



AGDASHBOARDS USER MANUAL

"Fostering stronger data driven planning and decision making in a more visually engaging format."





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AGNR iDashboards User Manual


General Instructions

Logging Into iDashboards

Click on or copy and paste the following URL in your browser of choice:

<https://dashboards.umd.edu/idashboards/sso>

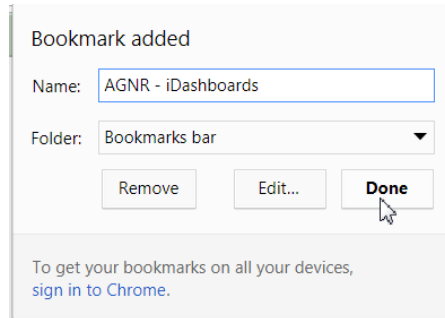
Bookmark: add the site as a bookmark or favorite:

- a. Chrome (Preferred): 

- i. Bookmark icon 



- ii. Name the Bookmark and click Done:



Bookmark added

Name:

Folder:

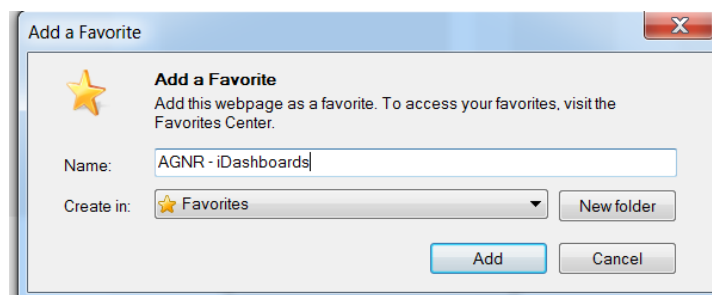
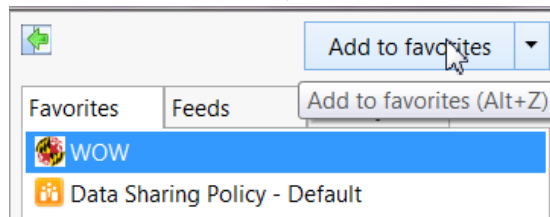
To get your bookmarks on all your devices, [sign in to Chrome](#).

- b. Internet Explorer: 


- i. Bookmark icon: 



- ii. Click "Add to favorites", name bookmark and click "Add"



Add a Favorite

 **Add a Favorite**
Add this webpage as a favorite. To access your favorites, visit the Favorites Center.

Name:

Create in:



Enable Flash: You may be required to enable Flash on your browser. Click Enable or Install Flash Plugin.

Oops.. We detected that your Adobe Flash Player plugin is either not installed or currently disabled for this URL. For the best user experience with this application we recommend enabling your Adobe Flash Player plugin. Click to [Enable or Install](#) the Flash plugin. If the link does not work, it is most likely because your browser settings will not permit the Flash plugin to operate. We also offer a full [HTML5](#) version that will allow you to view the dashboards in the web browser without the use Flash.

User Credentials: If you are unable to authenticate using the University CAS system and the below log in screen pops up, enter in your UMD directory ID and password. iDashboards uses single-sign on authentication. Click Login.

The image shows a login form titled "iDashboards Login". It contains two input fields: "Username:" with the text "fakeuser|" and "Password:" with "*****". Below the password field is a checkbox labeled "Log in automatically". A green "Login" button is positioned at the bottom right of the form.


*The "Log In automatically" checkbox will remember your user credentials and automatically log into iDashboards when navigating to the above URL.

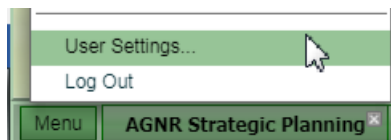
Assistance Logging In?


Contact David Kenny – dkenny82@umd.edu.

User Settings

iDashboards has several configurable user settings including changing the default color scheme or skin of the application, default language, category sort order, etc. This manual will outline the user settings most commonly used.

Accessing User Settings: The User Settings window can be access by selecting the Menu button located in the bottom left of the iDashboards application: 

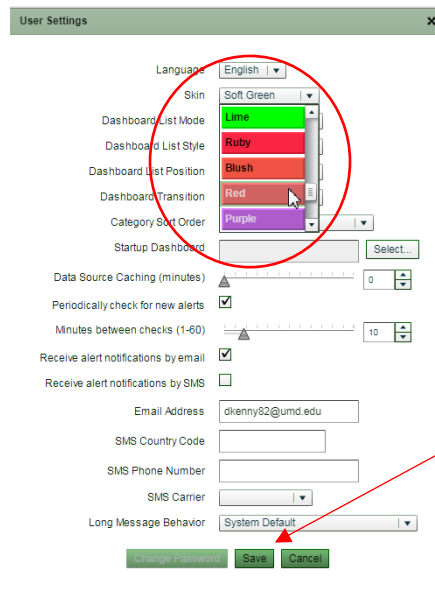


The User Settings window can also be accessed by clicking the User Settings QuickStart icon located in the bottom right hand corner of the application: 



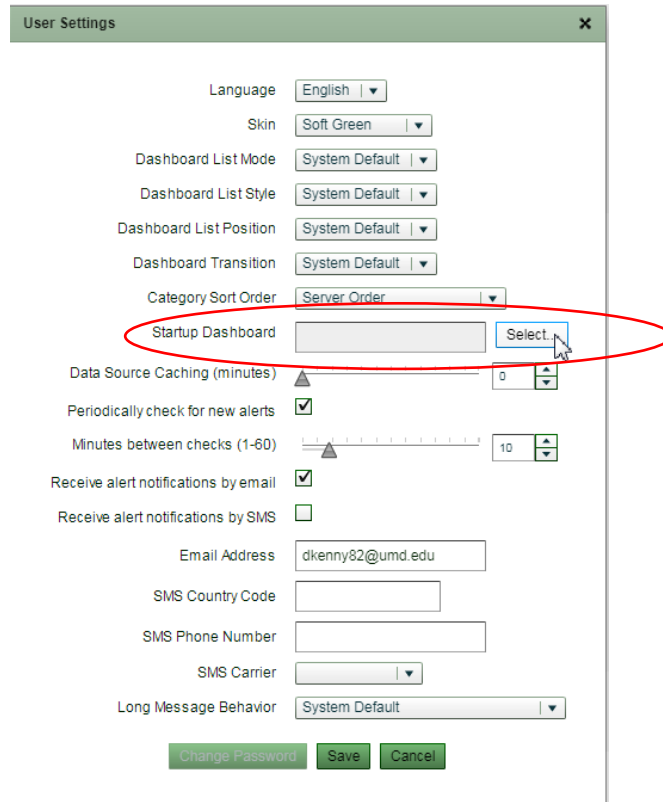


Changing Skin: The iDashboards default skin is “Soft Green”. You can customize the skin or application color scheme within the User Settings by clicking on the dropdown box and selecting your desired color scheme. You must click Save in order to view the new skin color:



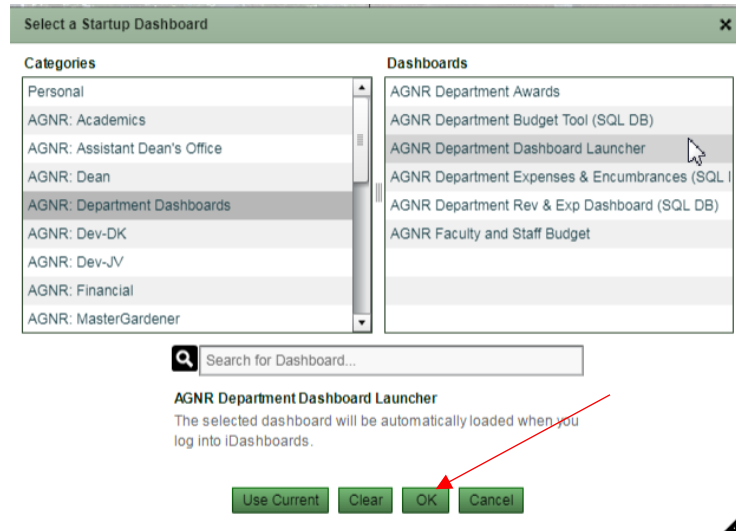
Designating a Startup Dashboard: Similar to bookmarking a page on a browser, a user can define a start-up dashboard which will appear upon first logging into iDashboards. The Startup Dashboard can be defined by:

1. Menu → User Settings → Startup Dashboard
Click the Select button to specify your startup dashboard:





2. A navigation similar to Windows Explorer will appear.
Choose: AGNR: Department Dashboards → AGNR Department Dashboard Launcher and click OK.



3. Click the Save button at the bottom of the User Settings.
4. Refresh your browser or log out and log back in to verify that your newly defined Startup Dashboard is working.

User Setting QuickStart Icons:

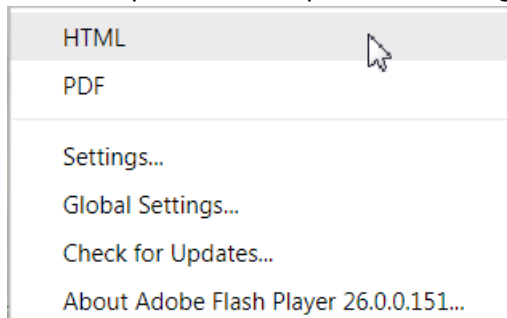
Located in the bottom right corner of the application are 6 QuickStart icons which will allow you to quickly access: Reports, Magnify (zoom), Mouse Over Pie Analyzer, User Alerts (not currently used), Refresh and User Settings.



Reports Icon: 

Left-click: new browser window will open with PDF report.

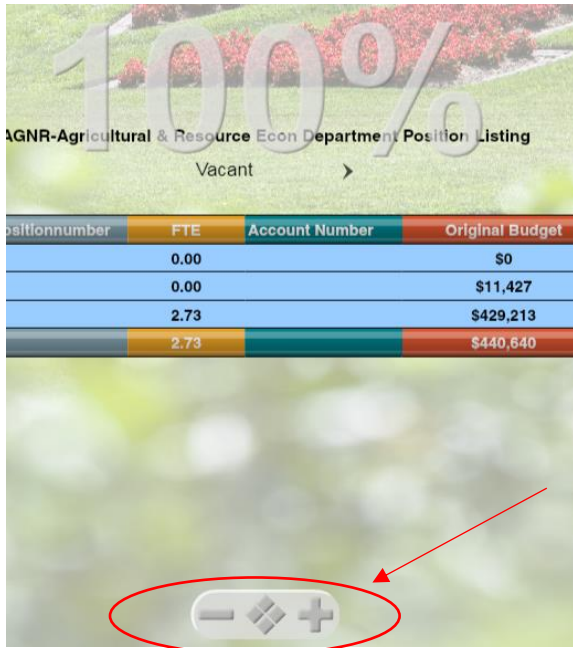
Right-click: user is provided the option of selecting either an HTML or PDF report output



Magnify Icon: 

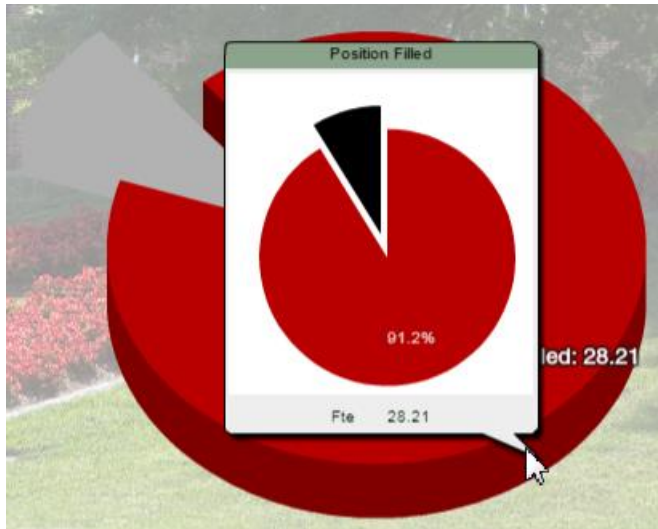


A user can adjust the zoom on the dashboard when click on the Magnify icon. Use the “+” and “-” to zoom in and out.



Mouse Over Pie Analyzer: 

Click on the Mouse Over Pie Analyzer icon to enable the ability to hover a chart and for the X-axis Value hover over, see the Y-axes relative percentages. This functionality is NOT available on all charts as the Y-axis must contain at least one numeric value.



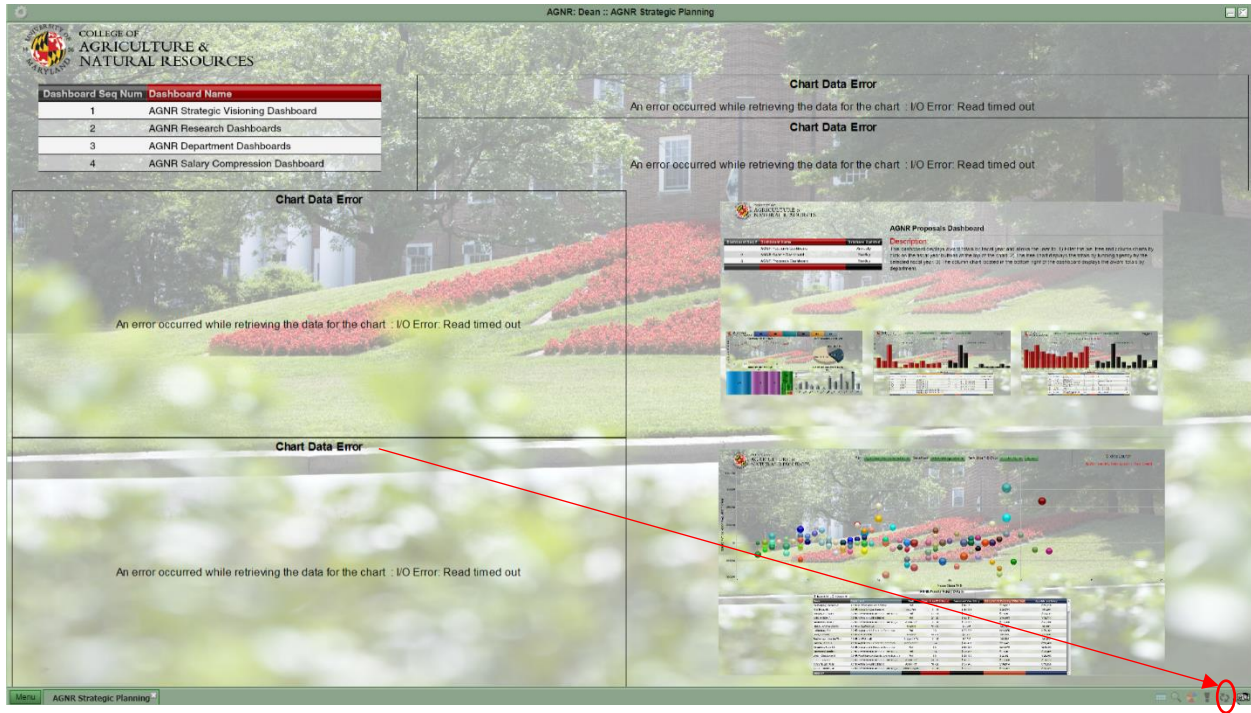
User Alerts: 

Currently not being used in AgDashboards.

Refresh: 



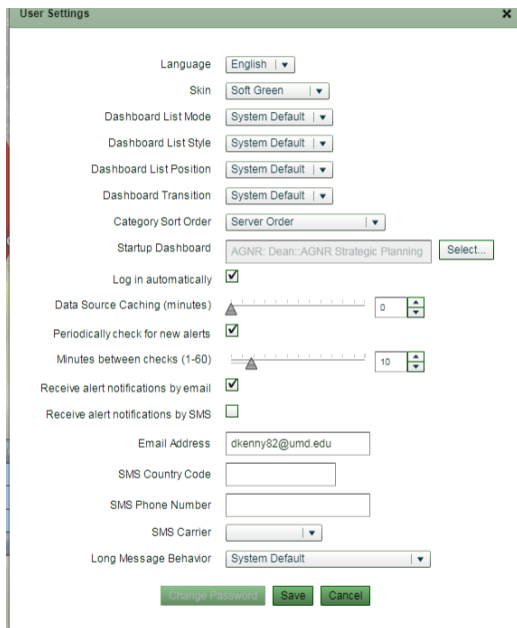
The Refresh icon allows a user to easily refresh the dashboard to update the any newly available data and/or reload the dashboard to remedy chart data errors as show below:



User Settings:



Click on the user settings QuickStart icon to access the user settings window with one click.



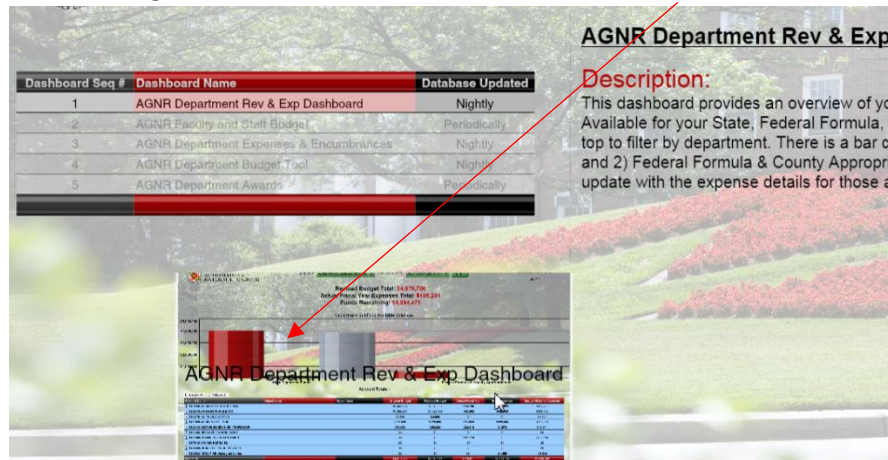
Opening Dashboards

There are several ways to open dashboards including designating a startup dashboard, utilizing the bookmark feature, using the recently opened feature or simply navigating to the category which contains the dashboard.

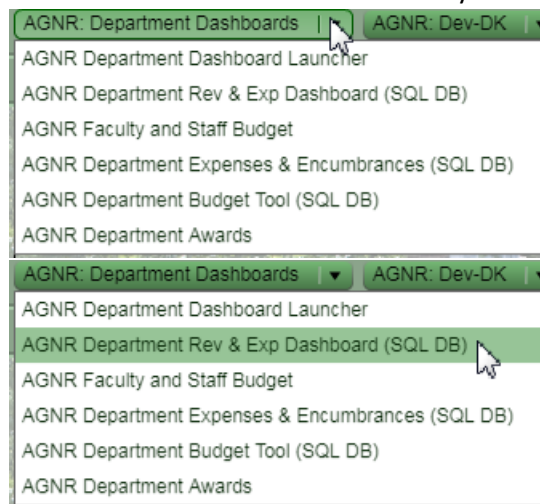


Opening a Dashboard

1. If you designated a dashboard launcher as your startup dashboard, you can simply click on a dashboard image to launch a dashboard:



2. Navigate to a category, i.e. AGNR: Department Dashboards, click on the category name or down arrow and select a dashboard which you would like to view:



Bookmarks:

Adding a Bookmark:

1. Similar to adding internet browsing bookmarks, **first open the dashboard** in which you would like to add as bookmark.

- a. To add a bookmark click the star located in the top left of the

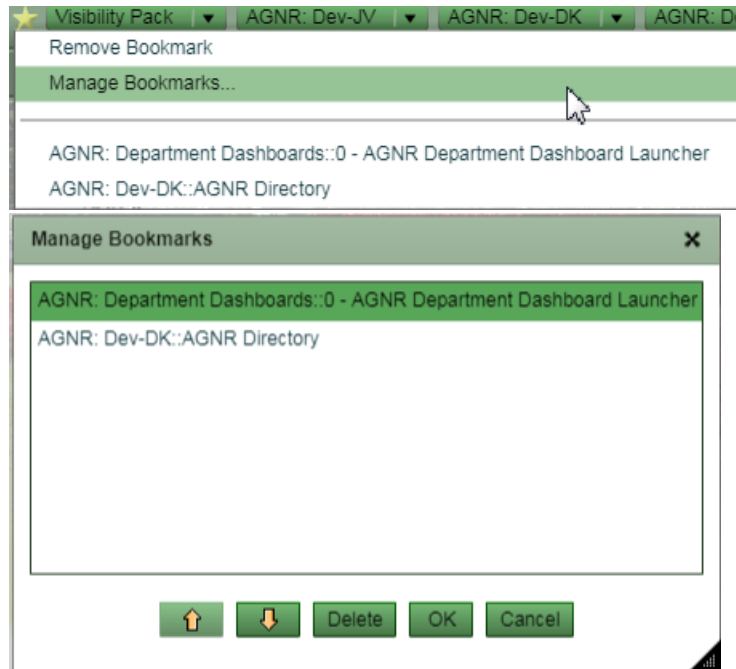
iDashboards application:

Accessing Bookmarks: Click on the star icon at the top left of the iDashboards application and click on the dashboard you'd like to view:



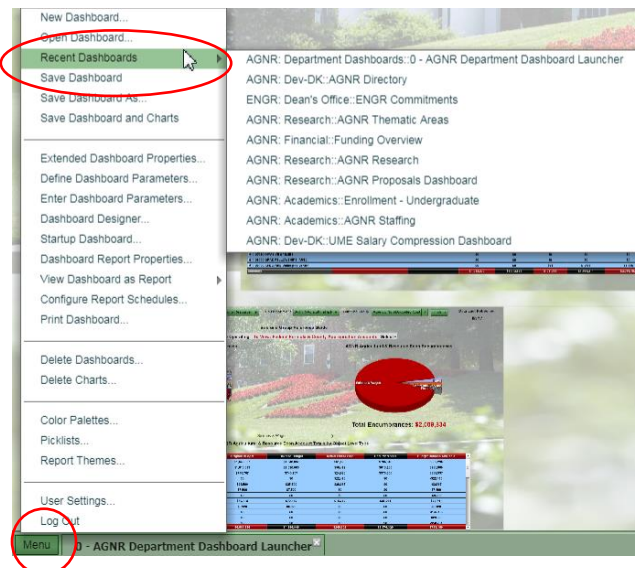


Managing Bookmarks: Bookmarks can be managed by again navigating to the star icon and selecting Manage Bookmarks. From there you can reorder or delete your bookmarks:



Recently Opened Dashboards:

A user can access the ten (10) most recently accessed dashboards by click on the Menu button located in the bottom left hand corner and selecting Recent Dashboards:




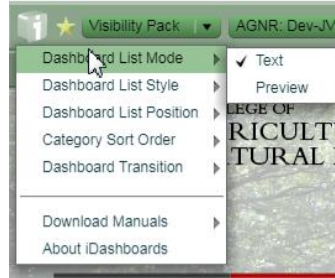


Dashboard Navigation

There are multiple options to navigate dashboards using the Dashboard List Mode, Dashboard List Style and Dashboard List Position features.

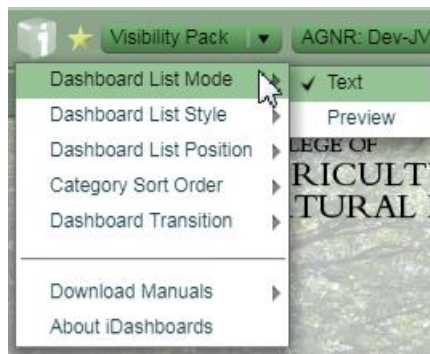
Accessing Dashboard Navigation Options:

1. Click on the “i” icon located at the top right of the application: 
2. Then choose the dashboard navigation option you would like to modify:

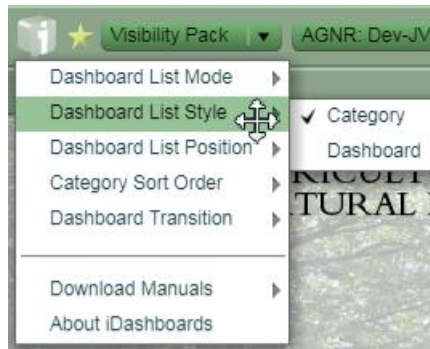


Summary of Navigation Options:

1. **Dashboard List Mode:**
 - a. Text (default) – Dashboard Categories will be viewable as text.
 - b. Preview – dashboard name and dashboard thumbnails are enabled, displaying images of the dashboards.



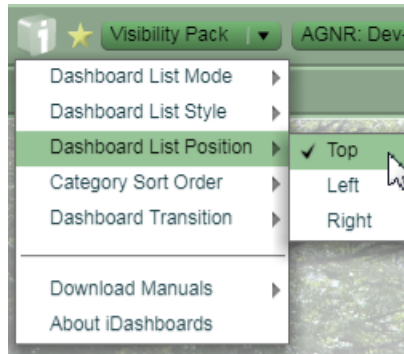
2. **Dashboard List Style:** Unopened dashboards can be displayed in two different ways: Category & Dashboard.
 - a. Category (default): dropdown list across the top of the application screen for each category with a list of the dashboards available in each category.
 - b. Dashboard: each available dashboard is listed individually across the top of the application. Sort order can be set under Category Sort Order.



3. **Dashboard List Position:** A User can select which position the dashboard list should be displayed within the application. The available options:



- a. Top (default)
- b. Left
- c. Right



Filters & Drilldowns

Most of the dashboards will contain filters and drilldowns which allow users to visualize a subset of the data presented on the dashboard. For example, most dashboards contain filters to present data by a specific department, sub department, account category, etc. Filters and drilldowns are useful tools to narrow down the data represented on the dashboard to better identify opportunities and analyze metrics to measure performance.

Dashboard Filters:

Most dashboard filters will can be viewed and changed at the top of the dashboard. Dashboard filters are often defaulted to either all items or the first item available. For example, department dashboards will most often be filtered by the first department displaying in the data filter subset. The following is an example of a dashboard with 3 filters: Department, Sub Department and Subfund Group:

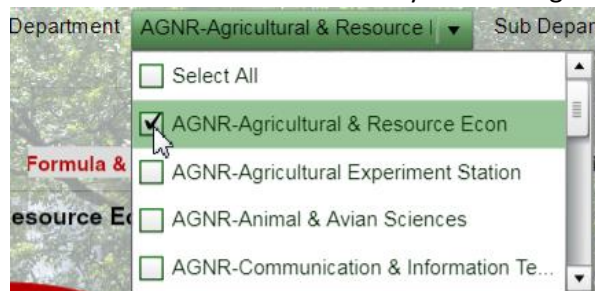


1. Editing or Changing Filters:

- a. Start from by changing filters from left to right. Click anywhere on the filter to display filter values:



- b. Unselect the default filter value by unchecking the box.



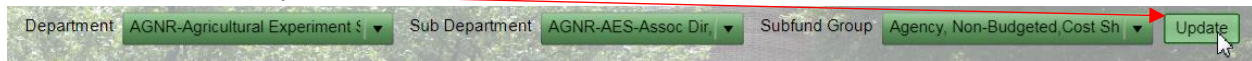


c. Select the filter value you would like to view.



d. Repeat these steps for any other filters you'd like to change on the dashboard.

e. Click Update to refresh the dashboard.



****TIP – When changing filters multiple times, ensure each filter is properly selected as filters have automatically been changed based upon previous selections.****


Dashboard Drilldowns:

Dashboards may contain drilldown functionality which allows users to drill into the data comprising the previous chart. For example, a drilldown may show the object code breakdown comprising the object level totals on a specific account (i.e. totals by object code for Travel). Drilldowns can also be referred to as pivots where pivots will update related charts on the dashboard with a simple click.

1. Identifying Drillable Charts:

To identify charts with drilldowns simply hover your mouse over the chart. If your mouse arrow



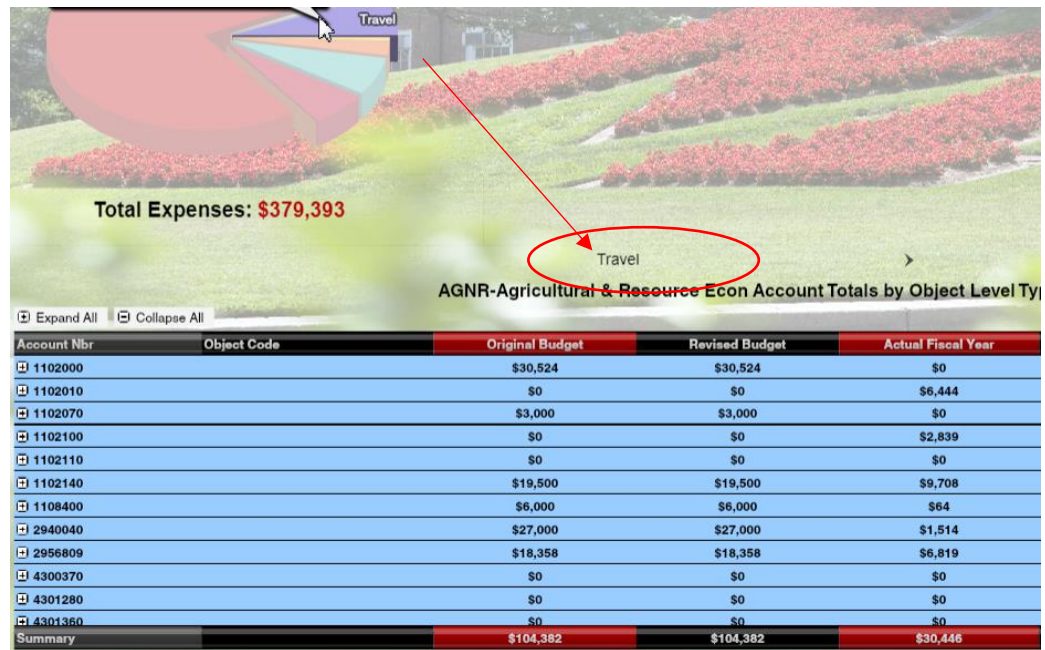
becomes a hand  then the chart you've selected contains drilldown functionality.

2. Drilling or Pivoting:

When the hand appears simply click on the value in which you would like to drill or pivot. When a chart contains a drilling function it will be replaced in the same dashboard window by another chart; with a pivot a related chart on dashboard will be changed by the value selected.



Pivot Example:



Drilldown Example: Select year 2014 Award details for a faculty member.



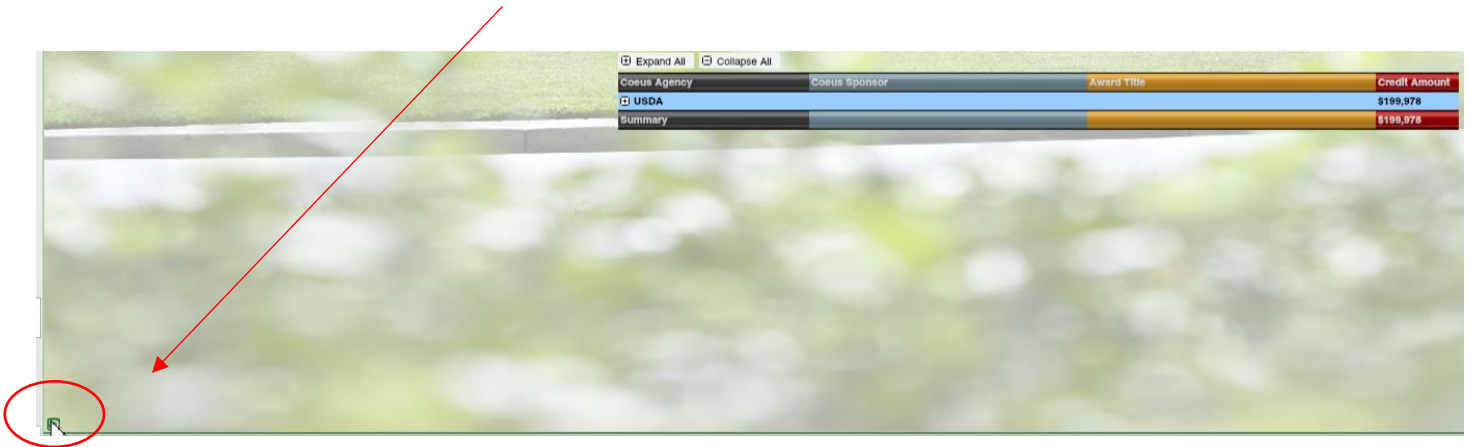
Drilldown chart results in the details comprising the totals from the previous chart.

Abani K Pradhan 2014

Coelus Agency	Coelus Sponsor	Award Title	Credit Amount
USDA			\$199,978
Summary			\$199,978

3. Drilling Back or Returning to Previous Chart:

To Drill back to the previous chart select the back button located in the bottom left hand of the drilldown chart:

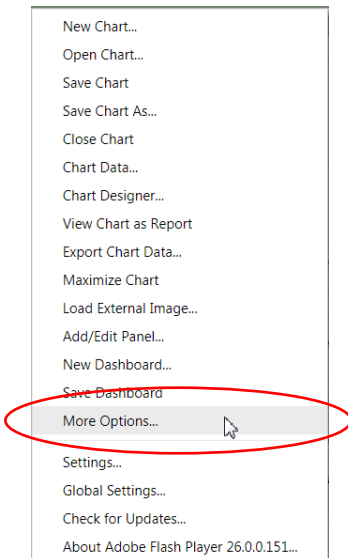


Saving Dashboards & Charts as HTML or PDF Report

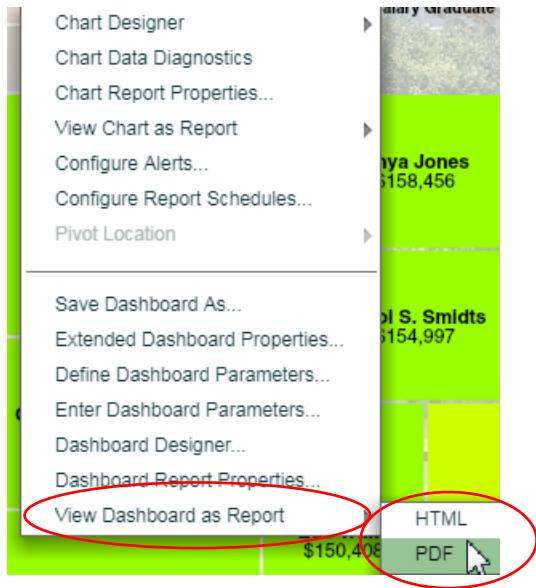
Dashboards and charts can be saved as .pdf report. To save a dashboard as a .pdf report follow these steps:

Saving Dashboard as HTML/PDF:

1. Right click on any chart on the Dashboard.
2. Choose More Options:

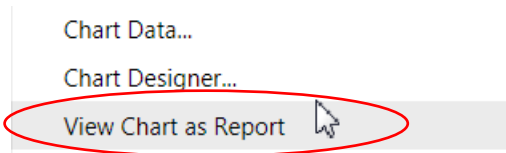


3. Under More Options choose View Dashboard as Report and choose: PDF or HTML



Saving Chart as PDF:

1. Right click on any chart on the Dashboard.
2. Click on View Chart as Report:




3. A PDF Report will display. If the chart contains a large dataset it may take a minute or two for the PDF to be generated:

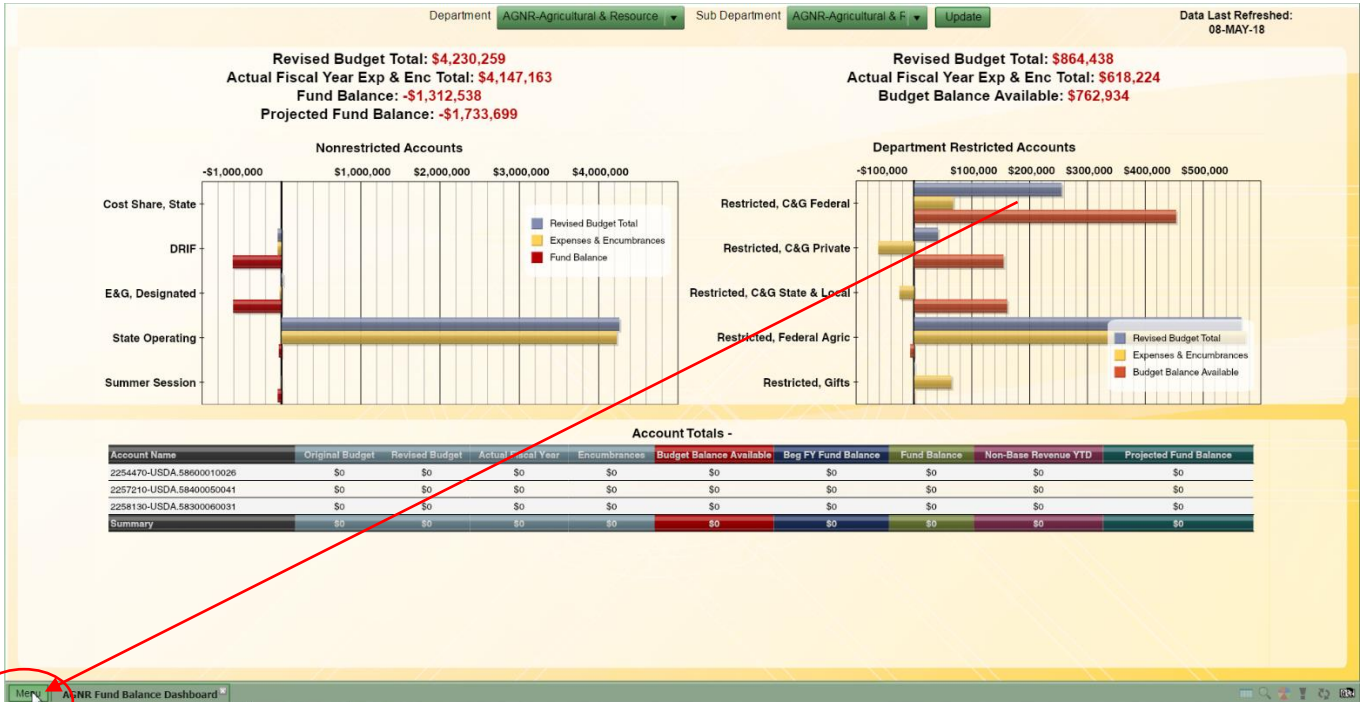
Expenses by Object Level	
Fin Obj Level Nm	Actual Fiscal Year Expenses
Accounts Receivable, net	\$0
Capital Equipment	\$3,596,084
Cash and Cash Equivalents	\$0
Communications	\$19,998



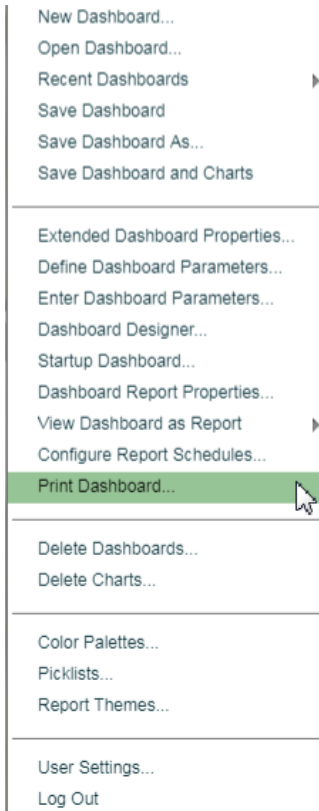
Print Dashboard:

A dashboard can be printed by:

1. Clicking on the Menu  button located in the bottom left corner of the dashboard.



2. Select Print Dashboard... and a print window should be launched.



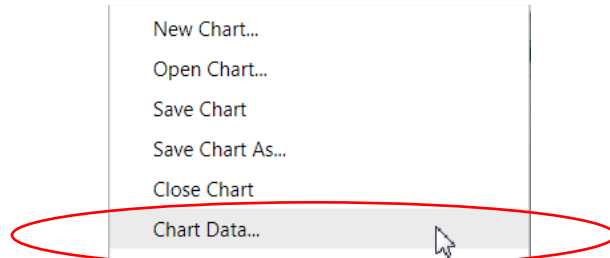


Viewing & Exporting Chart Data

A user can easily view the data used to develop the charts contained on the Dashboard. Viewing the data allows the user to see the data in a table. Exporting the chart data will result in .csv download.

Viewing Chart Data:

1. To view chart data, right click anywhere on a chart and choose Chart Data:



2. A window with a table of the chart data will appear. You can export the data from this window by click the Export button at the bottom of the window:

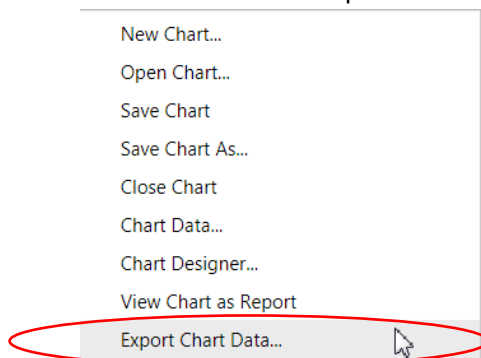
The 'Chart Data' window displays a table with the following data:

Fin Obj Cd Nm	Actual Fiscal Yea	Fin Obj Level Nm
Business Meals	2945.69	Travel
Conference Fees	825	Travel
Faculty Recruitm	0	Travel
Foreign Travel	420322.46999999	Travel
In State Travel	150174.63999999	Travel
Out of State Trav	1058467.500000	Travel
Travel Card Rece	700	Travel
Award Revenue I	0	Federal Grants and Contracts
Contracts and Gr	0	Federal Grants and Contracts
Indirect F&A Cos	0	Federal Grants and Contracts
Award Revenue (0	Nongovernmental Grants and Contracts
Gift Revenue fro	0	Nongovernmental Grants and Contracts
Indirect F&A Cos	0	Other Operating Revenue
Operating Expen	0	Pool

At the bottom of the window, there are two buttons: 'Export' and 'Configure...'. The 'Export' button is highlighted with a red oval and a mouse cursor is pointing at it.

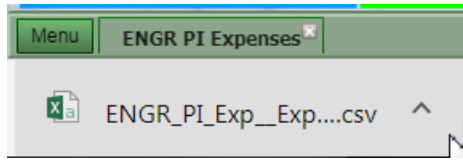
Exporting Chart Data:

1. Another method to export chart data, right click anywhere on a chart and choose Export Data:





2. The export will automatically occur and will appear at the bottom of your browser if you're using Google Chrome:



Overview of Available AgDashboards

The AgDashboards Department dashboards were developed by a collaborative team comprised of both department and administrative resources. Each dashboard tells a different story aimed at identifying opportunities, facilitating productive conversations and assisting in planning.

1. Standardized reporting from multiple data sources within one user interface.
2. Aggregated and detail level financial information with a click of a mouse.
3. Timely and accurate reporting tools to facilitate planning and decision making.
4. Engaged end users via intuitive, visually appealing data visualizations.

The dashboards are comprised of multiple campus datasources including: AGNR Strategic Initiatives, BPM, KFS, PHR and Kual Research (KR)

AGNR Department Launcher

The AGNR Department Launcher Dashboard contains category links to five different sets of dashboards:

1. **Strategic Visioning** – a dashboard with an overview of the College of Agriculture & Natural Resources five strategic initiatives and the related objectives.
2. **Financial** – a suite of financial dashboards to aid in the oversight and management of department finances and position management.
3. **Research** – a suite of research related dashboards displaying fiscal year and period proposals and awards
4. **Academics** – enrollment dashboards featuring undergraduate enrollment totals by gender & ethnicity and applicant enrollment metrics by county and department.
5. **Extension** – a funding overview dashboard and a Master Gardener dashboard by county.

AGNR Strategic Visioning Dashboard

The AGNR Strategic Visioning Dashboard provides an overview of the College of Agriculture & Natural Resources five strategic initiatives. Users can click on a strategic initiative to reveal the objectives in the chart located on the right side of the dashboard. Users can also play the “We are the Cornerstone College of the University of Maryland” video by selecting the play button.



Strategic Visioning Initiatives

COLLEGE OF AGRICULTURE & NATURAL RESOURCES

- Establish a healthy food system and ensure global food and nutritional security.**
- Ensure a clean and healthy Chesapeake Bay.**
- Advance innovative, profitable, and sustainable agricultural production systems.**
- Improve human, animal, and environmental health.**
- Optimize urban environments through design, green technology and community engagement.**
 - Refine and improve the process and perception of urban expansion into rural areas.
 - Improve understanding of agriculture and environmental awareness in urban areas.
 - Improve the performance of built environments.

Financial Dashboards

A suite of financial dashboards to aid in the oversight and management of department finances and position management. The suite of financial dashboards can be accessed by click on the “Financial” button located under the AGNR: Department Dashboards category.

Welcome to AgDashboards!

Use this launcher to access all of AGNR's available dashboards.

STRATEGIC VISIONING

FINANCIAL

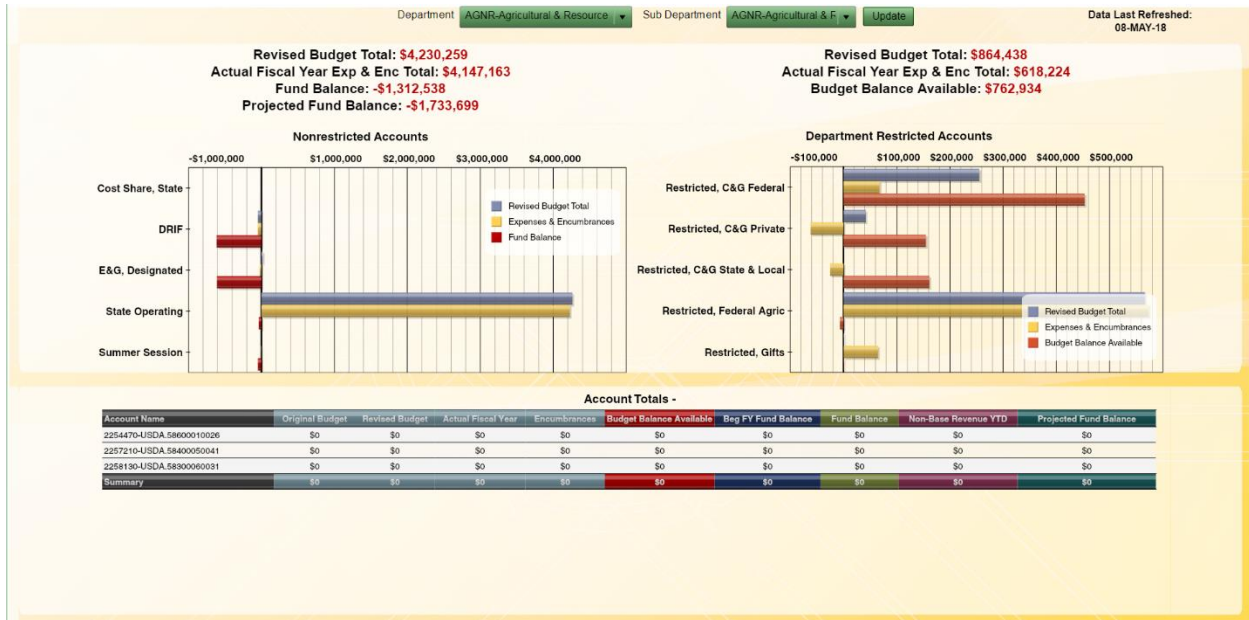
RESEARCH

ACADEMICS

EXTENSION

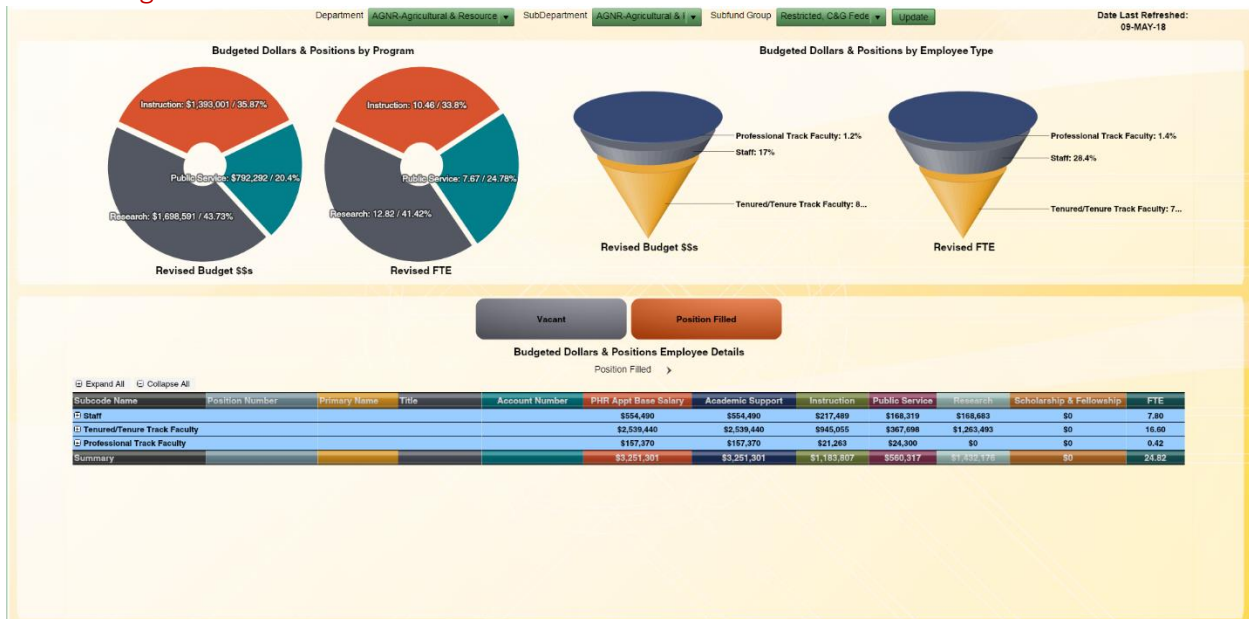


AGNR Fund Balance:



This dashboard visualizes a department's Non-Restricted and Restricted Fund Balance and Budget Balance Available. Click on a subfund group to display the account balances in the tabular chart below. You can drill into a specific account to view the Revenue, Expense and Fund Balance figures. Expanding the Revenue, Expenses and Fund Balance figures will reveal the Object Level and Object Code breakdown.

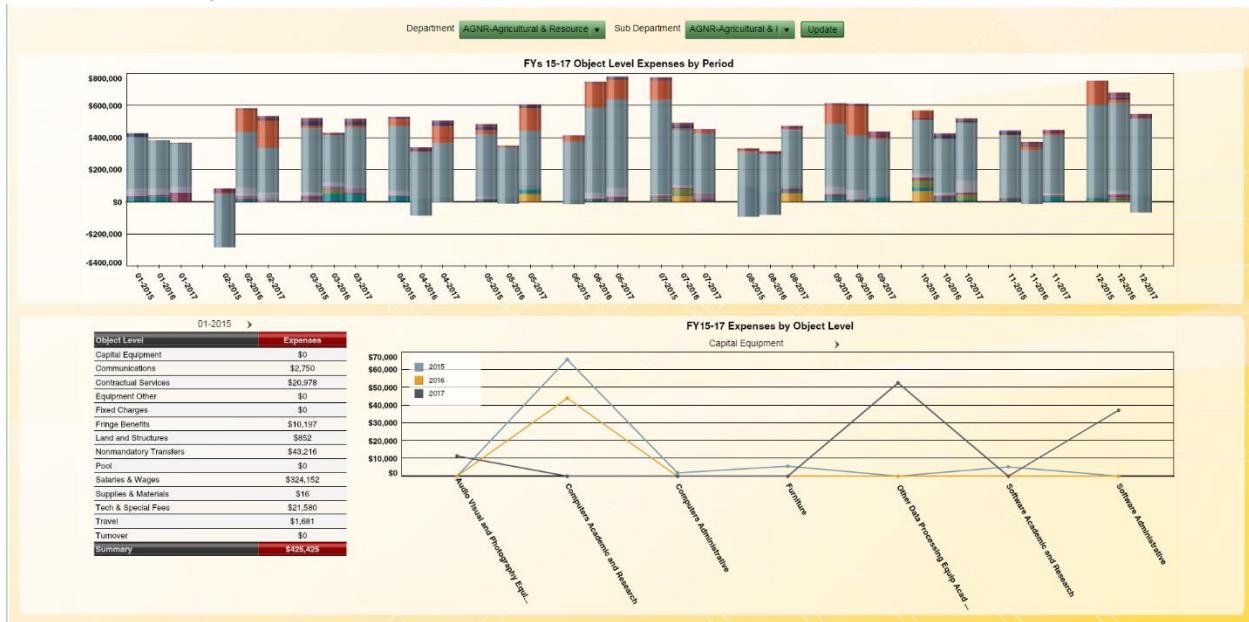
AGNR Budgeted Positions



This dashboard visualizes a department's budgeted position \$\$'s and FTE by program and by employee group classification (TTK, PTK and Staff). Dashboard users can pivot the tabular chart below using the Position Filled or Vacant buttons. Expanding the subcode name/employee group classification will reveal a list of employees falling under that group. Employee details include: position number, primary name, title, account number, PHR appointment base salary, totals by program and FTE.

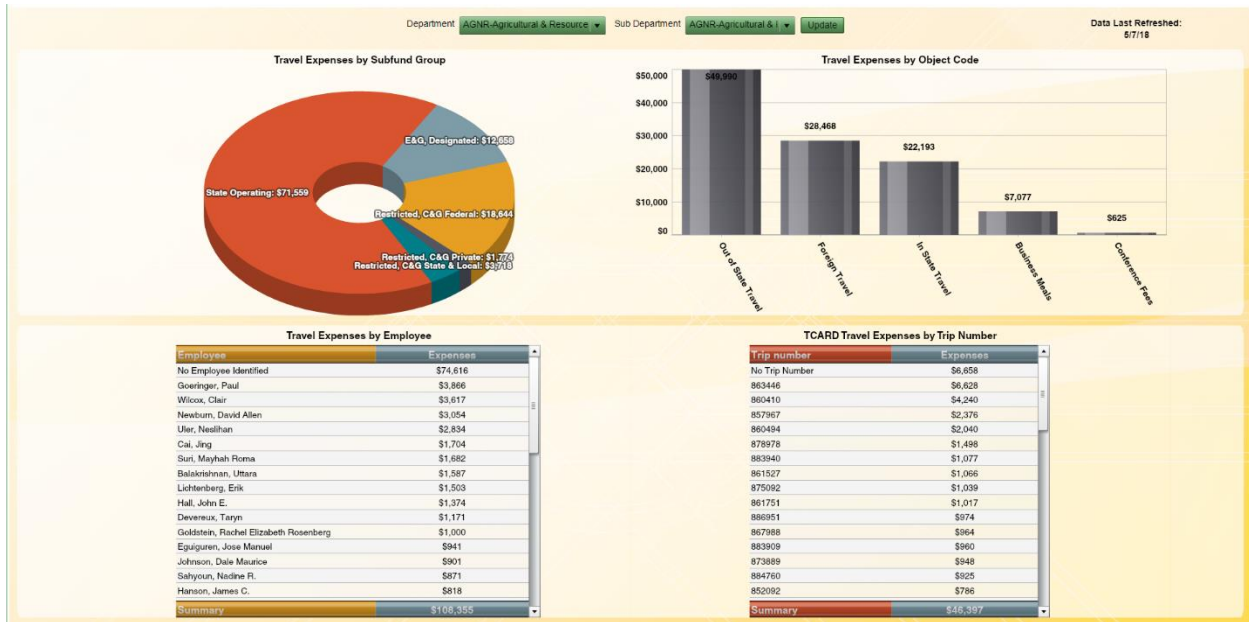


AGNR 3-Year Expense Trend



This dashboard visualizes the previous three fiscal years' object level expenses by fiscal period. Department users can compare expenses by object level and identify fiscal period variances by object level. Users can view a specific period's object level totals by clicking on a fiscal period column. Clicking on an object level in the tabular chart will plot 3 fiscal year totals by the object code name.

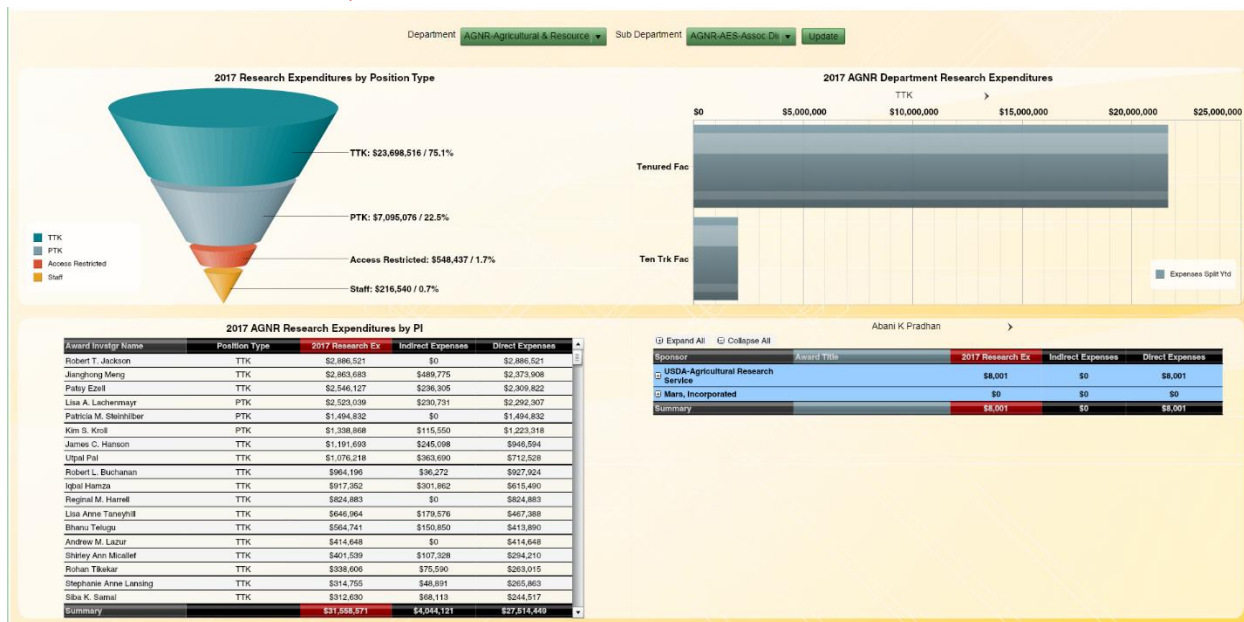
AGNR Current FY Travel Expenses Dashboard



The AGNR Current FY Travel Expenses dashboard displays a department's current fiscal year's travel expense totals by subfund group and object code name. The bottom left tabular chart displays travel expenses by employee using the ledger description UID to identify the employee. The bottom right tabular chart lists all the TCARD expenses by trip number. Users can drill into either of these tabular charts to reveal an itemized list of travel expense lines comprising the applicable totals

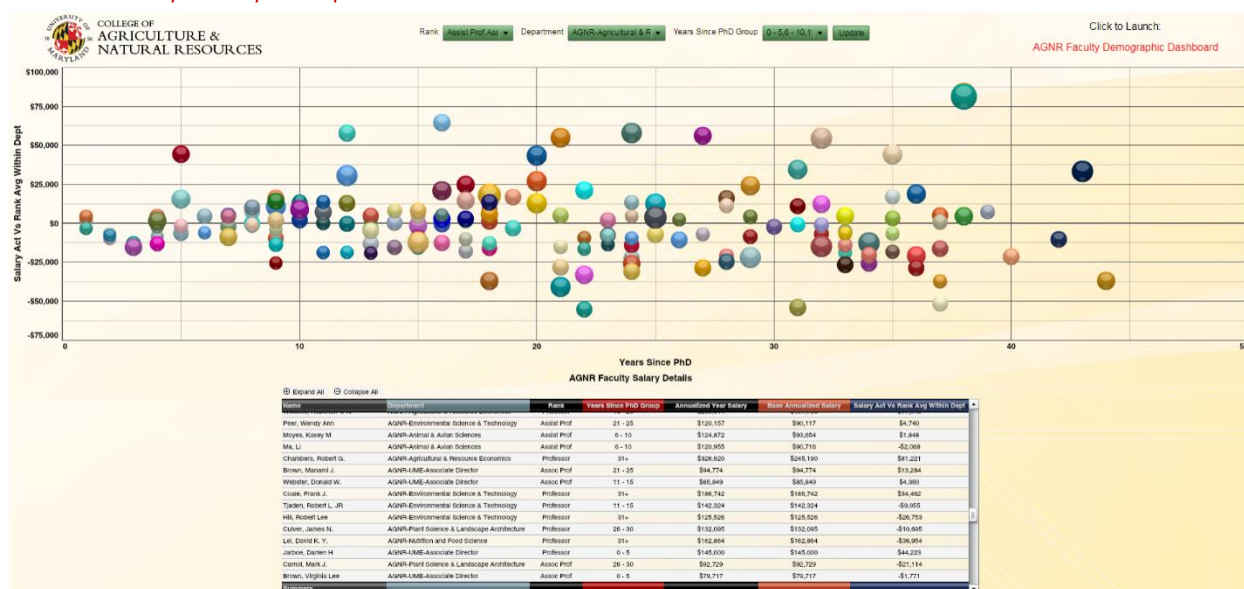


AGNR Current FY Travel Expenses Dashboard



This dashboard displays a department's sponsored research expenditures on the selected department accounts in fiscal year 2017 by TTK, PTK and staff with drilldown capabilities to employees.

AGNR Faculty Salary Compression Dashboard



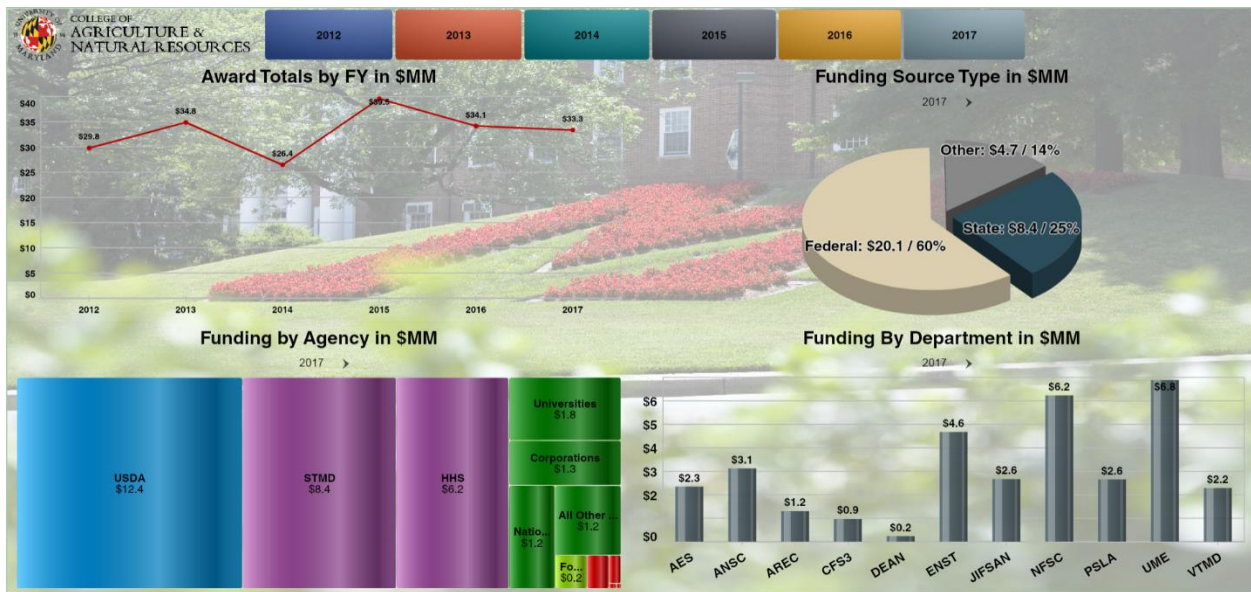
This dashboard visualizes TTK faculty's academic year salary vs. their peer's avg academic salary within the department by rank to aid in the salary compression gap analysis.

Research Dashboards

Four research dashboards have been developed to assist AGNR staff in reviewing proposal and award trends by fiscal year, sponsor type and agency. The suite of research dashboards can be accessed by click on the "Research" button located under the AGNR: Department Dashboards category.



AGNR Research Dashboard:



This dashboard displays award totals by fiscal year and allows the user to:

1. Filter the pie, tree and column charts by click on the fiscal year buttons at the top of the chart.
2. The tree chart displays the totals by funding agency by the selected fiscal year.
3. The column chart located in the bottom right of the dashboard displays the award totals by department.



AGNR Awards Dashboard:



This dashboard displays the counts and aggregate award totals sorted by fiscal period. Users can filter the dashboard by fiscal year, department, sponsor type and agency using the filters at the top of the dashboard. The tabular chart displays the award details by the fiscal period selected using either the count or aggregate amount charts above the tabular chart.

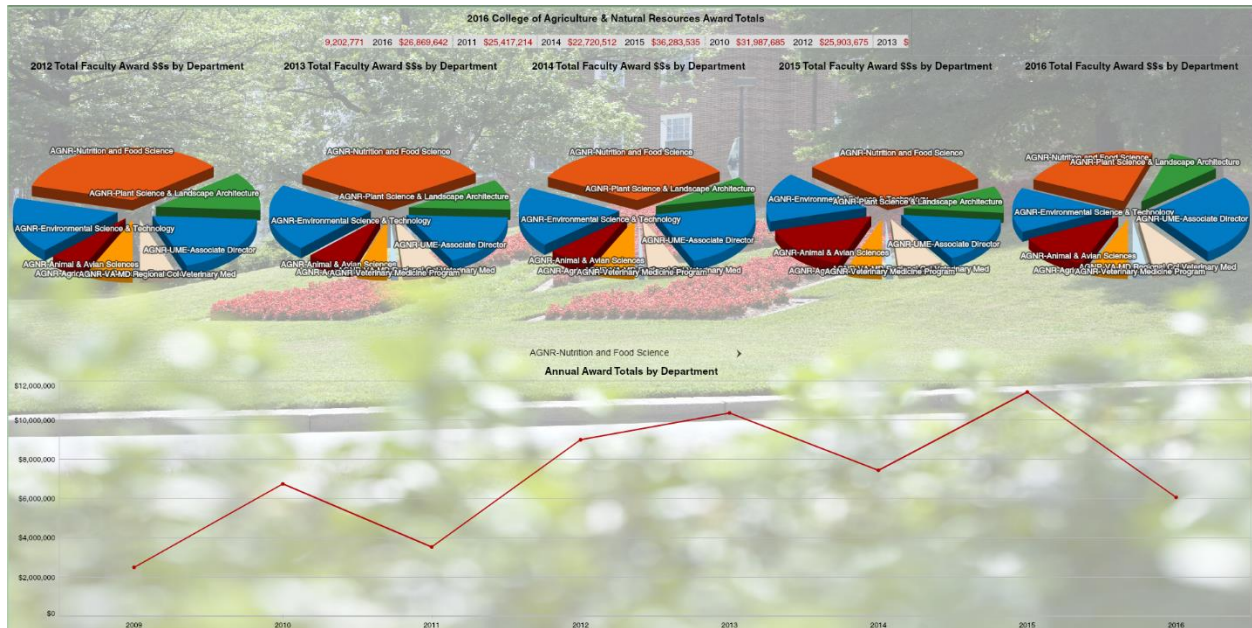
AGNR Proposals Dashboard:



Similar to the AGNR Awards Dashboard, this dashboard displays the counts and aggregate **proposal** totals sorted by fiscal period. Users can filter the dashboard by fiscal year, department, sponsor type and agency using the filters at the top of the dashboard. The tabular chart displays the **proposal** details by the fiscal period selected using either the count or aggregate amount charts above the tabular chart.



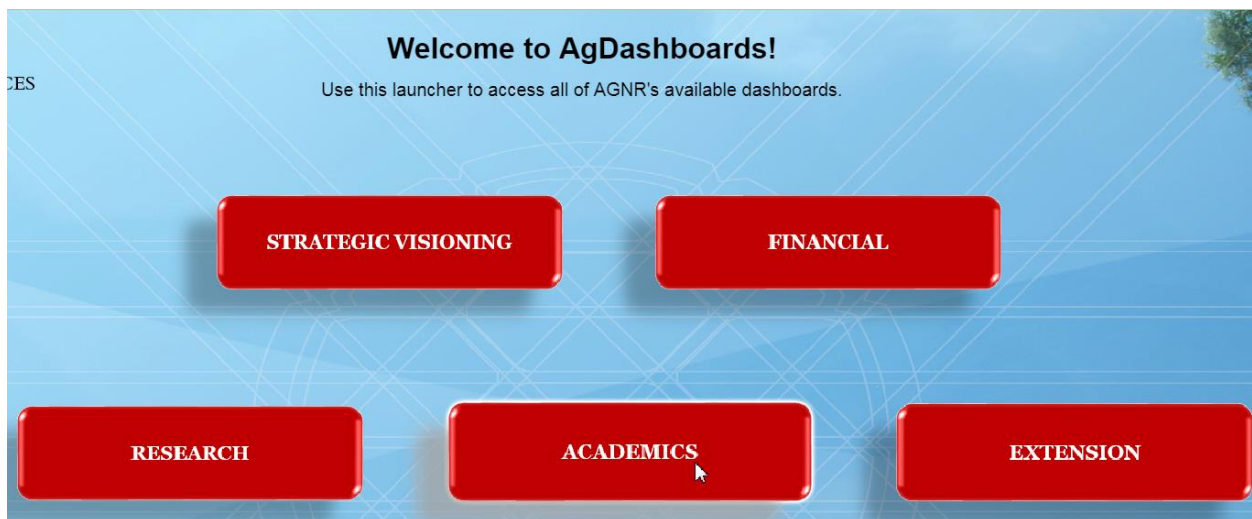
AGNR Faculty Award Dashboard (Tenure Home)



This dashboard displays 5 pie charts with the department award breakdown for the most recent 5 fiscal years. The ticker scrolling at the top displays the total AGNR awards by year. When clicking on a department pie slice in any year the line chart below will be filtered by department and display the department's 5 year trend. Click on the department line chart to drill to display faculty award amounts and click on a faculty name to visualize their trend. Finally, click on the faculty trendline to display FY specific award detail.

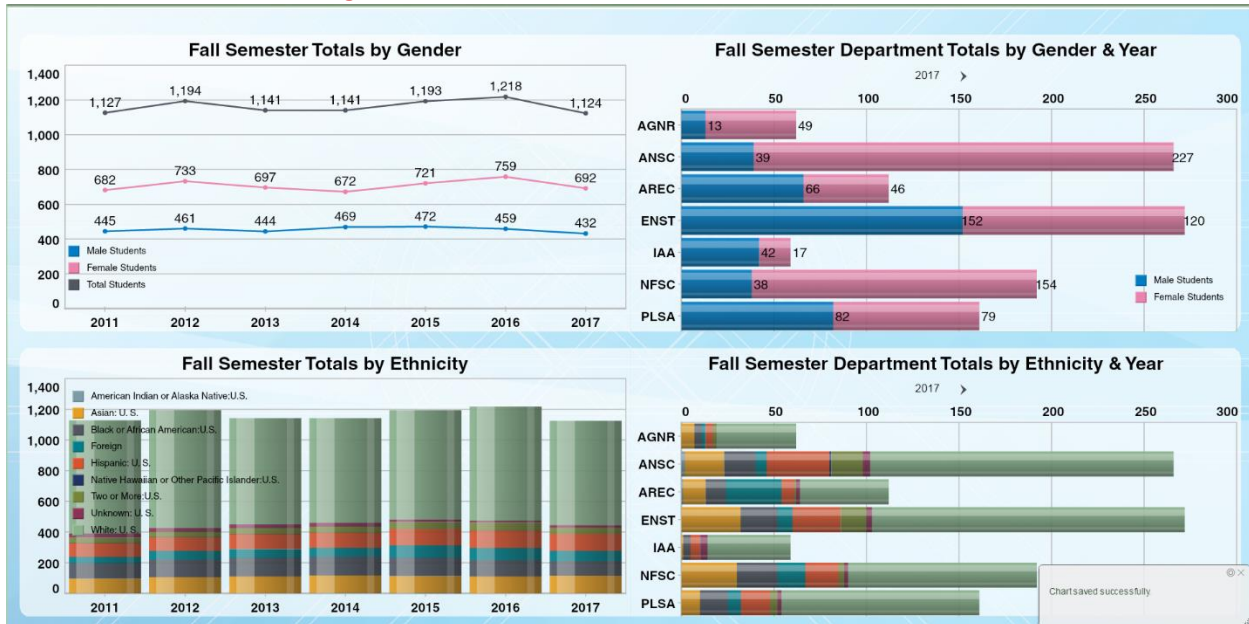
Academic Dashboards

The Academic Dashboards are a set of enrollment dashboards featuring undergraduate enrollment totals by gender & ethnicity and applicant enrollment metrics by county and department. The suite of academic dashboards can be accessed by click on the "Academics" button located under the AGNR: Department Dashboards category.



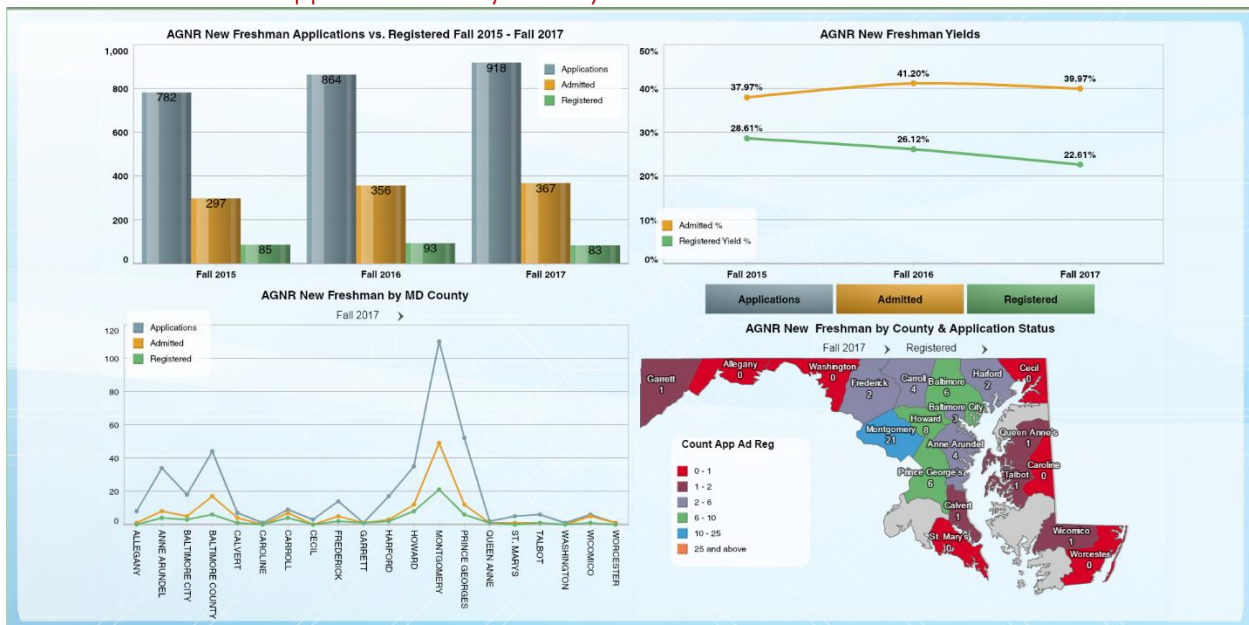


AGNR Enrollment – Undergraduate Dashboard



This dashboard visualizes AGNR's undergraduate enrollment trends by gender, ethnicity and by department.

AGNR Fall Freshmen Apps & Admits by County



This dashboard displays admissions data for terms from Fall 2015 to Fall 2017. The dashboard compares number of applications, admitted students, and registered students. It calculates both an admitted rate and registered yield. Dashboard users can view these rates/yields by county and by term using the Applications, Admitted and Registered buttons and by clicking a term in either of the top two charts.



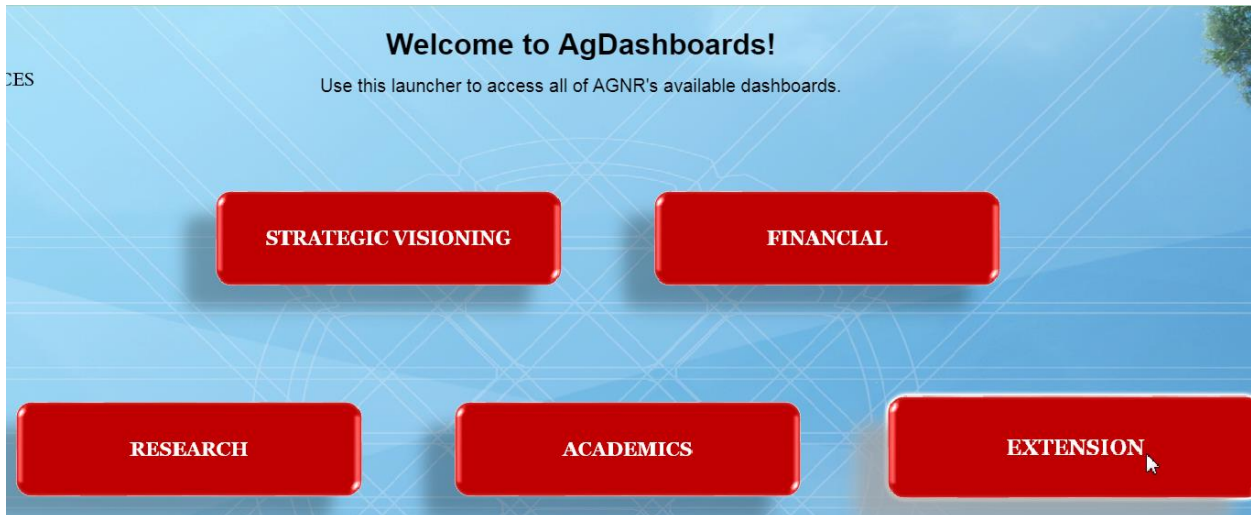
AGNR Fall Freshmen Apps & Admits by Department



This dashboard displays admissions data for terms from Fall 2015 to Fall 2017 by Department. Choose a department(s) by using the filter at the top of the dashboard to refresh the data. Hover over a Fall term in the column chart to interact with the speedometer charts to the right. Users can isolate a specific major's enrollment trend by drilling into a major listed in the tabular chart below.

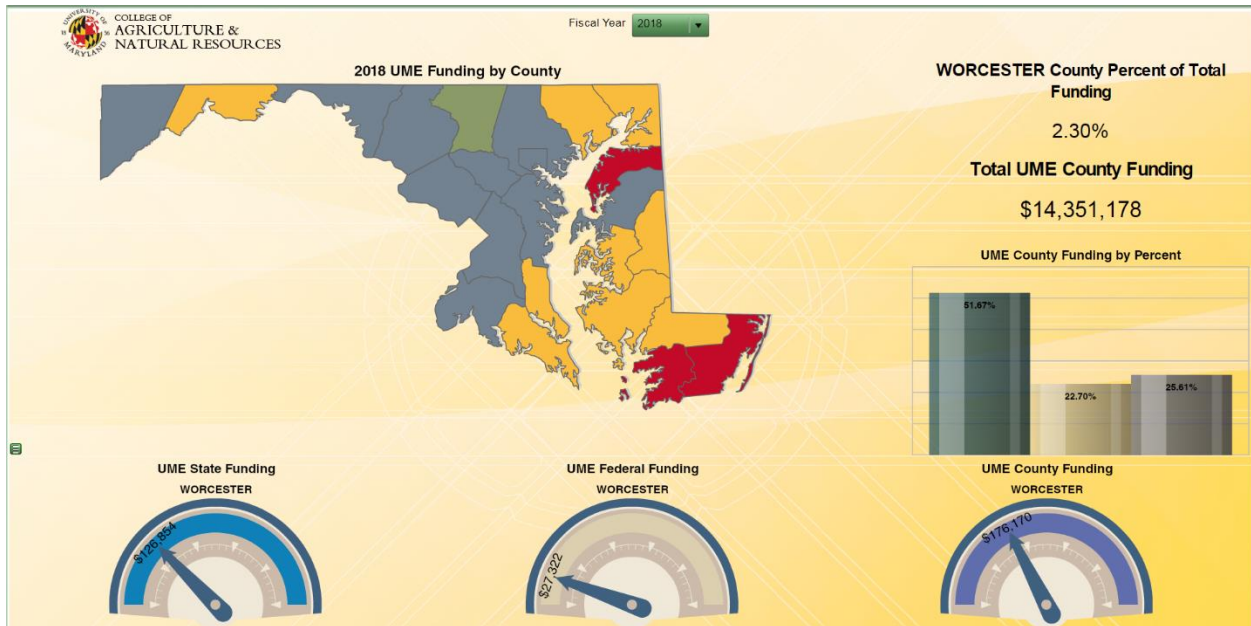
Extension Dashboards

The Extension Dashboards feature a funding overview dashboard and a Master Gardener dashboard by county. The suite of extension dashboards can be accessed by click on the “Extension” button located under the AGNR: Department Dashboards category.



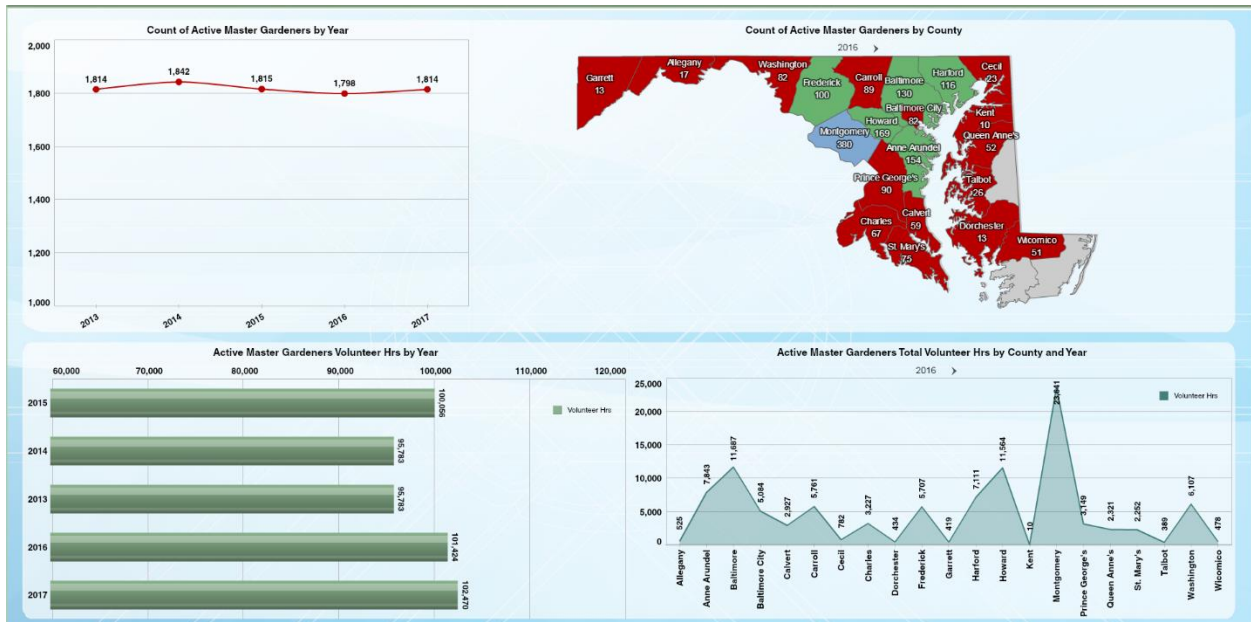


AGNR UME County Funding



This dashboard visualizes the County/City Extension offices full funding authority and percentages received by State of Maryland, Federal Capacity and County Appropriations. Hover over the map and a county/city to move the speedometers below. Click on a county/city to refresh the column chart "UME County Funding by Percent" and agency.

AGNR Active Master Gardeners



The Active Master Gardener dashboard displays counts of active master gardeners and total volunteer hours of active master gardeners by year and by county. Click on a year in the Count of Active Master Gardeners by Year line chart or pivot the county map to the right. Click on the bar chart in the bottom left-hand corner to pivot the Active Master Gardeners Total Volunteer Hrs by County and Year line chart by year.