The **Financial** Edge ™

Dashboard Guide

Contents

The Financial Edge Dashboard

Note: Visit our website at www.blackbaud.com for the latest documentation and information.

Dashboard organizes information in your database into a "snapshot" you can easily view with the click of a mouse. Quickly and effortlessly, *Dashboard* summarizes your organization's most valuable information.

A dashboard contains panels of summaries, lists, and graphs that efficiently compare and analyze information. You can create a variety of panels on the Dashboard page. From most panels, you can open a record in **The Financial Edge** and view or edit information in the actual record. For example, on the Project Tracking panel, you can click the project header to access the Activity tab on the corresponding project record.

Warning: The dashboards in **The Financial Edge** require certain web components installed with *Office XP* and higher to work. Office web components are automatically installed by *Microsoft Office XP* Setup. If you do not have *Office XP* or higher, you can download the web components from the Download Center at microsoft.com.

The program automatically saves panels on the dashboard, and they appear until you remove them or replace them with a new panel. You can edit a panel to view different information or refresh information at any time. You can print panels and, for some, view graphs or tables.

Dashboard is ideal for managers, business officers, executives, or other users who need to quickly access information about your organization. Because *Dashboard* does not require a complete working knowledge of **The Financial Edge**, it is ideal for occasional users. You can create dashboards with panels containing information from **General Ledger**, **Accounts Payable**, **Accounts Receivable**, **Cash Receipts**, **Fixed Assets**, **Student Billing** and information shared throughout **The Financial Edge**. You can also create weekly, monthly, and annual dashboards.

Even though you can create an unlimited number of dashboards, it is a good idea to delete those you do not need to keep the database running efficiently. Once you delete a dashboard, you cannot retrieve the information. We recommend you write down filter and output information in case you want to create the panel again in the future. You can also hide panels that you do not need presently but do not want to delete. For more information about hiding panels, see "Hiding Panels" on page 15.

The security settings you establish in *Administration* apply to *Dashboard*. For example, if you prohibit data entry clerks from viewing certain budgets, they cannot view budget information in *Dashboard.* If you deny a group access to all *Dashboard* options, **Dashboard** does not appear on the navigation bar for those users.

Accessing Dashboard

You access the Dashboard page by clicking **Dashboard** on the navigation bar.
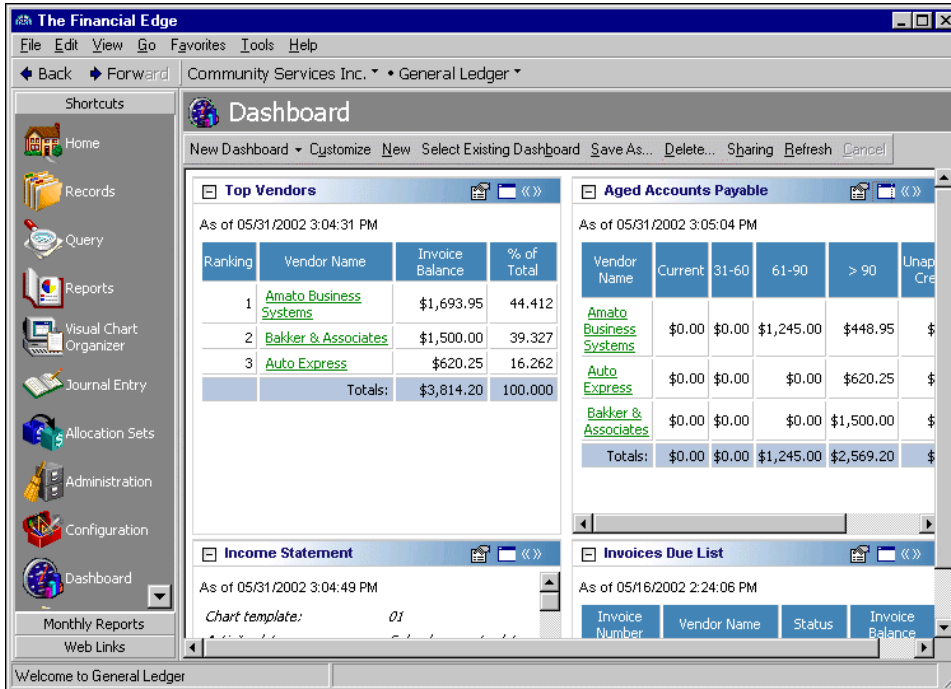
Note: To access *Dashboard*, you must have rights established in Set up system security in *Administration*.

On the Dashboard page, click the down arrow on the action bar and select a dashboard. You can either customize the selected dashboard or create a new one. To customize a dashboard, click **Customize** on the action bar; to create a new one, click **New**. For more information about creating or customizing a dashboard, see "Managing Panels" on page 12.

Working with Action Bars

Dashboards and panels have action bars with commands you can use to quickly and easily perform multiple processes, such as refreshing or deleting.

Dashboard Page Action Bar

You can perform several tasks from the action bar on the Dashboard page. With the buttons on the action bar, you can make changes to an entire dashboard.

[ ] Dashboard. Click **[ ] Dashboard** to select from dashboards you have created and saved. You can select only one dashboard at a time.

Customize. Click **Customize** to create new panels and edit existing panels on a selected dashboard.

New. Click **New** to create a new dashboard.

Select Existing Dashboard. Click **Select Existing Dashboard** to select a shared dashboard.

Save As. Click **Save As** to rename and save a dashboard as another name.

> **Note:** Instead of deleting, we recommend you hide panels on a dashboard by marking the checkbox in the **Selected Panels** frame on the Customize Dashboard screen. For more information about hiding panels, see "Hiding Panels" on page 15.

Delete. Click **Delete** to permanently remove a selected dashboard.

Cancel. Click **Cancel** to stop any action on a selected dashboard.

Refresh. Click **Refresh** to update the information in the panels appearing on a selected dashboard.

Sharing. Click **Sharing** to share saved dashboards with other users.

Dashboard Panel Action Bar

You can perform several tasks from the action bar on a dashboard panel. You can collapse, expand, copy, print, and change display characteristics of individual panels. Tooltips appear automatically when you move the cursor over the links on the action bar.
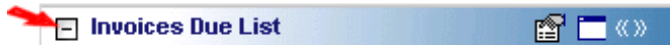
Click the **Collapse panel** button to collapse a panel so that only the action bar is visible.

Click the **Expand panel** button to expand a panel so that its information is visible.

Click the **Panel options** button to view the properties of the panel. You can copy, refresh, print, or send the panel as an email.
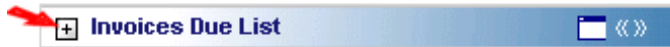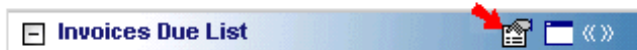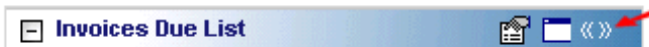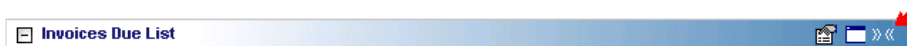
Click the **Zoom panel** button to display only that panel on the dashboard.

Click the **Show all panels** button to display all panels on the dashboard.

Click the **Stretch panel** button to maximize an individual panel to full screen width.

Click the **Restore panel** button to restore the panel to its original size.

Dashboard Panels

A panel is a block of information on a dashboard that contains summary, list, and graph information you select. A dashboard contains innumerable panels based on selections you make on the Customize Dashboard screen.

With ease and flexibility, you can process panels of information in *Dashboard*. You can create dashboards in each program of *The Financial Edge* with panels that can serve very different purposes for different types of users.

Accounts Payable Panels

Accounts Payable panels can track aging information based on your organization's aging periods, rank vendors based on balances, display invoices due, and open purchase orders.

Accounts Payable Query. The Accounts Payable Query displays a panel you can customize based on a query.

Aged Accounts Payable. The Aged Accounts Payable panel displays an aged payables view based on accounts payable aging periods.

Invoices Due List. The Invoices Due List panel displays invoices due as of a selected date with balances over a specified amount.

Pending Purchase Orders List. The Pending Purchase Orders List panel displays purchase orders with balances over a specified amount.

> **Note:** You can show vendor activity in a table, graph, or both.

Top Vendors. The Top Vendors panel displays a ranking of vendors based on vendor activity.

Accounts Receivable Panels

Accounts Receivable panels can track aging information based on your organization's aging periods, rank clients based on activity, and display analyses of revenue, collections, service, sales, and cash receipts.

Top Clients. The Top Clients panel displays a ranking of clients by outstanding balance, total charges, or average pay cycle. You can show client activity in a table, graph, or both.

Aged Accounts Receivables. The Aged Accounts Receivables panel displays an aged receivables view based on accounts receivable aging periods.

> **Note:** Revenue transactions include charges and invoice line items. Collections transactions include payments. You cannot compare collections with revenue in the Revenue and Collection Analysis panel.

Cash Receipts Analysis. The Cash Receipts Analysis panel displays cash receipts for selected categories.

Revenue and Collection Analysis. The Revenue and Collection Analysis panel displays trends in revenue and collections for selected periods and date ranges.

Service and Sales Analysis. The Service and Sales Analysis panel summarizes transaction information by transaction groupings.

Service and Sales Trend Analysis. The Service and Sales Trend Analysis panel summarizes transaction information for specific time periods by transaction groupings.

Accounts Receivable Query. The Accounts Receivable Query displays a panel you can customize based on a query.

Fixed Assets Panels

Fixed Assets panels can track projections of depreciation and book value, provide a list of asset acquisitions, and rank assets based on values you select.

Fixed Assets Query. The Fixed Assets Query displays a panel you can customize based on a query.

Top Assets. The Top Assets panel displays a ranking of assets based on acquisition value, accumulated depreciation, or book value.

Asset Projections. The Asset Projections panel displays projected depreciation or projected book value for assets.

Acquisition List. The Acquisition List panel displays assets acquired during a selected date range.

General Ledger Panels

General Ledger panels track general ledger activity within your organization. You can view summaries of income statement and balance sheet information, accounts that are over budget, percentages of expenses and revenues, and cash flows. If you have the optional module *Projects and Grants*, you can track revenue and expenses for selected projects and a project's percentage of an allocation pool.

Accounts Over Budget. The Accounts Over Budget panel displays a list of accounts over budget by a specified amount or percentage.

Balance Sheet. The Balance Sheet panel displays your organization's financial condition at a specific point in time.

Financial Ratios. The Financial Ratios panel displays an encapsulated view of conditions that help provide insight into your organization's financial welfare.

General Ledger Query. The General Ledger Query displays a panel you can customize based on a query.

Income Statement. The Income Statement panel displays a summary of your organization's financial position over a selected period of time.

Percentage of Expenses. The Percentage of Expenses panel displays expenses for a given period of time.

Percentage of Revenues. The Percentage of Revenues panel displays revenues for a given period of time.

Project Tracking. The Project Tracking panel displays a budget versus actual detail for a selected period of time.

Statement of Cash Flows. The Statement of Cash Flows panel displays the flow of cash and cash equivalents in and out of your organization.

Cash Receipts Panels

Cash Receipts provides a Cash Receipts Analysis panel which displays cash receipts for selected categories. This panel is shared with *Accounts Receivable.*

Cash Receipts Analysis. The Cash Receipts Analysis panel displays cash receipts for selected categories.

Cash Receipts Query. The Cash Receipts Query displays a panel you can customize based on a query.

Student Billing Panels

Student Billing panels can track aging information based on your organization's aging periods, rank payers based on activity, and display analyses of revenue, collections, service, sales, and cash receipts.

Top Payers. The Top Payers panel displays a ranking of payers by outstanding balance, total charges, or average pay cycle. You can show payer activity in a table, graph, or both.

Aged Accounts Receivables. The Aged Accounts Receivables panel displays an aged receivables view based on accounts receivable aging periods. When determining how to reduce balances, you can include ungenerated financial aid and advanced deposits. However, if you have advance deposits that are not fully applied, those deposits will not be included in the balance calculations.

> **Note:** Revenue transactions include charges and invoice line items. Collections transactions include payments. You cannot compare collections with revenue in the Revenue and Collection Analysis panel.

Cash Receipts Analysis. The Cash Receipts Analysis panel displays cash receipts for selected categories.

Revenue and Collection Analysis. The Revenue and Collection Analysis panel displays trends in revenue and collections for selected periods and date ranges.

Service and Sales Analysis. The Service and Sales Analysis panel summarizes transaction information by transaction groupings. You can analyze service and sales transactions by record, current grade, or class.

Service and Sales Trend Analysis. The Service and Sales Trend Analysis panel summarizes transaction information for specific time periods by transaction groupings. You can analyze service and sales trends by record, current grade, or class

Student Billing Query. The Student Billing Query displays a panel you can customize based on a query.

Shared Panels

Panels shared among the *Financial Edge* programs can provide a ranking of users based on their activity.

Top Users. The Top Users panel displays a ranking of users by number of records added. You can specify the record types.

Action Reminders. The Action Reminders panel displays a list of all actions not yet completed.

Managing Dashboards

You can create an unlimited number of dashboards with panels you create in *Dashboard*. Saving these dashboards makes viewing information about your organization quick and easy. Once you create and save a dashboard, you can open and customize it at any time.

Select a dashboard by clicking the down arrow on the action bar on the Dashboard page. For more information about panels, see "Dashboard Panels" on page 5. From the Dashboard page, you can create, save, refresh, and delete dashboards and panels. We encourage you to try the procedures in this guide with the sample database before you create your own to use with your data.
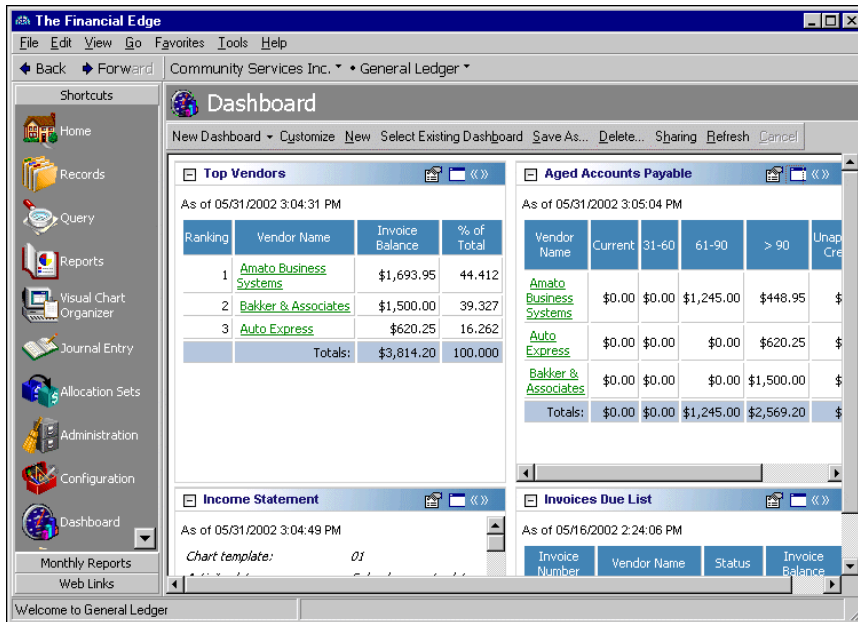
Adding Dashboards

To organize all the panels on a dashboard, we recommend you maintain certain panels on certain dashboards. For example, you may want to keep panels with weekly updated information on one dashboard and panels with quarterly information on another.
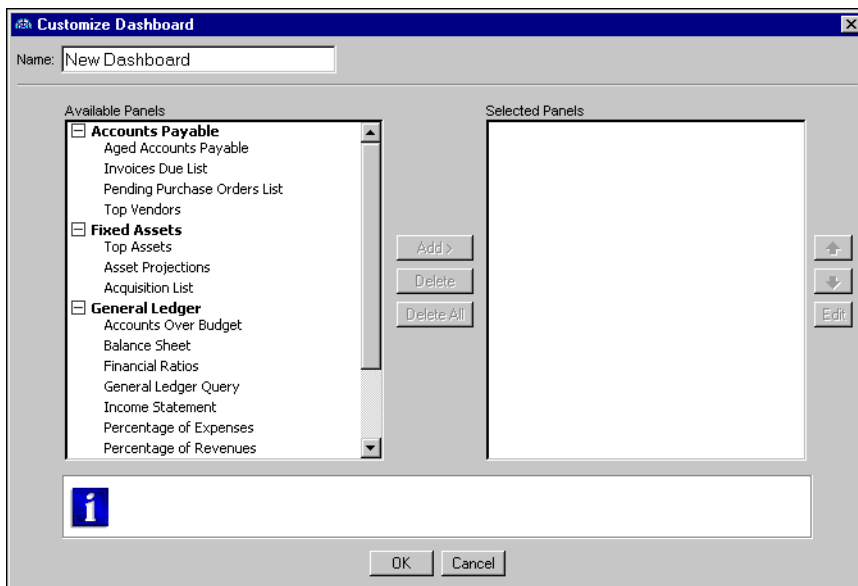
▶ **Adding a dashboard**

> **Tip:** When you create a new dashboard, the program automatically saves your selections. However, you may find times when you need to rename and save a dashboard with another name. You can create the new dashboard by clicking **Save as** on the action bar and save the new dashboard with a different name.
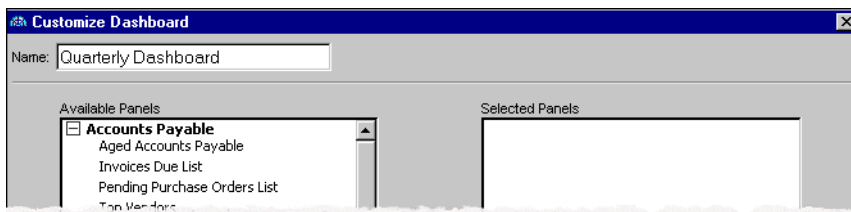
1. On the navigation bar, click **Dashboard**. The Dashboard page appears.

2. On the action bar, click **New**. The Customize Dashboard screen appears.

3. In the **Name** field, enter a name for the new dashboard.

Note: This procedure is merely an overview of adding a dashboard. For more information about selecting panels for a dashboard, see "Adding a dashboard panel" on page 13.

4. After you select panels for the new dashboard, click **OK**. The program saves the dashboard and you return to the Dashboard page. For more information about selecting panels for a dashboard, see "Adding Panels" on page 13.

Sharing Dashboards

You can share dashboards with users that have security rights to view dashboards.

▸ **Sharing dashboards**

Note: You cannot share dashboards with security groups that do not have rights to view dashboards. For more information about security rights, see the *Administration Guide*.

1. From a selected dashboard, click **Sharing**. The Share a Dashboard screen appears.
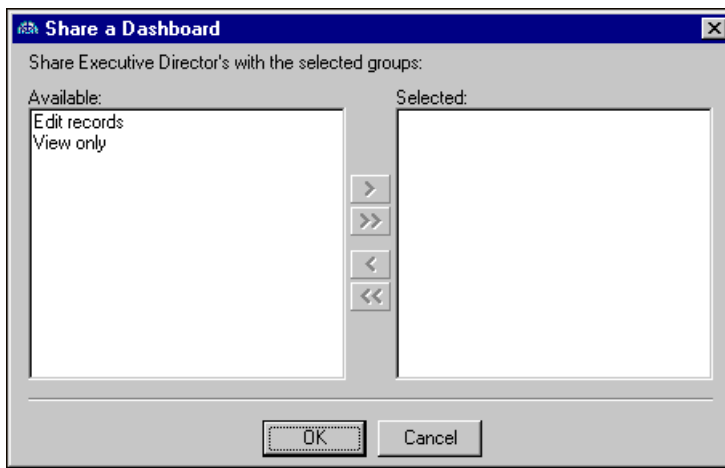
2. In the **Available** box, select the security user group(s) you want to share the dashboard with, and click the single right arrow to move the group(s) to the **Selected** box. To select all groups, click the double arrow.

3. Click **OK**. You return to the dashboard.

▸ **Accessing shared dashboards**

Users in the security group for a shared Dashboard page can select to view the dashboard on his or her Dashboard page.

1. To view a shared dashboard, click **Select Existing Dashboard** on the action bar. The Select a Dashboard screen appears.

2. Select the shared dashboard you want to view. If a shared dashboard does not appear on the screen, you do not have security rights. You must be in the security group for which the dashboard is shared.

    For information about security groups, see the *Administration Guide*.

3. Click **OK**. The shared dashboard appears on your Dashboard page.

Refreshing Dashboards

After you enter information into *The Financial Edge*, it is important to refresh the dashboard so any new information is included in the panels. You can quickly refresh every panel on a dashboard at the same time from the action bar.

▶ **Refreshing a dashboard**

Tip: When the dashboard is updating information, you can navigate to other pages in *The Financial Edge*. For example, you can go to the Reports page while the Dashboard page refreshes panels.

1. From a selected dashboard, click **Refresh** on the action bar. The program updates each panel on the dashboard.
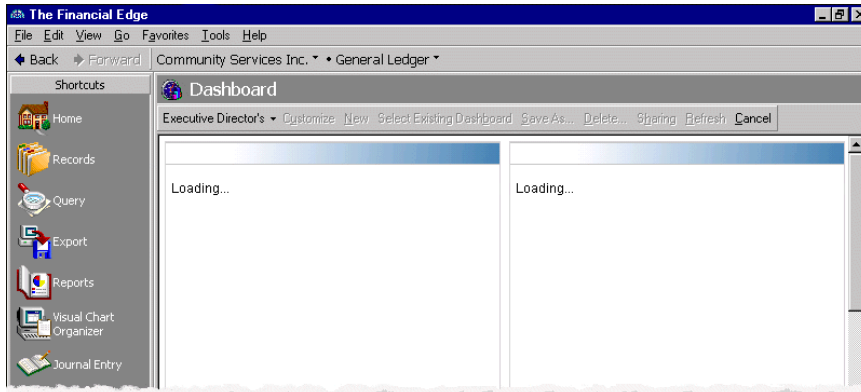
2. When the program finishes refreshing the information, the dashboard reappears with updated information in the panels.

3. To update an individual panel, click the **Panel options** button from a panel's action bar and select **Refresh**. For more information about action bars, see "Dashboard Panel Action Bar" on page 4.
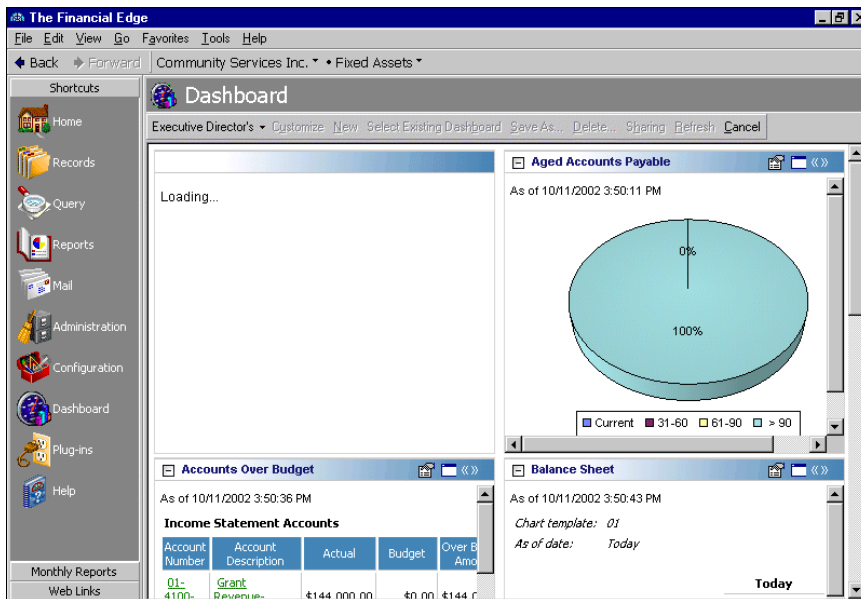
Editing Records from a Dashboard

From most panels, you can open a record in *The Financial Edge* and edit information in the record. For example, on the Project Tracking panel, you can click the project header to access the Activity tab on the corresponding project record.

▶ **Editing a record from a dashboard**

This procedure guides you through opening a vendor record from the Invoices Due List panel, which is an *Accounts Payable* panel contained in the sample database. However, you can use this same basic procedure to open various records from other panels.

Note: You can also view a record from a dashboard panel without editing it.

1. From the Dashboard page, access the Invoices Due List panel. In the **Vendor Name** column, click **Amato Business Systems**.

2. The Amato Business Systems record appears.

Warning: If you edit a record from a dashboard, you must refresh the panel to include the edits. For more information about refreshing, see "Refreshing Dashboards" on page 10.

3. You can edit the information on any of the tabs in the record. For more information about editing records in *The Financial Edge*, see the records guide for each program.

4. To save changes, click **Save and Close**. You return to the Dashboard page.

Managing Panels

You can add and edit panels in a dashboard at any time by selecting a dashboard from the Dashboard page. For more information about dashboards, see "Managing Dashboards" on page 8. We encourage you to try these procedures with the sample database before you create your own to use with your data.

Warning: Deleting a panel permanently removes it from the database. Be sure you have a backup of your database before you delete a panel from a dashboard. We highly recommend you hide panels you do not need instead of deleting them.

Once you understand the basics of each process, you can quickly and easily use any panel you select. The program automatically saves your selections on the Customize Dashboard screen, making future summarizing, listing, and graphing simple. Filter and output selections do not change unless you edit the panel or delete the panel from the **Selected Panels** box on the Customize Dashboard screen.

Adding Panels

Note: To print panel information, click the **Panel options** button on the panel's action bar and select **Print** from the submenu.

Although you can run multiple panels of the same type, you may find times when you need to edit an existing panel. To edit a panel, click **Customize** on the action bar and make your changes. When you return to the dashboard, the program saves your changes, and the edited panel displays the updated information.

▶ **Adding a dashboard panel**

Note: To access *Dashboard*, you must have rights established in Set up system security in *Administration*.

1. From the Executive Director's dashboard, click **Customize** on the action bar. The Customize Dashboard screen appears.
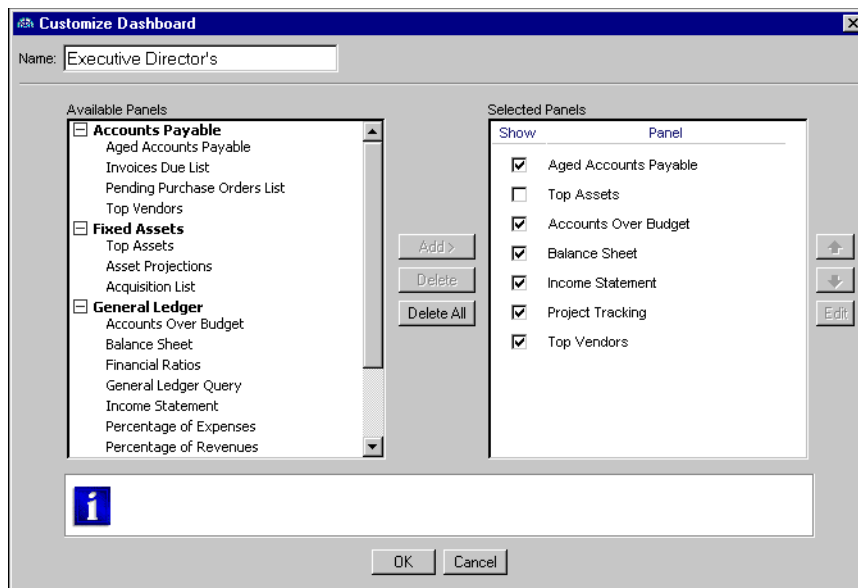
Note: If you unmark the checkbox in the **Show** column, the panel does not appear on the dashboard.

2. In the **Available Panels** box, select **Invoices Due List** and click **Add**. **Invoices Due List** appears in the **Selected Panels** box.
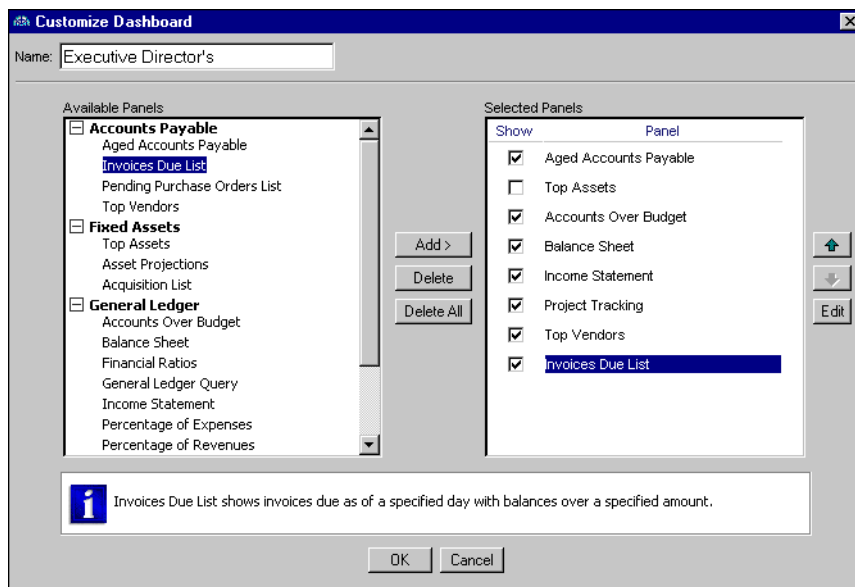
3. To specify information the panel displays, select **Invoices Due List** and click **Edit**. The Invoices Due List screen appears.

Note: You can leave the default title in the **Description** field, or you can enter your own. Customizing a panel's description makes recognizing panels easier, especially if you have multiple panels of the same type.

4. In the **Description** field, leave the default title "Invoices Due List" as the title.

5. In the **Invoice due date** field, select "Today".

6. In the **Include these statuses** field, click the binoculars and select **Approved**, **Pending**, and **Partially Paid**.

7. To include only invoices that have a balance due, mark **Only include invoices with a balance** and select "greater than or equal to". Enter "25.00" in the next field.

8. To include invoices only for a specific bank account, mark **Only include invoices for** bank and select "Operating". You define bank accounts in *Banks* in **Accounts Payable**. For more information about bank accounts, see the *Banks Guide*.

9. In the **Format** frame, click the binoculars and select **Invoice Number**, **Vendor Name**, **Status**, and **Invoice Balance** as columns to appear on the panel.

10. In the **Sort by** fields, select "Invoice Number" and "Ascending" to list the invoices numerically.
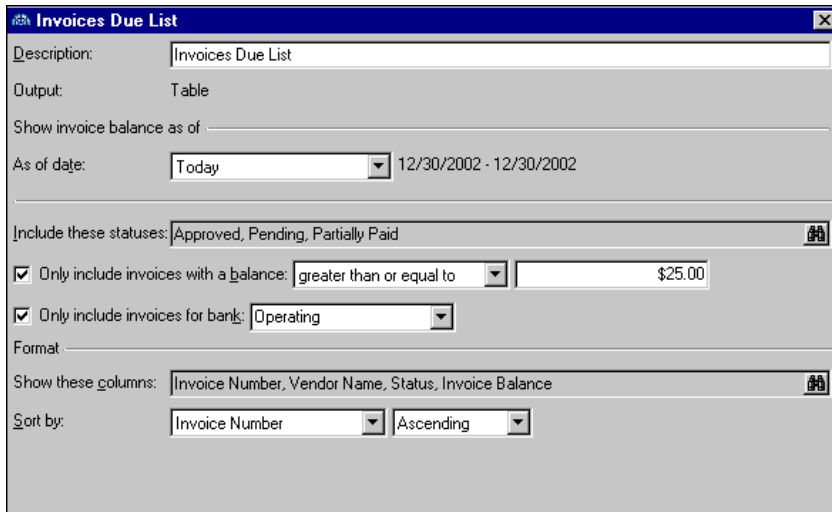
11. Click **OK**. You return to the Customize Dashboard screen.

12. To update the information, click **OK**. The new information appears in the new panel on the dashboard.
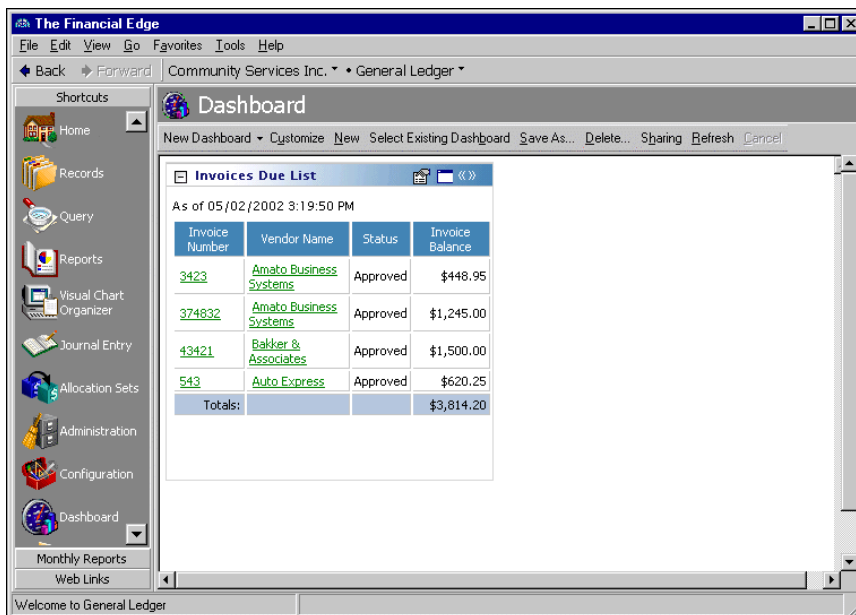
Hiding Panels

Instead of deleting a panel from a dashboard, you can use the Customize Dashboard screen to hide the panel. If you delete a panel, you must re-create the panel if you need it again. To make navigating in dashboards easier, we recommend you hide panels you do not want to use.

▶ **Hiding a panel**

> **Note:** You can organize panels in the **Selected Panels** box by using the arrow buttons to move the panels up and down.

1. From the Dashboard page, click **Customize** on the action bar. The Customize Dashboard screen appears.

2. A list of panels you created appears in the **Selected Panels** box. Unmark the checkbox in the **Show** column next to the panel you want to hide.
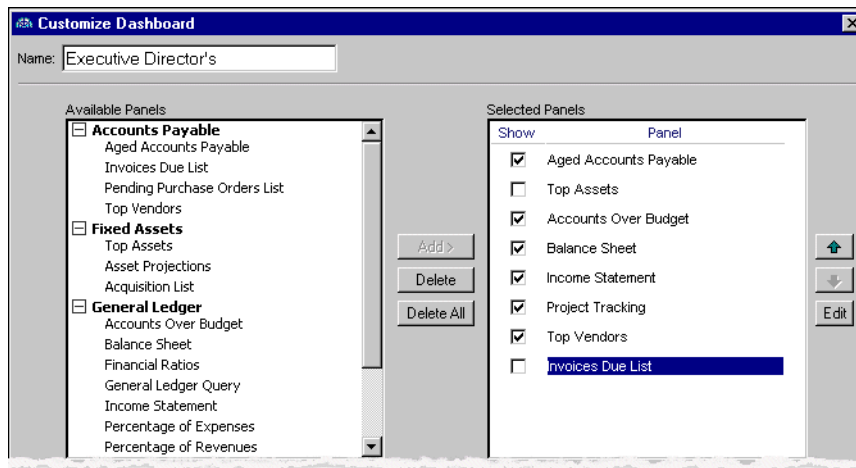
3. Click **OK**. You return to the Dashboard page and the panel you hid is not visible.

Graphing Panels

Dashboard graphs use standard graphing features, such as two- or three-dimensional bar graphs and line graphs. To access these features, on the Dashboard page, click the Summary Graph button on the action bar.

▶ **Graphing a dashboard panel**

Note: You can organize panels in the **Selected Panels** box by using the arrow buttons to move the panels up and down.

1. From the Weekly Dashboard, click **Customize**. The Customize Dashboard screen appears.

2. In the **Selected Panels** box, select **Top Vendors** and click **Edit**. The Top Vendors screen appears.
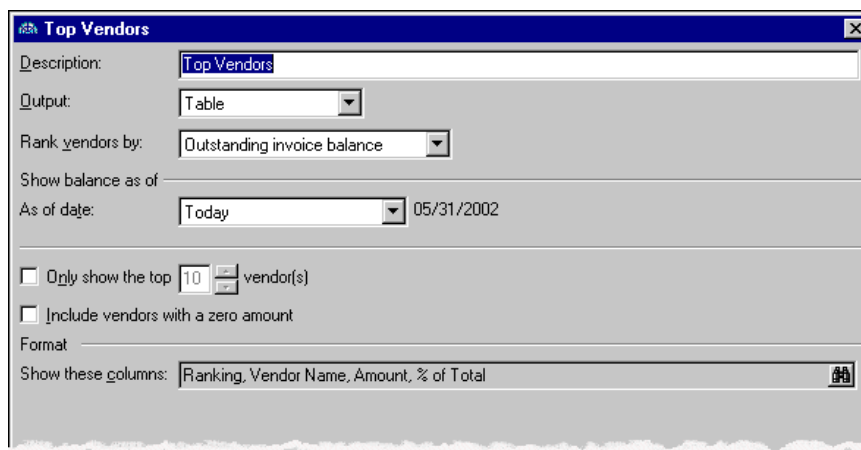
Note: To view both a table and graph on a dashboard, select "Table and Graph" in the **Output** field.

3. In the **Output** field, select "Graph".
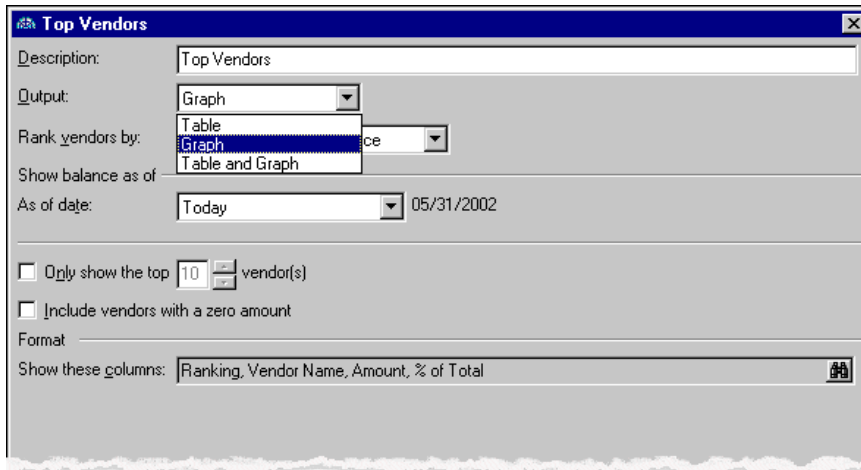
4. Click **OK**. You return to the Customize Dashboard screen.

Note: To print the graph, click the **Panel options** button on the action bar and select **Print** from the submenu. For more information about action bars on dashboard panels, see "Dashboard Panel Action Bar" on page 4. For more information about printing panels, see "Printing a panel" on page 20.

5. Click **OK**. You return to the dashboard, and a graph of the information appears in the Top Vendors panel.
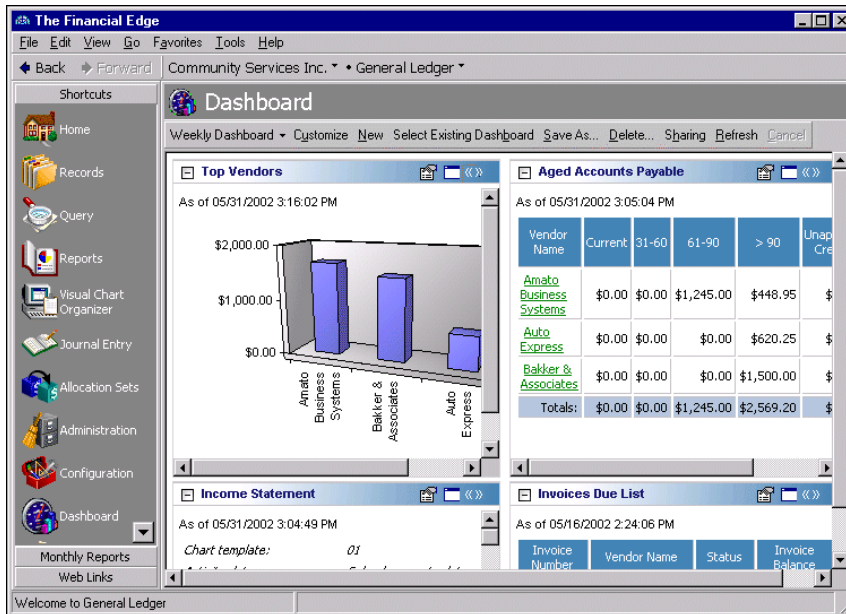
6. To customize the graph, click the **Zoom panel** button to display only that panel on the dashboard.
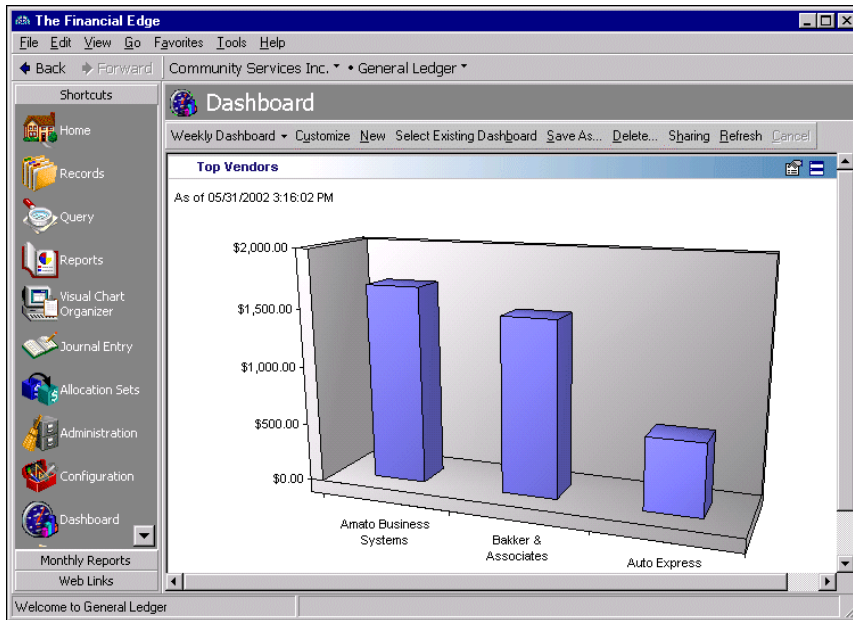
7. To change the type of graph that appears, right-click the graph.
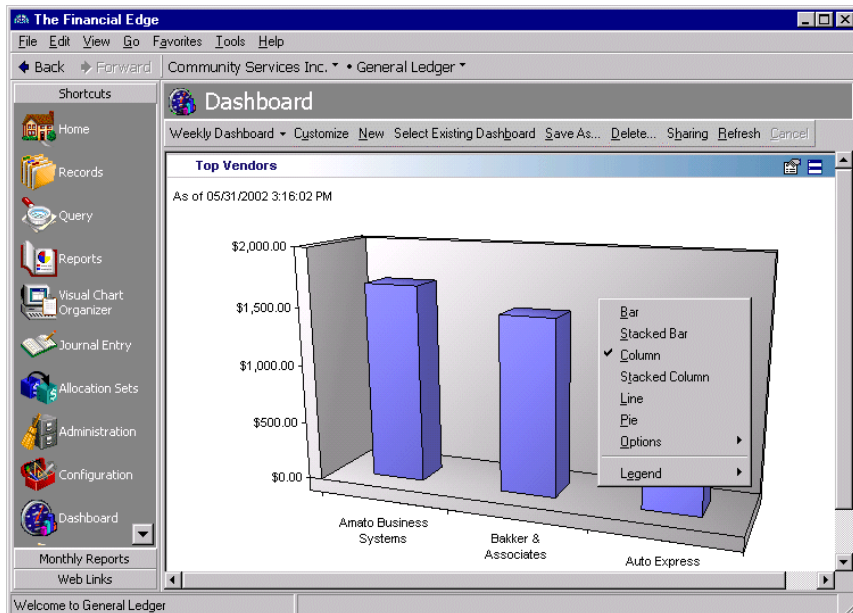
8. From the submenu, you can select:

   Bar — displays the information in the panel as a horizontal bar graph

   Stacked Bar — multiple sets of information appears as one horizontal bar in the graph

   Column — displays the information in the panel as a vertical bar graph

   Stacked Column — multiple sets of information appears as one vertical bar in the graph

   Line — displays the information as a line graph

   Pie — displays the information as a pie chart

Options — defines the category, value, and appearance of the axes on the graph or displays a three-dimensional graph

Legends — places the legend where you want it to appear on the panel or hides the legend if you do not want it displayed

9. From the Dashboard page, click the **Show all panels** button on the action bar. The graph appears in the panel as you selected.
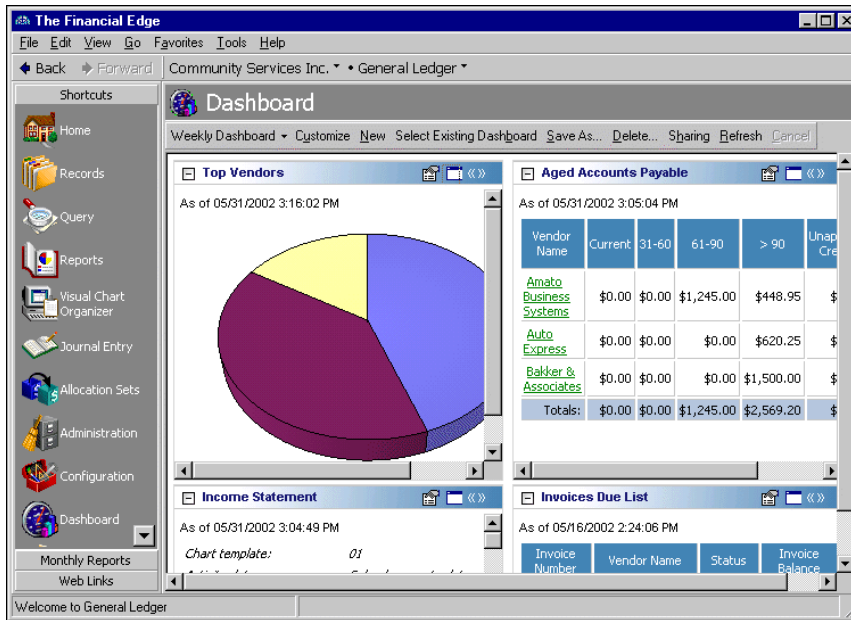
Printing Panels

From a selected panel, you can print the grid or a graph of the information displayed in the panel. For more information about setting up printers in **The Financial Edge**, see the *Program Basics Guide*.

▶ **Printing a panel**

1. From a selected dashboard panel, click the **Panel options** button on the action bar. For more information about action bars, see "Dashboard Panel Action Bar" on page 4.
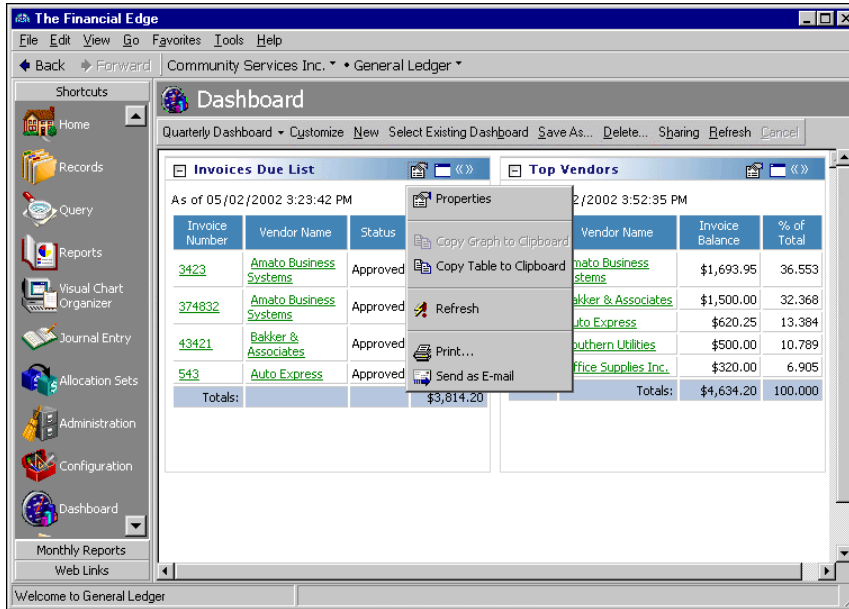
2. From the submenu, select **Print**. The Print screen appears so you can select a printer and make printing selections. For more information about setting up printers in **The Financial Edge**, see the *Program Basics Guide*.

3. Click **Print**. The panel prints on the printer you selected and you return to the Dashboard page.

Sending Panels as Email

You can send a panel as email directly from the Dashboard page. **The Financial Edge** is compliant only with MAPI email software, such as Microsoft *Outlook*.

▶ **Sending a panel as email**

1. From the Top Vendors panel, click the Panel options button on the action bar. For more information about the action bar, see "Dashboard Panel Action Bar" on page 4.
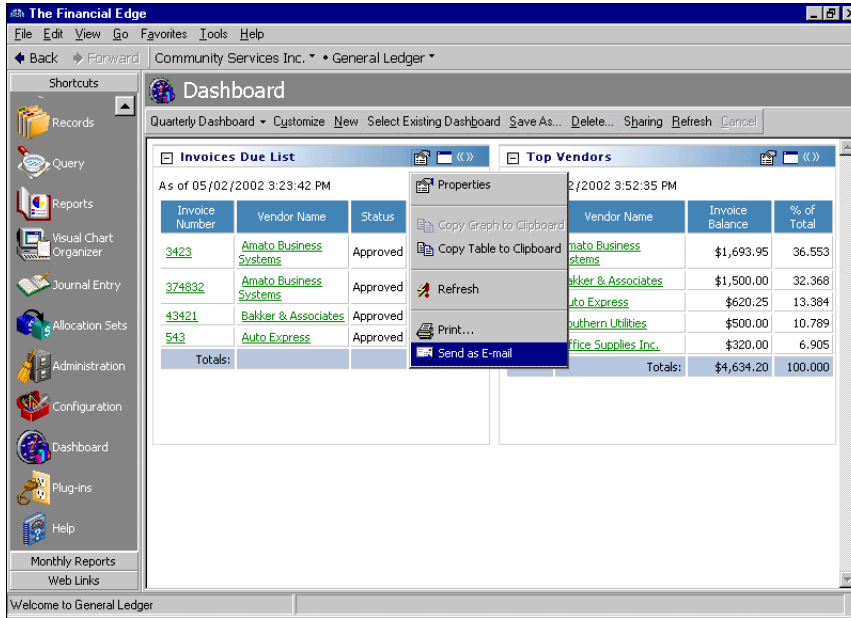
2. From the submenu, select **Send as E-mail**. An email screen appears.
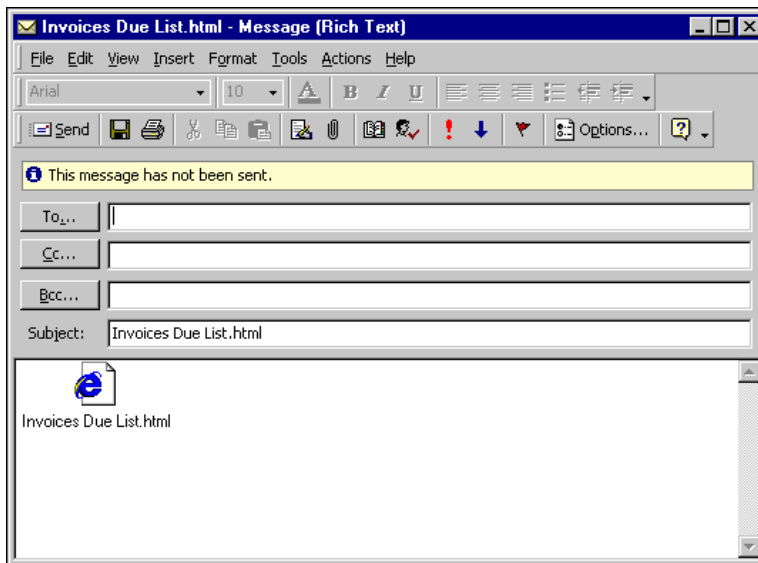
Warning: *The Financial Edg*e is compliant only with MAPI email software, such as Microsoft *Outlook*.

3. In the **To** field, enter an email address.

4. In the **Subject** field, enter a subject for the email.

5. Click **Send**. The program sends the selected panel as an attachment to the message, and you return to the Dashboard page.

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