Dashboards

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Dashboards Overview

- **Dashboards** work with user account restrictions.
    - For example, a graph of total revenue will show the CFO user the total corporate revenue, while a youth sports director viewing the same graph will see only the total of youth sports revenue.
    - Because of account restrictions, one set of dashboards will work for all users.
- **SGA Master Dashboards** are a set of dashboards provided by SGA and are not able to be changed by the client just like master reports. These will periodically be updated to include new graphs or reports. Currently the list includes the following.
    - Quick Overview. This is 3 graphs, one for Total Revenue, Total Expense and Total Net.
    - Membership Review
    - Program Review
    - High Level Overview
    - High Level Overview Historical
    - High Level Overview in Numbers (no graphs)
    - Monthly Revenue by Department
    - Productivity Ratios are reports that show key indicators. There are columns that compare for example "Salaries & Benefits" as a percentage of "Total Revenue."
    - Cash shows the change in Cash for the month and for each month of this year.
- **Preferred Dashboard.**
    - Each user can click on the button called "Set as Preferred." Each time they login to SGA their preferred dashboard will display. When dashboards are made live, the preferred is set to "Welcome."
- **Right click on a graph or report**. The normal drill downs from reporting are available and the report, or view, "behind a graph" will open in a new tab for you to continue drilling down.
- **A copy of the Master Dashboards** can be made so that the client can begin to create additional dashboards.
    - We recommend that you touch base with SGA staff to begin this set up process.
    - Permissions for a user or group can be applied to a Dashboard.
    - Remember the account restrictions already do user specific dashboards.
- **Buttons, Drop-downs, and Links**
    - **Path** is the location of this Dashboard
    - **Dashboard** drop-down is used to select a different dashboard. Click on the blue drop down if there are dashboards in more than one path location.

- **Set as Preferred**. The dashboard display at login.
- **Refresh**. Pressing refresh will recalculate the current dashboard. For example, you can change the period and then refresh the dashboard.
- **Period**. The user may change the period for the dashboard. The default in the dashboard setup is either the “prior period” or the “current period,” but the period can be changed with this dropdown.
- **Reports**. This will send the current screen to the Printer. NOTE: there is no auto formatting when sent to the printer. So, to have a Dashboard print with a nice format to a printer, the dashboard needs to be formatted to a view for a printer instead of a view for your screen.
- **Filter**. Like the “Select” tab in reporting, this link is used to narrow or expand the current dashboard. For example, if the CFO is looking at a dashboard which includes all branches, then by clicking filter and selecting only one branch then the current dashboard will display information for only that one branch.
- **Customize Dashboard**. This is where the set up is done for this dashboard. Just like in “Reporting,” Master Dashboards cannot be changed/and saved. See above for getting started on the process to create user specific dashboards.
- **Right click on a graph or report**. The normal drill downs for reporting are available and the report or view, “behind a graph,” will open in a new tab for you to continue drilling down.