

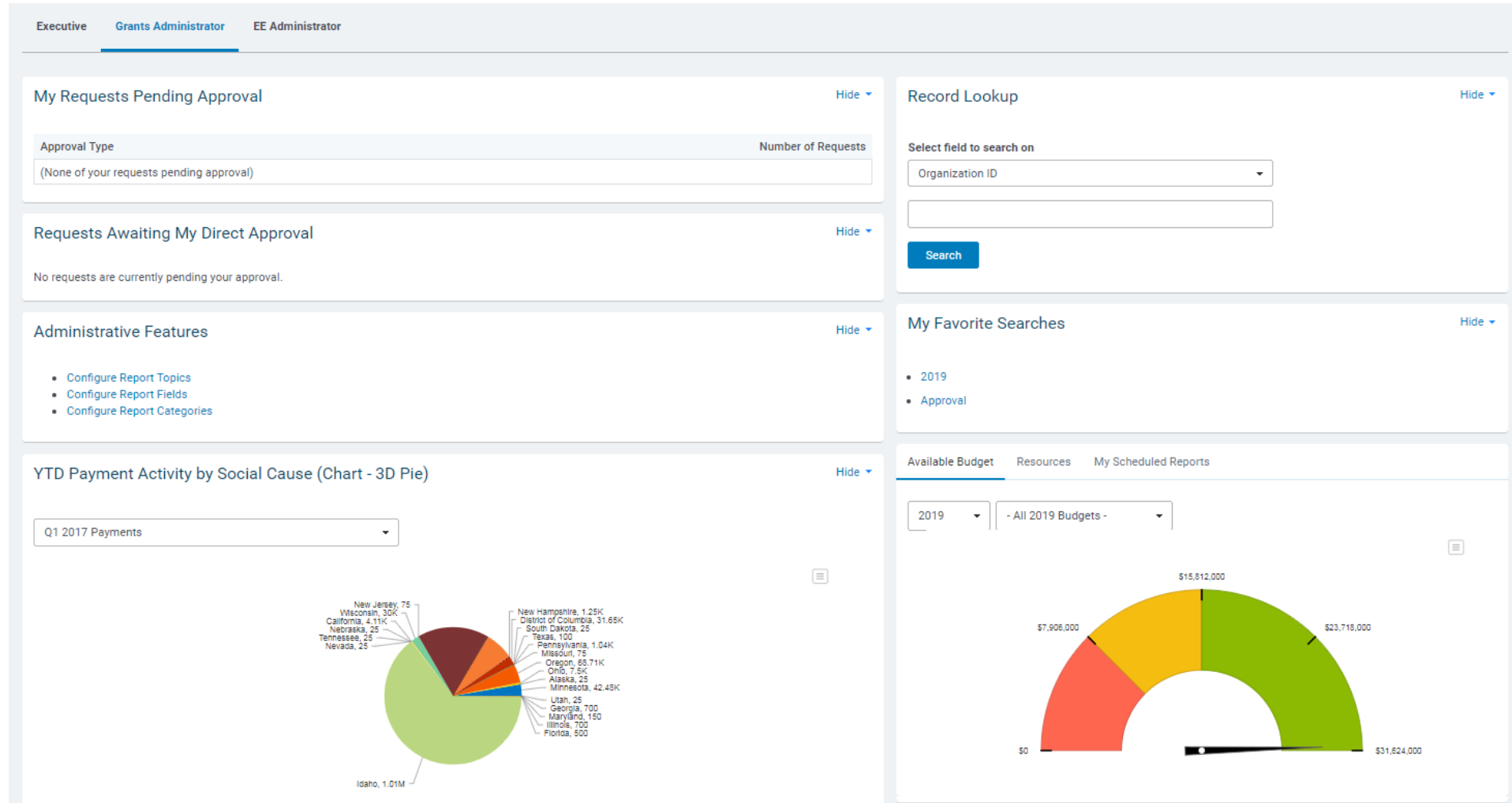
Creating Efficiencies with Dashboards



Overview

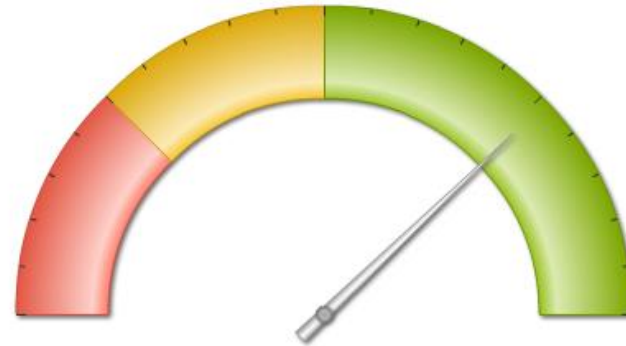
In this session, we will be reviewing all the functionality within the Dashboard. You will learn what portlets will help you **Search** for information, the ones that will increase your **Productivity**, how to display **Data** in various formats, how to bring in **Reporting** functionality and how to add your own unique **Content**.

What is the Dashboard?



What is the Dashboard?

- 'Blank slate'
- Essentially lives in its own tab
- Displays useful content
- Provides tools for users of all kinds
- No impact on other configuration



Why should you use it?

- Reduce processing time
- Create easier workflows
- Tailor content to users
- Represent data visually
- Easy to setup/change



Tips – What not to do..

- Lots of random portlets ‘for looks’
- One million portlets
- One portlet
- Try to limit visibility to a single user
- Giant portlets in tiny columns
- Tiny portlets in giant columns



Who is your audience?

- Executives
- Program managers
- Council reviewers
- Reporting users
- System administrators
- Finance/payment users
- You



What content is available?

Search

- Get results, go places

Productivity

- Do more with less effort

Data

- Show meaningful information

Reporting

- Bring in Reports tab content

Content

- Helpful text, images, files, and more

Search

- Similar to 'keywords' box on Main tab
- Adds Tax ID and payment-level fields

Record Lookup

Record Lookup

Select field to search on

Organization Name	▼
Organization ID	
Organization Name	
Organization Tax ID	
Request ID	
Project Title	
Reference Code	
Payment ID	
Check Number	
Reference Code	

Search

Organization Search

- Leads to “New Organization” results page
- Find existing organizations
- View tax source listing

Organization Search

Hide ▾

Legal Name:

State:

Search

Recent Main Searches

- Displays name if a 'Favorite'
- Displays run date
- Lists criteria
- Links to Main tab results

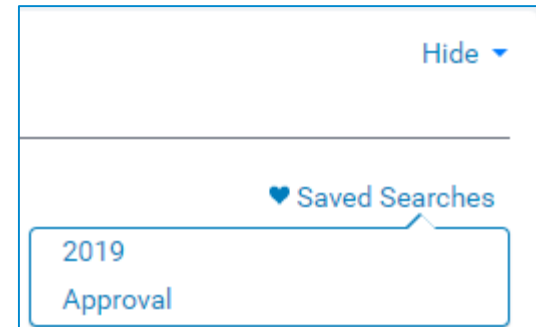
Recent Main Searches

Hide ▾

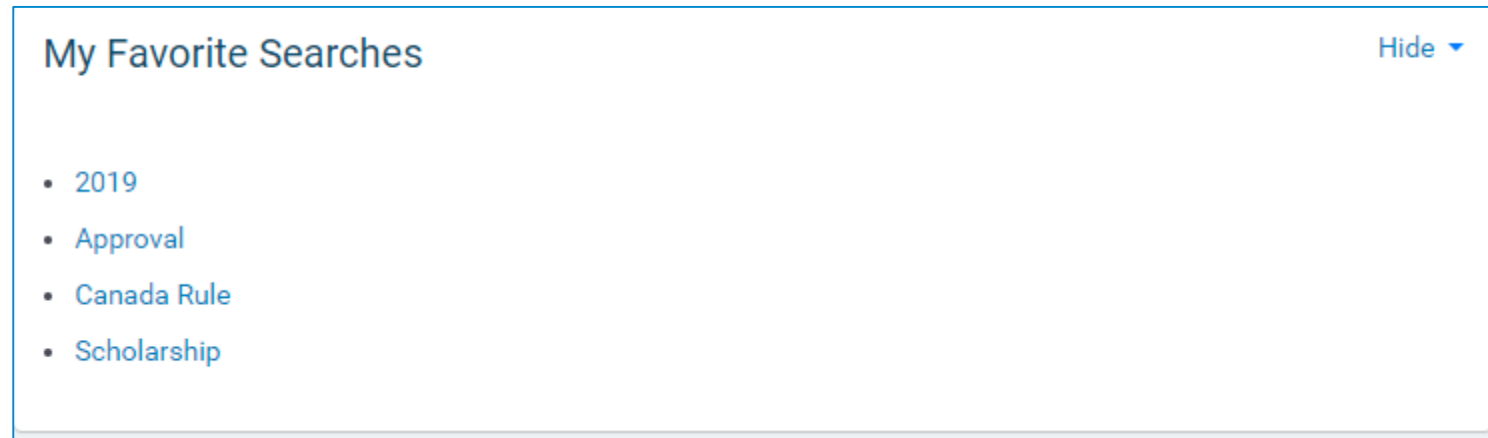
- [\(Unsaved Search\)](#)
Last Run: 06/12/2019
Search Criteria:
Proposal Type of:
**Standard Grant Application
Request Disposition of:
Approved
Request Year of:
2018
- [\(Unsaved Search\)](#)
Last Run: 06/11/2019
Search Criteria:
Request Disposition of:
Approved
Request ID of:
"41641037"
- [\(Unsaved Search\)](#)
Last Run: 06/10/2019
Search Criteria:
Request Score of:
greater than 1
- [\(Unsaved Search\)](#)
Last Run: 06/10/2019
Search Criteria:
Request Disposition of:
Approved
Request Year of:
2018
- [\(Unsaved Search\)](#)
Last Run: 06/06/2019
Search Criteria:
Request Disposition of:
Approved
Request ID of:
"17009431"

Search

My Favorite Searches



- Leads to Main tab results



Search

Outstanding Payment

- Use one or more filters
- Payments that are ready to be paid

Outstanding Payment Hide ▾

List of outstanding payments where:

- Grant is "Approved"
- Payment is "Scheduled"
- Scheduled Payment Date is today or earlier than today
- Transmitted to AP Date does not have a date

Proposal Type:

▾

Request Owner:

▾

Payment Type:

▾

Search

Outstanding Impact Report

- Use one or more filters
- Only returns unsubmitted reports

Outstanding Impact Report Hide ▾

Proposal Type:
**Standard Grant Application ▾

Impact Report Type:
- All - ▾

Request Owner:
- All - ▾

Due Date between:
04/01/2019 and 06/12/2019

Completed By:
Organization ▾

Search

1 2 3 Next »
1 - 50 of 149

Organization / Project Title	Due Date	Grant / Request Amount	Owner ID	Completed By
LITTLE SAIGON SAN DIEGO FOUNDATION SD Lunar New Year Tet Festival 2019	04/01/2019	\$5,000.00	xiomaraarroyo	Organization
SUSAN G KOMEN FOUNDATION - SAN FRANCISCO 2019 Visionary Awards Luncheon	04/07/2019	\$12,000.00	diazm	Organization

Search

Completed Impact Report

- Use one or more filters
- Only returns submitted reports

Completed Impact Report

Hide ▾

Proposal Type:

**Standard Grant Application ▾

Impact Report Type:

- All - ▾

Request Owner:

- All - ▾

Due Date between:

04/01/2019 and 06/12/2019

Completed By:

Organization ▾

Search

1 2 3 4 5 6 7 8 9 10 11 12 13 Next »

1 - 50 of 605

Organization / Project Title	Due Date	Grant / Request Amount	Owner ID	Completed By
COMMUNITY FOUNDATION GREATER DES MOINES Des Moines Regional Skatepark	04/01/2019	\$100,000.00	U122568	Organization
JUNIOR ACHIEVEMENT - FORT WAYNE	04/01/2019	\$50,000.00	U318866	Organization

Productivity

My Approvals

- Requests waiting on you
- Bulk options

My Approvals					Hide ▾
Select	Organization	Project Title	Submission Date	Amount Recommended	
☐	Food Bank of Northwest LA	Healthy Food for Healthy Children	02/12/2019	\$8,000.00	
☐	St. Paul Catholic School	Literacy and Reading Program	03/19/2019	\$11,531.73	
☐	Lowndes County Imagination Library	Reading is a Priceless Skill	06/20/2018	\$3,500.00	
☐	Deloitte & Touche LLP	2011 IPF Form 990-PF	09/20/2012	\$4,610.00	
☐	Purpose of God Annex Outreach Center	Family Matters	04/01/2019	\$0.00	
☐	Frank P. Phillips Memorial YMCA	Rock Steady Boxing-Fighting Back Against Parkinson's	06/05/2018	\$5,000.00	
☐	Starkville Area Habitat for Humanity	177 Chisolm Dr.	06/06/2018	\$3,000.00	
☐	Boys & Girls Club of the Golden Triangle	Healthy Kids Rock!	06/29/2018	\$5,900.00	
☐	Food Bank of Northwest LA	Healthy Foods for our Community	02/19/2019	\$40,000.00	
☐	Tenn-Tom Waterway Transportation Museum, Inc.	Tenn-Tom STEM Education	03/29/2018	\$2,000.00	
☐	Noxubee County Diabetes Coalition	Back to School/Health Fair	07/02/2018	\$1,000.00	

- Click to display list

My Requests Pending Approval

Hide

Provides summary of requests that you own broken down by approval type.

Approval Type	Number of Requests
National/Intl LOI Request Owner Step	1
Organization / Grant Amount / Project Title	Authorized Users
America's Warrior Partnership \$0.00 (Community Integration)	Kathy Cox

- Pending status
- Waiting on you or others

My Requests				Hide ▾
Organization / Project Title	Submission Date	Grant / Request Amount	Pending Action	
Children's Museum of Memphis Educational Programs	08/28/2018	\$100.00	You	
Children's Museum of Memphis International Paper Treehouse Exhibit, Golf Tournament & Cirque du CMOM	01/22/2019	\$45,000.00	You	
Germantown Chamber of Commerce IP contribution	01/22/2019	\$7,500.00	You	
Knowledge Quest Green Leaf Learning Farm/ Extended Learning Academy	04/01/2019	\$100,000.00	You	

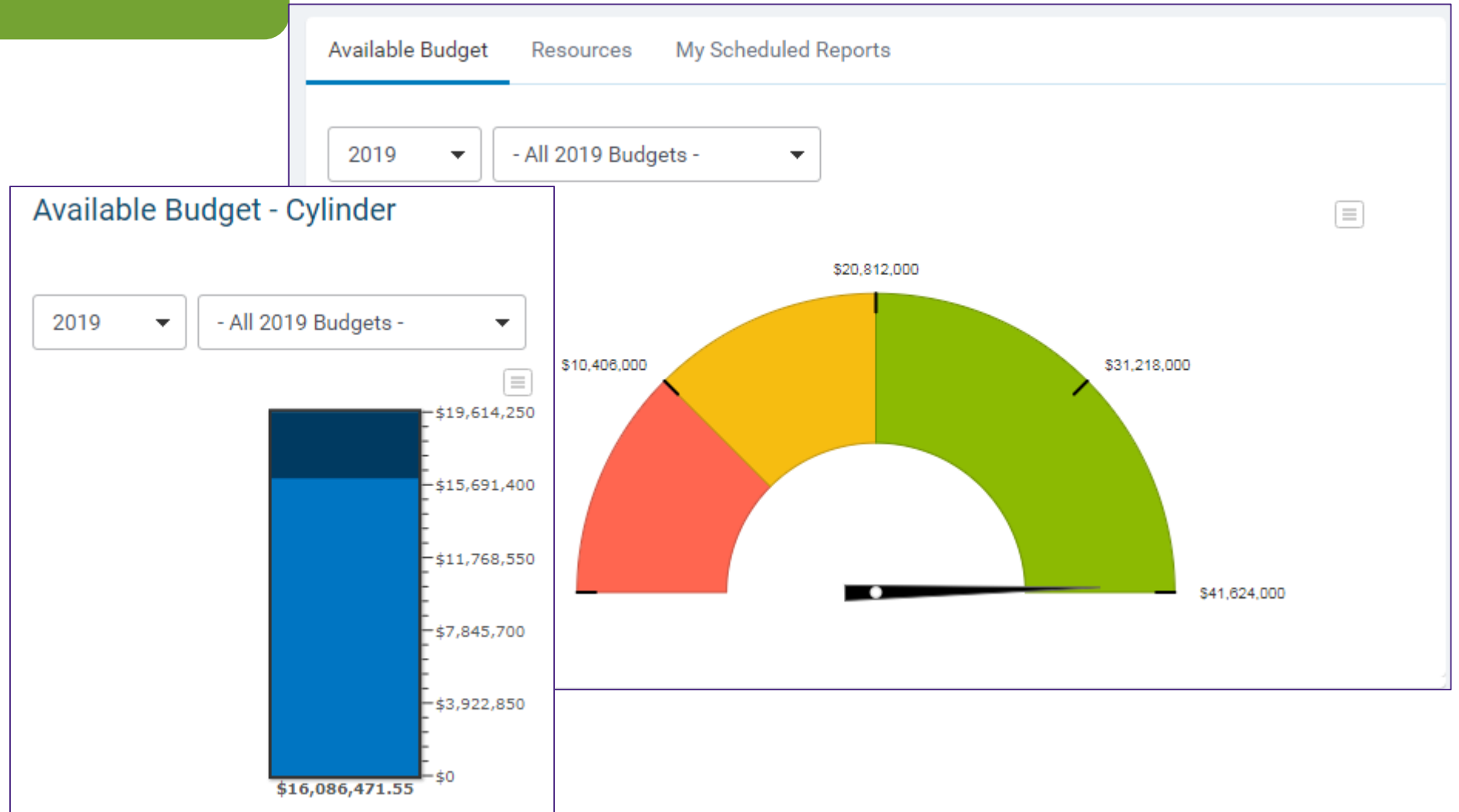
- Marked as required
- Requests owned by you

My Overdue Impact Reports Outstanding Impact Report Completed Impact Report			
List of requests owned by you with overdue impact reports that are required.			
Organization / Grant Amount / Project Title	Impact Report	Due Date	To be completed by
OPERATION HOMEFRONT INC \$115,000.00 (Food Assistance and Guard/Reserve Support)	Hunger Relief Final Report	10/31/2012	Organization
Veterans To Farmers \$750,000.00 (Veterans Green Jobs)	Jobworkforce (WF-EC) Annual Report	02/16/2013	Organization
The Salvation Army \$1,000,000.00 (Feed the Need)	Hunger Relief Final Report	07/30/2013	Organization
THE WORKPLACE INC \$250,000.00 (Platform to Employment)	Jobworkforce (WF-EC) Final Report	09/30/2013	Organization
American GI Forum National Veterans Outreach Program, Inc \$750,000.00 (Texas Veterans Employment and Transition Program (Tx-VET))	Interim Impact Report	12/14/2013	Organization
American GI Forum National Veterans Outreach Program, Inc \$750,000.00 (Texas Veterans Employment and Transition Program (Tx-VET))	Jobworkforce (WF-EC) Final Report	12/31/2013	Organization

Productivity

Available Budget (gauge, cylinder)

- Filter by year, budget lines
- Uses budget security



Productivity

My Available Budget

- Uses budget security

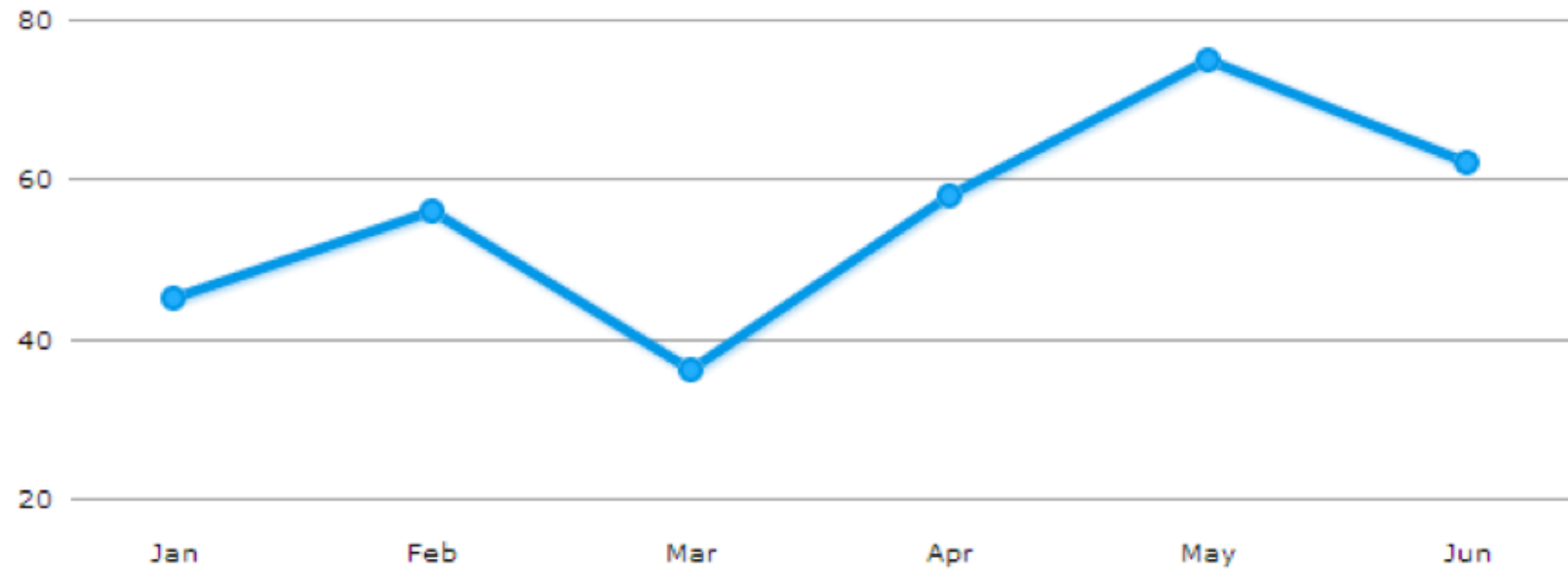
My Available Budget		Hide ▾
2019 Budget	Balance	
Approved Overages	\$131,000.00	
—Equal Justice Works	\$61,000.00	
—Memphis Bar Association	\$0.00	
—Race Judicata	\$5,000.00	
—University of Memphis CAESAR	\$0.00	
Equal Access to Justice	\$65,000.00	
Total IP Giving	\$15,888,471.55	
—IP Company	\$13,052,350.00	
——Capital Campaigns 761541	\$300,000.00	
———Brooks Museum of Art	\$50,000.00	
———Children's Museum of Memphis	\$50,000.00	
———Memphis Botanic Garden	\$200,000.00	
———Disaster Relief 761543	\$1,400,000.00	
———American Red Cross	\$0.00	
———Disaster Relief - Held for In-Kind	\$185,000.00	

Data

Importance of visualization

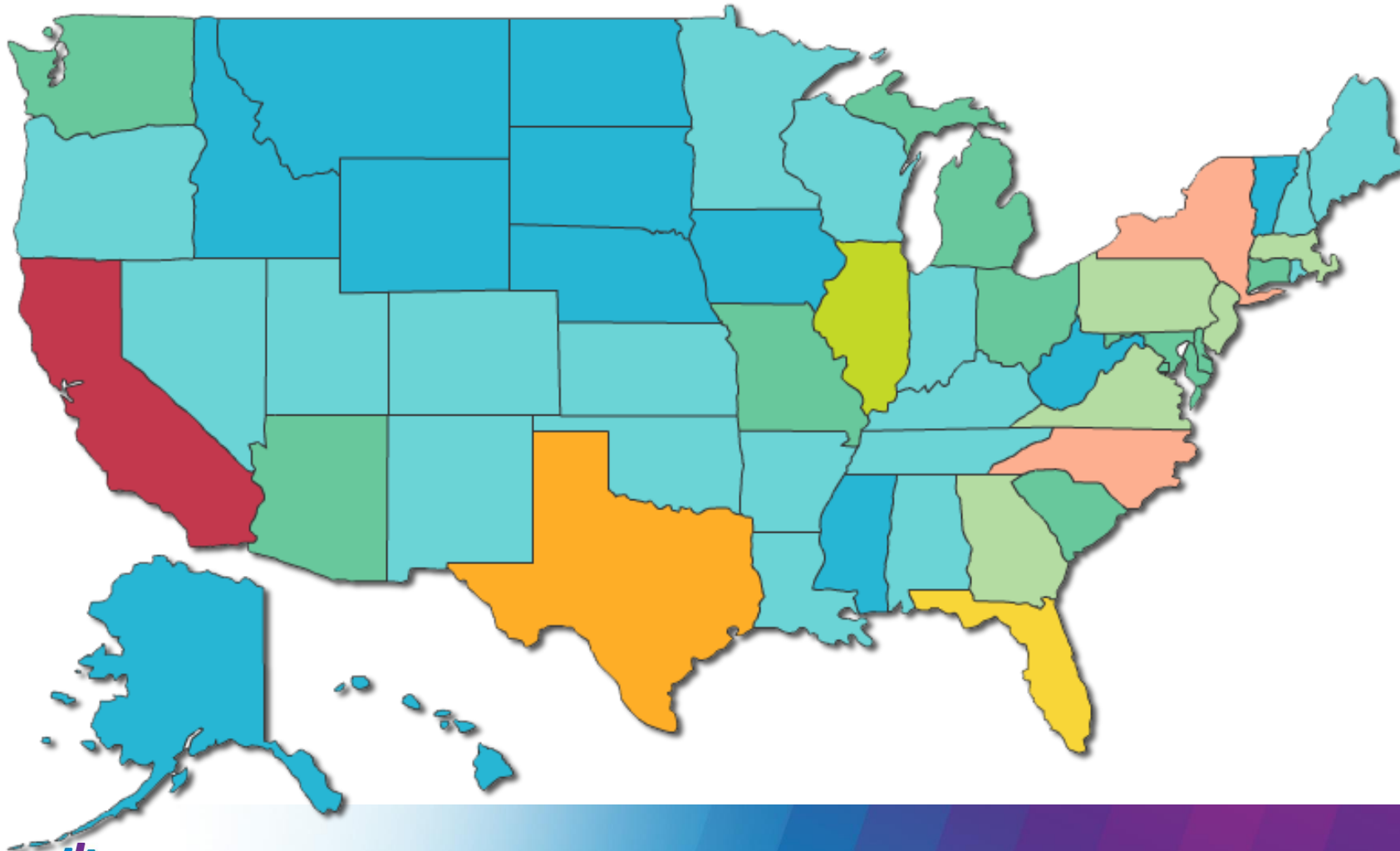
More information than a table in a smaller space:

Month	Jan	Feb	Mar	Apr	May	Jun
Sales	45	56	36	58	75	62



Data

Map – United States (full)





Data

Map – United States (regions)

Northwest



Northeast



Central



Southwest



Southeast



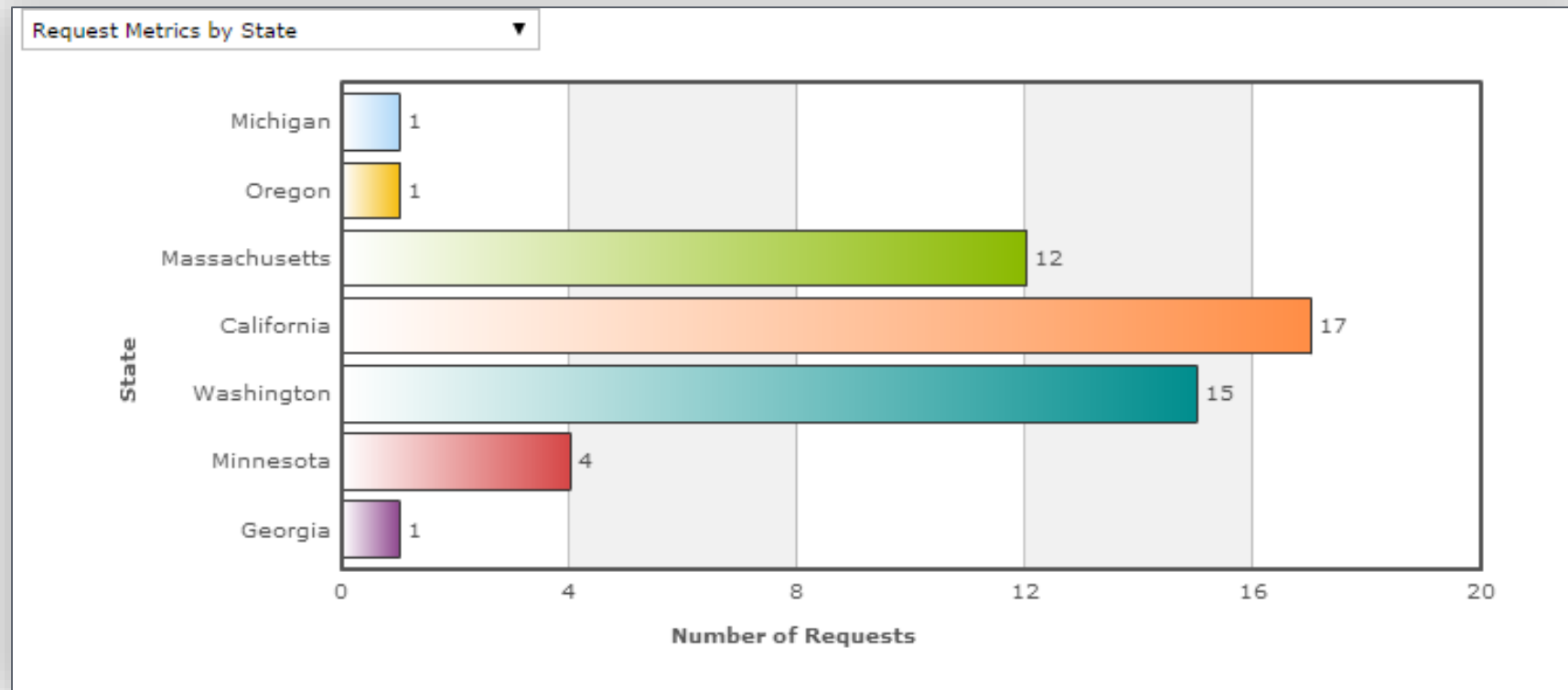
Data

Map – Global



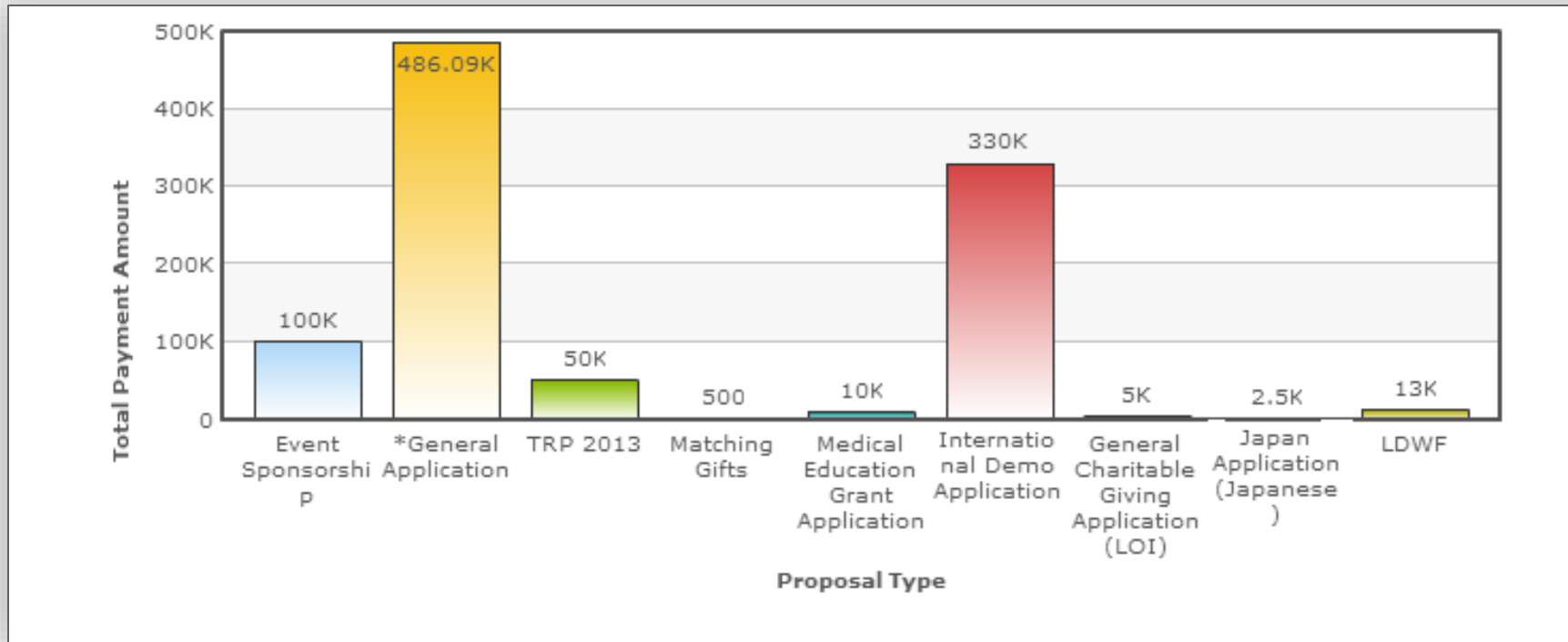
Data

Chart – 2D - Bar



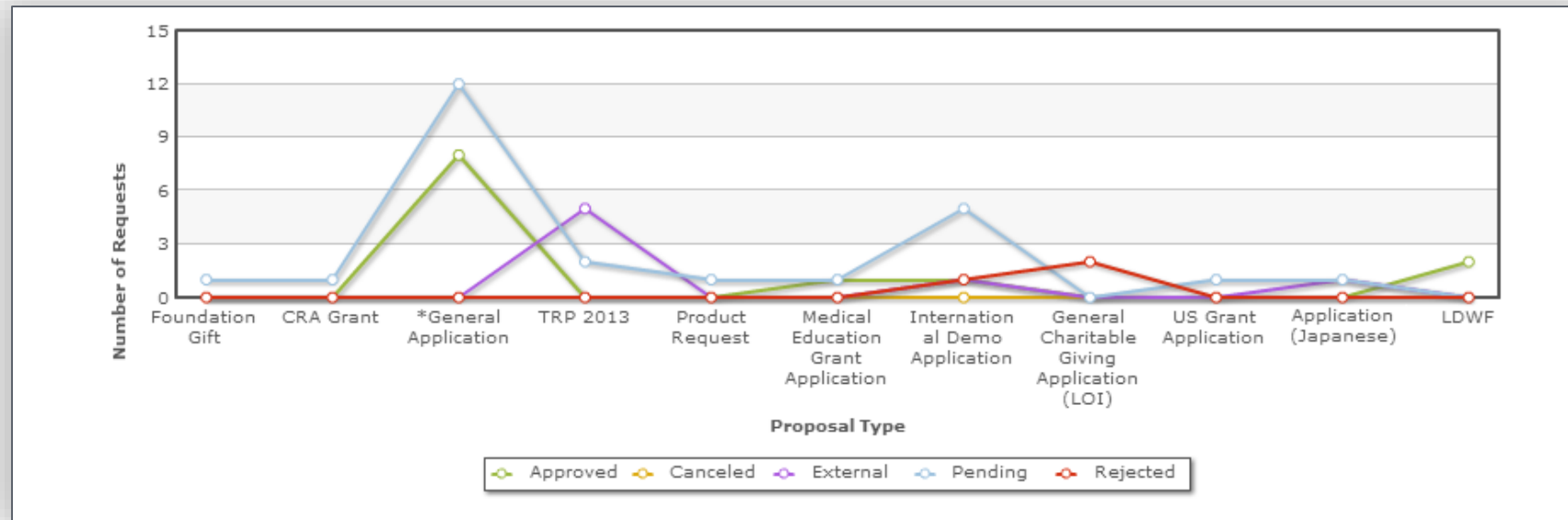
Data

Chart – 2D - Column



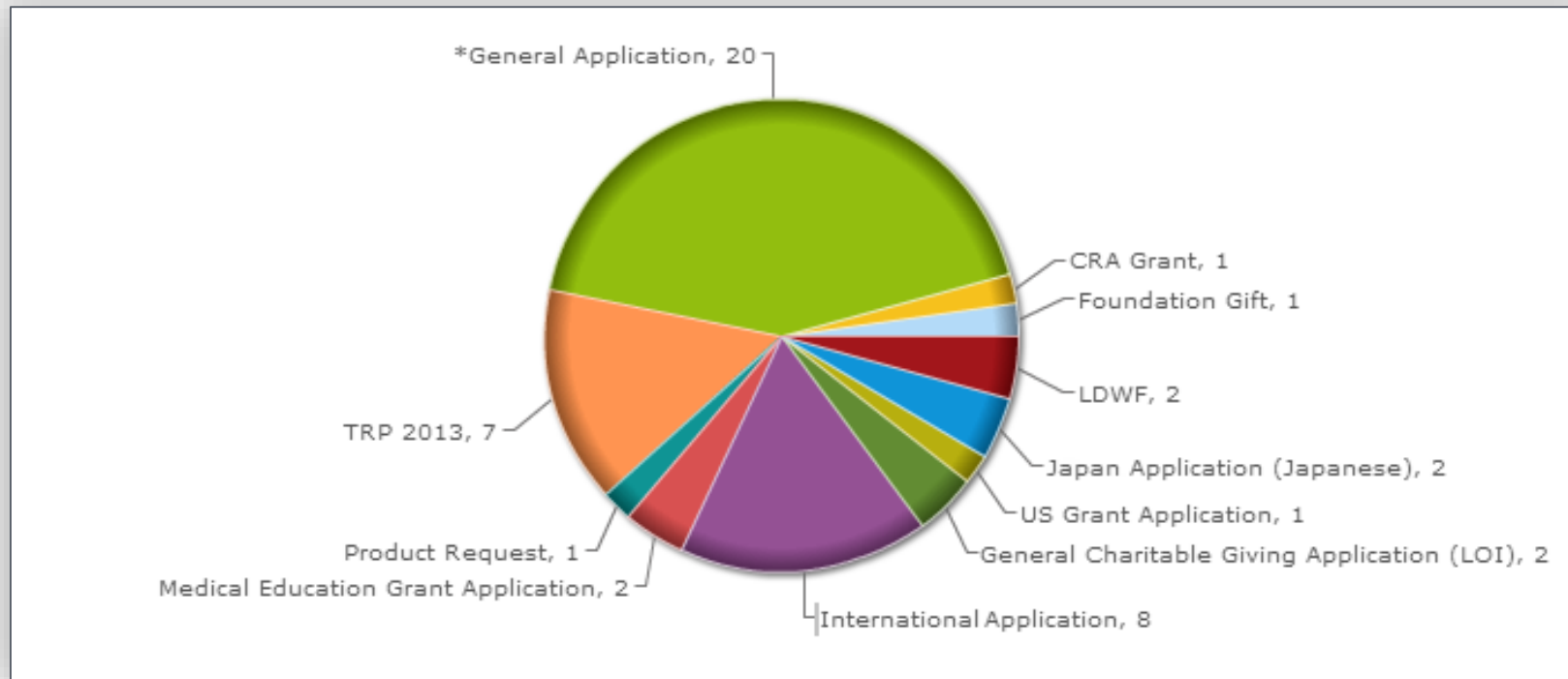
Data

Chart – 2D - Line



Data

Chart – 2D - Pie



Data

Chart – 3D - Column

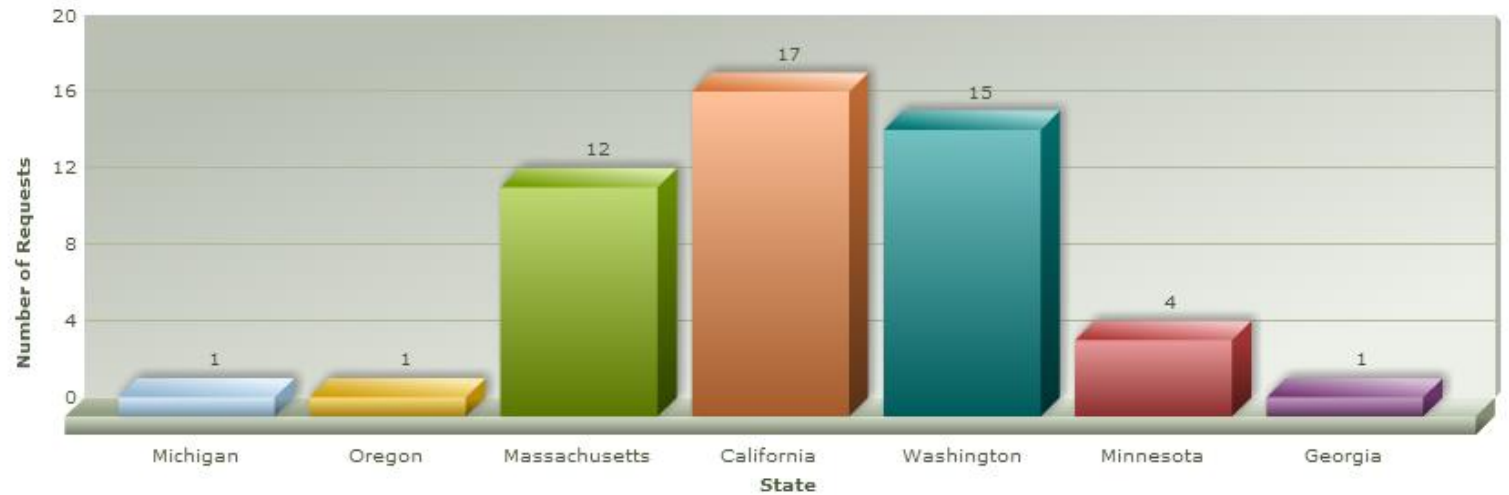
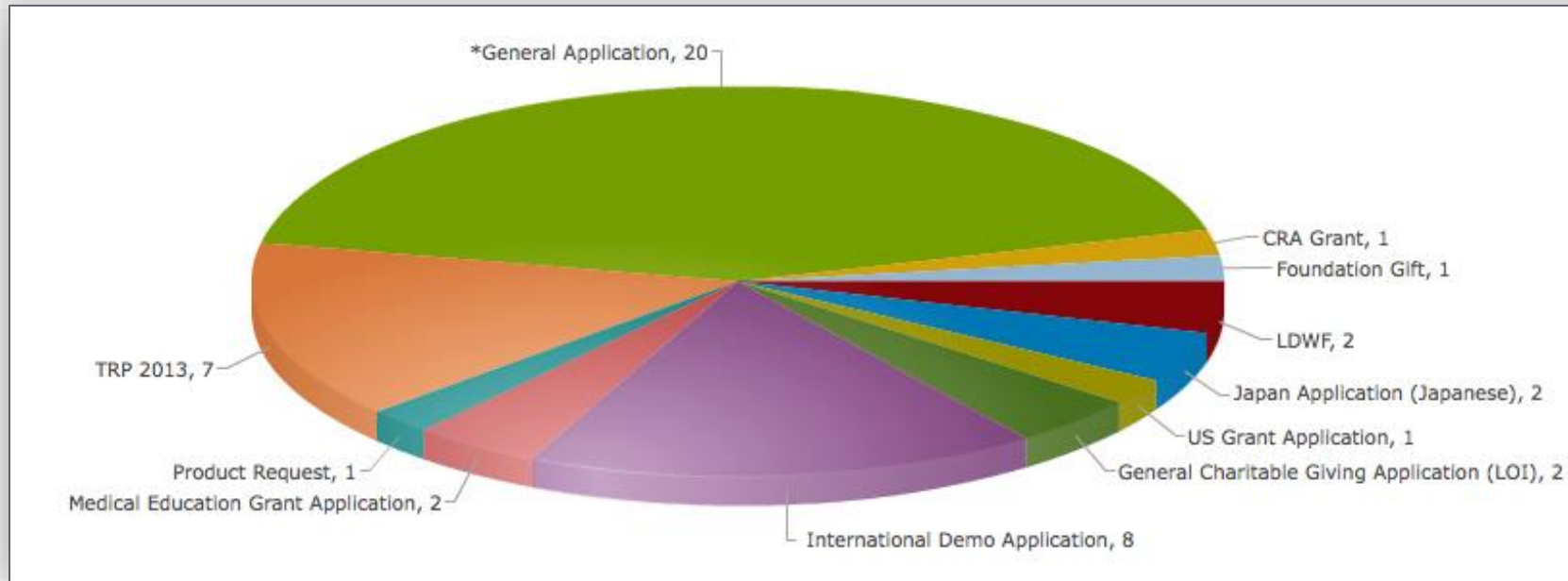


Chart – 3D – Column Stacked



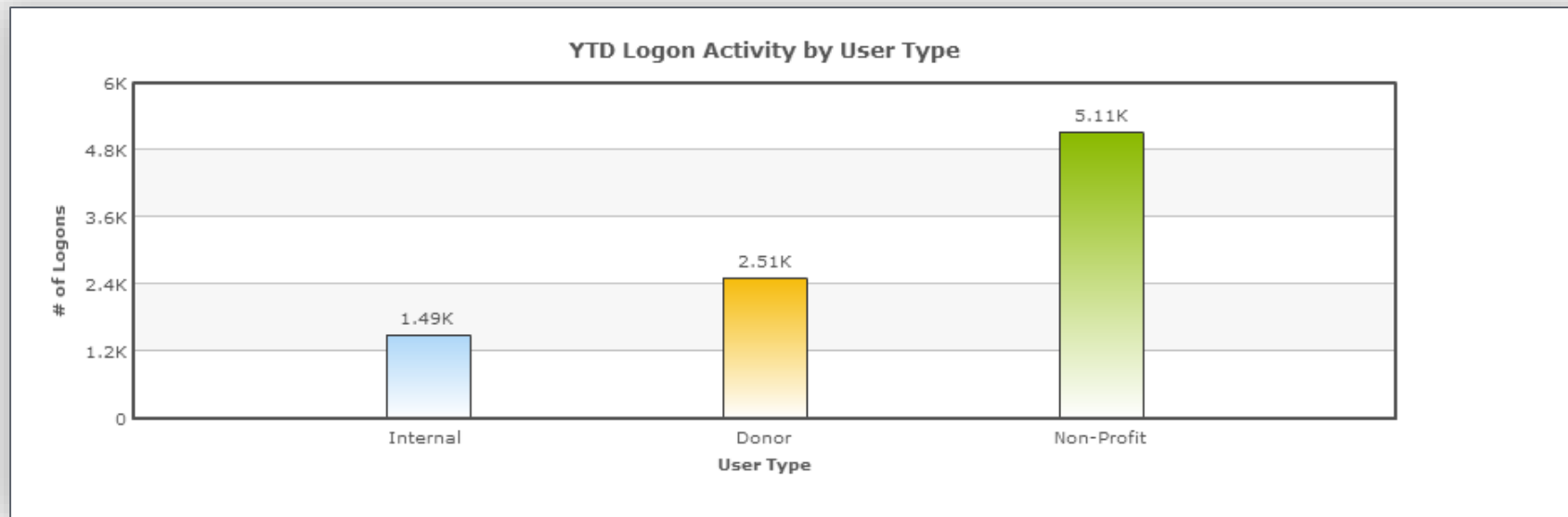
Data

Chart – 3D – Pie



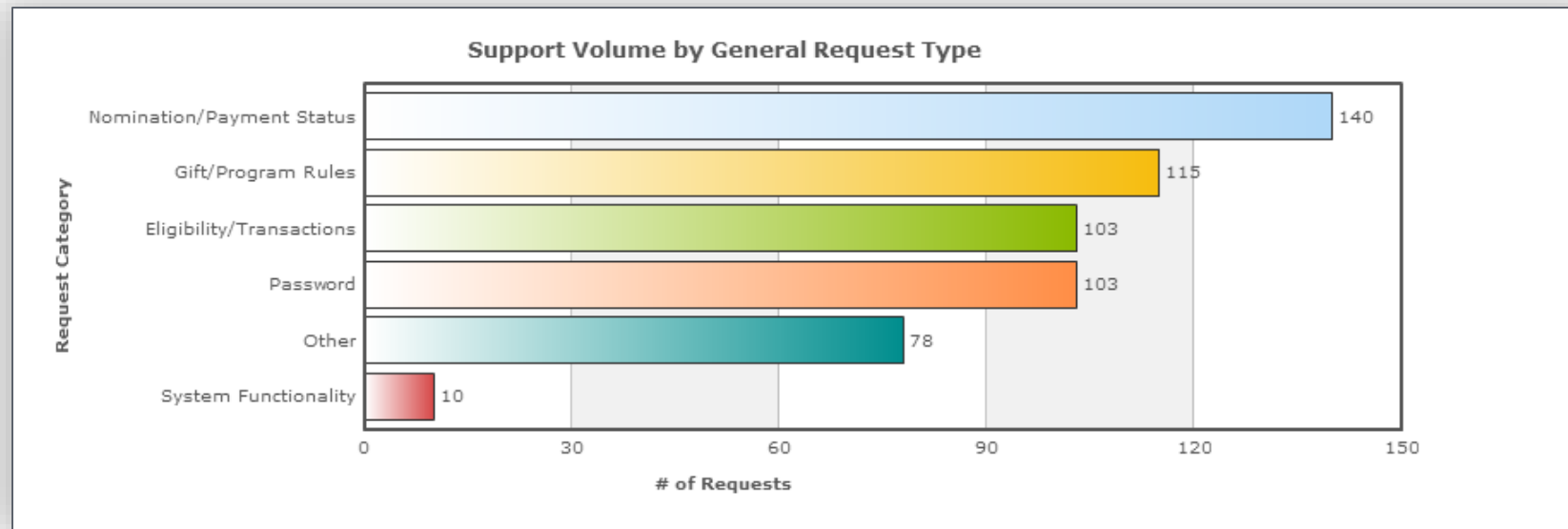
Data

CyberGrants YTD Logon Activity



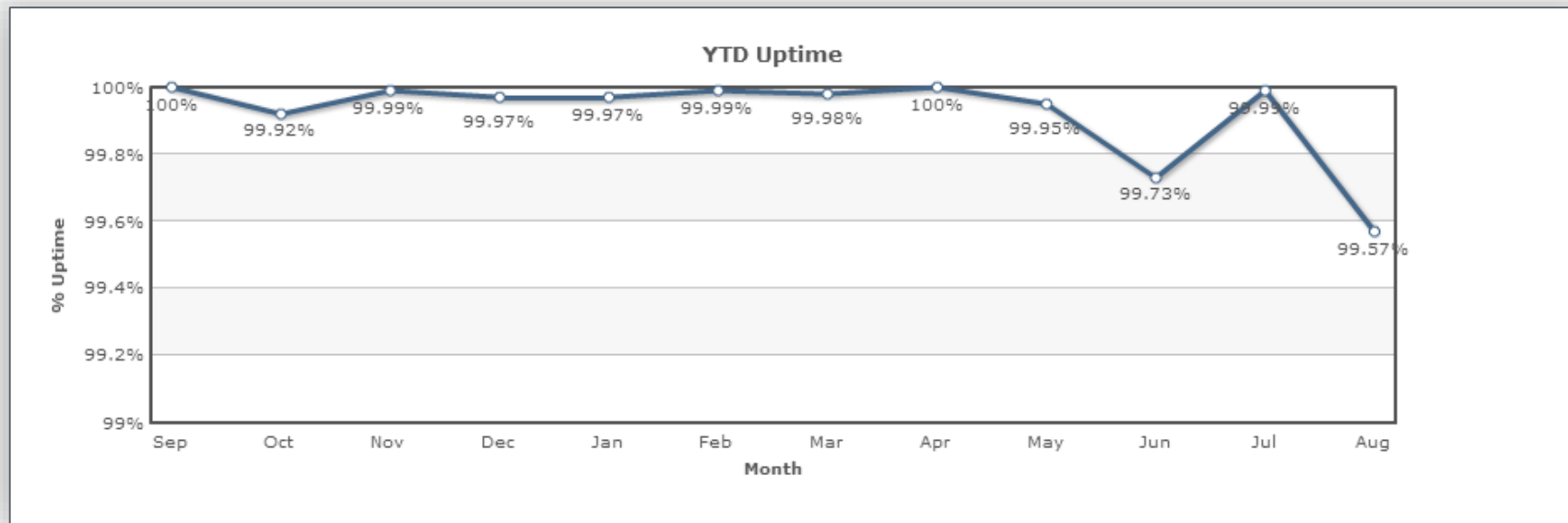
Data

CyberGrants YTD Support Volume



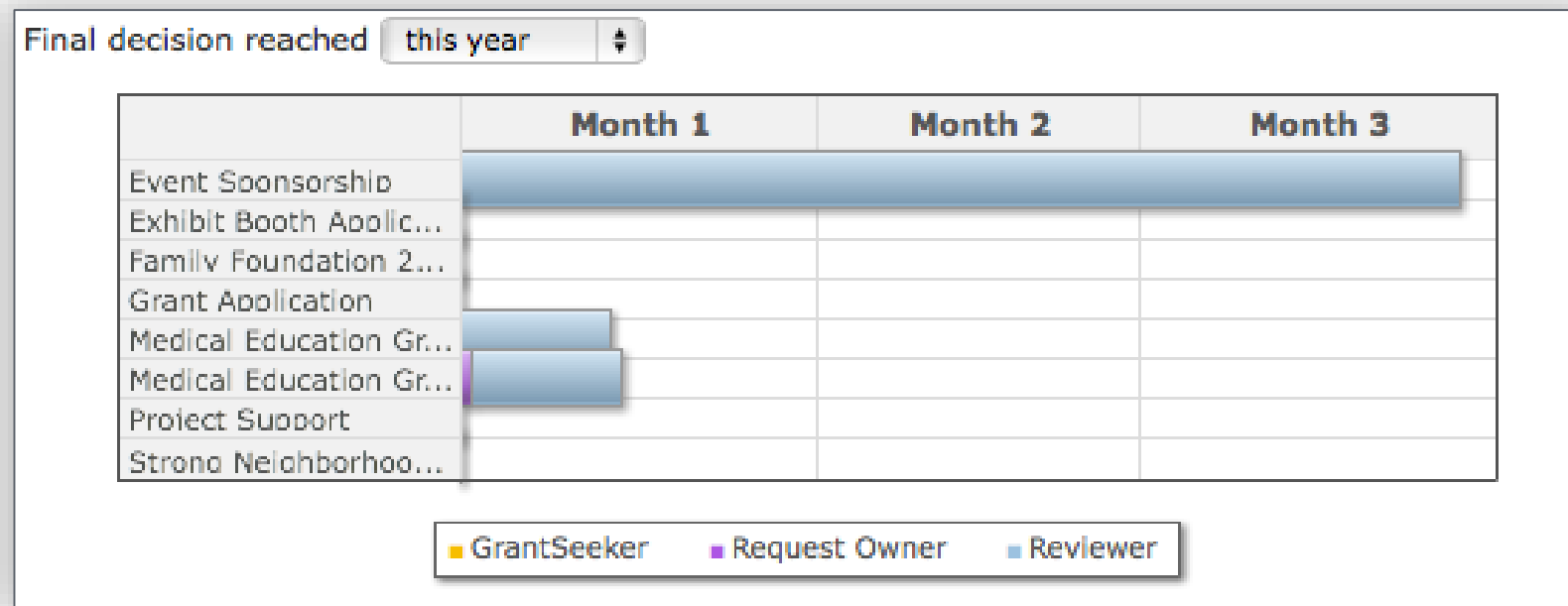
Data

CyberGrants YTD Uptime



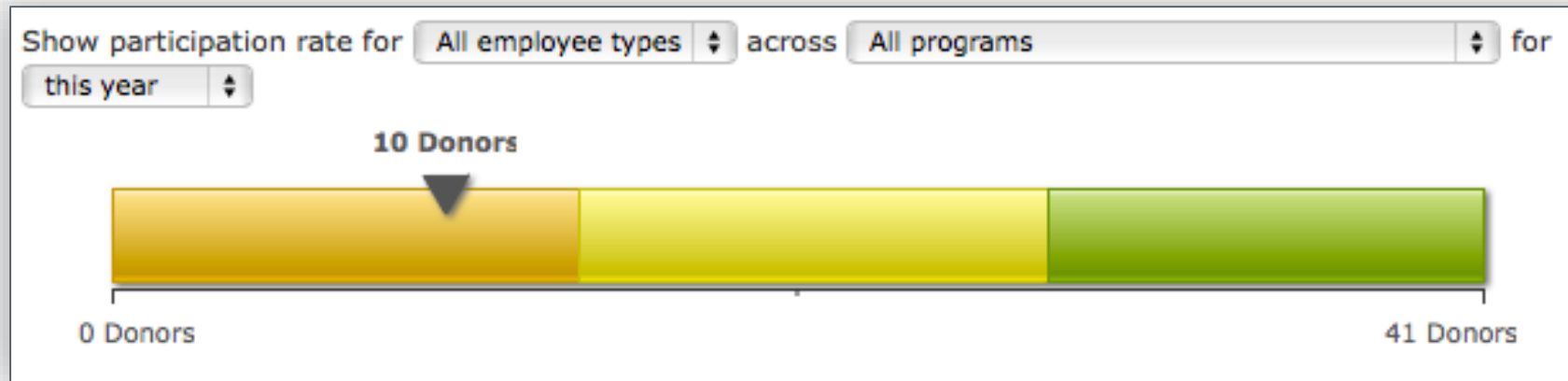
Data

Cycle Times (grants, employee giving)



Data

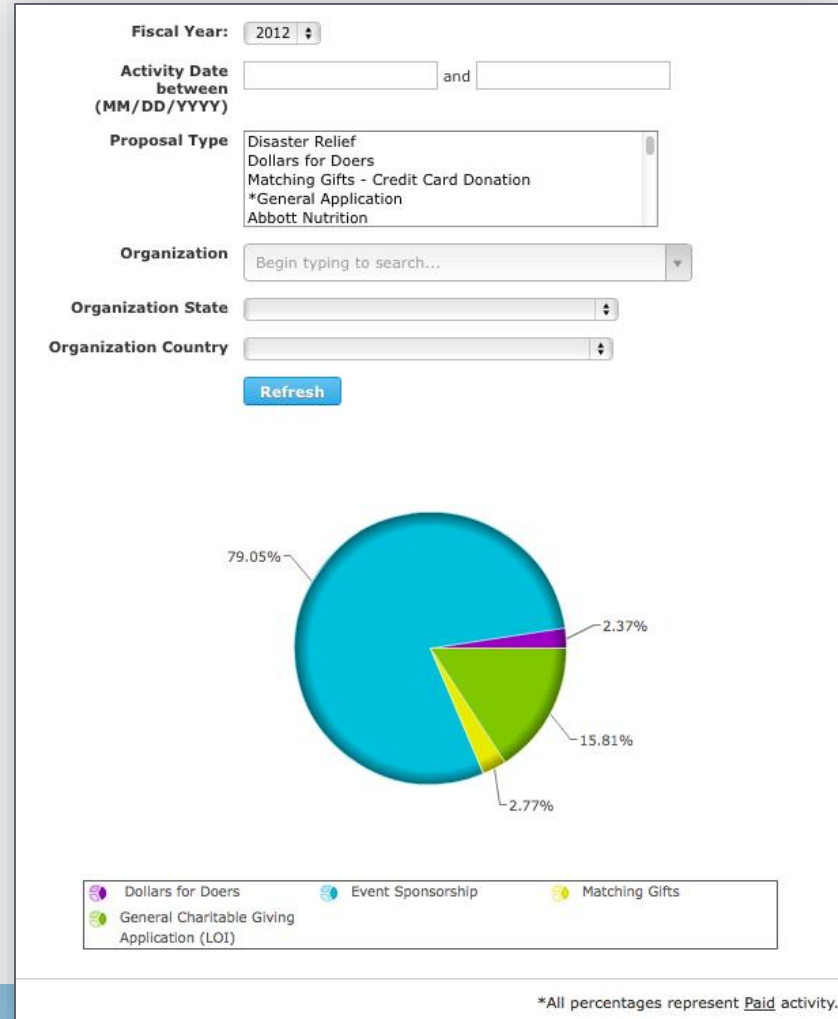
Employee Giving Participation Rate



Data

% Paid by Program Name

- Allows pre-set filters
- Display filters or hide



Data

Program Totals

Amount Paid	\$286,180
Hours Submitted	1,000
Employee Contribution	\$3,932
Amount Pledged	\$0

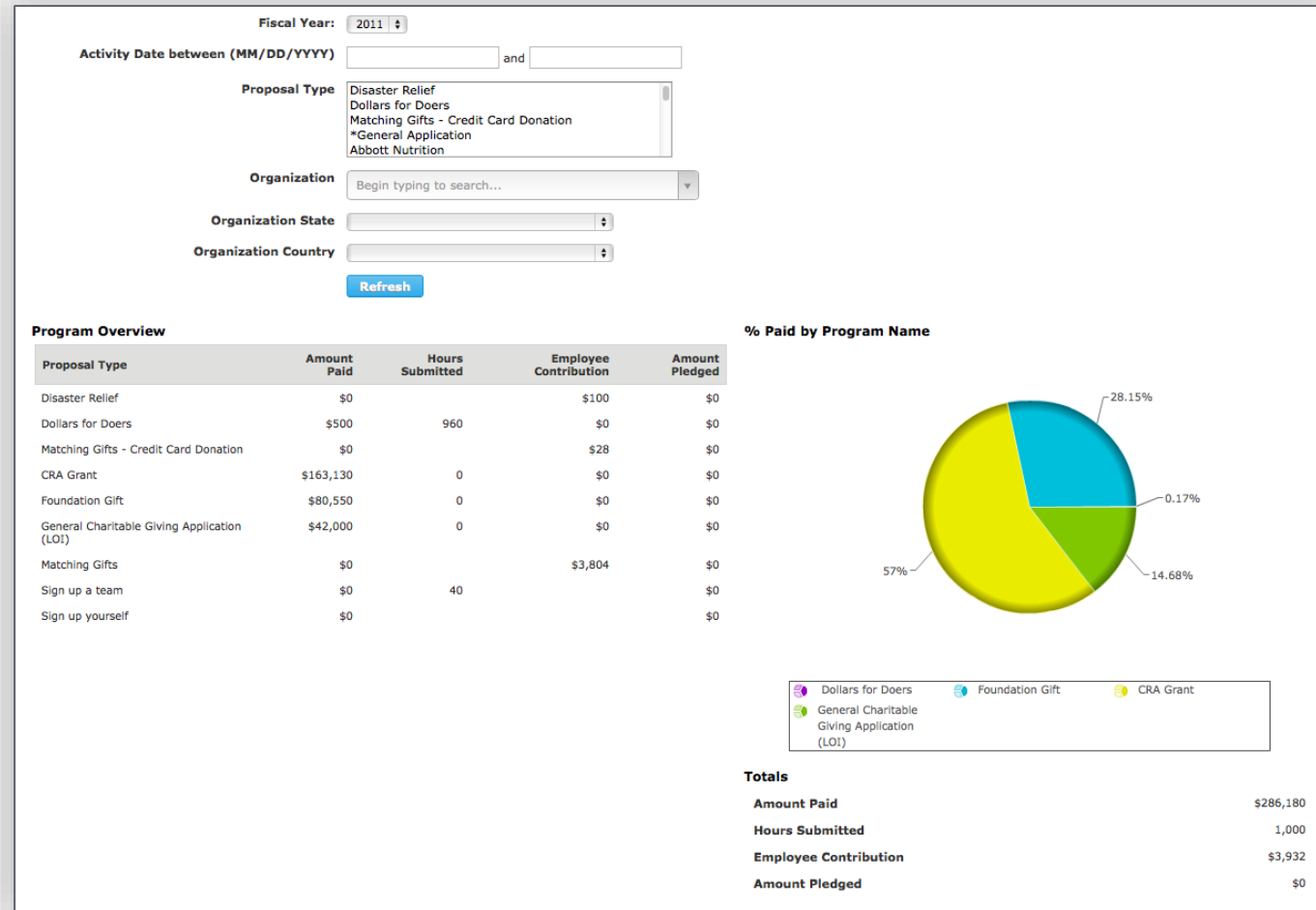
Data

Program Overview

Proposal Type	Amount Paid	Hours Submitted	Employee Contribution	Amount Pledged
Disaster Relief	\$0		\$100	\$0
Dollars for Doers	\$500	960	\$0	\$0
Matching Gifts - Credit Card Donation	\$0		\$28	\$0
CRA Grant	\$163,130	0	\$0	\$0
Foundation Gift	\$80,550	0	\$0	\$0
General Charitable Giving Application (LOI)	\$42,000	0	\$0	\$0
Matching Gifts	\$0		\$3,804	\$0
Sign up a team	\$0	40		\$0
Sign up yourself	\$0			\$0
<u>Amount Paid</u> Sum of payment amount (cash) + Sum of match amount (gifts) <u>Hours Submitted</u> Sum of non-rejected hours (Includes unsubmitted journaling hours) <u>Employee Contribution</u> Sum of non-rejected gift amount (Includes credit card, payroll, cash) <u>Amount Pledged</u> Sum of one time deductions + Sum of recurring deductions x pay periods				

Data

At a Glance Giving



Data

Budget Cash Flow



Reporting

Report Library

Ad Hoc Reports: Data Extract
+ Data Extract Reports
Administration
+ Nonprofit Application Statistics
+ User Information
+ WatchList Scanning
Budget
+ Budget
+ Budget Cash Flow By
+ Budget Listing
+ Grant Payments By
+ Multi-Year Grant Reconciliation By
Configuration Reports
+ Approval Configuration
+ Custom Field
+ User Access
Custom Reports
+ My Custom Reports
Employee Giving
+ Employee Cash Giving Activity Summary By
+ Employee Giving Reports
Employee Giving Payout Processing

Reporting

Ad Hoc Reports

Ad Hoc Reports: Data Extract

☒ Data Extract Reports

- ☐ Cash Grants
- ☐ Donor Report
- ☐ Donor Report
- ☐ Donor email address
- ☐ Donor email address
- ☐ ED and Youth Organizations in System
- ☐ Military/Veterans Volunteer Events
- ☐ Nomination Test
- ☐ Rebuilding Together
- ☐ Request for Support Take II
- ☐ Request for Support Take II
- ☐ VSG and Cash Grants
- ☐ VSG and Cash Grants2
- ☐ VSG and Donor Information
- ☐ VSG Contribution Detail Report

Reporting

My Favorite Reports

My Favorite Reports

Hide ▾

Ad Hoc Reports: Data Extract

☐ Data Extract Reports

☐ Credit Card 2016

(Uncategorized)

☐ Approval Rules

☐ Org with Blanks

☐ Transparency Indirect payments

Reporting

My Tags

My Tags Hide ▾	
▲ Tag ▾	▲ Count ▾
bms roles	1
credit card	1
detail	1
historical	1
interium impact report	1
location	1
organization	1
test	1
test1	1

Reporting

My One Click Reports

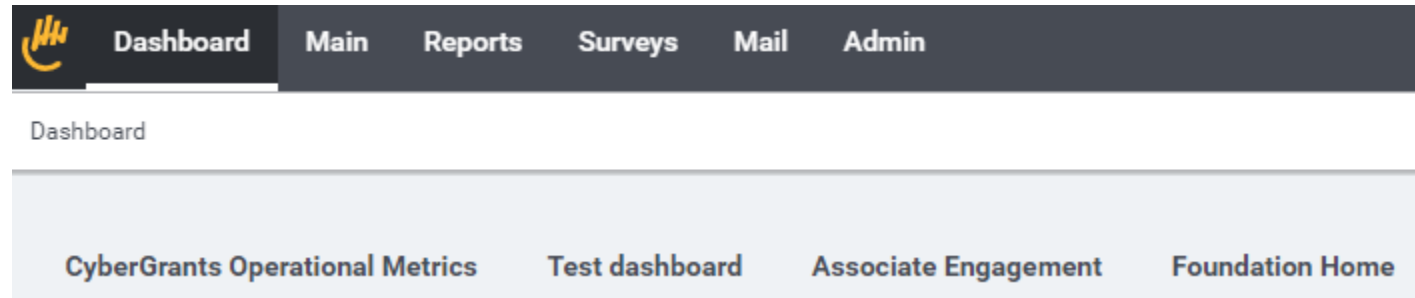
My One Click Reports

Hide ▾

- ☐ 2013 Submitted Monsanto Farmers Grown Rural Education
 - 2013 Submitted Monsanto Farmers Grown Rural Education
- ☐ AFGRE Rejected
 - AFGRE Rejected
- ☐ AFGRE Rejected 2012 (2)
 - AFGRE Rejected 2012 - 2
 - AFGRE Rejected 2012
- ☐ AFGRE Teacher 7
 - AFGRE Teacher 7
- ☐ AFGRE Teacher Master 2014
 - AFGRE47 2014
 - AFGRE33 2014

Content

Page Navigation



- Shows even if page not included in navigation bar

Content

Resources

 2012 Training Video

 Quick Guide - How to Approve a Grant

 Reports Data Dictionary

 Reports Tip Sheet

 Add a Resource

*** Type of Resource:**

Title:

Description:
(2000 character maximum)

*** Display as:**

Content

Static Content

1,908 HOURS

95 TRANSACTIONS

60% PARTICIPATION

\$5,950 TOTAL GIFT AMOUNT

REQUESTS AWAITING MY APPROVAL

REVIEWER GUIDELINES

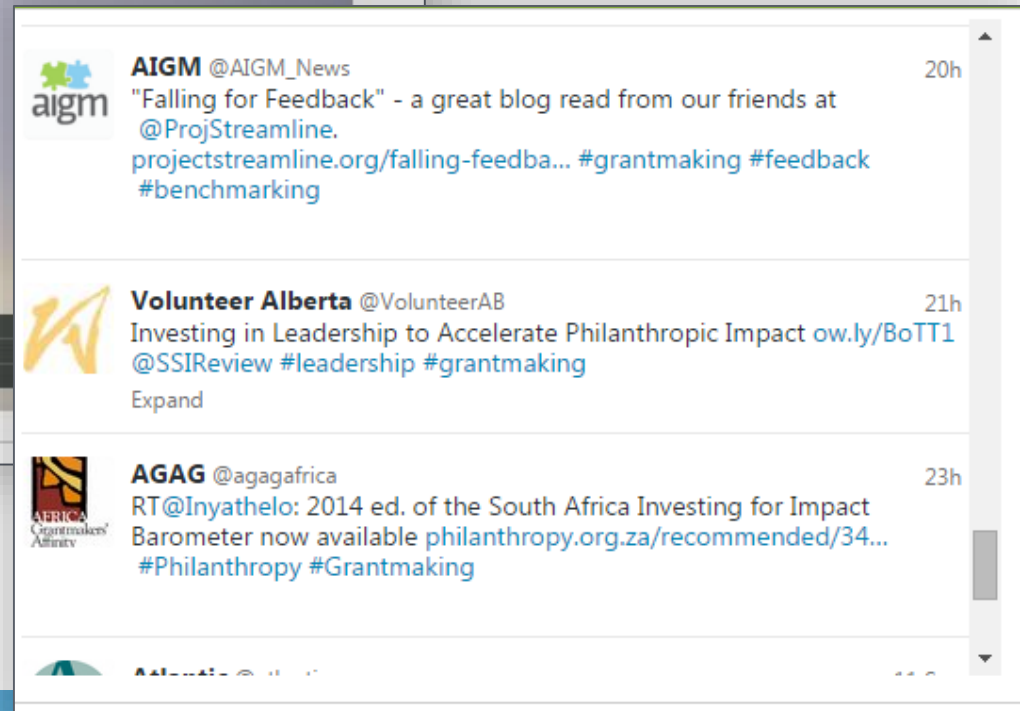
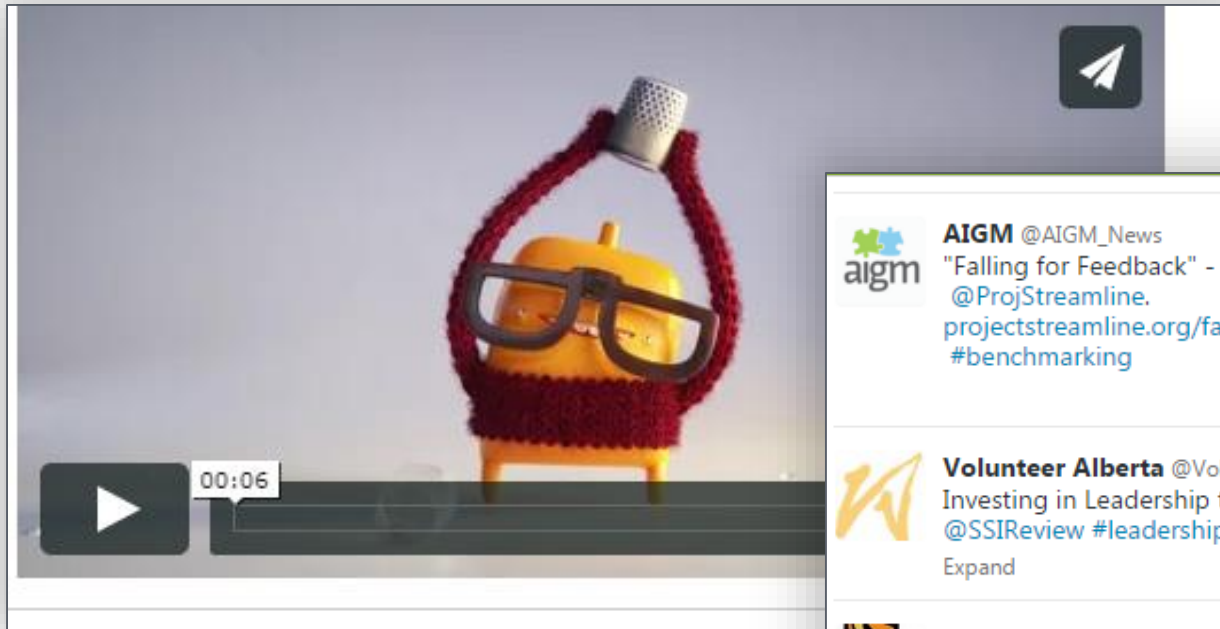
Welcome to the CyberGrants grantmaking portal. Requests that are currently assigned for your review are listed below in the Requests Pending My Approval section. If this section is empty, you have no assignments to address. To review a request, you should do the following:

- 1)** Click on the linked **Project Title** for the request you would like to review
- 2)** Within the request, click the '**Approval**' link within the Request Toolbox menu on the left side of the screen
- 3)** Address your review in the **Review** approval step

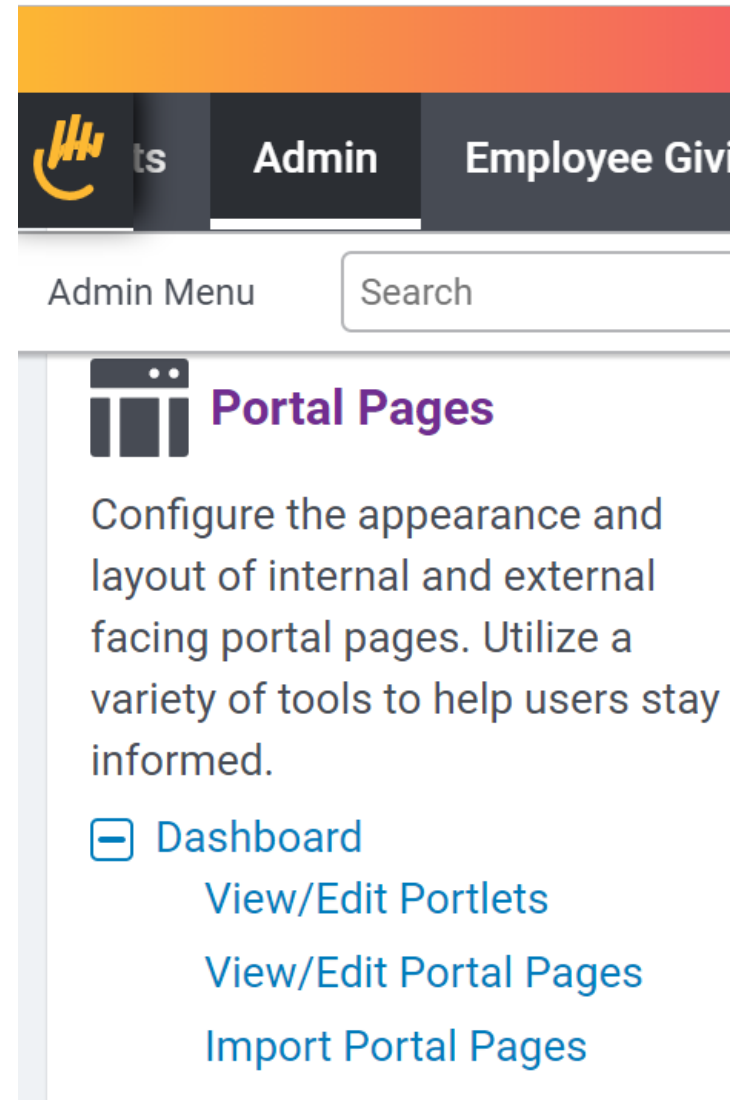
You may print out a PDF or Word document copy of the request by clicking the Print link in the menu on the left side of the screen.

Content

Embedded Content



Setting up the dashboard



Questions?



Next steps

Determine
your goals

Think of
your
audience

Get
creative
and build

Thank You!