

4 Dashboards Every Organization Should Have and Tips for Creating Them

Presented by:
Association Technology Solutions

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 & 2016 Authorized iMIS Solution Provider (AiSP) of the Year



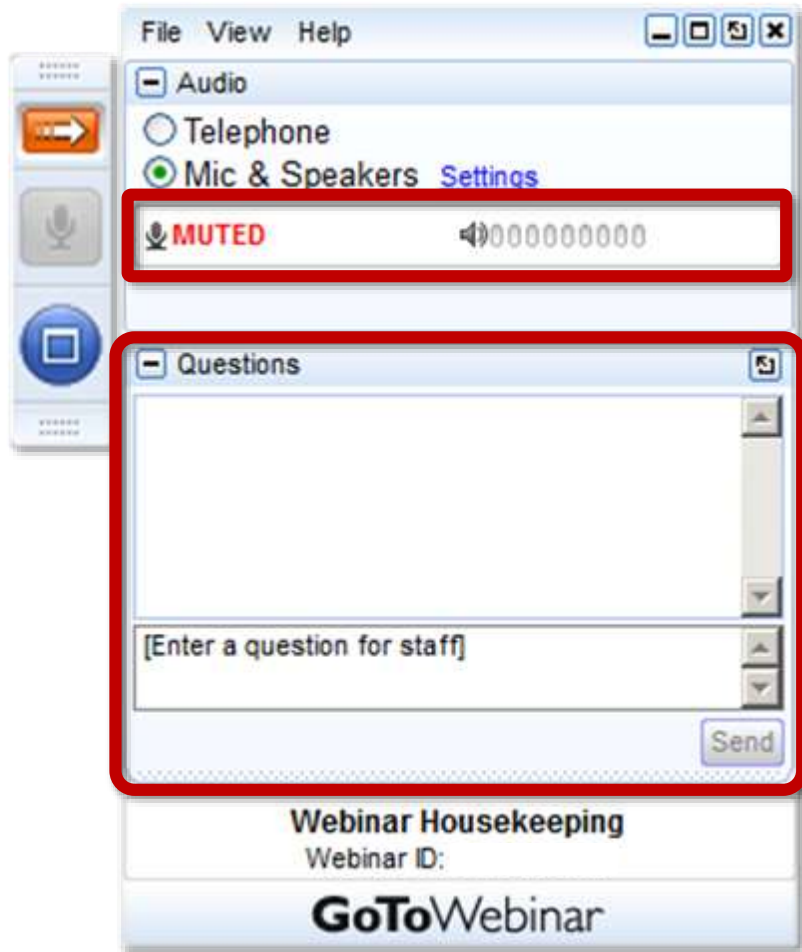
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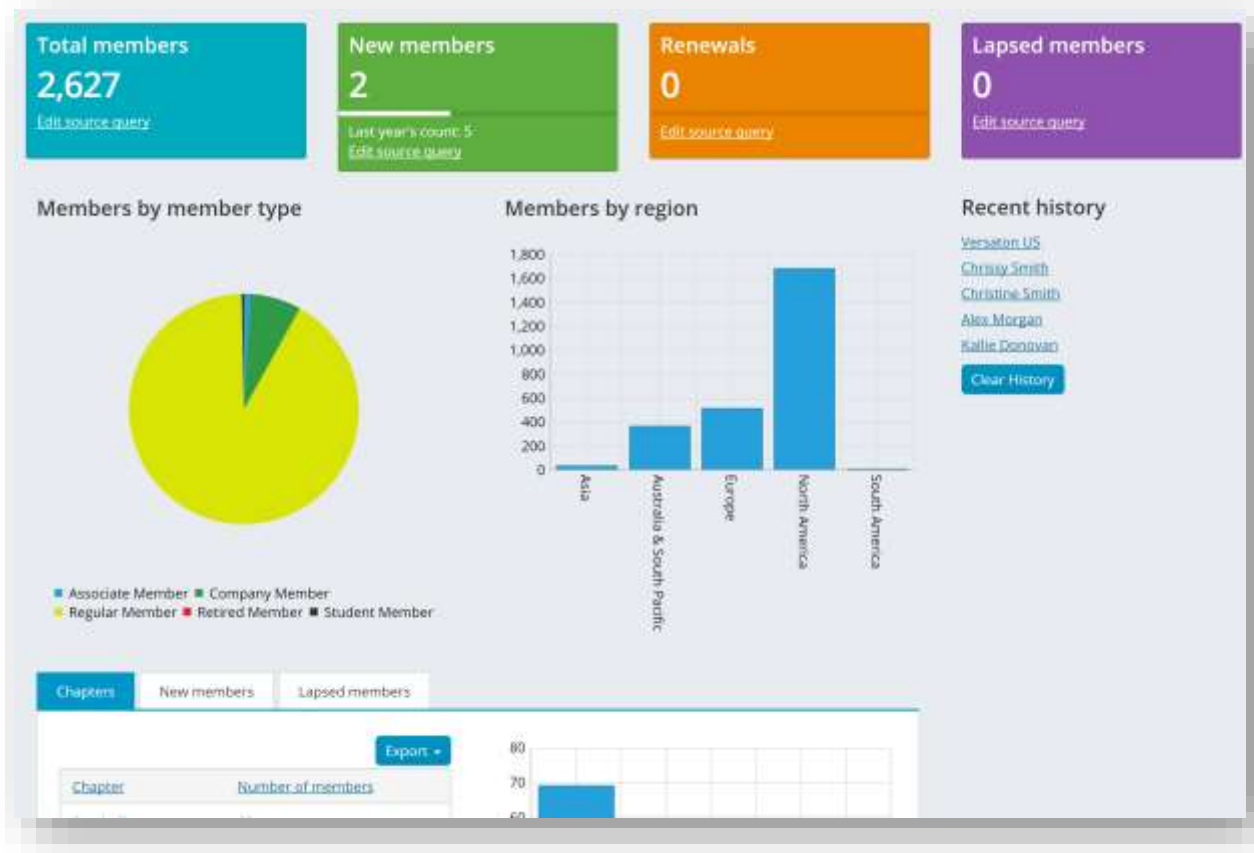


- Attendees are muted to reduce background noise
- Remember to ask questions via the **Questions** panel
- Questions will be answered during Q&A after presentation is complete



DASHBOARDS

Dashboards display summary information through the use of IQA queries.



WHAT IS A DASHBOARD?

Dashboards allow you to visualize your data using charts, graphs, progress trackers, and alerts. View yearly trends, membership totals, and fundraising goals all in one place.



Out of the box dashboards include Community, Membership, Events, Commerce, Fundraising, and Advanced Email. These dashboards provide a summary of these navigation items.



4 COMMON DASHBOARDS

- Events
- Dues
- CEO Overview
- Membership Snapshot



- Process for creating dashboards
 - Meet with stakeholders and staff to find out the most commonly used reports or questions
 - Create IQAs and reports to display the information using iParts on the page
 - Put the iParts together on the page
 - Deploy your new dashboard



- You want a place to find information about your events without having to drill down into the particular event. Create an events dashboard!



EVENTS



OUT OF THE BOX DASHBOARD



- Snapshot of major upcoming events – *Graph or Progress Tracker*
 - Annual Conference Registration
 - Winter event registration
 - Luncheons
- Revenue by Meeting Type – *Pie Chart*
- Top Events by Attendance – *Chart or Graph*
- Registered for a previous event and not registered for an upcoming event – *Query Menu*
- And much more!

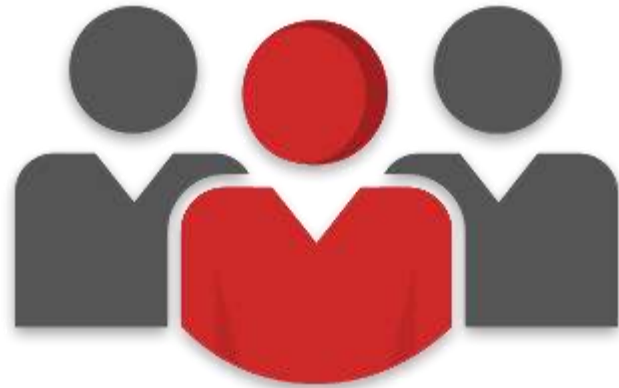
Want to keep track of dues payments without having to find a specific report to run in the Document System each day?

Put it on your Dues Dashboard!



**KEEP
CALM
AND
PAY YOUR
DUES**

- Total Dues vs Goal – *Progress Tracker*
- Revenue by Member Type – *Bar Graph*
- Recent Dues Payments – *Query Menu*
- Unpaid New Members – *Query Menu*
- Billed and Still Unpaid – *Progress Tracker and/or Query Menu*



Your CEO or Executive Director knocks on your office door asking for a report that he/she runs frequently. How do you help them find the answers without having to ask you?

CREATE A CEO DASHBOARD!



- Total Members – *Progress Tracker*
- Top Events – *Pie Chart*
- Top Products – *Graph or Chart*
- Events in Danger – *Query Menu*
- Members by Member Type – *Pie Chart*



- Looking for a quick look at your membership with a breakdown of members by member type, highly engaged members, and new members?
- Create your own membership snapshot!





MEMBERSHIP SNAPSHOT DASHBOARD



- Counts of all member types - *Progress Tracker*
- Total Members – *Progress Tracker*
- Members by Category - *Pie Chart or Bar Graph*
- Members by Member Type - *Pie Chart*



- Create the IQAs to track your Key Performance Indicators
- Things to keep in mind when creating your queries
 - When creating a progress tracker, the total you are counting is your Sum_Total in the Display Alias, and your goal amount is the Goal_Amount
 - When creating for a chart, determine what will be your x and y-axis variables
 - When creating an IQA that will be exported, be sure to include all fields you want in the display

- Under Page Builder, create a new content page to put all your IQAs as iParts
- Choose a layout to display all the reports you need on one page

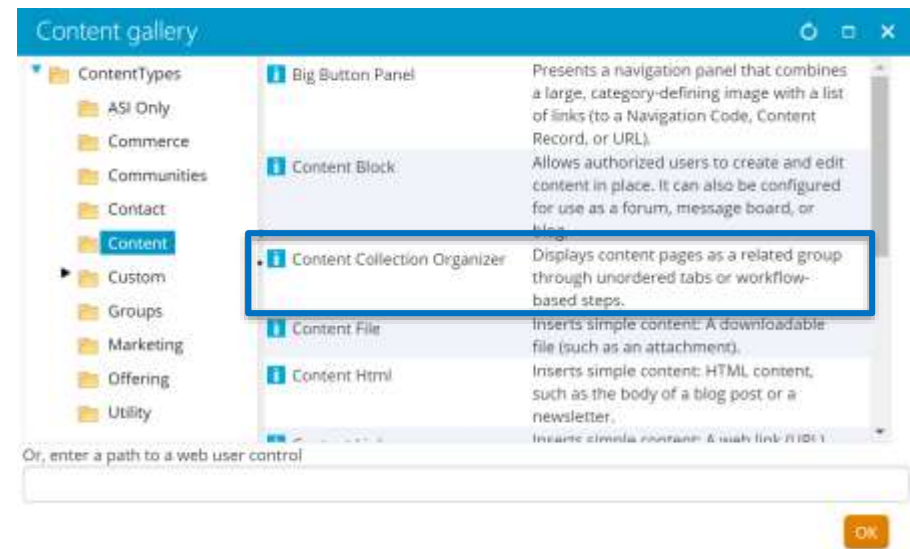
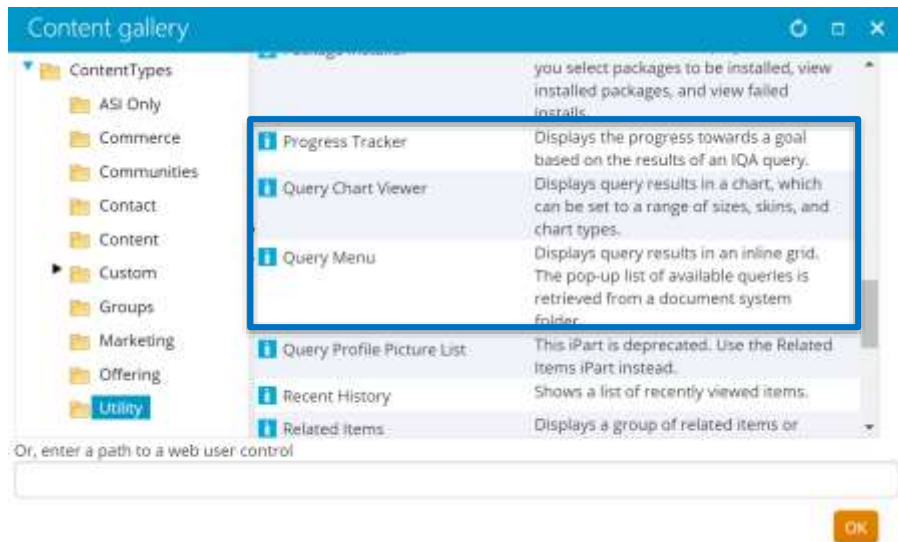
The screenshot shows the 'Manage content' interface for a page titled 'CEO Dashboard'. The page is in a 'Working' status and was last updated on 10/15/2018 at 5:57:37 PM. The interface includes tabs for 'Definition', 'Properties', 'Current tags', and 'Access settings'. The 'Definition' tab is active, showing the following configuration:

- Title:** CEO Dashboard (with a checked 'Use dynamic page title' option)
- Publish file name:** CEO_Dashboard
- Layout:** OneOverThree33-33-33OverOne
- Publish location:** <http://pa2017.arsol.org>
Click appropriate button to generate a full URL or free link to copy elsewhere.
Buttons: [Generate Full URL](#), [Generate Fremlink](#)
- Create navigation on publish

Below the configuration, there are four identical blocks of text, each with a link to 'Add content' and 'Edit zone properties':

[Add content](#) | [Edit zone properties](#)
To add content, click the "add content" link above.

- Progress Tracker
- Query Chart Viewer
- Query Menu
- Content Collection Organizer
 - Use the CCO ipart to display multiple IQAs in a tabbed interface using pages with the Query Menu iPart





IPARTS MOST COMMONLY USED

Progress Tracker

Event revenue: 9,856 (Last year's total: 25,280)

Event registrations: 31 (Last year's count: 170)

Program item registrations: 21 (Last year's count: 245)

Scheduled events: 8 (Last year's count: 19)

Query Chart Viewer

Top 10 event revenue

Event	Revenue
AM2018	~35%
BUNDLE18	~15%
DMA2018	~45%
EXPO2018	~5%
FALL18	~2%
SIMPLE18	~2%

Registrations by member type

Member Type	Registrations
Associate Member	~1
Individual Member	~29
Web Customer	~1

Event reports

Members Only Event begins soon and has low registration
Event date: 11/1/2018
Registrants: 0

Recent and upcoming | Top events | Top attendees | Data integrity

Export +

Content Collection Organizer
Made up of pages with Query Menu iParts





UPDATE OUT OF THE BOX DASHBOARDS

- Have you modified one of the out of the box dashboards like Membership or Events and want to see your new dashboard instead of the out of the box one?
- Manage Shortcuts > Update the StaffEventsLanding and StaffMembershipLanding

For Website	All Sites ▾
Shortcut	StaffMembershipLa ▾
URL or Content Record	@/iCore/Staff_Dashboards/Membership/Membership_d select
URL Parameters	
Description	Landing page for the Membership area of the Staff site ▾
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	



- Need a new place to put your CEO Overview or Dues Dashboard?
- Create a new navigation item in your staff site

Organize New Edit Import Export Versions Publish Preview

~/CEO_Dashboard Go

Staff

Cart [CartItemCount]

Community

Membership

Fundraising

Events

Commerce

Marketing

Certification

Finance

Continuum

RISE

Settings

Documentation

Support

CEO Dashboard

Recycle Bin

Status: Active (Published)

Properties Workflow management Options Access settings

* Navigation link text
CEO Dashboard

* Navigation folder name
CEO_Dashboard

Tool tip description

Content or URL to link to
@/Shared_Content/CEO_Dashboard [select](#)

URL parameters

Breadcrumb name
CEO Dashboard

Hide on this page



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