▲ APPEX360

Plant Excellence Intelligence Platform

Executive Guide

Complete guide to the APPEX360 Boardroom — executive visual reporting for plant excellence intelligence. Covers every section, navigation, filtering, and export.

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APPEX360 Knowledge Centre

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Boardroom Guide

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1. Overview

Purpose
The Boardroom is APPEX360's executive visual reporting suite. It transforms assessment data into actionable intelligence for leadership teams.

Who should use it
Executives, plant directors, operations leaders, and board members who need to understand organisational performance at a glance.

Expected outcome
After reading this guide you will be able to navigate every Boardroom section, apply filters, interpret visualisations, and export reports.

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2. Quick Start

☐ Open the Boardroom from the left navigation menu.
☐ Review the Executive Summary at the top — your organisation's headline metrics.
☐ Browse the category sections: Financial, Governance, Risk, Operations, Intelligence.
☐ Use the filter bar to narrow by time period or business unit.
☐ Click any KPI card to see trend details.
☐ Export the full Boardroom as a PDF for your next board meeting.

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3. Detailed Walkthrough

Navigation

The Boardroom is organised into colour-coded category sections. Each section has a distinct accent colour:
Financial — Gold
Governance — Blue
Risk — Red

Operations — Teal
Intelligence — Purple
Executive — Indigo

Scroll through sections in order, or use the filter bar to jump to a specific category.

Executive Summary

The first section shows your organisation's key headline metrics in a four-column grid. Each metric card displays the current value, a trend indicator, and the change direction. These are the numbers your leadership team asks about most.

KPI Grids

Each category section contains a grid of KPI cards. Cards show:
Current value — The latest score or metric
Trend arrow — Direction of change compared to the previous period
Sparkline — Mini trend chart
Status colour — Green (strong), Amber (moderate), Red (attention needed)

Click any KPI card to view more context in the analytical panels below.

Filters and Controls

Use the Boardroom Filters bar at the top to refine your view:
Time Period — Last 30 days, Quarter, Year
Category — Show or hide specific categories
Business Unit — Filter by site or department
Reset — Clear all filters and return to the default view

Visualisation Cards

Below each KPI grid, detailed visualisation cards provide deeper analysis. These include:
Trend charts showing performance over time
Bar charts comparing categories side by side
Heat maps highlighting patterns across business units
Call-out numbers drawing attention to key changes

Each card has a clear label explaining what you are looking at, why it matters, and what action to take.

Export and Sharing

Click "Export PDF" at the top of the Boardroom to generate a board-ready document. The PDF includes all visible sections and respects your current filter settings.

Share the Boardroom view by copying the URL — filters are preserved in the link.

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4. Best Practices

Start with the Executive Summary. It gives you the headline story before you dive into details.

Use filters to focus. Viewing all categories at once can be overwhelming. Filter to the areas most relevant to your current review.

Look for colour patterns. A section with multiple red cards needs attention before it escalates.

Compare trends, not just scores. A score of 60 that is improving is more encouraging than a score of 70 that is declining.

Export before each board meeting. Build a library of Boardroom PDFs to track strategic progress over time.

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5. Common Mistakes

Scrolling past the Executive Summary. The headline metrics are your fastest route to understanding overall health.

Ignoring trend indicators. Current scores are point-in-time. The trend arrow tells you whether things are getting better or worse.

Not using filters. The default view shows everything. Filters help you focus on what matters.

Skipping visualisation cards. The cards below KPI grids contain the analytical depth that supports decision making.

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6. Troubleshooting

Boardroom shows no data: Complete at least one assessment. The Boardroom populates from assessment results.

Sections are missing: Verify assessments cover the relevant categories. Each Boardroom section maps to assessment categories.

PDF export is empty: Apply filters before exporting. The PDF includes only visible sections.

Filters do not change anything: Reset all filters and apply them one at a time.

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7. Related Features

Executive Homepage — your daily command centre.
Executive Reports Guide — custom report generation.
Executive Snapshot — one-page PDF summary.
Intelligence Reports — deeper analytical views.
Assessment Guide — how assessment data drives your reports.

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8. Frequently Asked Questions

How often is Boardroom data updated?
Data updates in real time as new assessments are completed.

Can I customise which sections appear?
Contact your administrator. Section visibility is configured at the organisation level.

Can I share the Boardroom with external stakeholders?
Yes. Use the Export PDF button or share the URL with stakeholders who have login credentials.

How many categories are shown?
The Boardroom displays all categories with completed assessment data, typically 6–10 sections.

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