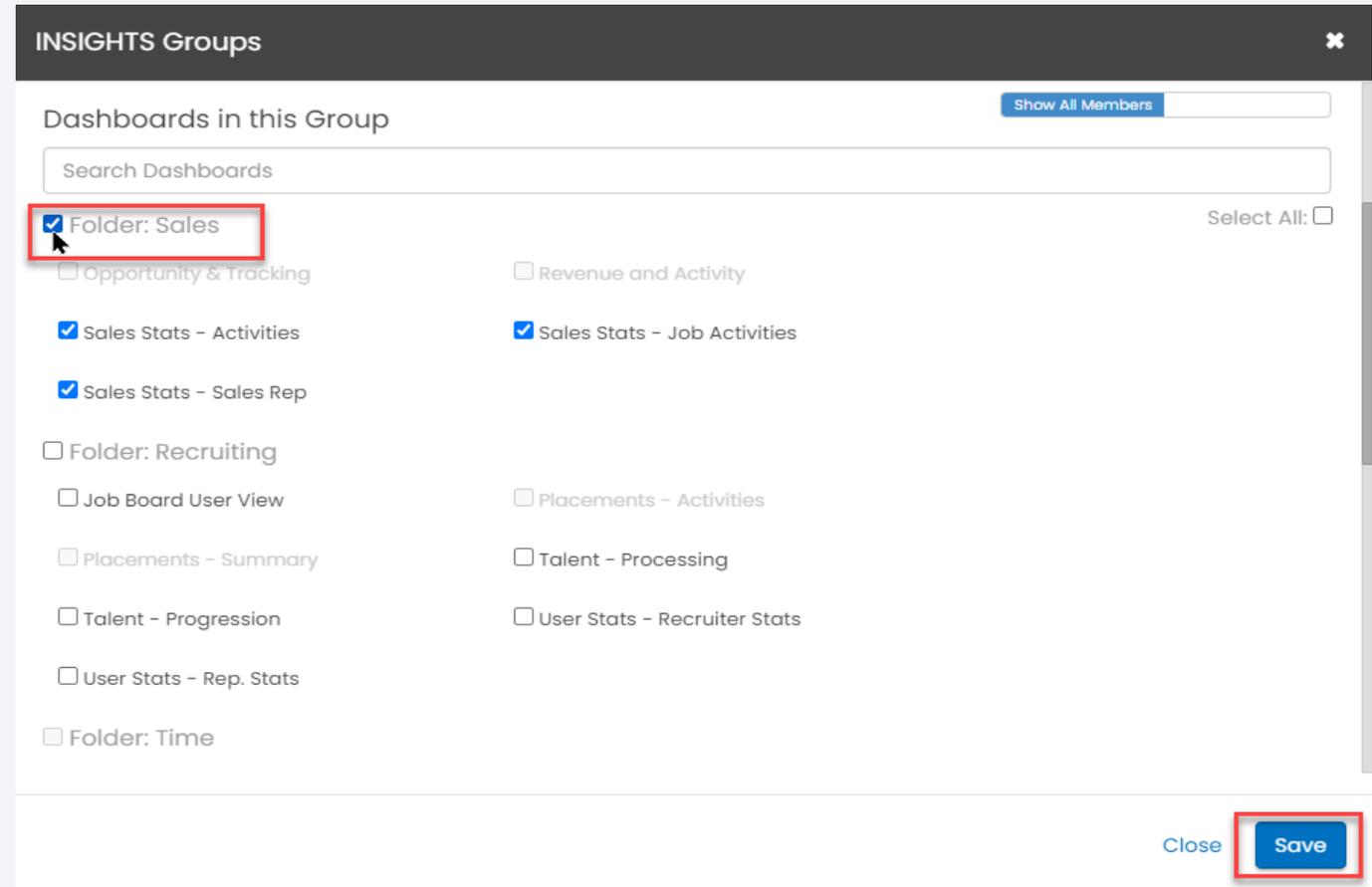
Close Save



PERMISSIONS

After this upgrade...

Through the INSIGHTS Admin utility tile, BOLD administrators can adjust dashboard permissions based on user role within the organization



The screenshot displays the 'INSIGHTS Groups' admin interface. At the top, there's a title bar with 'INSIGHTS Groups' and a close button. Below it, the section 'Dashboards in this Group' is visible, with a 'Show All Members' button on the right. A search bar labeled 'Search Dashboards' is present. A list of dashboard items follows, each with a checkbox. The 'Folder: Sales' item is selected and highlighted with a red box. Other items include 'Opportunity & Tracking', 'Revenue and Activity', 'Sales Stats - Activities', 'Sales Stats - Job Activities', 'Sales Stats - Sales Rep', 'Folder: Recruiting', 'Job Board User View', 'Placements - Activities', 'Placements - Summary', 'Talent - Processing', 'Talent - Progression', 'User Stats - Recruiter Stats', 'User Stats - Rep. Stats', and 'Folder: Time'. A 'Select All:' checkbox is on the right. At the bottom right, there are 'Close' and 'Save' buttons, with the 'Save' button highlighted by a red box.

INSIGHTS Groups

Dashboards in this Group [Show All Members](#)

Search Dashboards

Folder: Sales Select All:

Opportunity & Tracking Revenue and Activity

Sales Stats - Activities Sales Stats - Job Activities

Sales Stats - Sales Rep

Folder: Recruiting

Job Board User View Placements - Activities

Placements - Summary Talent - Processing

Talent - Progression User Stats - Recruiter Stats

User Stats - Rep. Stats

Folder: Time

Close [Save](#)



Knowledge Check

Why is this upgrade happening?

A. To provide access to the same reporting data

B. To enable self-service for granting access

C. Increased security for reporting data

D. All of the above

HOW TO ACCESS



STEP 1

INSIGHTS Admin. Access

Ensure that all BOLD Administrators who need to grant access to the new BI experience have applicable user permission

- Select INSIGHTS ADMIN from within the INSIGHTS section
- Save before navigating away from user access



Avionté Utilities

insights|

INSIGHTS ADMIN

Administer Groups, Users and Dashboards for INSIGHTS



STEP 2

Dashboard Access

Navigate to Utilities > INSIGHTS ADMIN
to give yourself and other users access
to dashboards

- Create a new group (or edit an existing group)
- Add users (or user groups) to the INSIGHTS group
- Select which dashboards are to be accessed

INSIGHTS Groups

Group Name:
Josh Test

User Groups

Admin BackOffice FrontOffice Sales Team

Users

zzJosh

zzJosh zzTest

Dashboards in this Group

Search Dashboards

Folder: Sales Select All:

Opportunity & Tracking Revenue and Activity

Sales Stats - Activities Sales Stats - Job Activities

Sales Stats - Sales Rep

Folder: Recruiting

Close Save

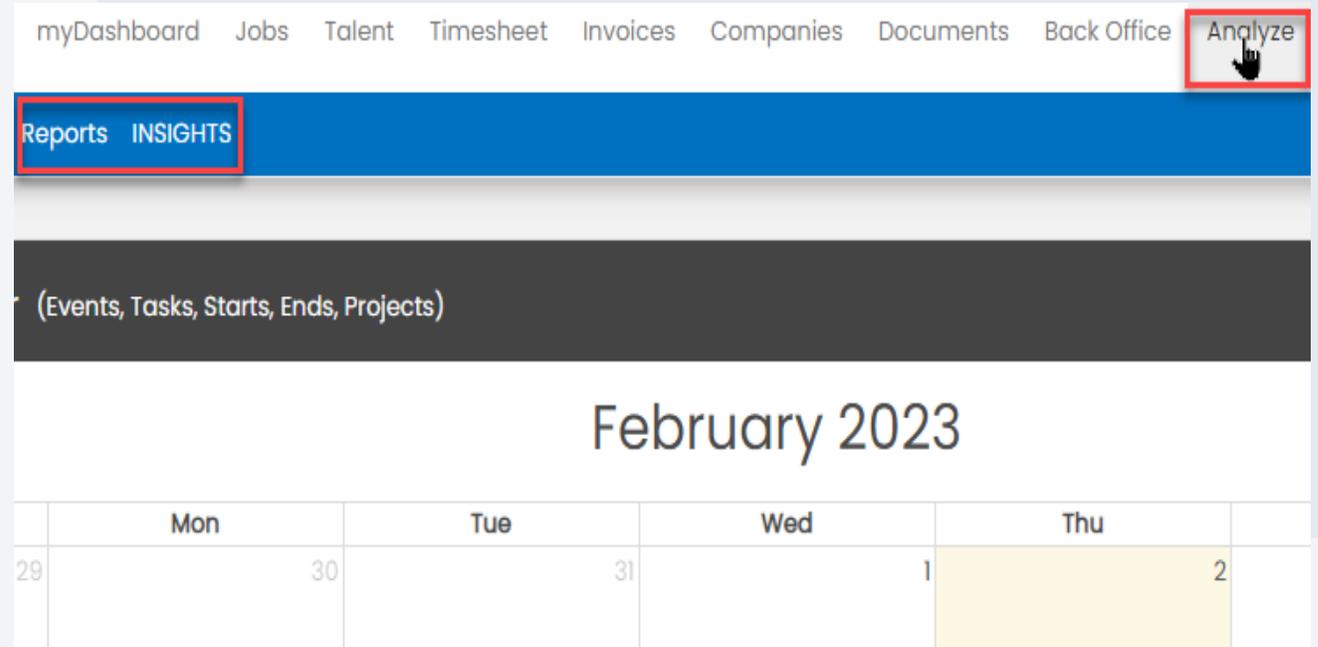


STEP 3

Confirm Access

Once users log out and log back in. . .

- Notice that “Business Intelligence” is no longer a submenu of the Analyze tab
- “Business Intelligence” has now been replaced with the “INSIGHTS” sub menu



The screenshot shows a web dashboard with a navigation menu at the top containing: myDashboard, Jobs, Talent, Timesheet, Invoices, Companies, Documents, Back Office, and Analyze. The 'Analyze' tab is highlighted with a red box and a mouse cursor. Below the navigation menu is a blue header bar with 'Reports' and 'INSIGHTS' sub-menu items, both highlighted with red boxes. Below this is a dark grey bar with the text '(Events, Tasks, Starts, Ends, Projects)'. The main content area displays a calendar for February 2023, with the date '2' highlighted in yellow.

February 2023				
	Mon	Tue	Wed	Thu
29	30	31	1	2



STEP 4

Access Dashboards

Navigate to Analyze > INSIGHTS and view the dashboards

- Only the dashboards that you have access should be displayed
- Note: Depending on your permissions, you may or may not have access to all shown dashboards



Knowledge Check

True or False: After this upgrade, administrators will still have to grant their users access to this new BI experience.

True

False



HOW TO USE



ACCESS

How Do I Access Post-Upgrade?

Once your organization has been upgraded. . .

- Dashboards will be accessed via the “INSIGHTS” submenu of the “Analyze” tab
- Reports will still be accessed via the “Reports” submenu of the “Analyze” tab

The screenshot displays a software interface with a top navigation bar containing the following tabs: myDashboard, Jobs, Talent, Timesheet, Invoices, Companies, Documents, Back Office, and Analyze. The 'Analyze' tab is highlighted with a red box and a mouse cursor. Below the navigation bar is a blue header bar with two sub-menus: 'Reports' and 'INSIGHTS', both of which are also highlighted with red boxes. Underneath this is a dark grey bar with the text '(Events, Tasks, Starts, Ends, Projects)'. The main content area features a calendar for February 2023, with the title 'February 2023' centered above a grid. The grid shows the days of the week (Mon, Tue, Wed, Thu) and the dates 29, 30, 31, 1, and 2. The date '2' is highlighted in yellow.

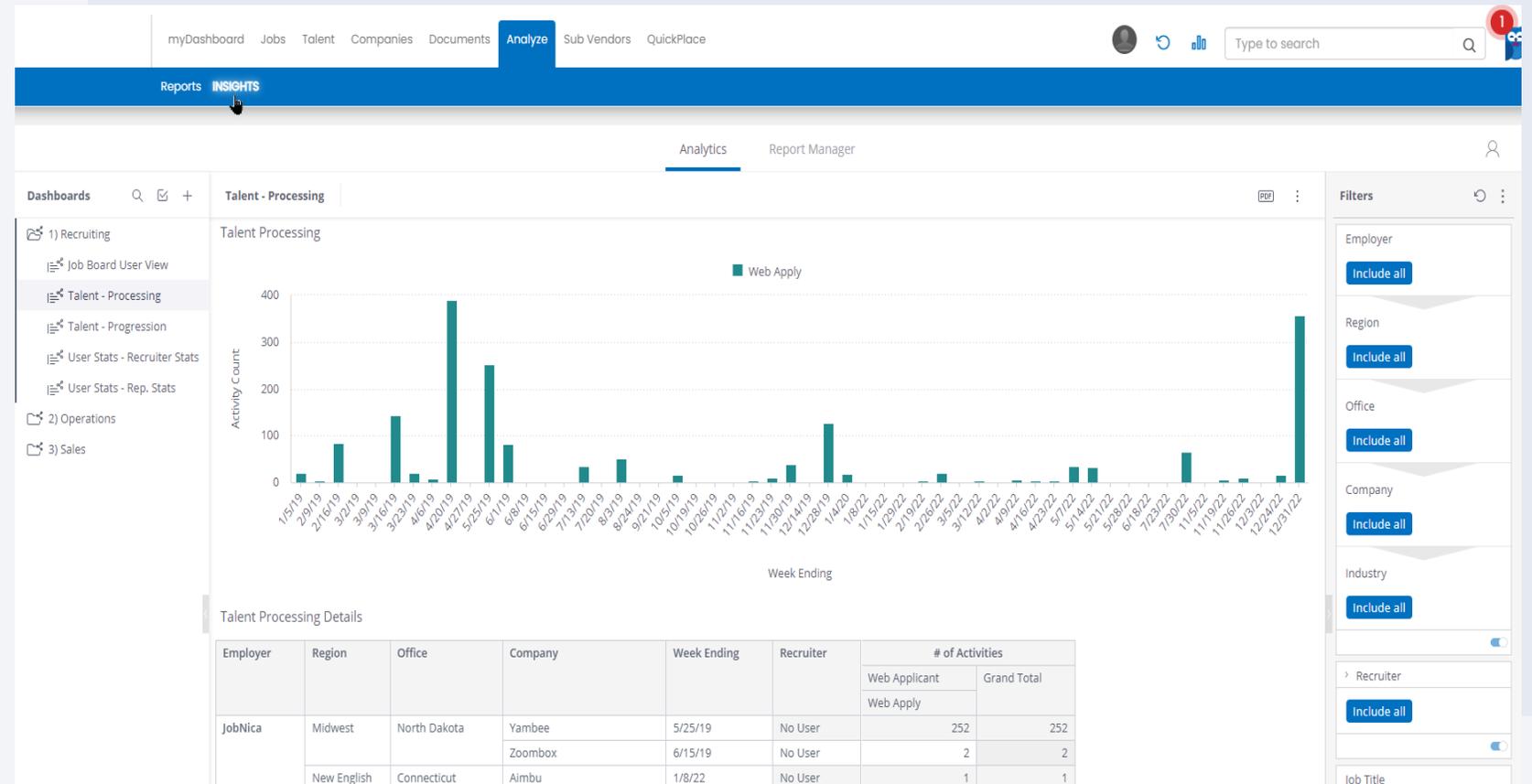
	Mon	Tue	Wed	Thu	
29	30	31	1	2	



What Does the Upgraded Tool Look Like?

Once you click the “INSIGHTS” submenu option. . .

- Dashboards will be listed along the left-hand side
- Selecting a dashboard within a folder will populate results
- Filters can be adjusted on the right-hand side



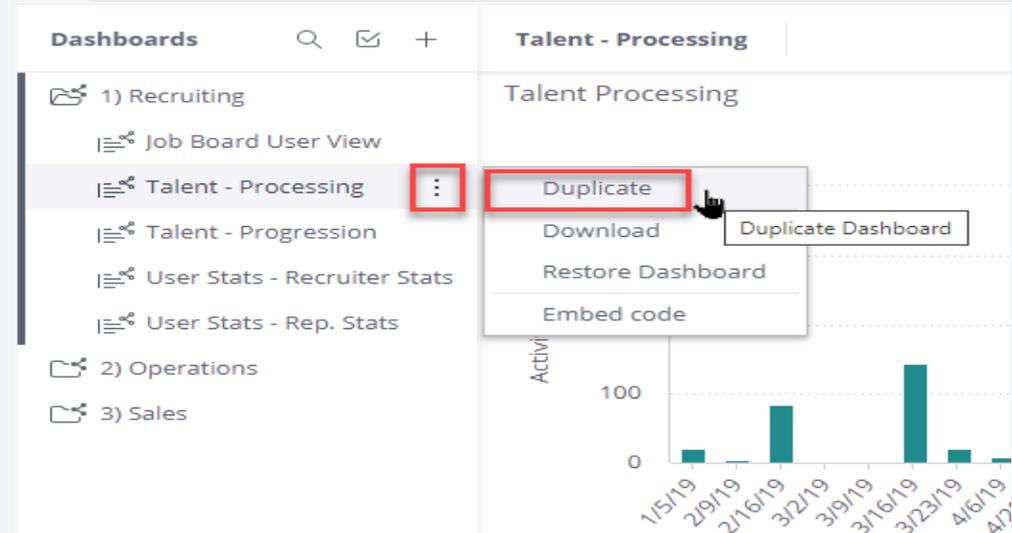
DUPLICATING DASHBOARDS

How to Duplicate Dashboards?

Users can duplicate dashboards in two places from the upgraded platform

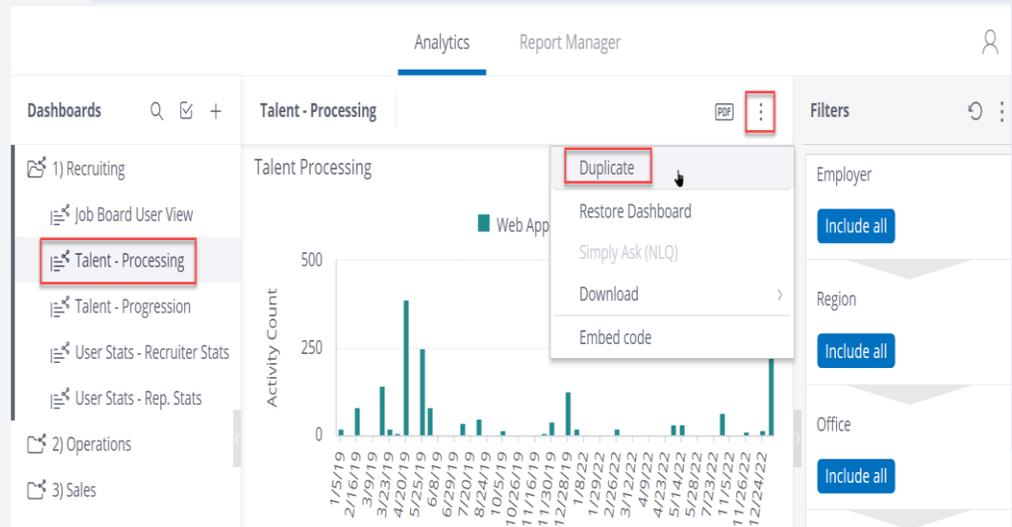
1. Hover over the dashboard name > click the 3 dots to the right of the name > “Duplicate”
2. Click the 3 dots in the upper-right corner of the dashboard results screen > “Duplicate”

1



This screenshot shows the 'Dashboards' sidebar on the left with 'Talent - Processing' selected. A red box highlights the three dots menu icon next to the dashboard name. A context menu is open, with 'Duplicate' highlighted in red. A tooltip 'Duplicate Dashboard' is visible over the 'Duplicate' option. The main area shows a bar chart titled 'Talent Processing' with 'Activity' on the y-axis and dates on the x-axis.

2



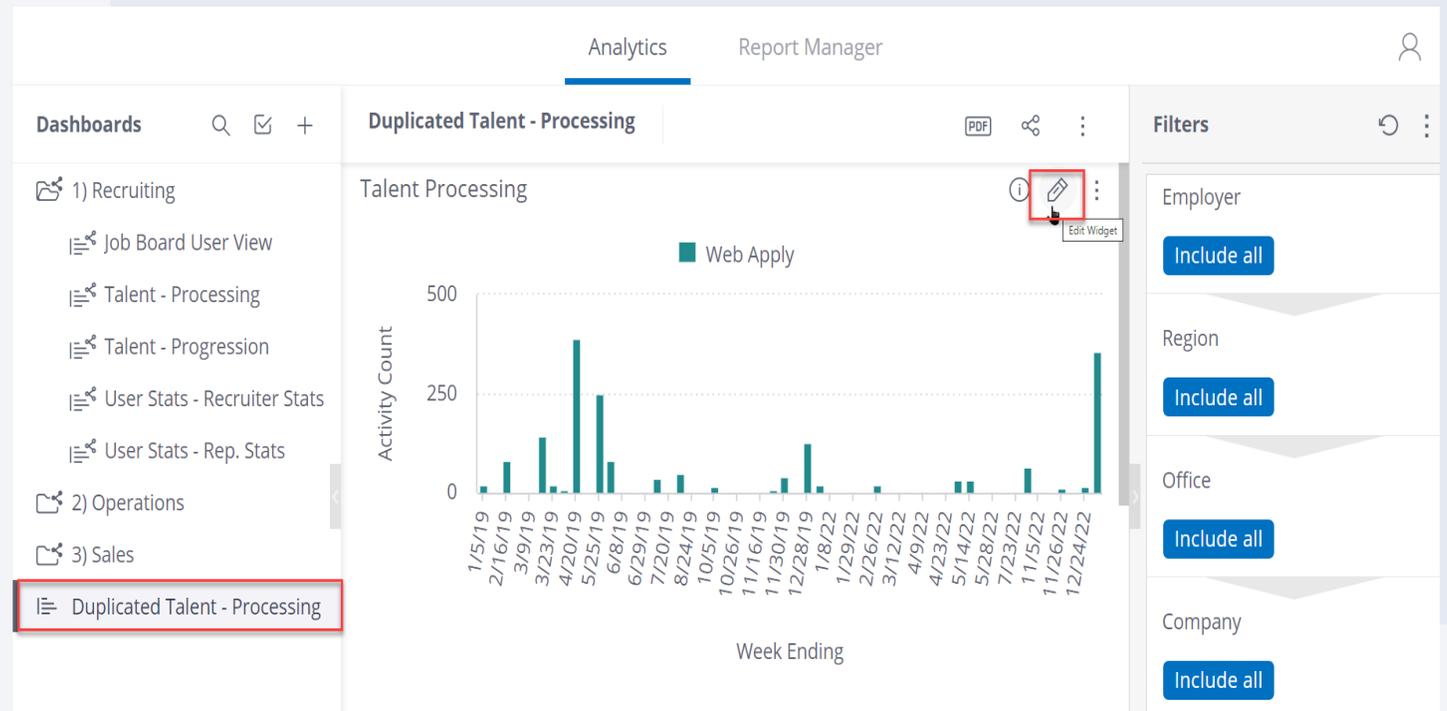
This screenshot shows the 'Dashboards' sidebar on the left with 'Talent - Processing' selected. A red box highlights the three dots menu icon in the upper-right corner of the dashboard results screen. A context menu is open, with 'Duplicate' highlighted in red. The main area shows a bar chart titled 'Talent Processing' with 'Activity Count' on the y-axis and dates on the x-axis. A 'Filters' panel is visible on the right with 'Employer', 'Region', and 'Office' filters, each with an 'include all' button.



How to Edit 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

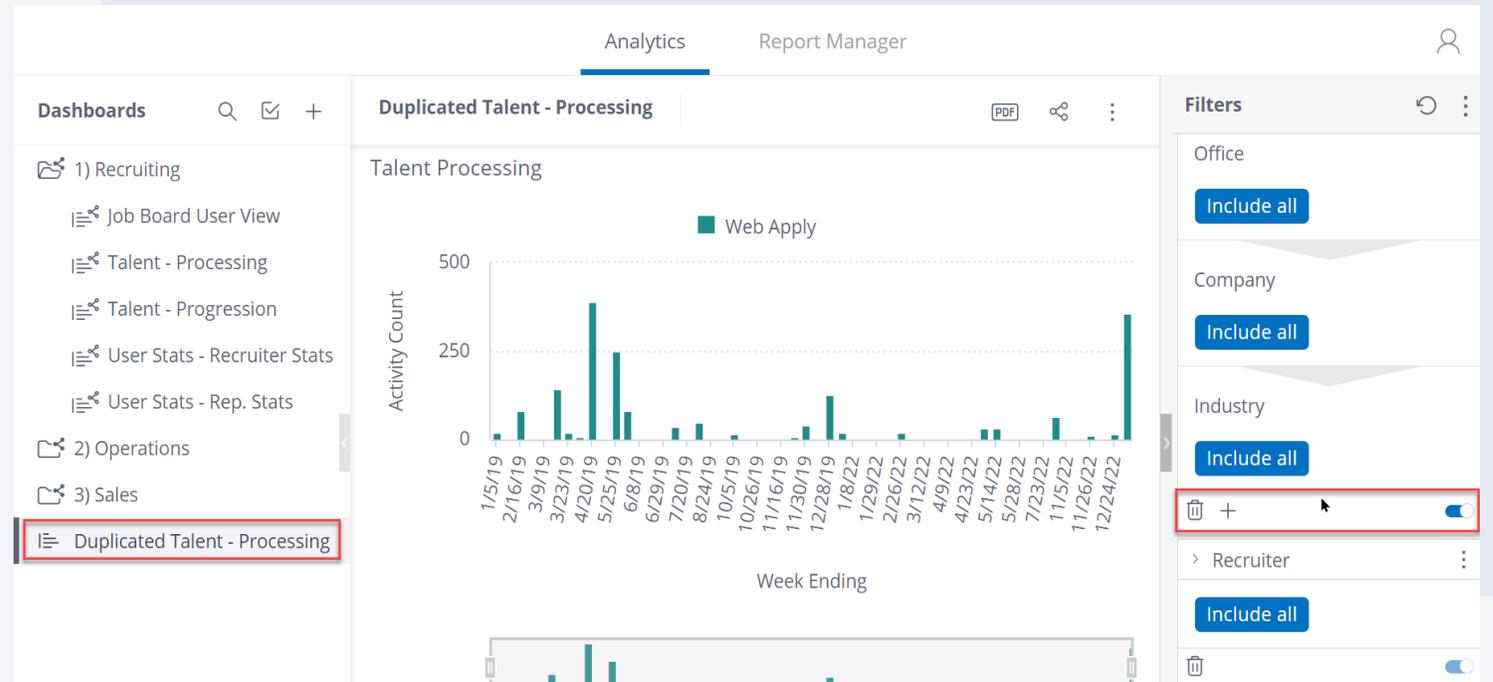


FILTERS

How to Modify Dashboard Filters?

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

- Filters can be modified by deleting, adding, or disabling filter fields



SHARING DASHBOARDS

How to Share Dashboards?

Option 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 another user to share with > adjust their level of access to the dashboard > “Save”

1

The screenshot shows a dashboard interface. On the left, there is a list of dashboards under categories: 1) Recruiting (Job Board User View, Talent - Processing, Talent - Progression, User Stats - Recruiter Stats, User Stats - Rep. Stats), 2) Operations, and 3) Sales. The 'Duplicated Talent - Proc...' dashboard is selected, and a context menu is open over it with options: Rename, Duplicate, Delete, Share (highlighted), Download, and Embed code. On the right, the 'Duplicated Talent - Processing' dashboard is displayed, featuring a bar chart titled 'Talent Processing' showing 'Activity Count' over time for 'Web Apply'.

2

The screenshot shows the 'Email reporting settings' dialog box for the 'Duplicated Talent - Processing' dashboard. The search field contains 'phil'. A list of users is displayed, with the first user, 'Phil Martini' (phil.martini@avionte.com), highlighted. The 'Save' button is highlighted at the bottom.



SHARING DASHBOARDS

Cont.

Option 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 another user to share with > adjust their level of access to the dashboard > “Save”

1



2

The screenshot shows a dialog box titled 'Email reporting settings - Duplicated Talent - Processing'. It features a search bar with 'phil' entered. Below the search bar, a list of users is displayed, with 'Phil Martini phil.martini@avionte.com' selected and highlighted in yellow. A red box highlights the 'Save' button at the bottom right of the dialog. The 'Dashboard URL' is visible at the bottom: https://avionte.sisense.com/app/main/dashboards/6425a7df8625190035b3.



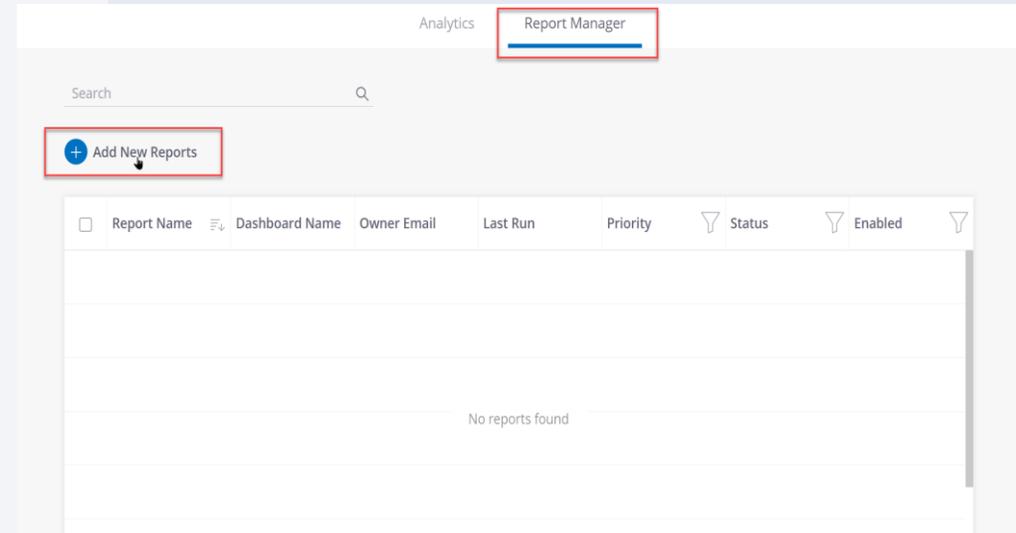
EMAIL SCHEDULING DASHBOARDS

How to Email Schedule Dashboards?

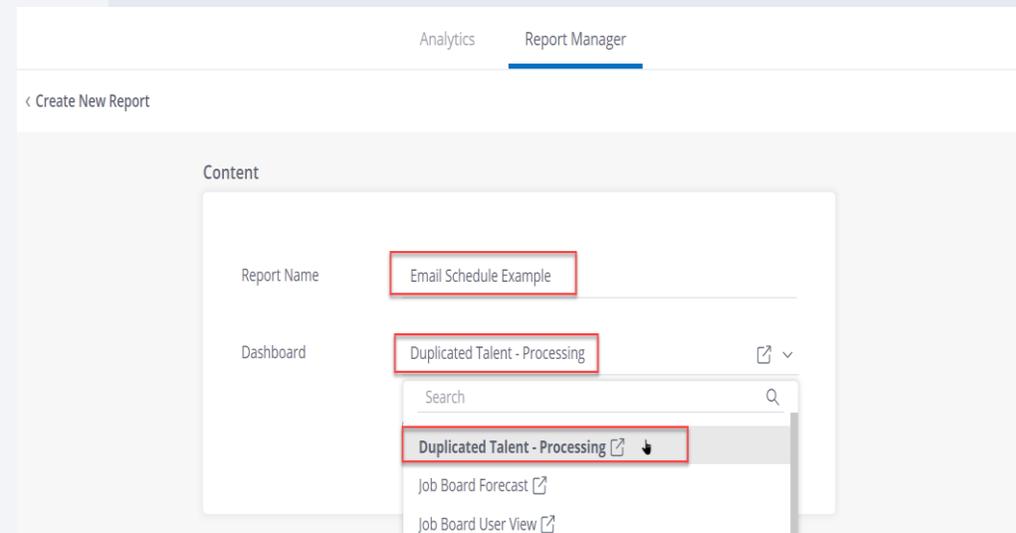
Users can schedule dashboards to be emailed out from the 'Report Manager' section of the upgraded tool

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 upgraded 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 (internal or external)

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

Search

- T** Training Team
zztrainingzztest@gmail.com
- J** josh.payne (external)
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 upgraded 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

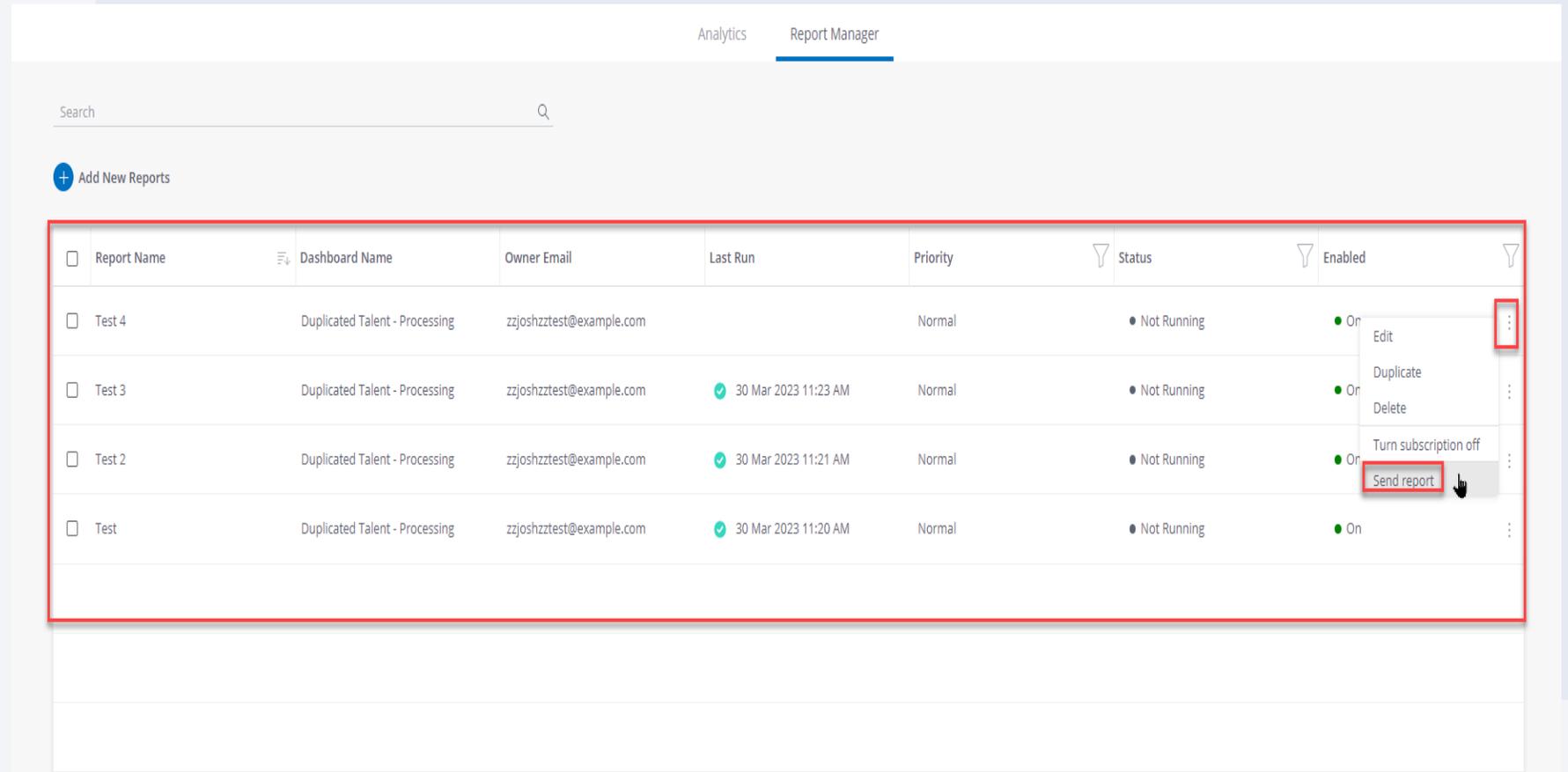
Starts Mar 15, 2023
Today
Select Date



Cont.

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

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



The screenshot shows the 'Report Manager' section of a dashboard. At the top, there are tabs for 'Analytics' and 'Report Manager'. Below the tabs is a search bar and a '+ Add New Reports' button. The main content is a table with the following columns: Report Name, Dashboard Name, Owner Email, Last Run, Priority, Status, and Enabled. The table contains four rows of data. A red box highlights the table, and a red box highlights the 'Send report' button in the context menu for the first row.

<input type="checkbox"/>	Report Name	Dashboard Name	Owner Email	Last Run	Priority	Status	Enabled	
<input type="checkbox"/>	Test 4	Duplicated Talent - Processing	zzjoshzztest@example.com		Normal	● Not Running	● On	⋮
<input type="checkbox"/>	Test 3	Duplicated Talent - Processing	zzjoshzztest@example.com	30 Mar 2023 11:23 AM	Normal	● Not Running	● On	⋮
<input type="checkbox"/>	Test 2	Duplicated Talent - Processing	zzjoshzztest@example.com	30 Mar 2023 11:21 AM	Normal	● Not Running	● On	⋮
<input type="checkbox"/>	Test	Duplicated Talent - Processing	zzjoshzztest@example.com	30 Mar 2023 11:20 AM	Normal	● Not Running	● On	⋮



DEMO



QUESTIONS?



Poll

Based on your experience during this training, how prepared do you feel in your ability to grant access to, utilize, and/or access this new BI upgrade?

1 (not confident)

2 (somewhat confident)

3 (confident)

4 (very confident)



THANK YOU!

