Grant Program Workbook inSight User Guide
GrantSolutions

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Overview Description

The purpose of the Grant Program Workbook is to enable comprehensive analysis into Applications, Funding Memos, and Awards associated with Grant Programs.

This user guide covers:

- The status of Applications associated with a Grant Program

    o The map displaying the number of Applications per state

- The status of Funding Memos associated with a Grant Program

- The status of Awards associated with a Grant Program

    o The map displaying the Awarded Amount per state

All three sections have details pages associated with them which can be viewed at the bottom the main dashboards. Application and Award have additional details pages accessible through the maps.

If you have further questions about the dashboards, please feel free to view our FAQ and videos.
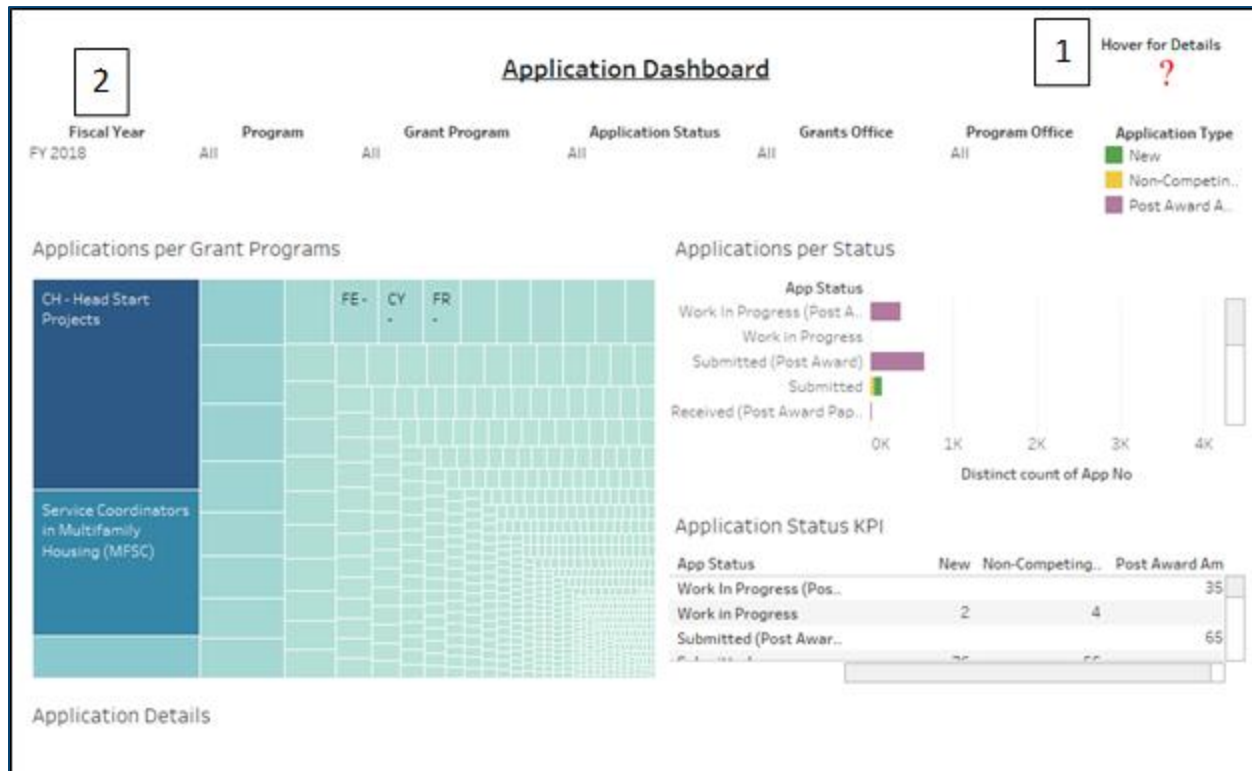
Application Dashboard

1. The help section of the dashboard can be viewed by hovering over the red question mark in the top right corner of the dashboard. By hovering over the question mark, you can view instructions on the dashboard you are currently viewing. Question marks can be different across dashboards so be sure to make that the first place you stop when viewing a new dashboard.

2. These are your available filters. Click the arrow next to the corresponding filter to open a multi-check box list of relevant fields. Select which fields you want to include and then click the "Apply" button in the bottom right corner of the drop down.
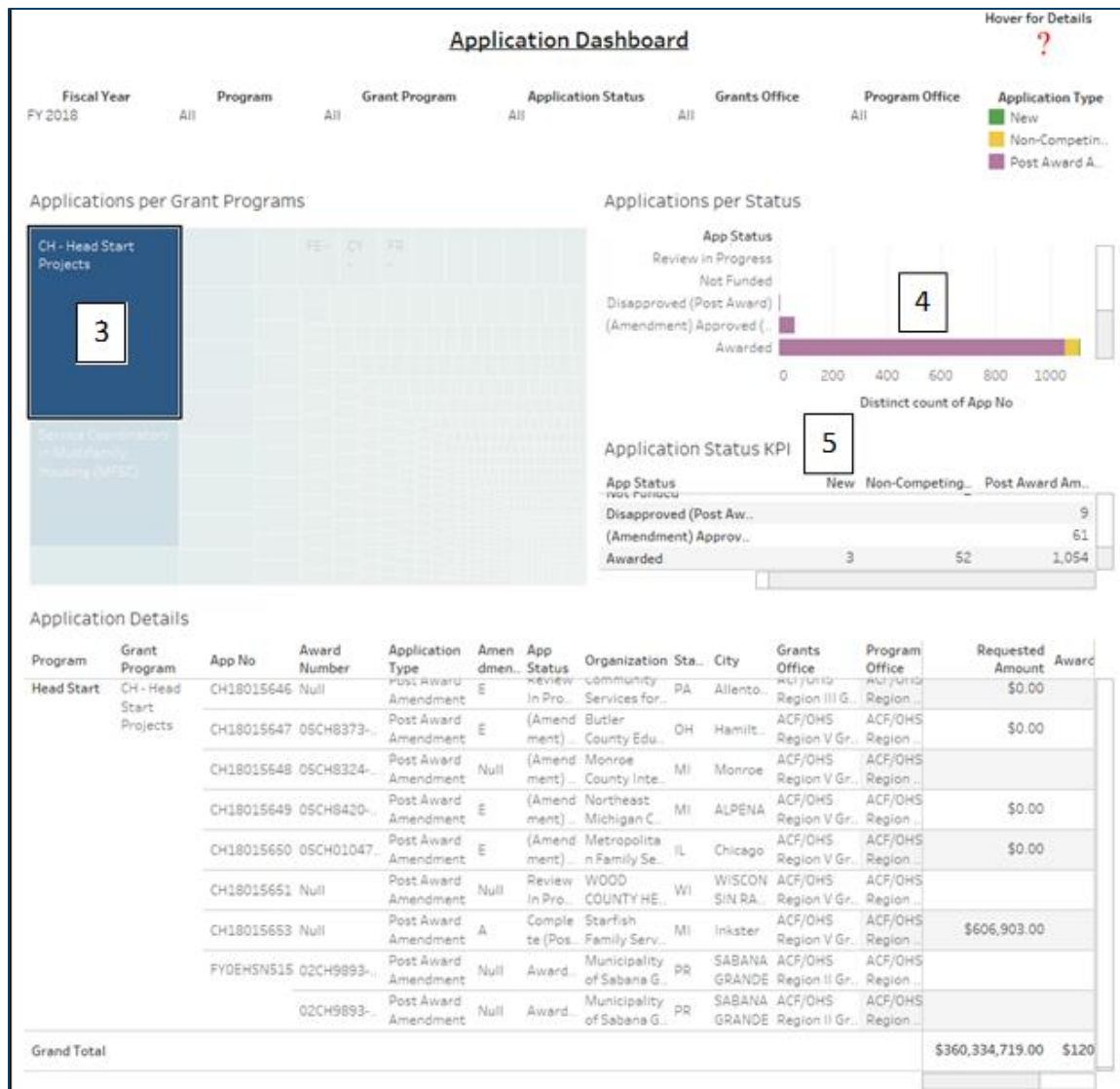
Figure 2: Application Dashboard - 2

3. Each tile represents an individual Grant Program. The size and color of the tile represents the number of Applications assigned to it. By hovering over a Grant Program, you will see the tooltip displaying the full Grant Program name and number of Applications.

4. Each Bar represents the number of Applications in the corresponding status. Each bar is further broken down by color based on the Application type. If you click on the status, it will filter all the Grant Programs from the tree map and populate the details section below.

5. This is your Key Performance Indicators (KPI), which is a summary of information displayed in the two charts. The KPI will update as you apply the filtering options from the previous numbers. The Application Status KPI is a total of each bar from the bar chart. The Application decision KPI is a summation of all the colors across statuses.
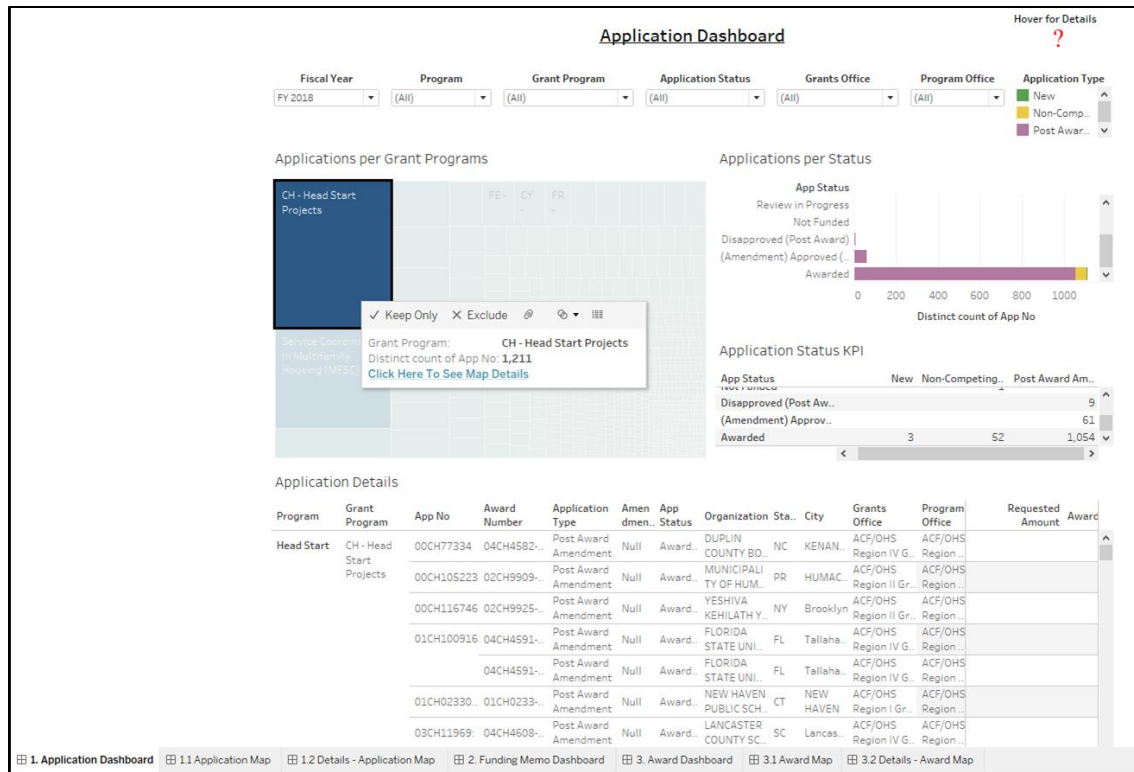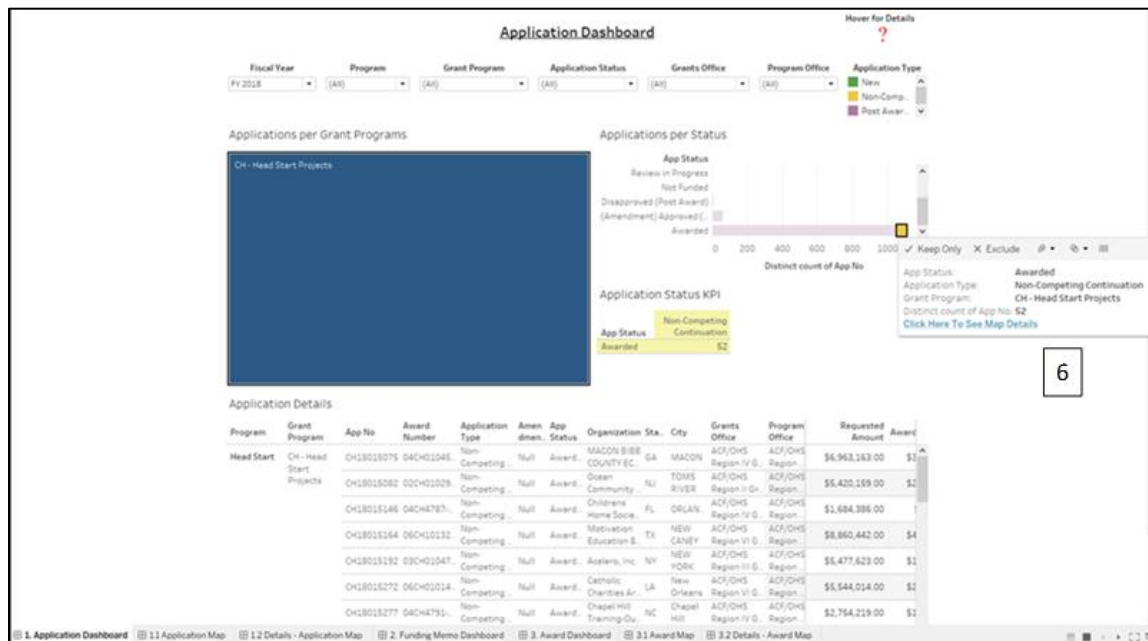
Figure 3: Application Dashboard - 3

Figure 4: Application Dashboard - 4

6. Hovering over a section of the Tree Map or Bar Chart and selecting "Click Here To See Map Details" will navigate to a Map displaying the Application Count by State.
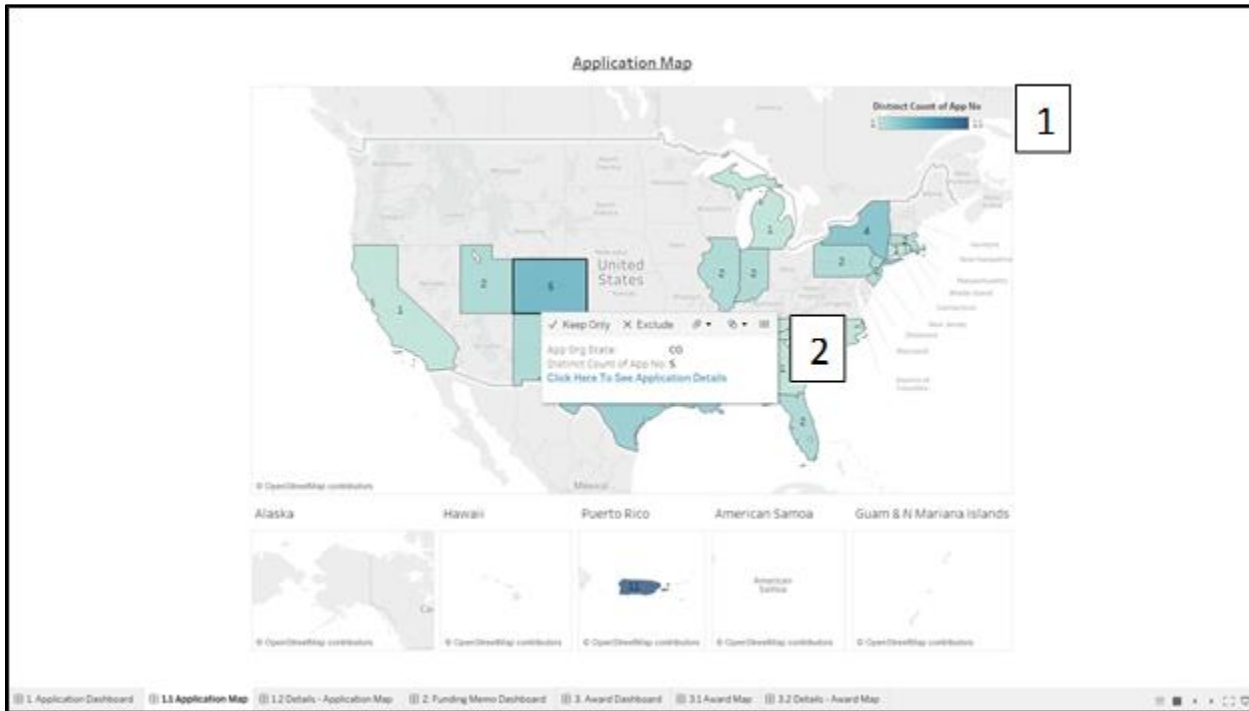
APPLICATION MAP DASHBOARD

Figure 5: Application Map

1. This is the map's legend. Its range (Number of Applications) is dependent upon what is chosen on the previous dashboard.

2. Select an individual state or a group of states and hover over the selection to click on "Click Here To See Map Details" to see a full sheet of relevant details.

APPLICATION MAP DETAILS

Figure 6: Application Map Details

1. Hovering over a dollar amount will cause the tooltip will appear with all the information relevant to that row. This is helpful for any columns cut off due to monitor size.
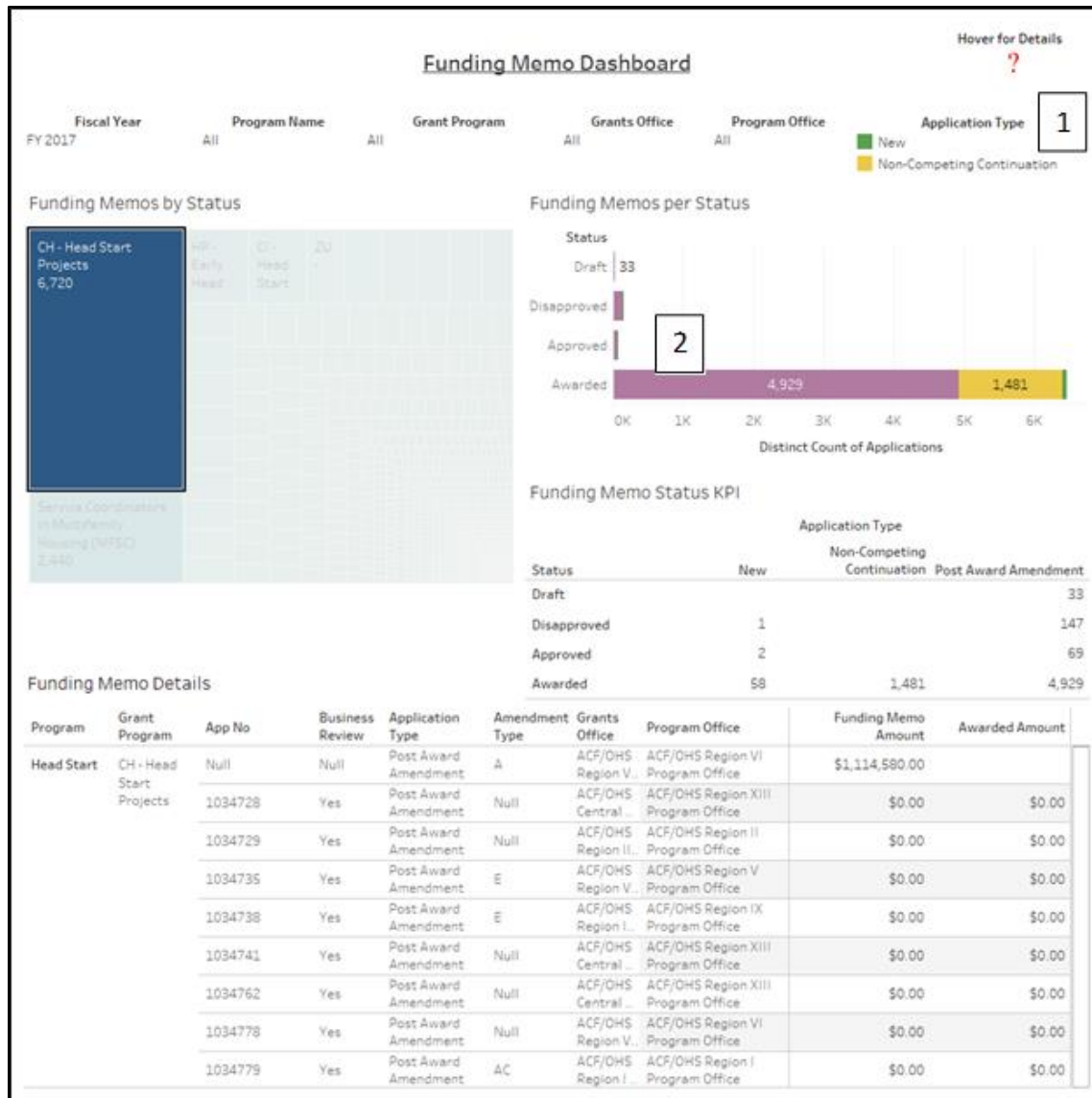
Funding Memo Dashboard

Figure 7: Funding Memo Dashboard

This dashboard acts similarly to Application Dashboard. However, there is no map option.

1. The bar chart's legend is based on Application Type. The Statuses are based on Funding Memo and not Application.

2. Select a section of the Bar Chart to view Funding Memo Details. Each section represents a different Application Type. The Funding Memo Status KPI will change based on the selection.
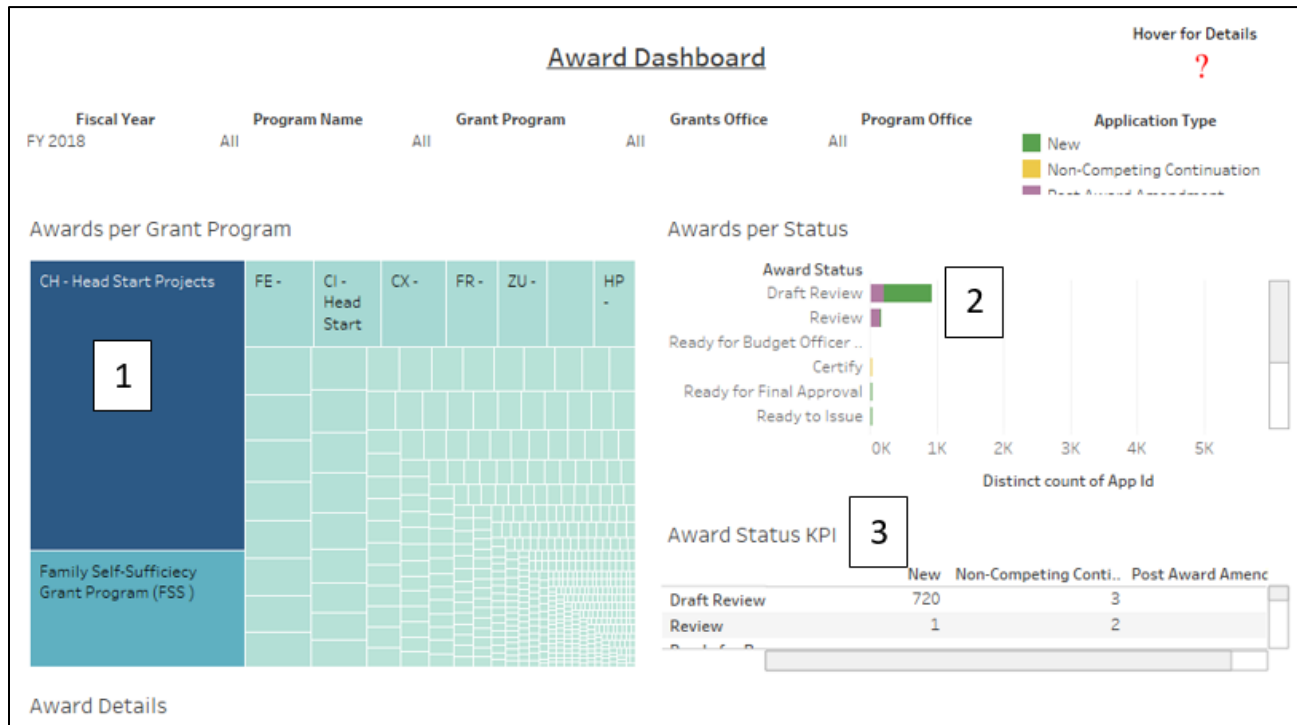
Award Dashboard

Figure 8: Award Dashboard

1. Each tile within the tree map represents an individual Grand Program. The size and color of the tile is dependent upon the number of awards assigned to it. Hovering over a Grant Program will display a tooltip showing the full Grant Program name and number of Awards.

2. Each bar within the chart represents the number of Awards within the corresponding status. By hovering over a status, the tree map will highlight all Grant Program which contain Awards under that status. Clicking on the status will filter all the Grant Programs on the tree map and populate the details section below.

3. This is your Key Performance Indicator (KPI), which is a summary of the information being displayed in the two charts. The KPI will update as you apply the filtering options from the previous numbers. The Application Status KPI is a total of each bar from the bar chart.
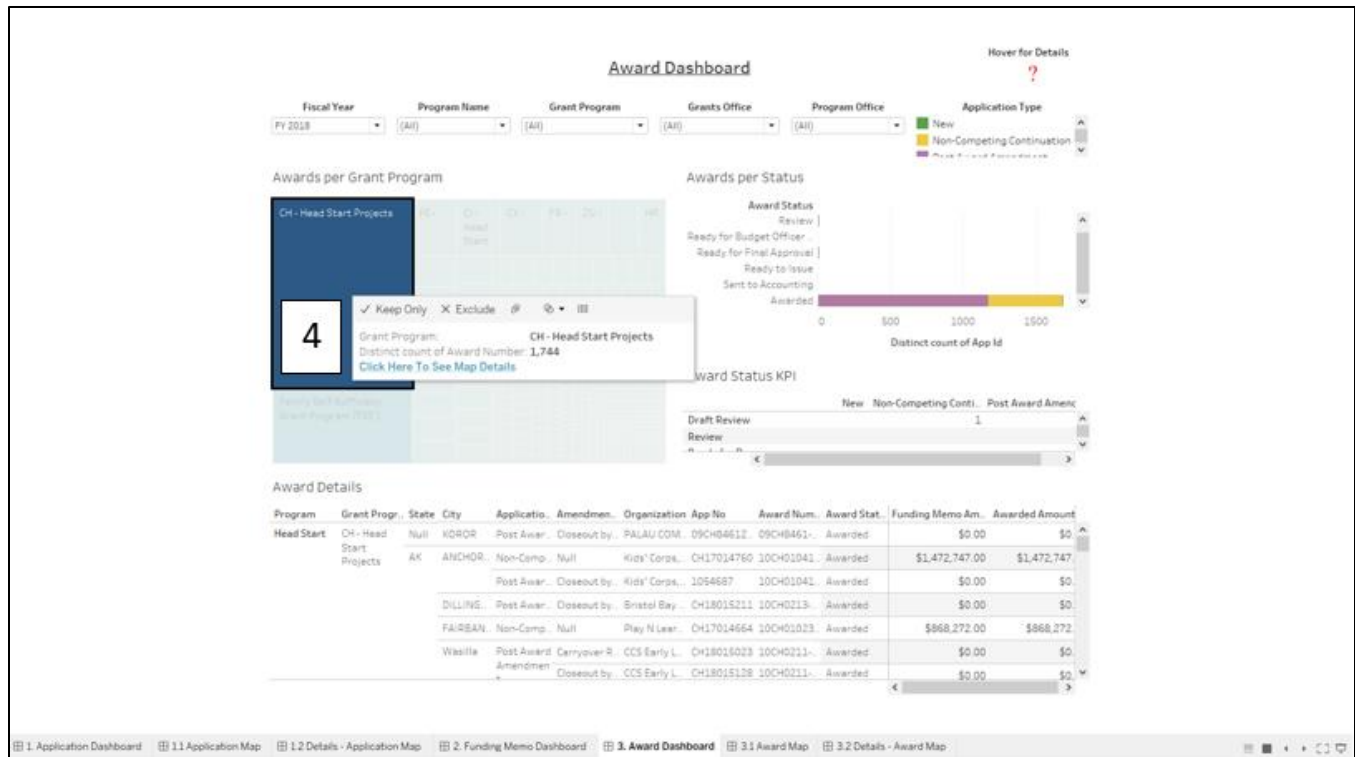
Figure 9: Award Dashboard

4. Hovering over a section of the Tree Map or Bar Chart and selecting "Click Here To See Map Details" will navigate to a Map displaying the Application Count by State.
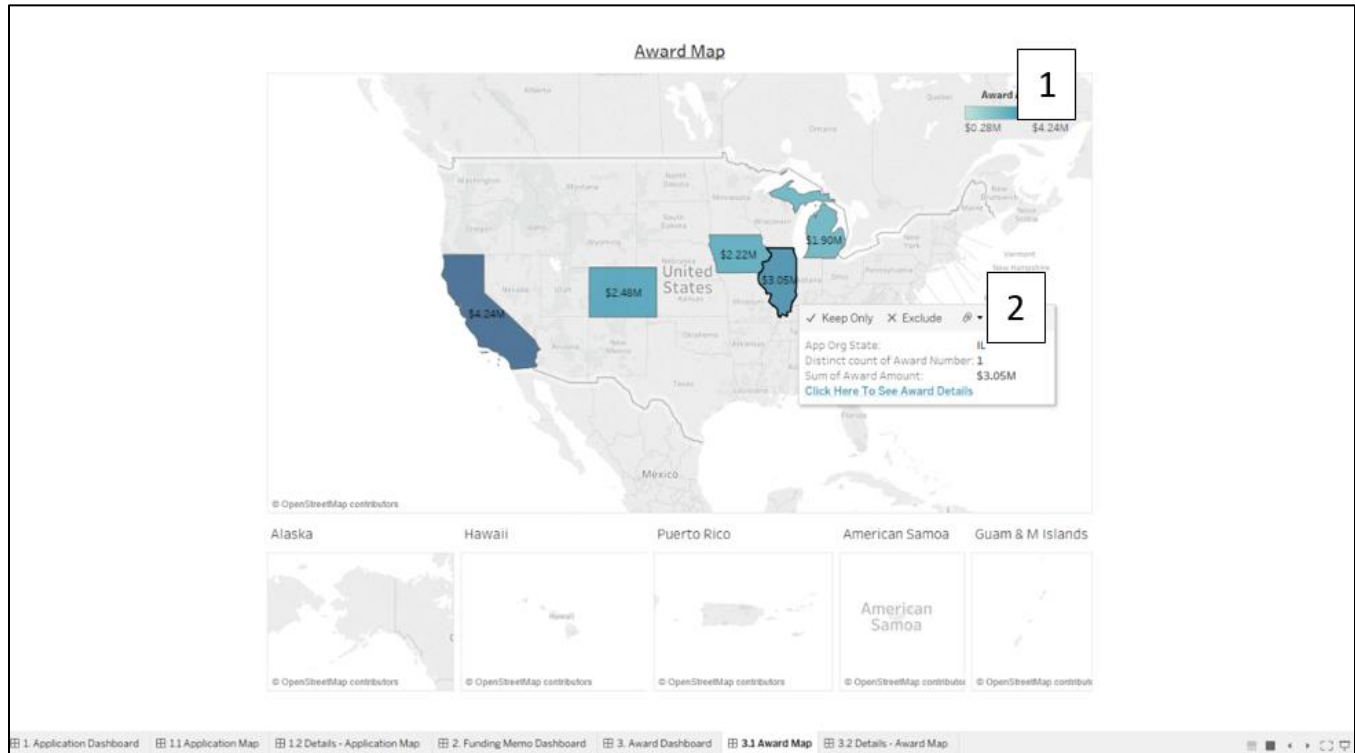
AWARD MAP DASHBOARD

1. This is the map's legend. Its range (Award Amount) is dependent upon what is chosen on the previous dashboard.

2. Select an individual state or a group of states and hover over the selection to click on "Click Here To See Map Details" to see a full sheet of relevant details.