



Analytics Deep Dive

Questions & Answers

Q: How do I get the Analytics tab to appear?

A: You won't automatically have the Analytics tab in your account. Analytics is a paid addition to your SmartyGrants account. Administrator users can enable a 30-day free Analytics trial. To do so, navigate to the settings cog and then select **Features**. Under **Analytics**, select **Request trial**. It can take up to 1 business day for your data to be ready. You will be notified via email when Analytics is ready to use. After the trial, if you would like to go ahead with enabling Analytics on your account, email our service team at service@smartygrants.com.au.

Q: Is the data model over our entire SG account or is it program specific?

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. The data model you have access to reflects your user's access settings. For example, if you are a program manager with only access to Program X, you will only see data for Program X in analytics.

Q: Can we cross analyse from previous rounds? Can you set up the system so that it compares previous rounds to the current round. Eg. This time last year

A: You certainly can! Broadly speaking, Analytics offers a few different ways to compare current rounds to old rounds. You would simply need to add these Rounds to your widgets as well as the fields you would like to analyse to compare the data between the rounds.

Q: Do fields need to be set a up a particular way to create data visualisation?

A: Any field in the system can be reported on in Analytics and have been set up so you simply need to select the fields for visualisation. These can be set up to be visualised how you would like (eg. Bar Chart, line graph, number etc.) There should be minimal data cleaning and data transformation.

Q: Once you have these analytics set up - will it track & update as the time ticks along?

A: Yes the data is live and auto-updates. Most data is totally live, but some data refreshes overnight (the Help Hub specifies which). So if you build a dashboard, the data will update

overtime to reflect new data. If you build a widget that finds you have 100 submitted applications and then you receive three more applications, that widget will update to 103.

Q: What about between different programs? E.g., If we can have 4 widgets to count submitted applications from 4 different programs?

A: You could have one widget showing submitted applications in each program -- e.g. a column chart with four columns, or a table. You could also have four different widgets if you wanted, each filtered to one program.

Q: Can you explain what the Limit To Application: 1 means?

A: We would recommend the content here on our Help Hub on Limit To filters: <https://help.smartygrants.com.au/analytics/creating-and-managing-custom-dashboards/>. If you have a background in data, you'll find a detailed explanation in the technical document linked at the bottom of the Help article. There are some rules you can follow for selecting the right filter. The technical document has more of the "why" behind the rules for those with a data background who might be interested.

Q: How would the widgets work to show 'outcomes' reported in milestone reports?

A: You would need to set up your widgets with the appropriate fields from your forms that will give you the correct 'outcomes' data output. You could then analyse this data through the Analytics tool. There is also a number of default dashboards already built in for Outcomes that will appear in your Analytics view.

Q: Can analytics pull data from outcomes engine?

A: Yes, Analytics can pull data from Outcomes Engine sections, questions and forms. There is also a number of default dashboards already built in for Outcomes that will appear in your Analytics view.

Q: Are you able to share the dashboards with people in your organisation that do not have a login to SmartyGrants? Just thinking that's why you would need to build the dashboards in Power BI so Executives can see them

A: You will need a login to SmartyGrants to access Analytics within SmartyGrants. However, the tool has options to export dashboards as PDFs and widgets as images for sharing externally. This article delves into sharing, importing and exporting your dashboards. If you want to share the results of a dashboard with your colleagues, or download your custom widgets for a PowerPoint presentation, this article is for you: <https://help.smartygrants.com.au/analytics/sharing,-importing,-and-exporting-dashboards/>

Q: Can any of our users see the dashboard once it is finalised? If no, how do we provide it to them?

A: You can 'share' your dashboards with users within SmartyGrants. This will give them the same live dashboard view. See our Help Hub here for more information:
<https://help.smartygrants.com.au/analytics/sharing,-importing,-and-exporting-dashboards/>

Q: Can you pull the reports into an excel report?

A: You can download the underlying data behind widgets in .csv form and this data can then be used in Excel. This article delves into sharing, importing and exporting your dashboards. If you want to share the results of a dashboard with your colleagues, or download your custom widgets for a PowerPoint presentation, this article is for you:
<https://help.smartygrants.com.au/analytics/sharing,-importing,-and-exporting-dashboards/>

Q: Can dashboarding be integrated into the mapping?

A: Yes, there are map widgets and visualisations available that can be added to your dashboards. Our existing SmartyMaps has been marked to be discontinued at the end of July as we now have maps available with greater functionality here in Analytics. To create your map widgets, see our Help Hub article on Location Data and Maps here:
<https://help.smartygrants.com.au/analytics/location-data-and-maps/>

Q: Can you find individual grant through the chart?

A: You can filter widgets to just one grant round/program or even just one application.

Q: Can the dashboard bring across applicant name from the Contact Tab?

A: Yes it can! All contact information either collected on your forms or in the Contacts tab can be used in Analytics.

Q: Does the Analytics licence provide the ability to call the API or OData?

A: Analytics, OData and API's are all separate add-ons to your SmartyGrants account. Please see our Help Hub for pricing on these:
<https://help.smartygrants.com.au/resources/pricing/>

Q: Can you drill down on chart, ie outstanding acquittals and finding who the grant recipient is with the outstanding reports?

A: There is a Drill Down feature, where you can right-click on charts and break down the data further. For example, if there's a bar chart showing the number of applications per

program, you can Drill Down further and find the Rounds those applications come from. However, you could also definitely build a separate table to find this information.

Q: Just to clarify, the forms to be enable to analytics, is this just to bring across general questions that are not standard fields? or all fields?

A: If you would like to report on the form responses (not standard fields but single questions etc.), you would need to ensure the Analytics switch has been enabled on your form. Once this has been enabled on the form settings, this would then make the data available in all of your users' accounts.

Q: So when building forms, I assuming there will be a button or tick box to select for the forms to be linked to the analytics work.

A: That's right - this can be switched on/off from the form settings page of each form

Q: Do you need to have the Finance component enabled to get the Finance Application information?

A: Whether you have access to financial data in Analytics depends on whether your user settings in SmartyGrants are set to have access to funding and payments data.

Q: When paying for Analytics can you go straight to building dash boards with data in SG?

Once you purchase analytics, this will provide access to the Analytics tab for you to start building dashboards.

Q: Setting up some of the dashboards we would want seem to require a bit of technical knowledge (i.e. formulas). Does SmartyGrants offer a service to set up dashboards for us?

A: You are welcome to contact our service team at service@smartygrants.com.au for any technical assistance. Alternatively, our Managed Services team can be utilised to assist with building your dashboards/widgets as needed.