

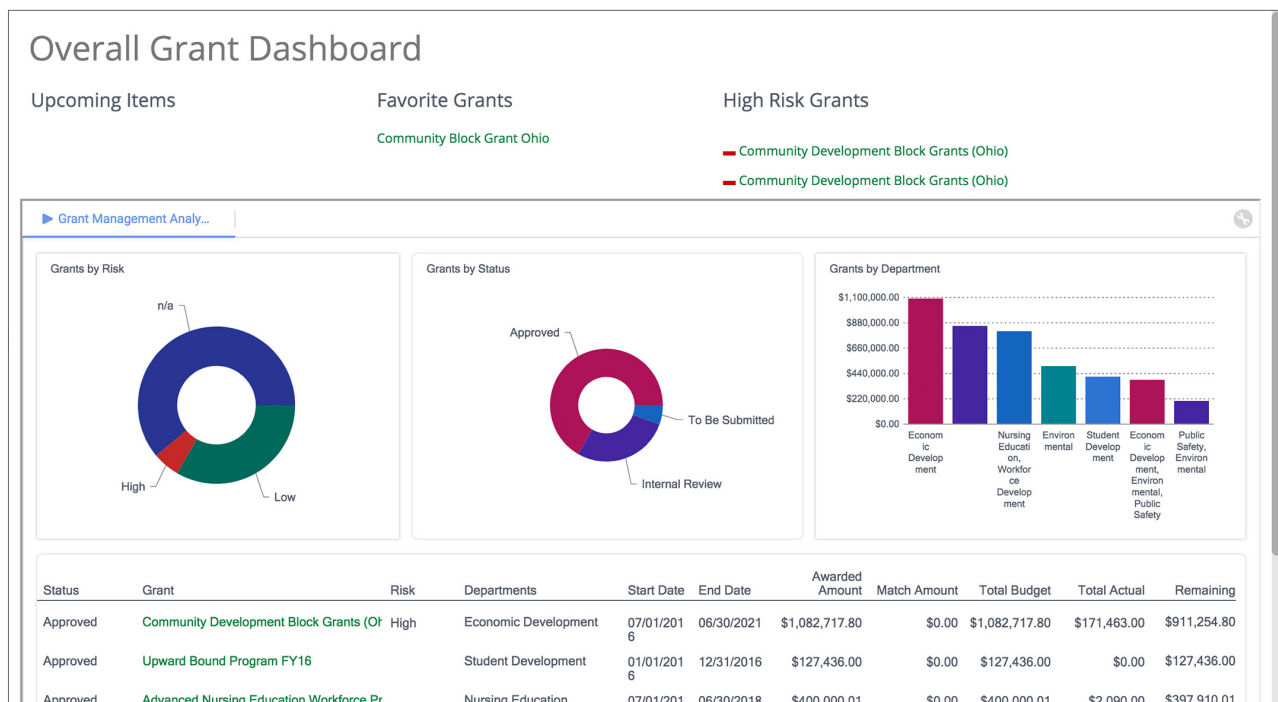
# AmpliFund Dashboards Guide

This guide explains the different features available on AmpliFund dashboards. The Overall Grant Dashboard and individual grant, award, and sub-award dashboards are currently available to all users. The dashboards will refresh with updated data every 15 minutes.

## Dashboards

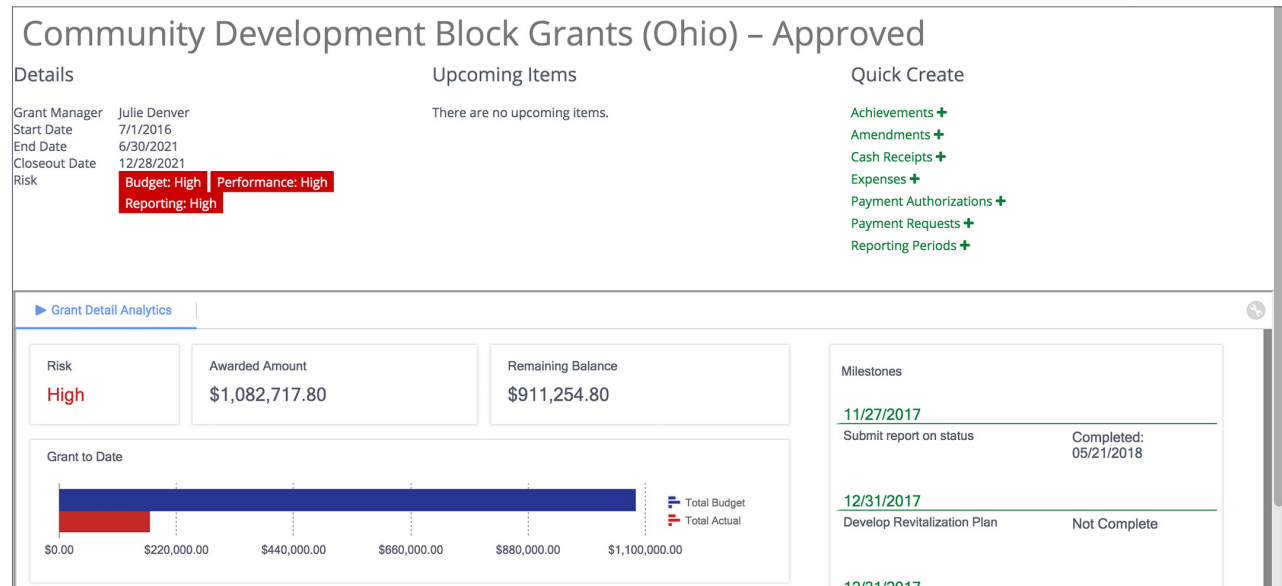
### Overall Grant Dashboard

The Overall Grant Dashboard shows information for all grants that the user has access to, based on the user's security. The Overall Grant Dashboard can be viewed from any list page under *Grant Management > Grants* by using the *Analytics* tab. The dashboard will show information based on the list page, i.e. data for all pending grants on *Grant Management > Grants > Pending Grants*.



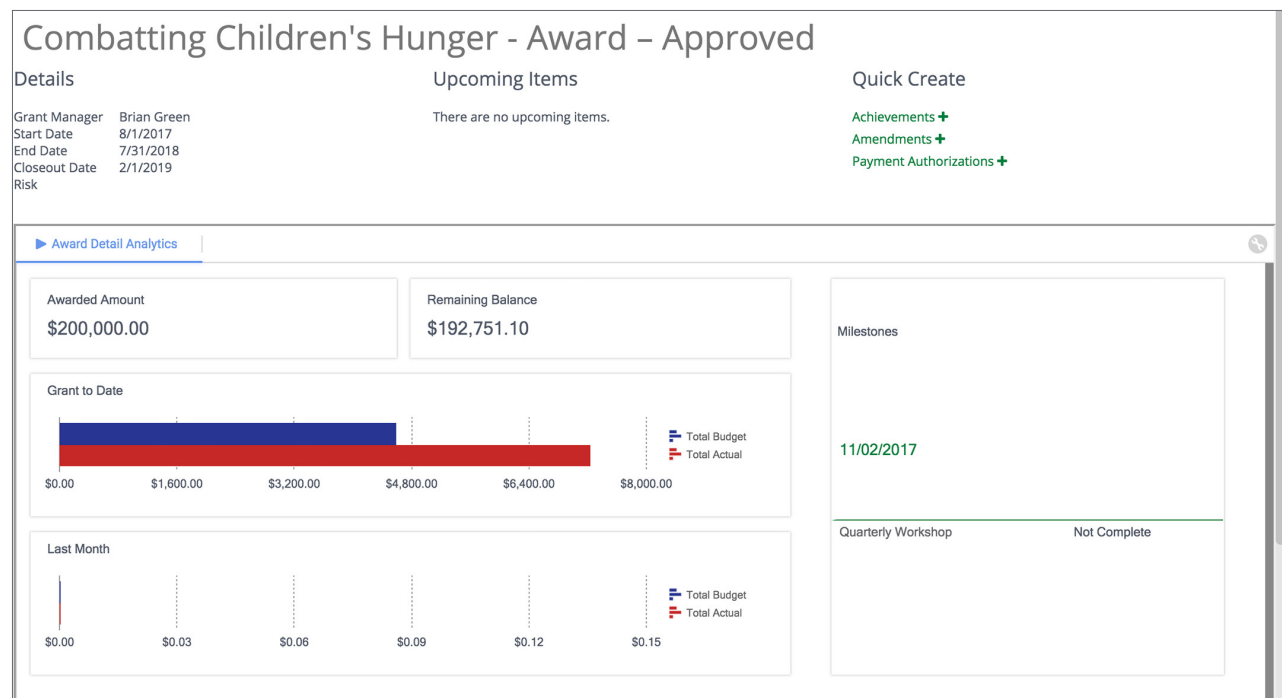
### Individual Grant Dashboard

The individual grant dashboard shows information for a single grant. The dashboard shows the Grant Manager, risk, and important dates. The Individual Grant Dashboard can be viewed from a grant record's *Analytics* tab.



## Individual Award Dashboard

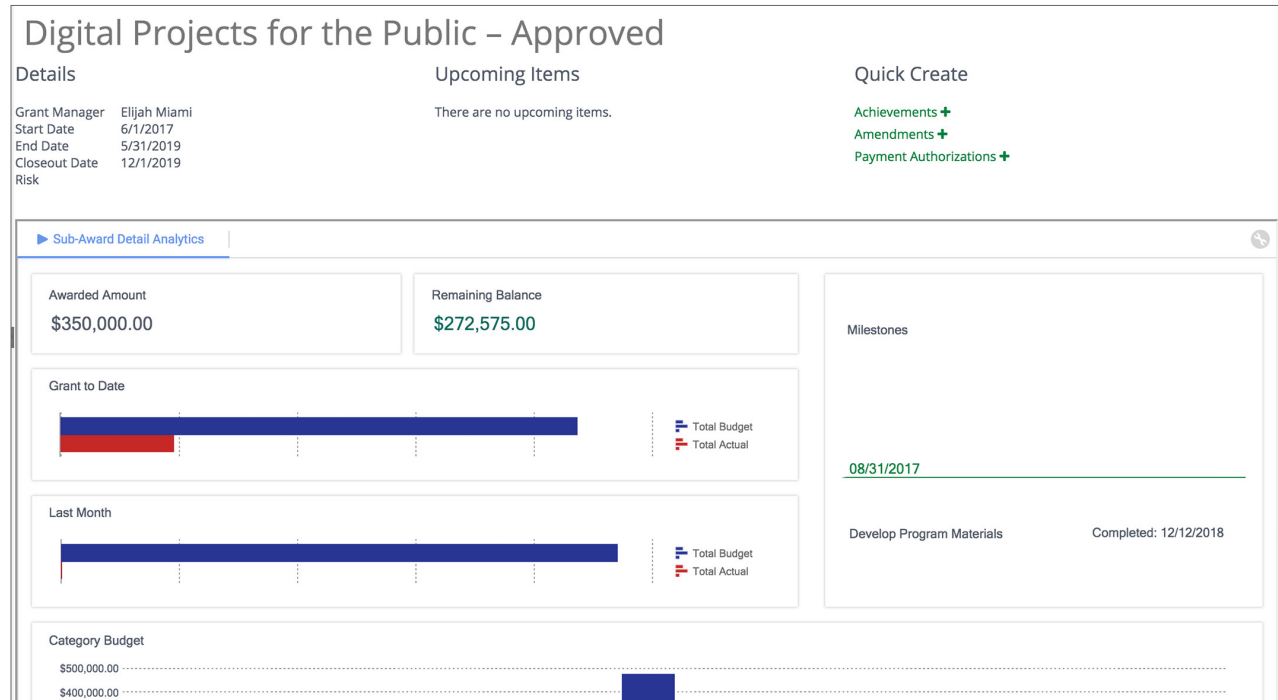
The individual award dashboard shows information for a single award. The dashboard shows the Grant Manager, risk, and important dates. The Individual Award Dashboard can be viewed from an award record's *Analytics tab*.



## Individual Sub-Award Dashboard


The individual sub-award dashboard shows information for a single sub-award. The dashboard shows the

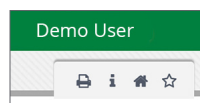
Grant Manager, risk, and important dates. The Individual Sub-Award Dashboard can be viewed from a sub-award record's *Analytics tab*.



# Dashboard Features

## Make Homepage

The  (Make Homepage icon) is available on all dashboards in the *Icon Bar*. When selected, this dashboard will be your homepage upon login.



## Risk

Risk shows a grant's or award's risk for budget, performance, and reporting. Risk can be high, medium, or low. Risk is defined by the following default thresholds:

### Budget

- **Low Risk:** Expenses within 10% of budget allocations to date.
- **Medium Risk:** Expenses within 10-50% of budget allocations to date.
- **High Risk:** Expenses over or under 50% of budget allocations to date.

## Performance

- **Low Risk:** Over 75% of goals on target.
- **Medium Risk:** 25-75% of goals on target.
- **High Risk:** Less than 25% of grant goals on target.

## Reporting

- **Low Risk:** Under 5 days past report due date.
- **Medium Risk:** 6-11 days past report due date.
- **High Risk:** Over 12 days past report due date.

Risk can be activated and the risk type and default risk thresholds can be customized for the account and for the individual grant, award, or sub-award.

Closeout Date	12/28/2021
Risk	Budget: High Performance: High Reporting: High

## Upcoming Items

The *Upcoming Items* list shows any actions, events, or tasks that are related to the grant(s). This list is user-specific based on user security and assigned tasks or responsibilities. Each item on the list is a link to more details.

Upcoming Items
There are no upcoming items.

## Favorite Grants

The *Favorite Grants* list shows all grants that the user has favorited. Each item on the list is a link to the grant's individual dashboard.

Favorite Grants
Community Block Grant Ohio

## Quick Create

The *Quick Create* menu allows you to quickly add grant-related records, such as achievements, amendments, and expenses. The available actions will depend on the grant and the user security.

Quick Create
Achievements +
Amendments +
Payment Authorizations +

## High Risk Grants

The *High Risk Grants* list shows all grants that have high risk in one or more of the following categories:

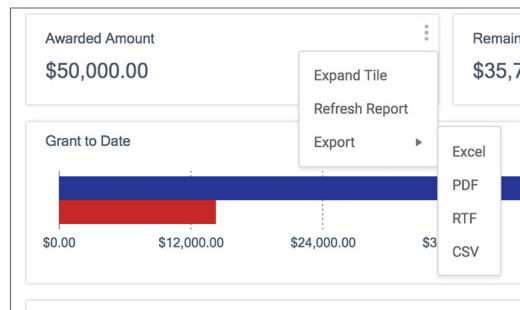
- **Budget:** Expenses over or under 50% of budget allocations to date.
- **Performance:** Less than 25% of grant goals on target.
- **Reporting:** Over 12 days past report due date.

Each of these default risk thresholds can be customized for the account and for the individual grant, award, or sub-award.



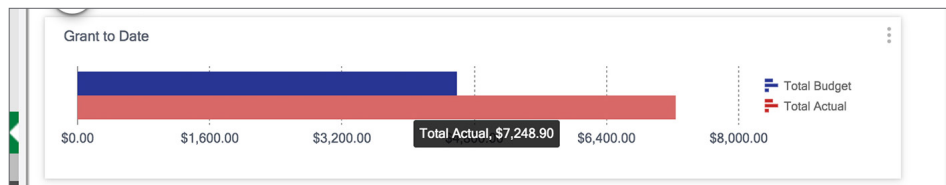
## Tiles

Each dashboard is made up of tiles. Each tile can have its data refreshed or exported to Excel, PDF, RTF (Rich Text Format) or CSV, or can be expanded to fill the dashboard or collapsed to its original size. These options are available by hovering over a tile and clicking the three dots in the top-right corner of the tile.



## Chart Tiles

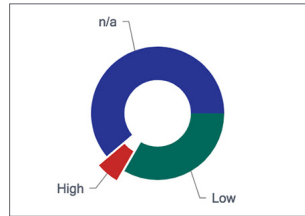
For tiles with graphical charts, users can click hover over a section of the grant to see numerical data.



Users can click a legend item to hide it from the graph.

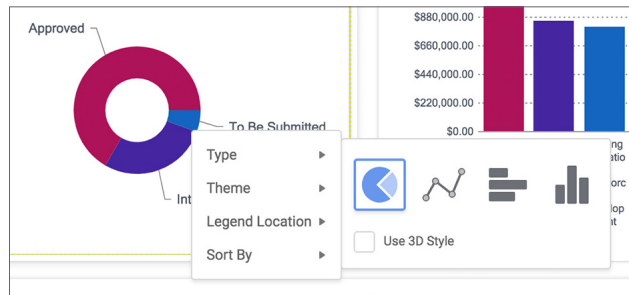


For circular charts, users can click a section to break it from the circle. Users can also rotate circular charts by dragging.




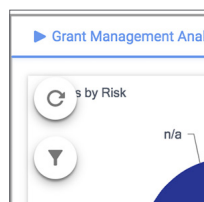
## Formatting Data

Users can format data by right-clicking a chart or column. Format options include graph type, color theme, legend location, data sort order, font style, cell color, and alignment.




## Refreshing Data

The data for the entire dashboard can be refreshed by hovering over the dashboard and clicking the  (Refresh icon). Data can also be refreshed on individual tiles using the tile menu (see *Tiles* above).



## Filtering Data

The data for the entire dashboard can be filtered by hovering over the dashboard and clicking the  (Filter icon).

