



SmartyGrants 9.0:

Questions & Answers

Q: Are the graphs fixed views or are we able to adjust them to different graphs/colours?

A: The 'Default Dashboards' in Analytics are all locked and can't be edited, but they can be filtered to show more specific data. To make changes to the default dashboards, they will first need to be duplicated. Once duplicated, a copy of the dashboard will be created that you can edit freely (change colours, deleted/add widgets).

Q: Can we adjust the 'rounds' to allow date filter options?

A: The filters for default dashboards are also 'locked' (you can't add or remove the filters listed). If you have another specific field you'd like to add, you will need to duplicate the dashboard. Then, you are able to add and change the filters that appear in the right panel.

Q: Can you apply permanent filters to dashboards?

A: Permanent filters can't be added to the default dashboards. Every time you load the analytics tab the filters will reset. If you duplicate the dashboard you are able to set and save your own filters.

Q: How much does it cost to obtain the analytics?

A: This depends on the subscription tier you currently sit in - you can find full pricing details on our help hub here (note there is a column for analytics against the subscription tiers)
<https://help.smartygrants.com.au/resources/pricing/>

Q: Is the dashboard updates continuing if the a round is open?

A: Dashboards continue to read data that comes through to your accounts, some data is updated instantly and this data will appear straight away in your dashboards. Other data such as new applications and newly submitted forms are refreshed over night. The new data will appear in your dashboards the following day. Our help hub articles cover which

data is updated overnight and which is updated live. You can view our help hu articles here: <https://help.smartygrants.com.au/analytics/>

Q: Can permissions or view of analytics be locked for certain staff enabling editing or reading permissions only?

A: The permissions for editing and viewing analytics is managed by the user access in smartygrants. Only specific SmartyGrants access levels are able to see and edit dashboards within analytics.

Q: Does the Financial overview - does it take into account amounts that been cancelled or returned?

A: Yes it does! Returned and cancelled amounts are also available in analytics for reporting. Some widgets such as 'Net Paid' take into account returned payments. You are able to build your own widgets and dashboards to report on returned or cancelled payments.

Q: Is the year calendar or financial? or can you set it to financial year?

A: You are able to use any of the different date fields to use as filters for your dashboard, this could be submitted date, round opening or closing date or financial period dates that you have set for your account.

Q: Are we able to set our own geo-boundaries (eg contract regions)?

A: You aren't able to set your own geo boundaries. We have a set of pre-defined boundaries that are available for the Maps widget. If you have an additional boundary that would be useful to use for reporting, please send us an email and let us know!

Q: Having that flexibility we can adjust our own geo boundaries would add great values and streamline to our analytics. Would it be something SmartyGrants might consider in the future?

A: We do manage the geo boundaries for the maps widget. If there are new boundaries that would be helpful for your reporting please let us know!

Q: Can financial overview filter down to list financials to specific grants within a round?

A: You can filter down any of the default dashboards, including the Financial Overview dashboard. You can filter this specifically by program or round, in which the dashboard data would update depending on the filter.

Q: Is the data updated live for analytics or is this refreshed periodically through the day?

A: Some data is updated live, and some is refreshed over night. Our help hub article on analytics gives a break down on the data that is live vs updated over night.

Q: If we don't have SG Maps - can this funding by GEO Boundaries still be used?

A: Yes, as we now have new and shinier mapping and filtering functionality in Analytics, we are actually discontinuing our SmartyMaps product. So you can use these boundary sets in analytics.

Q: We had a custom address type which did not show on the current maps tool, which we stopped using but will this show on the new tool.

A: Any address type (applicant primary, office, home or custom types) will be available in analytics. However, if when filling out the form someone selects 'can't find address' and manually types in an address, this address won't appear in the dashboard or analytics tool as it doesn't capture the geo location data for the address.

Q: For the local government filter in maps, can it show our area by council divisions, or is it just the whole local government area?

A: At the moment it is whole LGA areas, I think you are referring to Council Wards, which we are aware many councils would like and have it listed as an improvement to add in.

Q: Are the SG maps available for areas outside Australia?

A: Location data is available for outside of Australia, so your scatter maps will show pins for locations outside of Australia. We currently only have geo boundaries available for Australia and New Zealand.

Q: Are some of these analytics/reports already available, existing, to some extent?

A: All of these default dashboards are default and available to customers to add on Analytics, and then you have the ability to create your own custom dashboards and widgets also.

Q: Are the Analytics more focused on the applications and funding allocations, compared to reporting? I.e., if a dashboard can be created to visualise data like progress report status?

A: Analytics is designed to be flexible to allow you to report on as much as possible within SmartyGrants. You are able to report on forms and submitted form responses so you are able to report on the data captured on acquittal forms such as progress reports.

Q: What happens if we add in the Subjects and Beneficiaries question fields to an application form AND we also select auto classification?

A: if you have the CLASSIE questions on your application form and then use a bulk action to auto classify you have the option to overwrite what is currently in the CLASSIE standard fields, or only fill in blank standard fields. Just to note as well the history tab will show a record of what has changed and show that it was updated by auto classification.

Q: When will the analytics tab appear as an option in our accounts?

A: Analytics is a paid add-on in SmartyGrants. You start a free 30-day trial from the account settings > features section. We will then enable that on our end and confirm when the tab is available for use.

Q: It seems very exciting with the beneficiaries, and what we can do with them. Would there be any chance we can edit the beneficiaries?

A: The list of beneficiaries in CLASSIE is set and managed by SmartyGrants, if you have any feedback please let us know!