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Dashboard Strategies for More Meaningful Insights

January 30th, 2024



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Session CPE Requirements

- You need to attend 50 minutes to receive the full 1 CPE credit.
- 4 Attendance Markers that read: “I’m Here,” will be launched during this session. You must respond to a minimum of 3 to receive the full 1 CPE credit.

****Both requirements must be met to receive CPE credit****



Learning Objectives

- *At the end of the session, you will be able to:*
 - *Determine the appropriate type of dashboard to meet your needs*
 - *Identify how to choose the best components and visualizations*
 - *Recall how to make informed decisions based on your data*



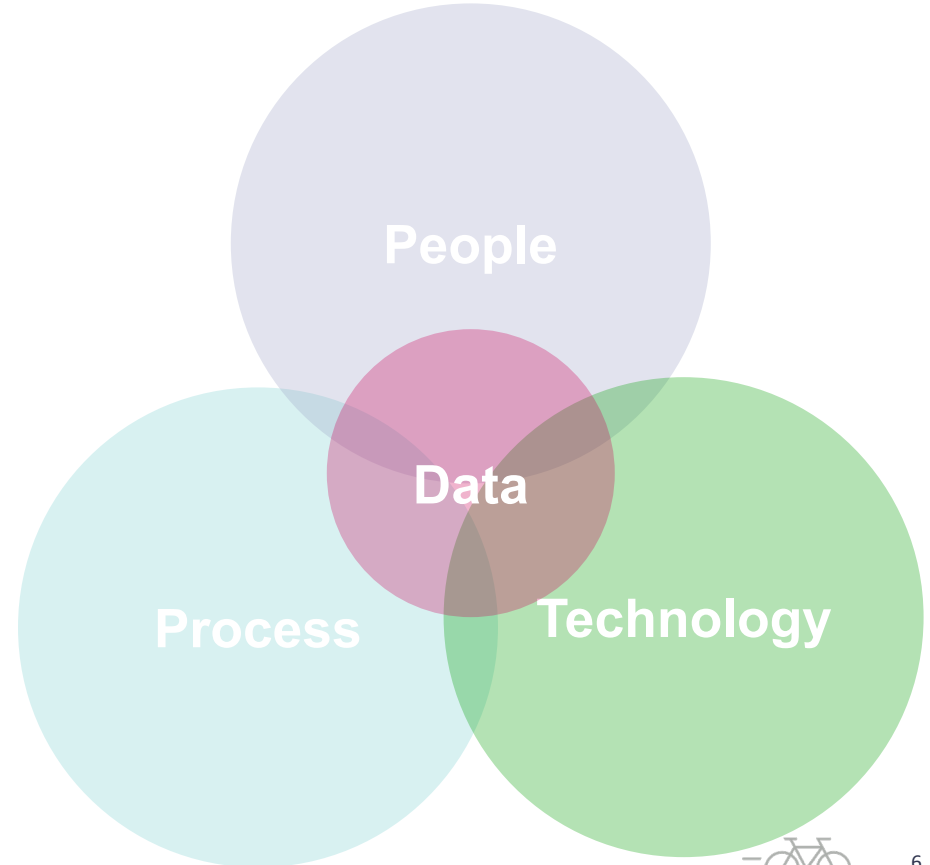


Types of Dashboards to meet your needs



People, Process, Technology, and Data

- We're leveraging **Sage Intacct** to optimize our **Business Processes** and gain efficiencies.
- Within **Sage Intacct**, we have all this **Data** (Records, Transactions, Dimensions) in different Modules, Subledgers, the General ledger – How do we take that **Data** and turn it into something meaningful for the **most important people within and outside the company.**



Types of Dashboards

Dashboards can break down complex data, help track business segments, encourage team collaboration, provide drill down into source transactions, and streamline business intelligence and reporting.

Strategic

Analytical

Operational

Tactical



Dashboard Type: Strategic

Provides strategic guidance, based on snapshots of the data. They can align business segment performance with overall company strategy.

Strategic dashboards typically include:

Key Performance Indicators

Comparative Data

Performance Tracking

Data from Multiple Sources

Examples of Strategic dashboards: Management Strategic Dashboard, CFO Dashboard for Strategic Planning



Dashboard Type: Analytical

Hands-on dashboards for your managers and data analysts. Allowing you to identify trends to help you make decisions about the future.

Analytical dashboards typically include:

**Interactive
Components**

Comparative Data

Vast amount of data

**Filterable
Components**

Examples of Analytical Dashboards: Financial performance, Procurement costs



Dashboard Type: Operational

Monitoring dashboards that provide a glimpse into the day-to-day activities of your business. This is the most common type of dashboard.

Operational dashboards typically include:

Real-time data

**Processes /
Workflows**

KPIs

Records

Examples of Operational Dashboards: Controller, AR Manager, AP Manager, Grant Manager



Dashboard Type: Tactical

Help analysts and line-of-business managers analyze historical data and visualize trends to gain deeper understanding.

Operational dashboards typically include:

Data Visualizations

Trend Analysis

**Filterable
Components**

Budget Comparisons

Examples of Tactical Dashboards: Procurement, Sales Performance





Choosing the best components and visualizations



Building Blocks

Performance
Cards

Reports

Charts &
Graphs

Records:
Queries, Lists,
Approvals, Etc.

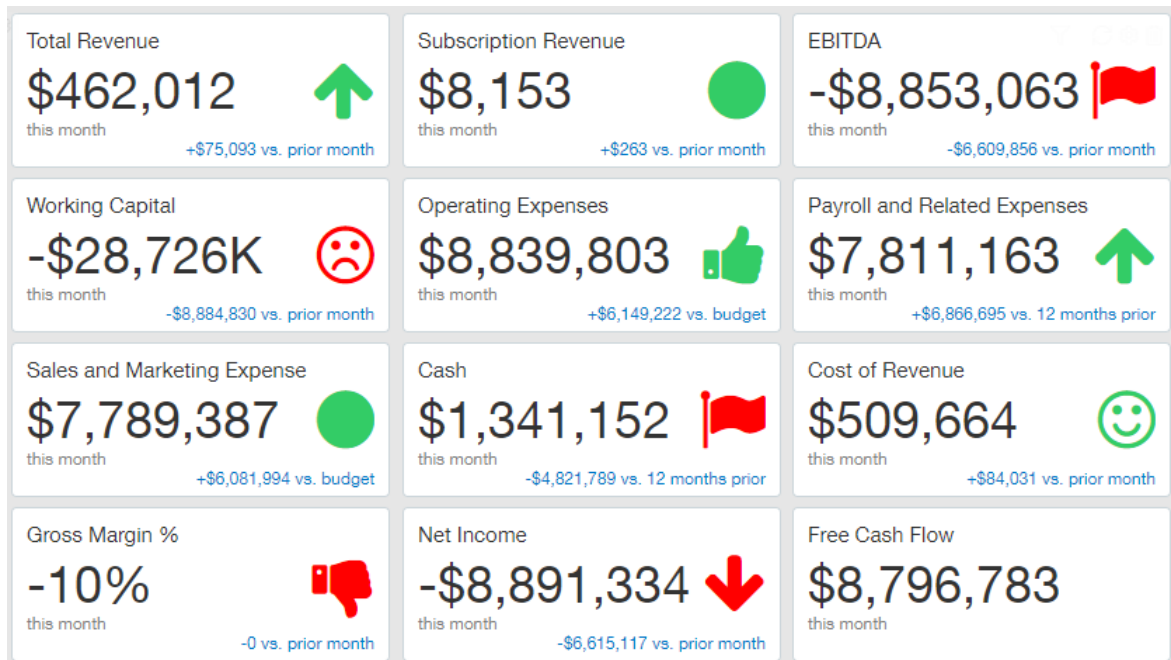
General:
Shortcuts,
Calendar, Etc.

SmartLinks

Collaboration
Feed



Building Blocks: Performance Cards



Single value component that represents an account group comparison against a period, budget, or computation. For example, Debt to Equity Ratio, Net Income and Revenue vs. Plan.



Building Blocks: Reports

Financial and memorized reports to display as a live report or as a snapshot.

Profit and Loss - Prior Year Comparison

08/31/2022 13:55:17



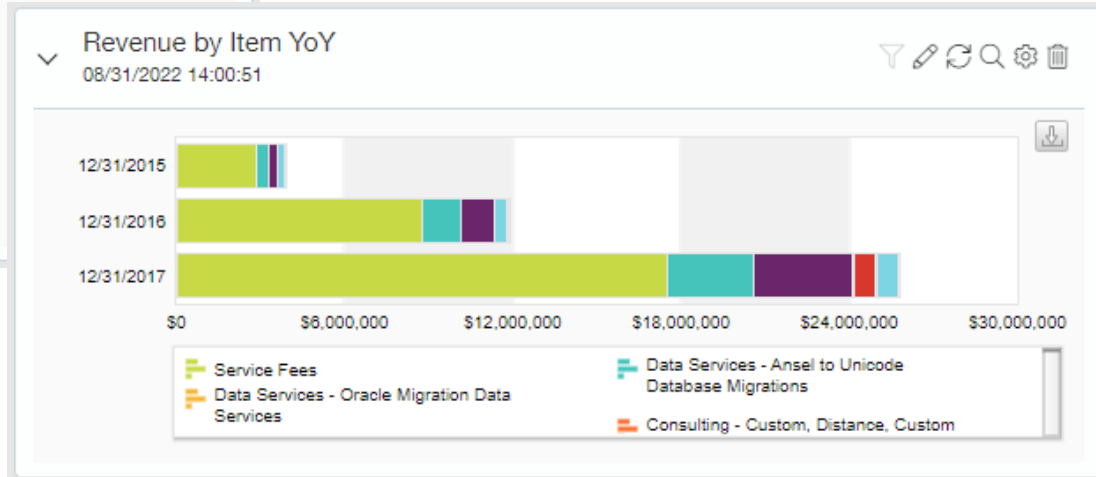
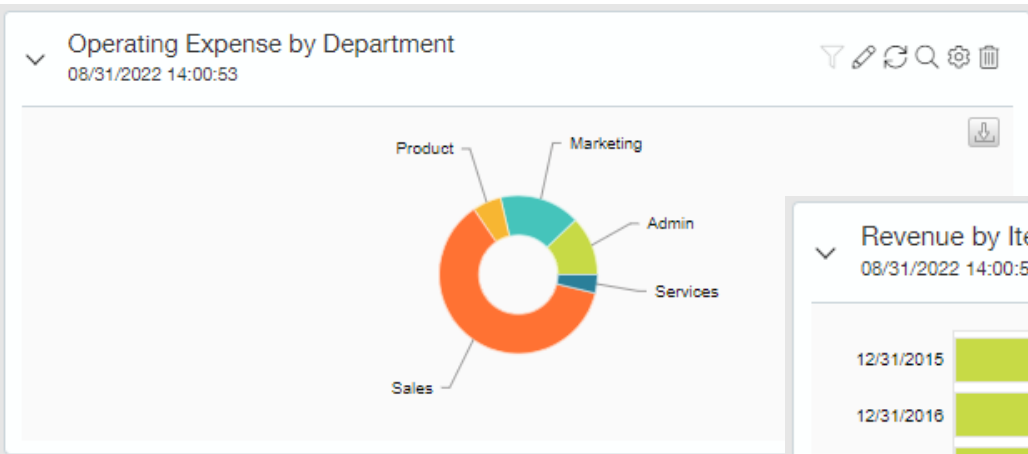
Location: USA
USA

Month Ending 12/31/2017				Month Ending 12/31/2016		01/01/2017 Through 12/31/2017				01/01/2016 Through 12/31/2016	
Actual	% of Revenue	Budget	Budget Diff		PY Actual	Actual	% of Revenue	Budget	Budget Diff	Actual	Actual
2,433,870.28	84.28 %	2,230,000.00	203,870.28		1,628,578.74	24,999,227.17	81.57 %	24,130,000.00	869,227.17	11,341,217.94	
453,859.48	15.72 %	190,000.00	263,859.48		221,762.41	5,645,774.76	18.42 %	3,880,000.00	1,765,774.76	2,768,041.50	
0.00	0.00 %	23,000.00	(23,000.00)		0.00	1,000.00	0.00 %	276,000.00	(275,000.00)	0.00	
2,887,729.76		2,443,000.00	444,729.76		1,850,341.15	30,646,001.93		28,286,000.00	2,360,001.93	14,109,259.44	
101,828.46	3.53 %	243,000.00	141,171.54		107,610.59	2,340,178.04	7.64 %	2,716,000.00	375,821.96	1,055,006.45	
407,836.40	14.12 %	310,000.00	(97,836.40)		138,773.19	3,349,537.51	10.93 %	3,350,000.00	462.49	1,501,382.40	
509,664.86		553,000.00	43,335.14		246,383.78	5,689,715.55		6,066,000.00	376,284.45	2,556,368.85	
2,378,064.90		1,890,000.00	488,064.90		1,603,957.37	24,956,286.38		22,220,000.00	2,736,286.38	11,552,890.59	
299,907.89	10.39 %	274,656.00	(25,251.89)		110,664.70	3,155,662.09	10.30 %	3,092,372.00	(63,290.09)	1,188,245.40	
347,990.26	12.05 %	341,033.86	(6,956.40)		191,813.78	2,644,702.62	8.63 %	2,539,106.32	(105,596.30)	1,376,292.89	
31,383.74	1.09 %	25,000.00	(6,383.74)		14,451.34	296,212.55	0.97 %	270,300.00	(25,912.55)	156,346.45	
7,811,163.82	270.49 %	1,759,500.00	(6,051,663.82)		1,046,631.98	29,014,333.73	94.88 %	22,212,500.00	(6,801,833.73)	10,274,814.37	
176,800.61	6.12 %	163,867.86	(12,932.75)		91,402.59	2,010,709.97	6.56 %	1,911,014.32	(99,695.65)	1,042,564.74	
119,929.39	4.15 %	98,900.00	(21,029.39)		69,172.19	1,405,369.85	4.59 %	1,224,200.00	(181,169.85)	762,689.04	
52,622.45	1.82 %	27,622.45	(25,000.00)		15,355.26	358,469.40	1.16 %	331,469.40	(25,000.00)	173,263.12	
52,622.45	1.82 %	27,622.45	(25,000.00)		15,355.26	358,469.40	1.16 %	331,469.40	(25,000.00)	173,263.12	
52,622.45	1.82 %	27,622.45	(25,000.00)		15,355.26	358,469.40	1.16 %	331,469.40	(25,000.00)	173,263.12	
8,839,803.16	306.12 %	2,690,580.17	(6,149,222.99)		1,539,491.84	38,883,460.21	126.88 %	31,580,962.04	(7,302,498.17)	14,974,016.01	
2,502.74	0.09 %	2,600.00	(97.26)		1,445.13	27,076.72	0.09 %	27,500.00	(423.28)	15,634.66	
3,003.29	0.10 %	3,000.00	3.29		1,661.90	32,492.07	0.11 %	32,200.00	292.07	17,979.84	
(9,385.29)	(0.33) %	(9,400.00)	14.71		(5,419.25)	(101,537.75)	(0.33) %	(102,100.00)	562.25	(58,629.91)	
(3,879.26)	(0.13) %	(3,800.00)	(79.26)		(2,312.22)	(41,968.96)	(0.14) %	(42,400.00)	431.04	(25,015.41)	
\$ (6,465,617.52)		\$(804,380.17)	\$(5,661,237.35)		\$62,153.31	\$(13,969,142.79)		\$(9,403,362.04)	\$(4,565,780.75)	\$(3,446,140.83)	



Building Blocks: Charts & Graphs

Variations of pie, column, bar, area, and line charts. For example, stacked column, Stacked bar, Doughnut.



Building Blocks: Records (Queries, Lists, Ect.)

Filter and sort transaction and data records for action, approvals, or monitoring. For example, Bills, Invoices, Posted Payments.

Vendor ID	Vendor Name	Total Due	Term	Default expense account	Default Currency	Vendor Type ID	City	State/province	Zip code	Tax ID	Form 1099 Type	Form 1099 Box
20001	American Express	\$0.00	Net 30		USD	General Trade	Dallas	TX	75265		MISC	7
20002	Amazon.com	\$0.00	Net 30		USD	General Trade	Seattle	WA	98109			
20003	STAPLES	\$0.00	Net 30	6220	USD	General Trade	Framingham	MA	01702		MISC	3
20004	Lenovo	\$0.00	Net 15	6230	USD	General Trade	Morrisville	NC	27560			
20005	Pacific Gas and Electric	\$0.00	Net	6185	USD	Utilities	San	CA	94105			

Bank	Date	Vendor	Document No	Txn curr	Txn amount	Base Curr	Amount	Cleared	
100_SVB - Silicon Valley Bank	08/19/2017	20028--Verizon Business	1111	USD	8,559.59	USD	8,559.59	In Transit	Bills
	08/14/2017	20028--Verizon Business	1110	USD	12,974.27	USD	12,974.27	In Transit	Bills
	08/01/2017	20007--Emporis Property Management	1107	USD	50,768.88	USD	50,768.88	In Transit	Bills
	07/15/2017	20008--Boston Properties	1106	USD	21,398.98	USD	21,398.98	In Transit	Bills
	07/01/2017	20028--Verizon Business	1100	USD	21,533.86	USD	21,533.86	07/31/2017	Bills
	06/14/2017	20008--Boston Properties	1098	USD	21,398.98	USD	21,398.98	07/31/2017	Bills
	06/01/2017	20007--Emporis Property Management	1099	USD	50,768.88	USD	50,768.88	07/31/2017	Bills
	05/15/2017	20028--Verizon Business	1097	USD	21,533.86	USD	21,533.86	06/30/2017	Bills
		20008--Boston Properties	1095	USD	21,398.98	USD	21,398.98	06/30/2017	Bills
		20007--Emporis Property Management	1096	USD	50,768.88	USD	50,768.88	06/30/2017	Bills
		20028--Verizon Business	1094	USD	21,533.86	USD	21,533.86	05/31/2017	Bills



Building Blocks: General

Shortcuts and productivity tools to stay informed, improve navigation, efficiency and oversight. For example, Close Thru Summary, Billboard, Main shortcuts, Custom Navigation, Attachment Container, News and Events – RSS, Message Board, New Features, and Resources.

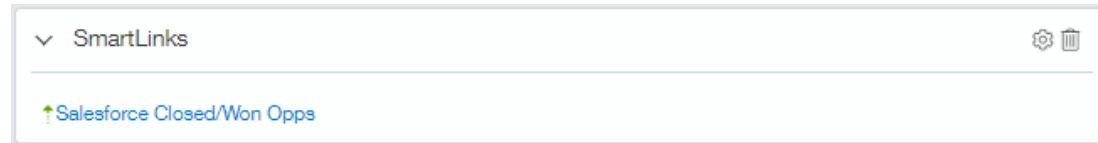
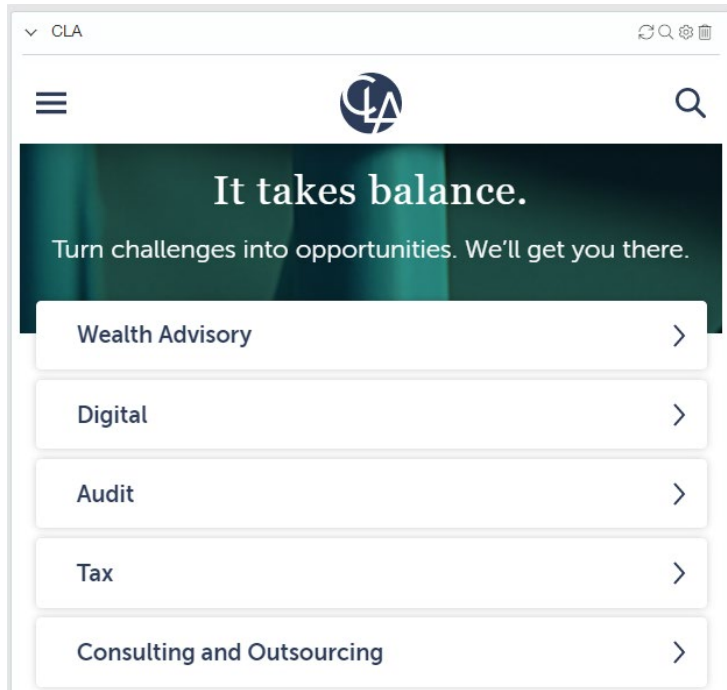
The screenshot displays two overlapping panels from a software interface. The left panel, titled 'Resources', contains a list of links: Intacct Help, Community, Release Notes, Learning Center, Checks & Supplies, and GSV Upload Templates. The right panel, titled 'Closed Thru Summary', contains a table with two columns: 'Application' and 'Closed Thru'. The table lists several applications and their corresponding closed thru dates.

Application	Closed Thru
General Ledger	10/31/2017
Accounts Payable	10/31/2017
Accounts Receivable	10/31/2017
Expenses	12/31/2017
Management	10/31/2017



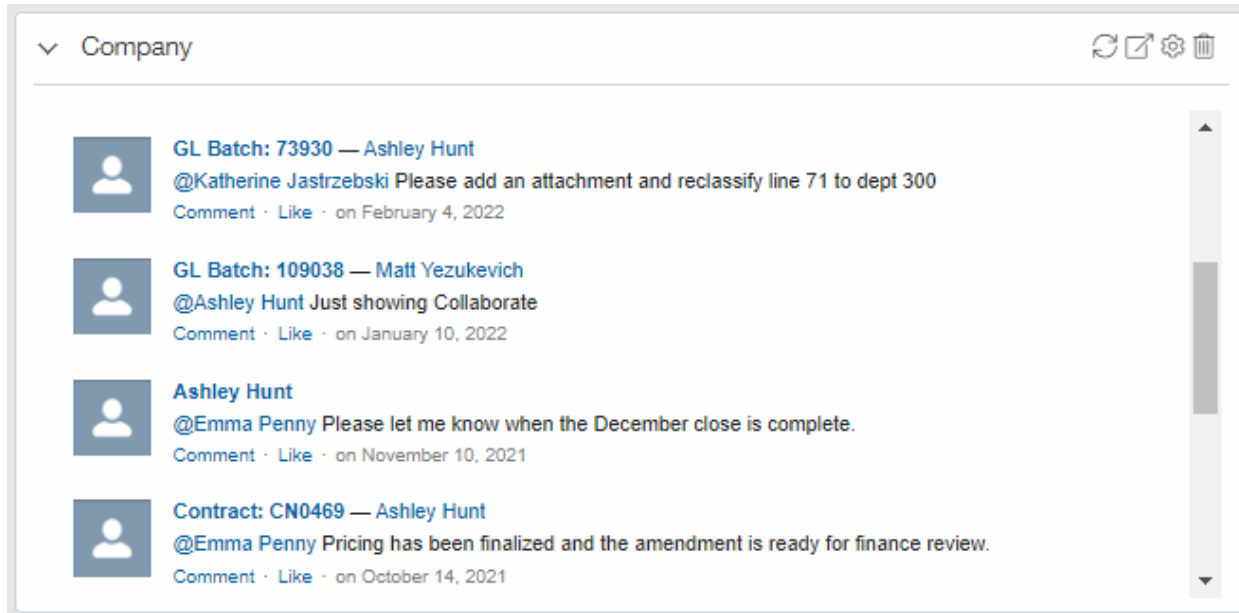
Building Blocks: SmartLinks

URLs to follow via a link, or open within the component (Click or Fetch)



Building Blocks: Collaboration Feed

You can post a snapshot of a dashboard to your Chatter feed to help other users follow changes in information.



The screenshot shows a Chatter feed titled "Company" with a dropdown arrow on the left and refresh, share, settings, and delete icons on the right. The feed contains four posts:

- GL Batch: 73930 — Ashley Hunt**
@Katherine Jastrzebski Please add an attachment and reclassify line 71 to dept 300
Comment · Like · on February 4, 2022
- GL Batch: 109038 — Matt Yezukevich**
@Ashley Hunt Just showing Collaborate
Comment · Like · on January 10, 2022
- Ashley Hunt**
@Emma Penny Please let me know when the December close is complete.
Comment · Like · on November 10, 2021
- Contract: CN0469 — Ashley Hunt**
@Emma Penny Pricing has been finalized and the amendment is ready for finance review.
Comment · Like · on October 14, 2021





Let's take a Look!





Making informed decisions based on your data



Converting to 'Real Time' on-Demand Views

Making informed decisions becomes easier with Dashboards in a variety of ways:

1. Real-time access
2. Marry financial and statistical data
3. Meaningful presentation
4. Conversation and Analysis



Summary

A successful dashboard implementation will:

- Save time across an organization: IT, analysts, managers, C-suite, etc.
- Save companies money by highlighting unnecessary operational costs
- Provide insight into customer behavior
- Effectively align strategy with tactics
- Ensure a goal-driven and performance-based data culture
- Encourages interactivity and analysis

Start with a Plan and Implement - choose the right type of dashboard!

Don't "data puke"



Resources

- Sage University Training & Release Notes
- Intacct Customer Office Hours
- View and Subscribe to the CLA Intacct Blog

<https://blogs.claconnect.com/intacct/>

- Continue to join our monthly Sage Intacct Webinars

[2023 Sage Intacct Webinar Series : 2023 : Events : CLA \(CliftonLarsonAllen\) \(claconnect.com\)](https://blogs.claconnect.com/intacct/2023-Sage-Intacct-Webinar-Series-2023-Events-CLA-CliftonLarsonAllen-claconnect.com)

What's New in Sage Intacct's 2022 R2 and R3?

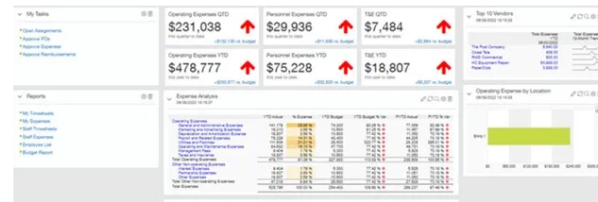
September 26, 2022 | by Ashley Klapperick

Struggling to keep up with all the enhancements pushed out in Sage Intacct's Release 2 (R2) on May 13, 2022, or Release 3 (R3) on August 19th, 2022? Keeping up with all the feature enhancements is a job along with your actual job. Intacct has pushed out a ton of exciting enhancements across the application, if you want to learn more keep reading.



Dashboards:

Have you struggled to get to creating dashboards for your team? If this is a task that keeps getting pushed further down your list of "To-Do's" utilize Intacct's new out-of-the-box Role Based Dashboards. The new role-based dashboards provide information in a format that is easier for the viewer to consume with specific information on each dashboard. If you don't like the look or information provided, you can easily make changes to these dashboards so they suit your team's needs.



Thank you!



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