Dazzle your Data Analytics with DDI's Digital Dashboard

2014 DDI User Group Meeting
April 22-23, 2014

DDI™

Serving those who serve others

AICPA Service Organization Control Reports
AICPA SERVICE ORGANIZATIONS
SOC
aicpa.org/soc
Formerly SAS 70 Reports

N-TEN MEMBER

Show of Hands:

Who here displays their organizations data graphically some how?

Share:

Can anyone provide some examples?

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What is a Dashboard?

Dashboards provides at-a-glance views of KPIs (key performance indicators) relevant to a particular objective or business process.

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Tips for Creating a Dashboard:

- Clarify the purpose of the dashboard
- Identify good KPI's
- Dashboards supplement your analytic reports, **not** replace them.
- Educate Stakeholders
- Layout the dashboard with purpose
- Maintain

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Benefits of DDI's Digital Dashboard

- Customizable to different stake holders
- Ability to drill into details
- Trending visibility
- Time Savings
- Constant real-time data flow
- Unlimited Dashboards
- Access from Anywhere
- Affordable Cost

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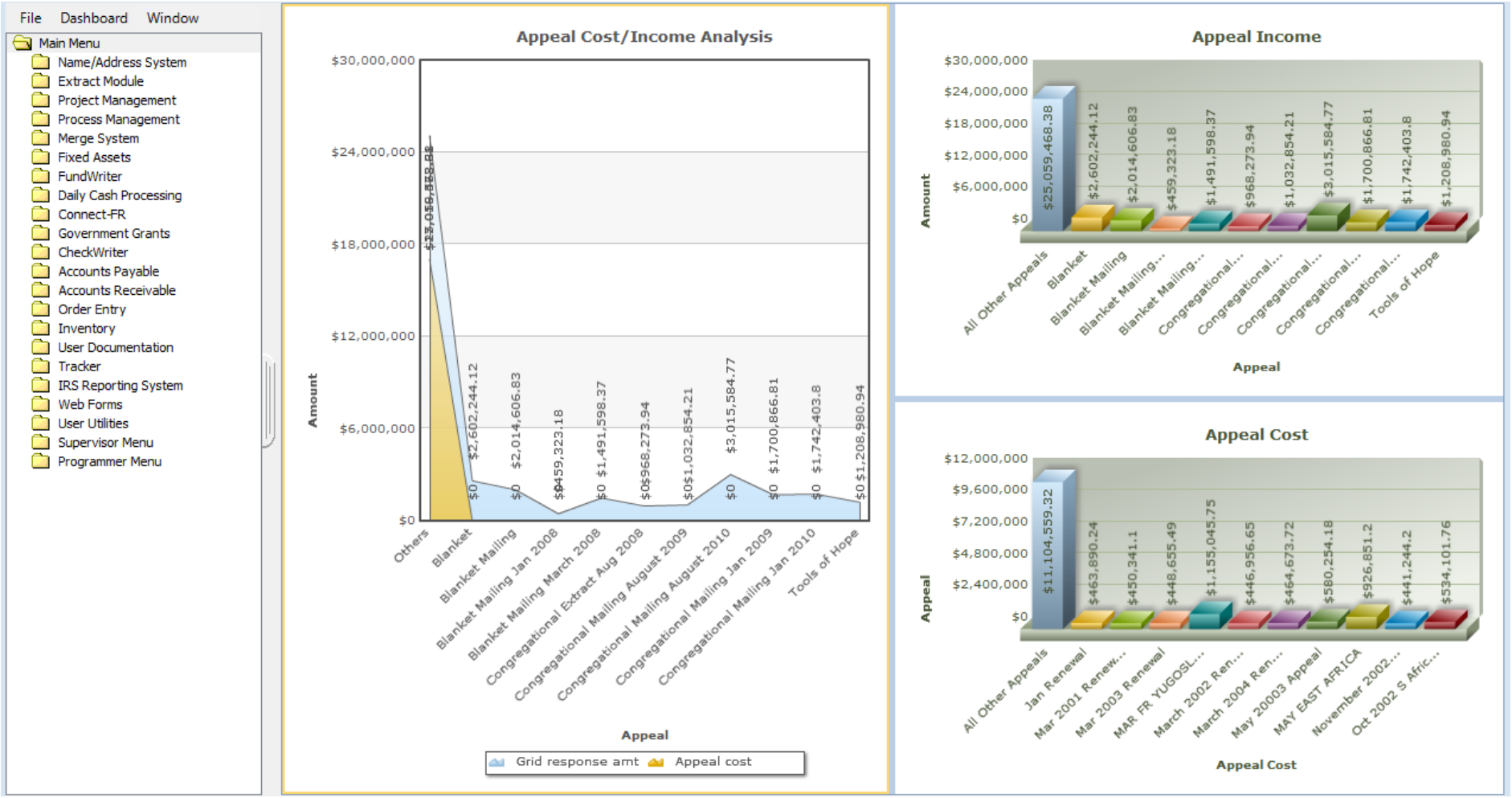
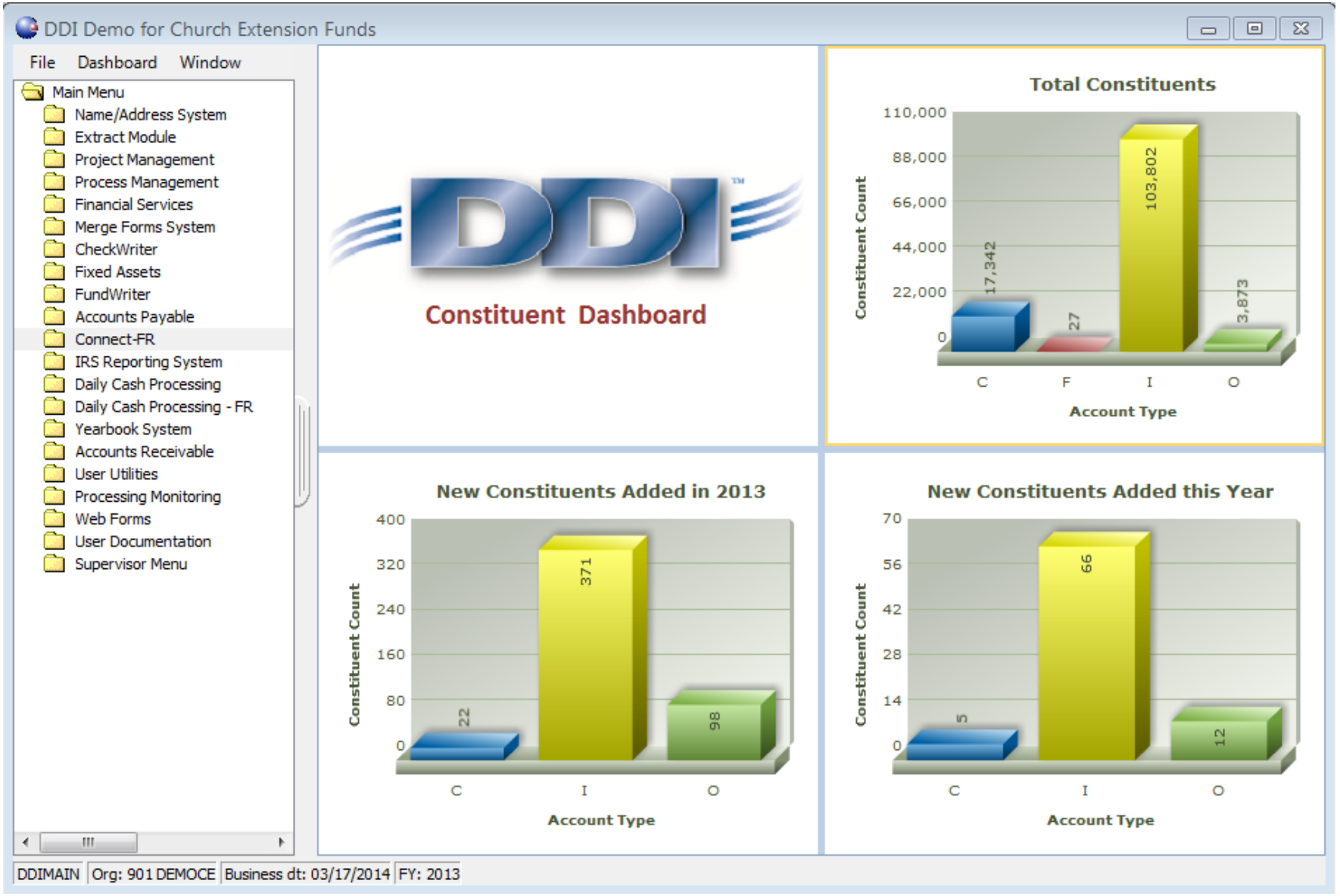
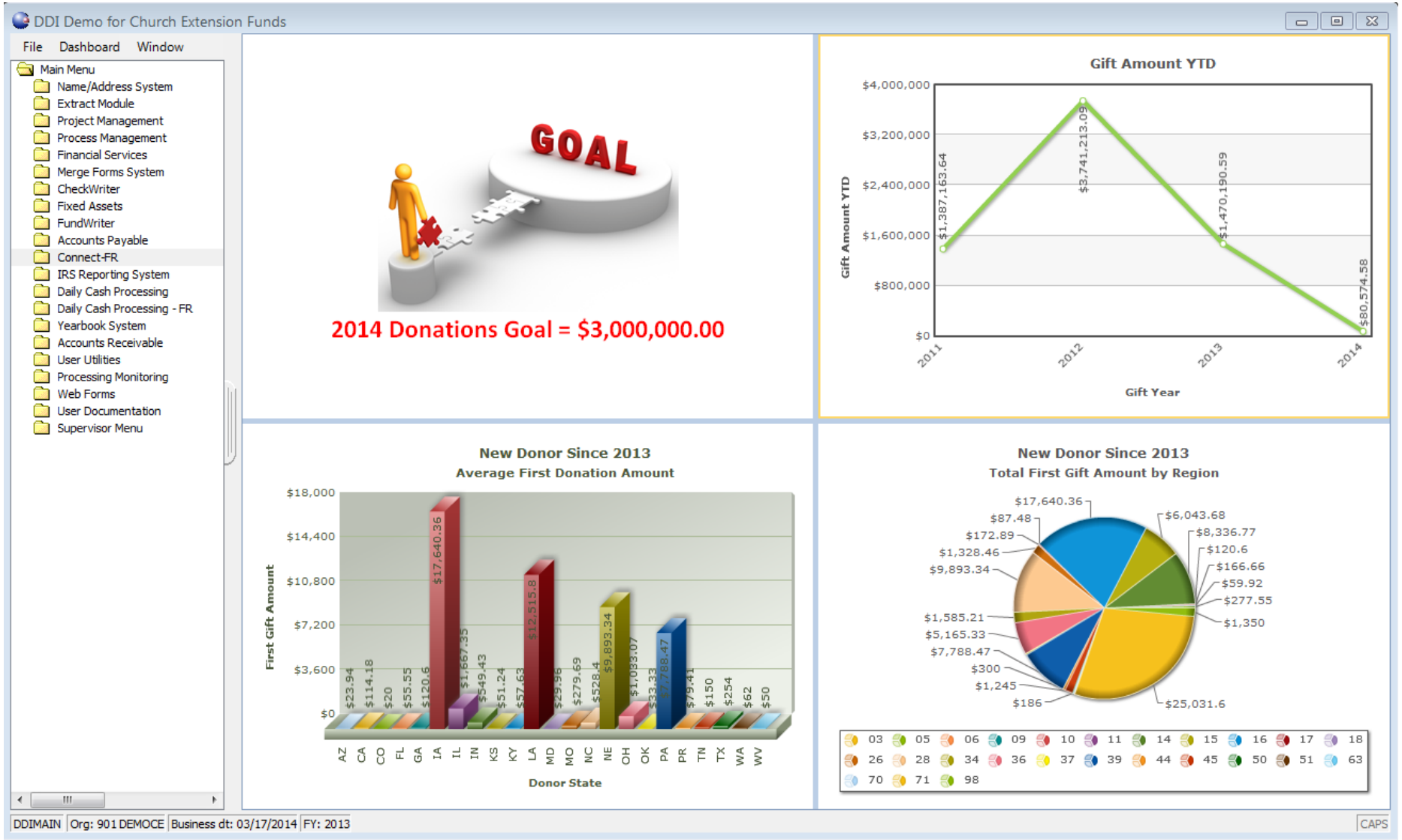
Appeal Data


File
Dashboard
Window
Main Menu
Name/Address System
Extract Module
Project Management
Process Management
Merge System
Fixed Assets
FundWriter
Daily Cash Processing
Connect-FR
Government Grants
CheckWriter
Accounts Payable
Accounts Receivable
Order Entry
Inventory
User Documentation
Tracker
IRS Reporting System
Web Forms
User Utilities
Supervisor Menu
Programmer Menu
Appeal Cost/Income Analysis
$30,000,000
$24,000,000
$18,000,000
$12,000,000
$6,000,000
$0
Amount
$2,602,244.12
$2,014,606.83
$1,491,598.37
$968,273.94
$1,032,854.21
$3,015,584.77
$1,700,866.81
$1,742,403.8
$1,208,980.94
Others
Blanket
Blanket Mailing
Blanket Mailing Jan 2008
Blanket Mailing March 2008
Congregational Extract Aug 2008
Congregational Mailing August 2009
Congregational Mailing August 2010
Congregational Mailing Jan 2009
Congregational Mailing Jan 2010
Tools of Hope
Appeal
Grid response amt
Appeal cost
Appeal Income
$25,059,468.38
$2,602,244.12
$2,014,606.83
$459,323.18
$1,491,598.37
$968,273.94
$1,032,854.21
$3,015,584.77
$1,700,866.81
$1,742,403.8
$1,208,980.94
All Other Appeals
Blanket
Blanket Mailing
Tools of Hope
Appeal
Appeal Cost
$12,000,000
$9,600,000
$7,200,000
$4,800,000
$2,400,000
$0
Appeal
$11,104,559.32
$463,890.24
$450,341.1
$448,655.49
$1,155,045.75
$446,956.65
$464,673.72
$580,254.18
$926,851.2
$441,244.2
$534,101.76
All Other Appeals
Jan Renewal
Mar 2001 Renew...
Mar 2003 Renewal
MAR FR YUGOSL...
March 2002 Ren...
March 2004 Ren...
May 20003 Appeal
MAY EAST AFRICA
November 2002...
Oct 2002 S Afric...
Appeal Cost

Constituent Data



Donor Data


DDI Demo for Church Extension Funds
File
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Main Menu
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Process Management
Financial Services
Merge Forms System
CheckWriter
Fixed Assets
FundWriter
Accounts Payable
Connect-FR
IRS Reporting System
Daily Cash Processing
Daily Cash Processing - FR
Yearbook System
Accounts Receivable
User Utilities
Processing Monitoring
Web Forms
User Documentation
Supervisor Menu
GOAL
2014 Donations Goal = $3,000,000.00
Gift Amount YTD
$4,000,000
$3,200,000
$2,400,000
$1,600,000
$800,000
$0
Gift Amount YTD
$1,387,163.64
$3,741,213.09
$1,470,190.59
$80,574.58
2011
2012
2013
2014
Gift Year
New Donor Since 2013
Average First Donation Amount
First Gift Amount
$18,000
$14,400
$10,800
$7,200
$3,600
$0
$23.94
$114.18
$20
$55.55
$120.6
$17,640.36
$1,667.35
$549.43
$51.24
$57.63
$12,515.8
$29.96
$279.69
$528.4
$9,893.34
$1,093.07
$33.33
$7,788.47
$79.41
$150
$254
$62
$50
AZ
CA
CO
FL
GA
IA
IL
IN
KS
KY
LA
MD
MO
NC
NE
OH
OK
PA
PR
TN
TX
WA
WV
Donor State
New Donor Since 2013
Total First Gift Amount by Region
$17,640.36
$87.48
$172.89
$1,328.46
$9,893.34
$1,585.21
$5,165.33
$7,788.47
$300
$1,245
$186
$6,043.68
$8,336.77
$120.6
$166.66
$59.92
$277.55
$1,350
$25,031.6
03
05
06
09
10
11
14
15
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17
18
26
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34
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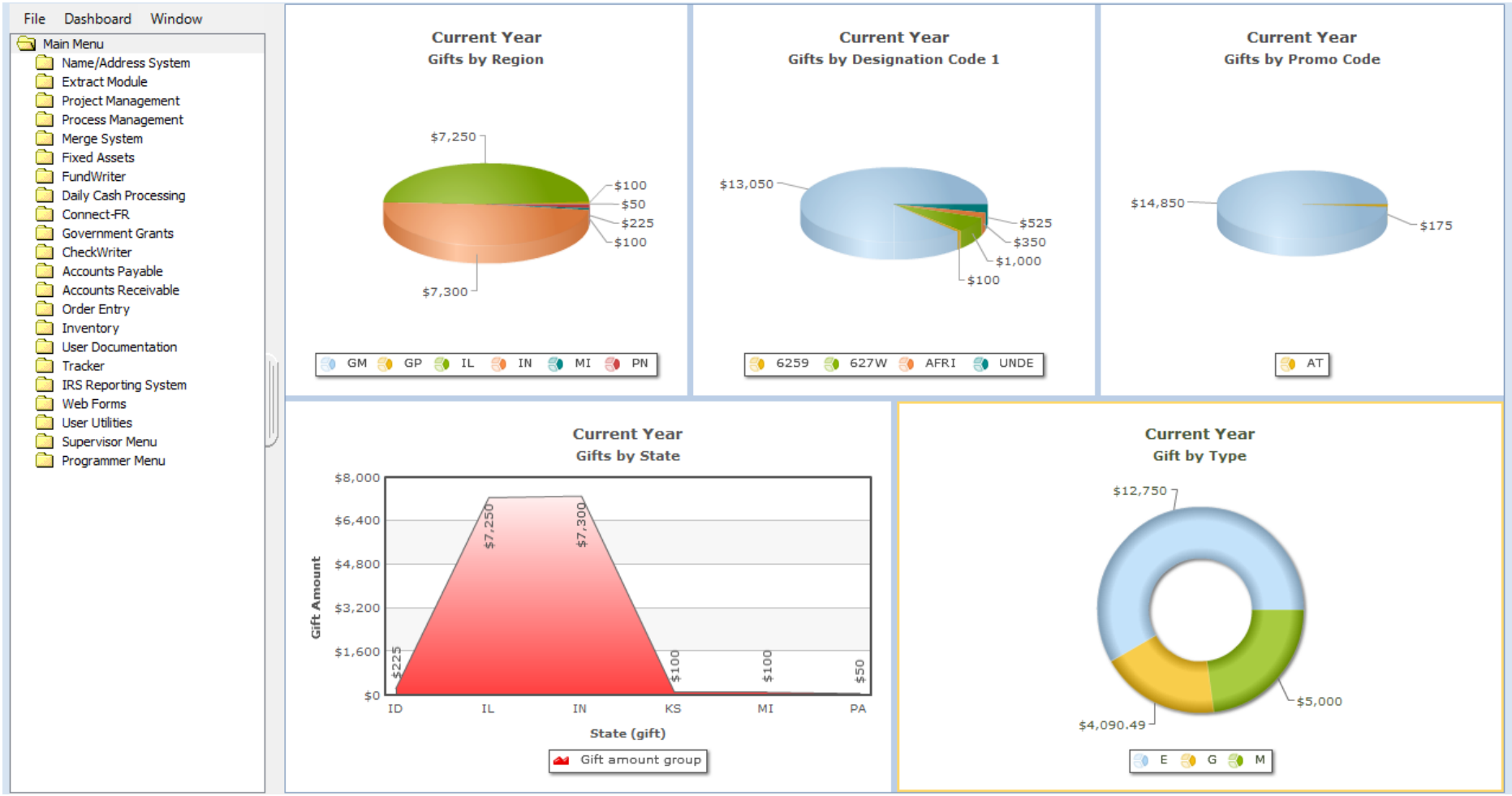
37
39
44
45
50
51
63
70
71
98
DDIMAIN
Org: 901 DEMOCE
Business dt: 03/17/2014
FY: 2013
CAPS

Gift Data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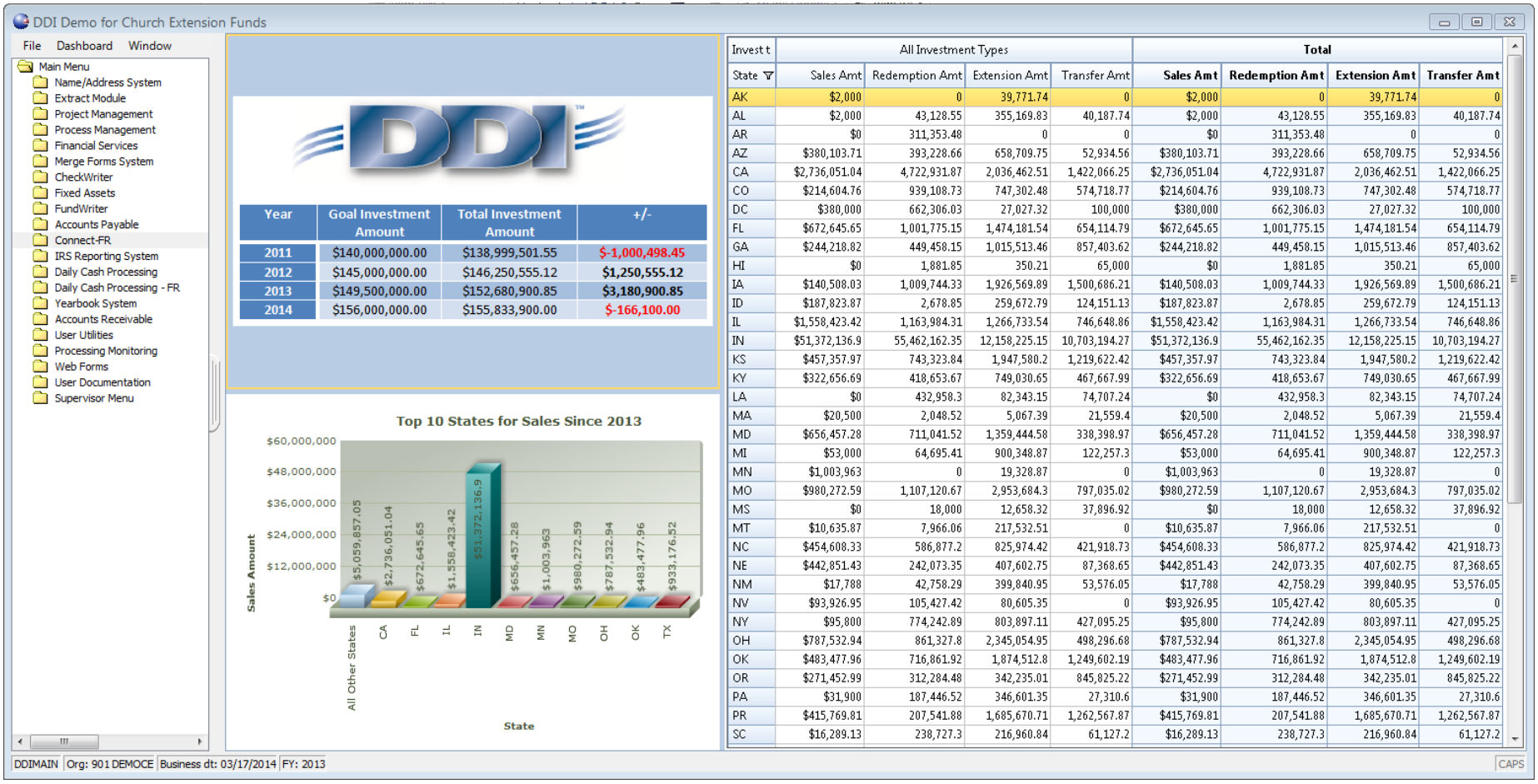
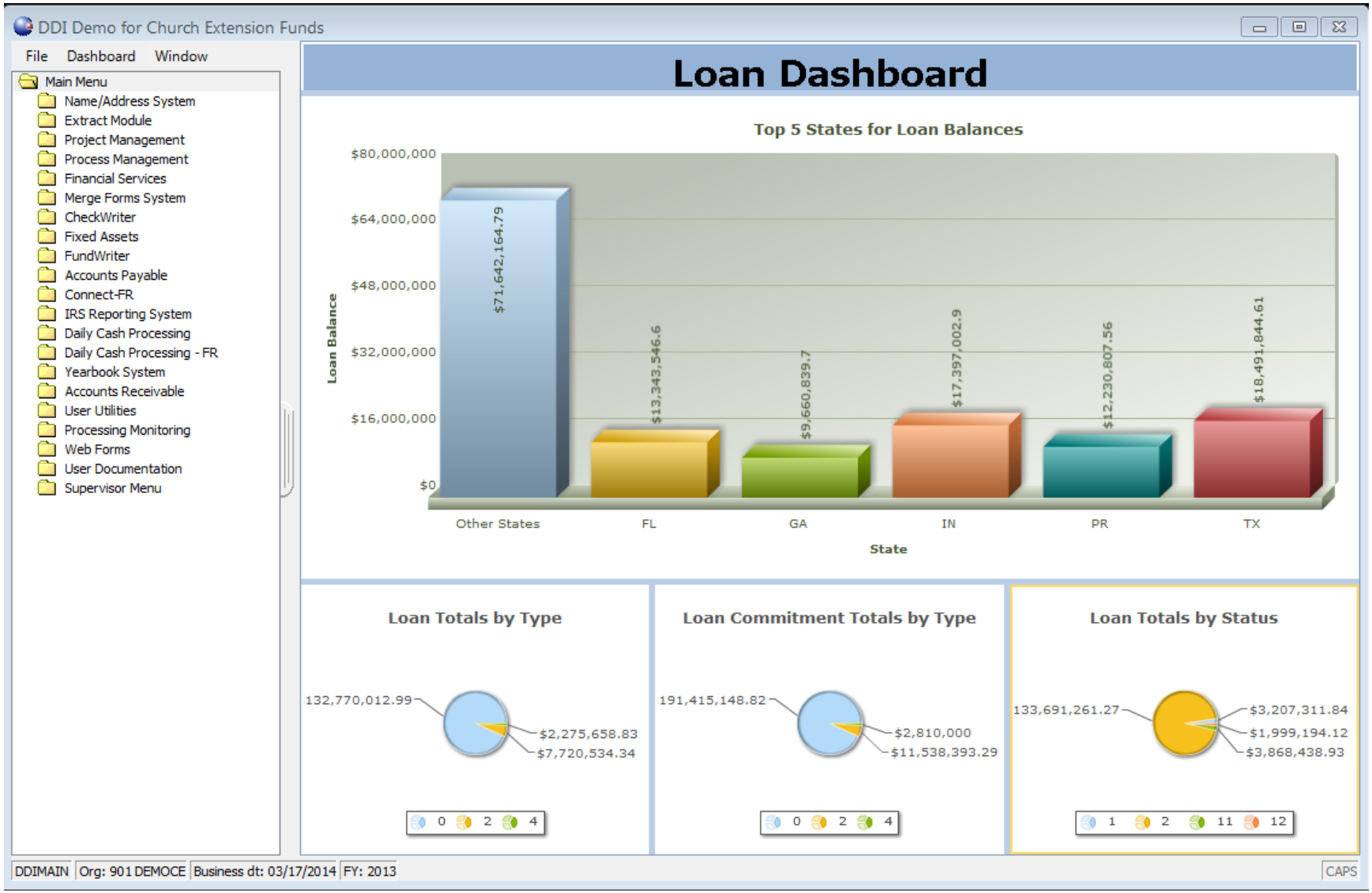
Web Forms
User Utilities
Supervisor Menu
Programmer Menu
Current Year
Gifts by Region
$7,250
$100
$50
$225
$100
$7,300
GM GP IL IN MI PN
Current Year
Gifts by Designation Code 1
$13,050
$525
$350
$1,000
$100
6259 627W AFRI UNDE
Current Year
Gifts by Promo Code
$14,850
$175
AT
Current Year
Gifts by State
$8,000
$6,400
$4,800
$3,200
$1,600
$0
Gift Amount
$225
$7,250
$7,300
$100
$100
$50
ID IL IN KS MI PA
State (gift)
Gift amount group
Current Year
Gift by Type
$12,750
$5,000
$4,090.49
E G M

Investment Data



Invest t	All Investment Types				Total			
State	Sales Amt	Redemption Amt	Extension Amt	Transfer Amt	Sales Amt	Redemption Amt	Extension Amt	Transfer Amt
AK	$2,000	0	39,771.74	0	$2,000	0	39,771.74	0
AL	$2,000	43,128.55	355,169.83	40,187.74	$2,000	43,128.55	355,169.83	40,187.74
AR	$0	311,353.48	0	0	$0	311,353.48	0	0
AZ	$380,103.71	393,228.66	658,709.75	52,934.56	$380,103.71	393,228.66	658,709.75	52,934.56
CA	$2,736,051.04	4,722,931.87	2,036,462.51	1,422,066.25	$2,736,051.04	4,722,931.87	2,036,462.51	1,422,066.25
CO	$214,604.76	939,108.73	747,302.48	574,718.77	$214,604.76	939,108.73	747,302.48	574,718.77
DC	$380,000	662,306.03	27,027.32	100,000	$380,000	662,306.03	27,027.32	100,000
FL	$672,645.65	1,001,775.15	1,474,181.54	654,114.79	$672,645.65	1,001,775.15	1,474,181.54	654,114.79
GA	$244,218.82	449,458.15	1,015,513.46	857,403.62	$244,218.82	449,458.15	1,015,513.46	857,403.62
HI	$0	1,881.85	350.21	65,000	$0	1,881.85	350.21	65,000
IA	$140,508.03	1,009,744.33	1,926,569.89	1,500,686.21	$140,508.03	1,009,744.33	1,926,569.89	1,500,686.21
ID	$187,823.87	2,678.85	259,672.79	124,151.13	$187,823.87	2,678.85	259,672.79	124,151.13
IL	$1,558,423.42	1,163,984.31	1,266,733.54	746,648.86	$1,558,423.42	1,163,984.31	1,266,733.54	746,648.86
IN	$51,372,136.9	55,462,162.35	12,158,225.15	10,703,194.27	$51,372,136.9	55,462,162.35	12,158,225.15	10,703,194.27
KS	$457,357.97	743,323.84	1,947,580.2	1,219,622.42	$457,357.97	743,323.84	1,947,580.2	1,219,622.42
KY	$322,656.69	418,653.67	749,030.65	467,667.99	$322,656.69	418,653.67	749,030.65	467,667.99
LA	$0	432,958.3	82,343.15	74,707.24	$0	432,958.3	82,343.15	74,707.24
MA	$20,500	2,048.52	5,067.39	21,559.4	$20,500	2,048.52	5,067.39	21,559.4
MD	$656,457.28	711,041.52	1,359,444.58	338,398.97	$656,457.28	711,041.52	1,359,444.58	338,398.97
MI	$53,000	64,695.41	900,348.87	122,257.3	$53,000	64,695.41	900,348.87	122,257.3
MN	$1,003,963	0	19,328.87	0	$1,003,963	0	19,328.87	0
MO	$980,272.59	1,107,120.67	2,953,684.3	797,035.02	$980,272.59	1,107,120.67	2,953,684.3	797,035.02
MS	$0	18,000	12,658.32	37,896.92	$0	18,000	12,658.32	37,896.92
MT	$10,635.87	7,966.06	217,532.51	0	$10,635.87	7,966.06	217,532.51	0
NC	$454,608.33	586,877.2	825,974.42	421,918.73	$454,608.33	586,877.2	825,974.42	421,918.73
NE	$442,851.43	242,073.35	407,602.75	87,368.65	$442,851.43	242,073.35	407,602.75	87,368.65
NM	$17,788	42,758.29	399,840.95	53,576.05	$17,788	42,758.29	399,840.95	53,576.05
NV	$93,926.95	105,427.42	80,605.35	0	$93,926.95	105,427.42	80,605.35	0
NY	$95,800	774,242.89	803,897.11	427,095.25	$95,800	774,242.89	803,897.11	427,095.25
OH	$787,532.94	861,327.8	2,345,054.95	498,296.68	$787,532.94	861,327.8	2,345,054.95	498,296.68
OK	$483,477.96	716,861.92	1,874,512.8	1,249,602.19	$483,477.96	716,861.92	1,874,512.8	1,249,602.19
OR	$271,452.99	312,284.48	342,235.01	845,825.22	$271,452.99	312,284.48	342,235.01	845,825.22
PA	$31,900	187,446.52	346,601.35	27,310.6	$31,900	187,446.52	346,601.35	27,310.6
PR	$415,769.81	207,541.88	1,685,670.71	1,262,567.87	$415,769.81	207,541.88	1,685,670.71	1,262,567.87
SC	$16,289.13	238,727.3	216,960.84	61,127.2	$16,289.13	238,727.3	216,960.84	61,127.2

Loan Data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Daily Cash Processing - FR
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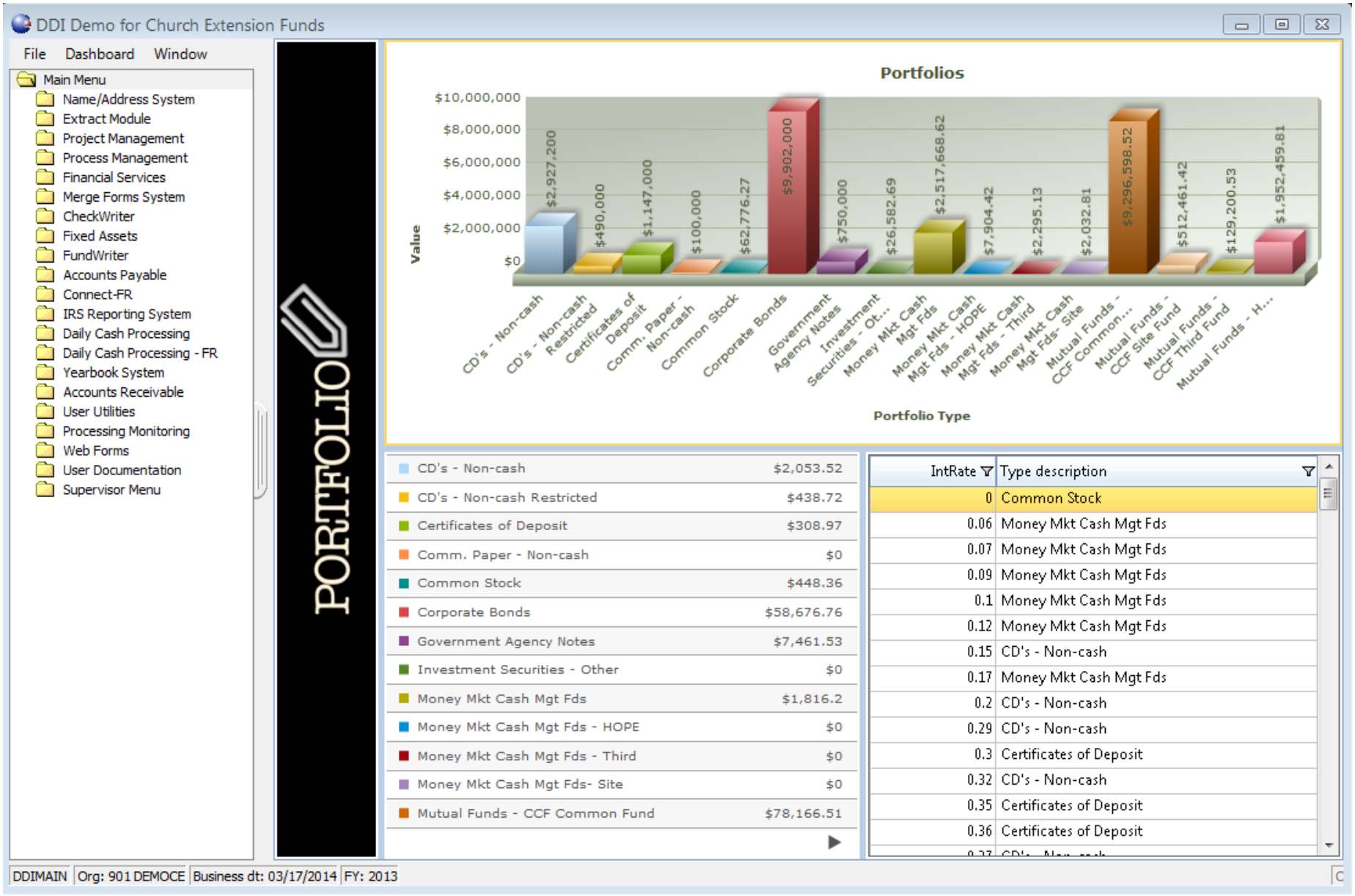
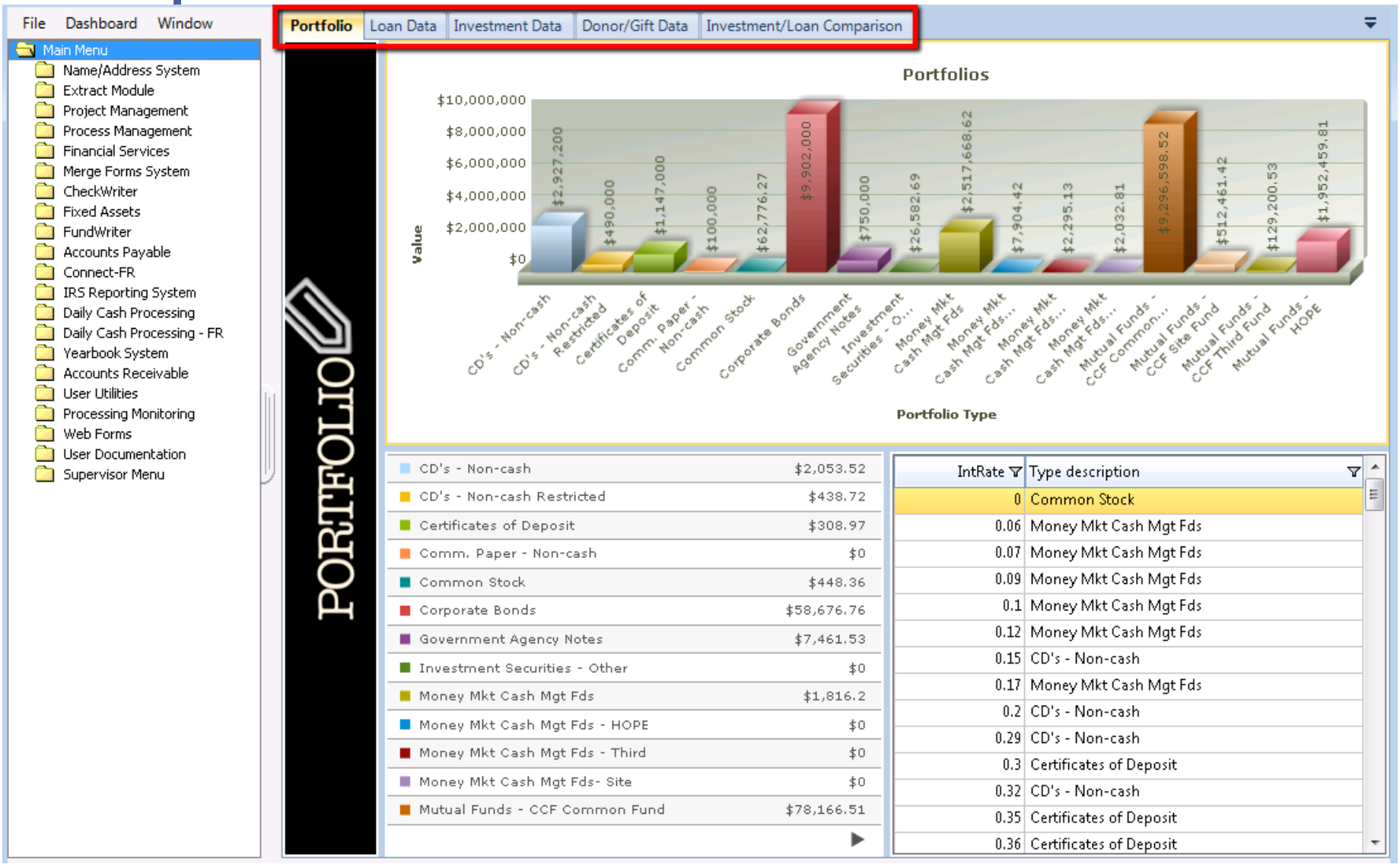
User Documentation
Supervisor Menu
Loan Dashboard
Top 5 States for Loan Balances
$80,000,000
$64,000,000
$48,000,000
$32,000,000
$16,000,000
$0
Loan Balance
$71,642,164.79
$13,343,546.6
$9,660,839.7
$17,397,002.9
$12,230,807.56
$18,491,844.61
Other States
FL
GA
IN
PR
TX
State
Loan Totals by Type
132,770,012.99
$2,275,658.83
$7,720,534.34
0 2 4
Loan Commitment Totals by Type
191,415,148.82
$2,810,000
$11,538,393.29
0 2 4
Loan Totals by Status
133,691,261.27
$3,207,311.84
$1,999,194.12
$3,868,438.93
1 2 11 12
DDIMAIN
Org: 901 DEMOCE
Business dt: 03/17/2014
FY: 2013
CAPS

Portfolio Data



Multiple Tab Dashboard



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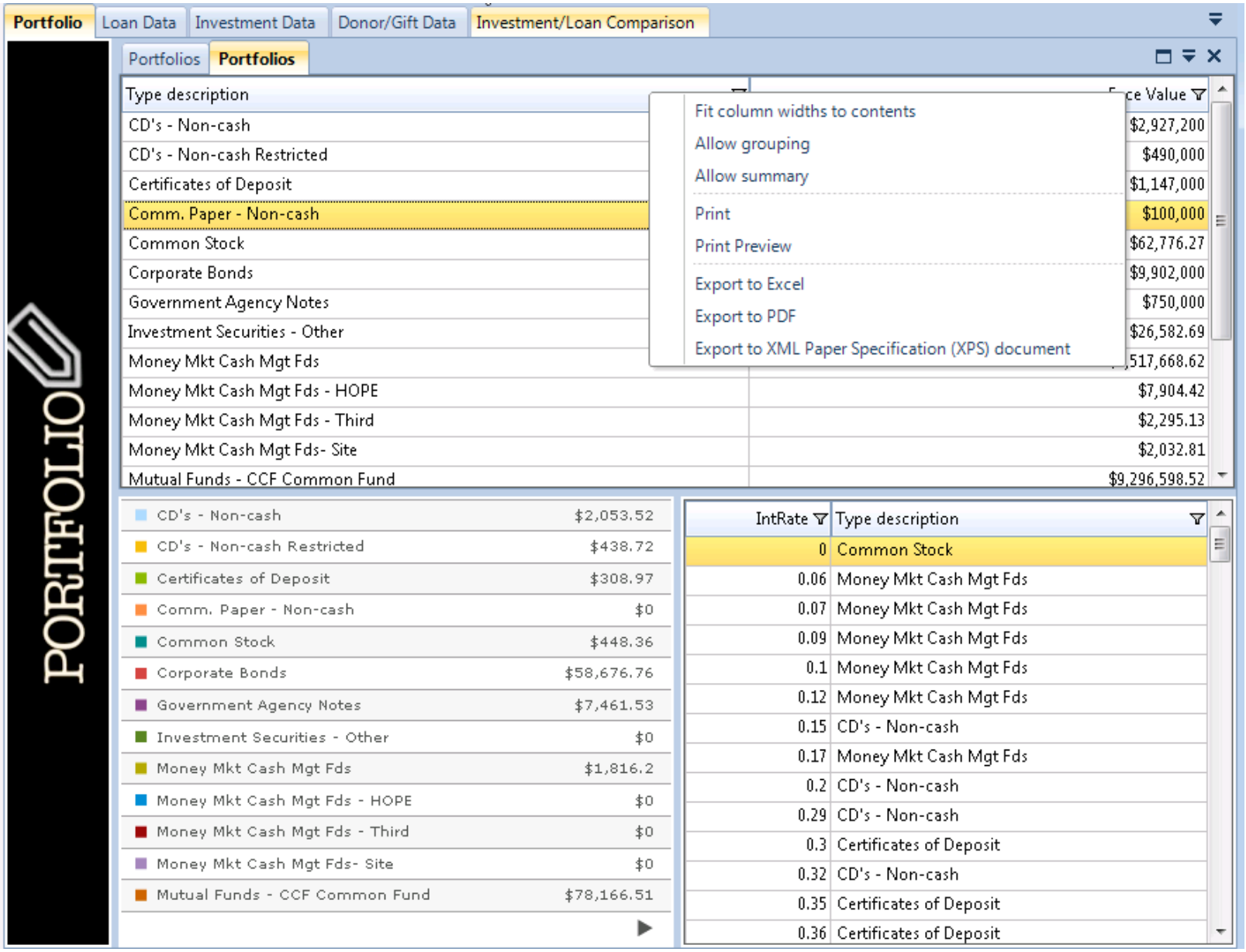
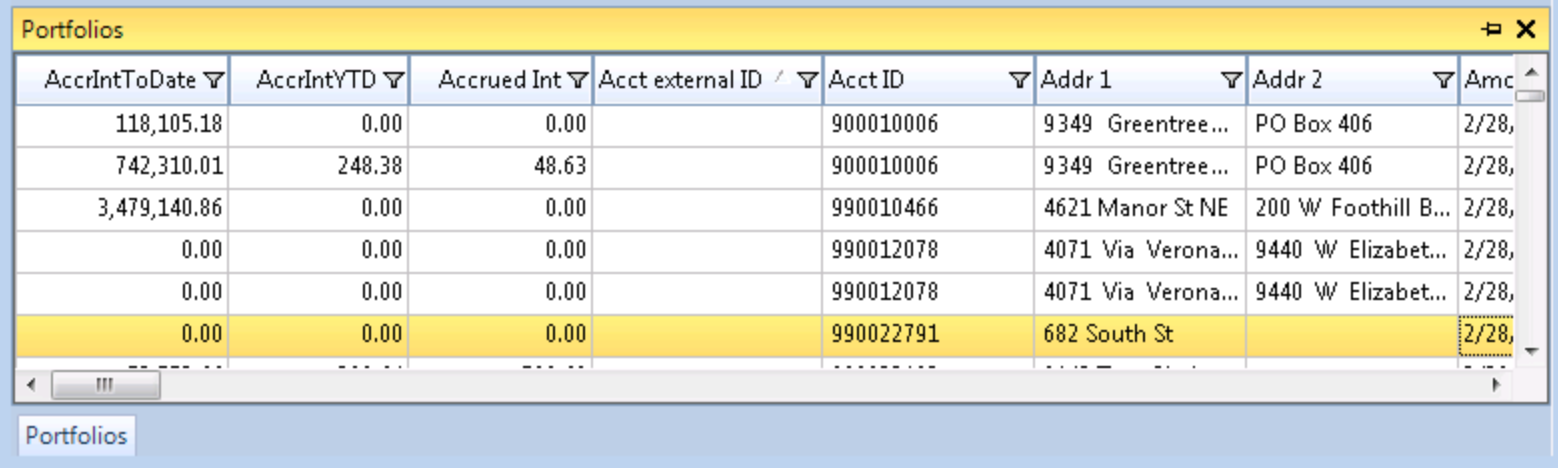
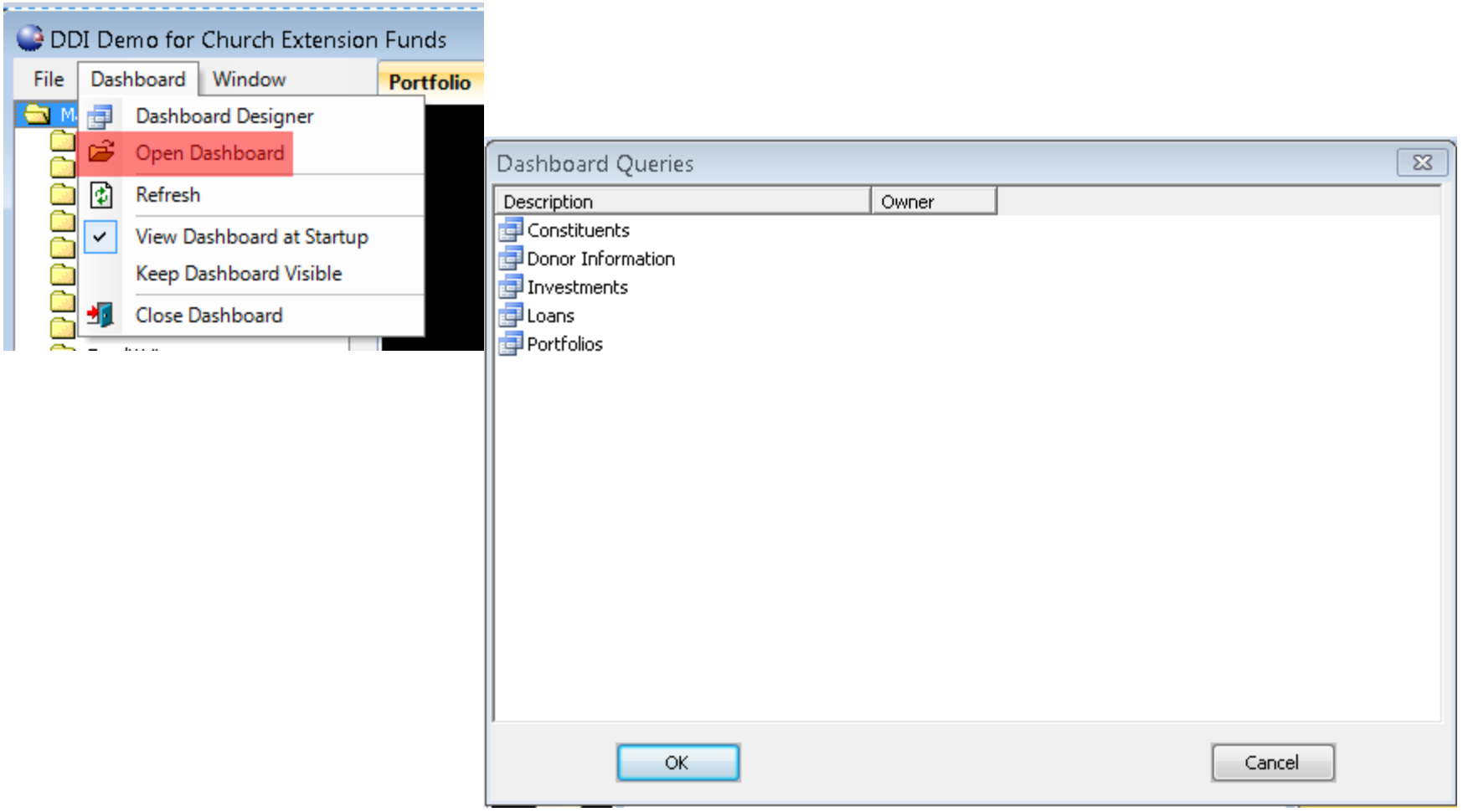
Drill Down Capability



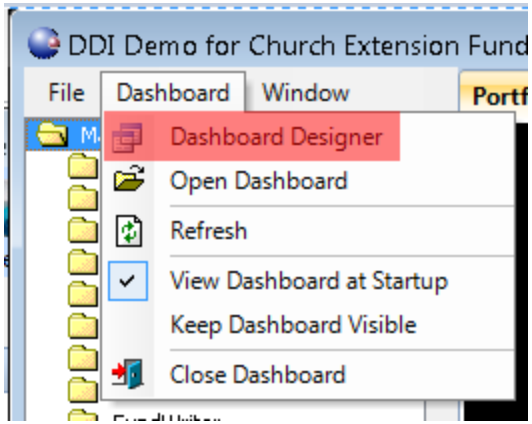
Data Extract Ability

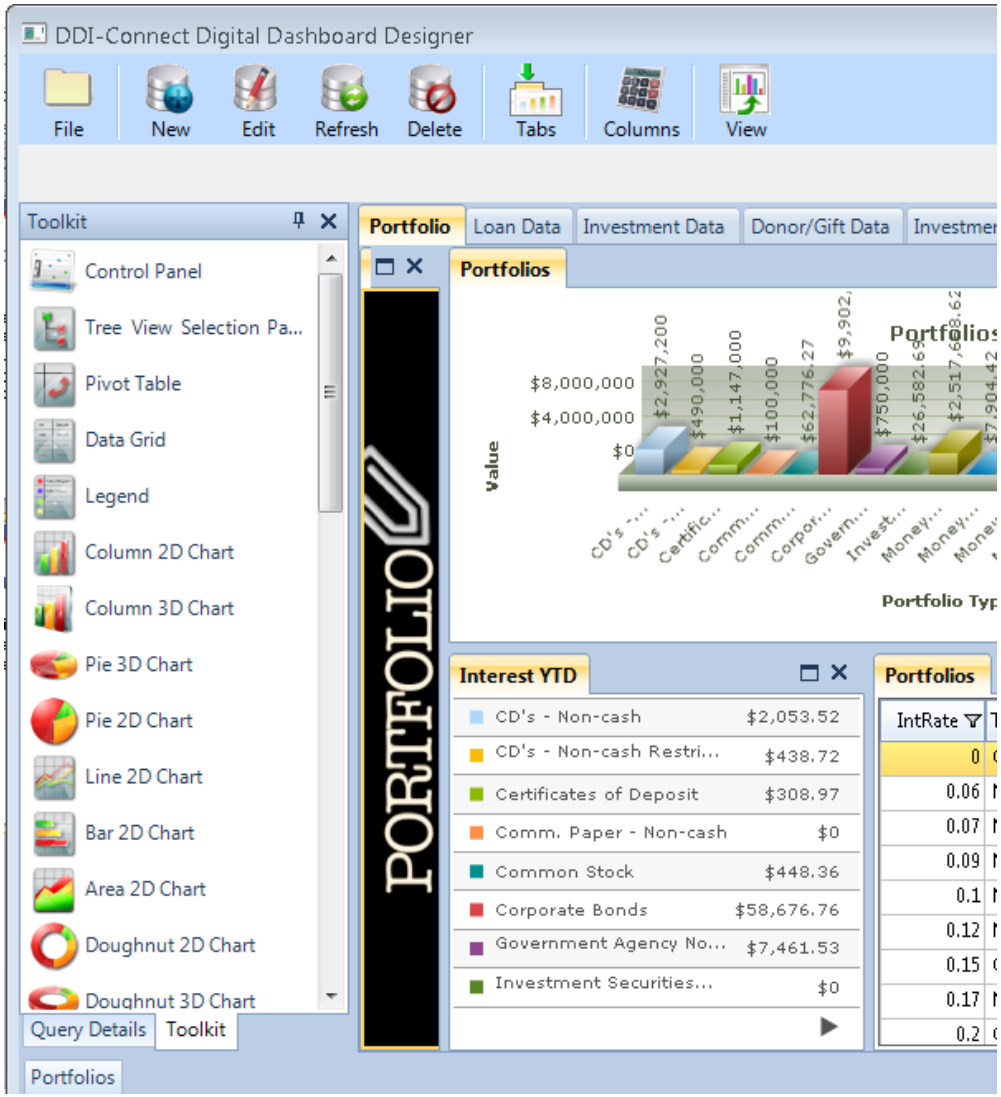


Unlimited Dashboards



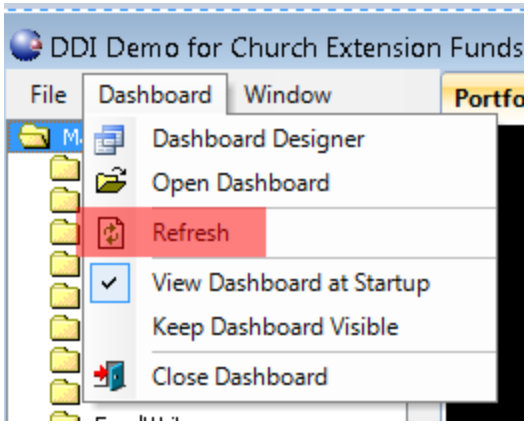
Dashboard Designer





Real-Time Data Updates

- Refreshed Queries On Login
- Refreshed Queries On Demand



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Low Cost

- Many dashboard solutions are very expensive to purchase. Also, those solutions will be with batched, outdated data.

- DDI has purchased the dashboard solution and configured it to be real-time inside DDI-Connect for a low monthly cost.

Advance Your Dashboard

- Combine Data Subjects
- Create your own Calculated Columns
- Create Multi-Series Graphs

How to get started?

1. Request a personalized demo (if needed)
2. Sign-up for the service
3. Receive a 2-hour training session
4. Start Creating Dashboards

Future of the Dashboard

- More Subjects
- Continued Updates
- Reporting Capabilites

Discussion, Questions, Comments

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