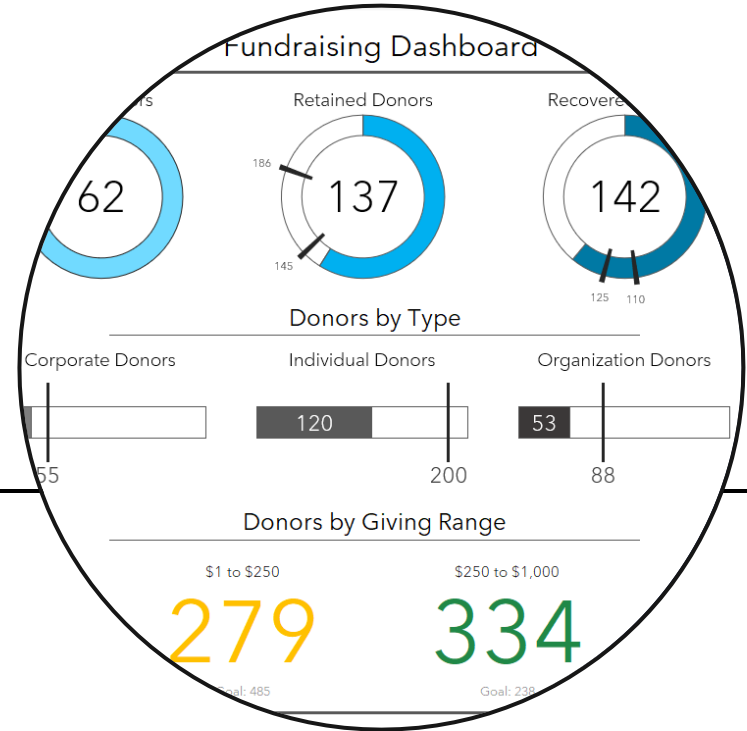


AUTOMATED EXCEL REPORTING & DASHBOARDS





BACKGROUND & REQUIREMENTS

Background

The client had an abundance of data but struggled to effectively utilize it for informed decision making. Traditional monthly reporting methods were time-consuming and often resulted in incorrect or incomplete reports.

Requirements

Develop a sustainable report that enables users to easily upload data on a monthly basis, format it in a way that is easily consumable, and provide a level of trust for decision making.



THE BLUEPRINT

Create a fully automated Excel workbook that will:

- ✓ Facilitate the upload of external data
- ✓ Automatically format data into various reporting templates
- ✓ Develop an intuitive user interface that looks less like Excel and more like a custom application

Skills & Expertise Utilized

- Automation with Excel VBA
- Data formatting
- Data Analysis and Visualization
- Custom UI Design
- Custom Tab in Excel Ribbon



ORIGINAL DESIGN

File Home Insert Draw Page Layout Formulas Data Review View Developer Comments Share															
Clipboard Font Alignment Styles Cells Editing Analyze Data															
P48															
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	DONOR_ID	DONOR_NAME	DONOR_T	INITIAL_GIFT_DATE	ZIP	LY_YTD	LY2_YTD	LY3_YTD	LY4_YTD	LY5_YTD	LY6_YTD	GIFT_TOT	YRS_DONATED		
2	5	Jacob Campbell	MG	8/24/2004	28255	0	0	0	0	0	500	2550	3		
3	6	Nicola Rampling	CO	11/18/2003	22031	20550	11950	10000	10000	10000	10000	167500	12		
4	8	Keith Greene	MG	1/12/2005	20071	0	0	0	0	0	100	175	3		
5	13	Anthony Clarkson	GV	11/3/2003	98284-126	2593.3	2785.38	4445.22	2543.98	3927	2745.08	31630.69	13		
6	14	Diane Duncan	GV	9/13/2004	98304-975	5152.85	4154.72	5006.57	4854.8	3117.34	5519.51	63068.98	12		
7	19	Sue Manning	IN	12/22/2003	98092	100	250	0	0	0	0	625	4		
8	23	Adam Simpson	IN	9/13/2004	98105-170	0	250	450	200	150	150	1600	9		
9	28	Alison Rampling	IN	12/16/2003	98177	0	0	0	100	100	0	400	6		
10	30	Mary Skinner	IN	11/30/2003	94941-213	50	50	50	50	50	50	735	13		
11	32	Heather Hamilton	IN	12/31/2003	99201	0	0	0	0	50	25	225	6		
12	33	Madeleine Walsh	IN	3/15/2004	46256	200	100	0	50	50	0	635	9		
13	37	Emily McDonald	IN	12/3/2004	80130-443	72	36	36	36	18	54	504	12		
14	44	Jacob Grant	IN	12/31/2003	6754	0	100	0	0	0	100	700	6		
15	45	Christian Newman	IN	6/15/2005	98177-294	0	0	25	25	25	0	160	5		
16	48	Sophie Terry	IN	1/8/2004	98312	0	0	0	25	0	0	105	5		
17	50	Pippa Welch	IN	9/26/2005	98116	0	0	0	15	0	15	85	5		
18	61	Katherine Cornish	IN	12/31/2003	52002-517	50	50	50	50	50	50	600	12		
19	66	Heather Ferguson	IN	11/22/2004	98501-752	100	50	50	50	100	100	850	11		

Gift Summary

Ready 100%



FINAL DELIVERABLE

Leadership Report					
Commitments by Donor Designation					
	Goal	Actual to Date	% of Goal	Balance Needed	
Annual Fund	\$8,000,000	\$6,380,850	79.8%	\$1,619,150	Annual Fund Details Tim Hunter \$536,000 Heather Hamilton \$469,574 Rebecca Martin \$457,401 Nicola Rampling \$355,017 Diane Duncan \$154,136 Jacob Campbell \$150,000 Sue Manning \$93,253 Christopher Oliver \$83,462
Special Projects	\$3,500,000	\$510,218	14.6%	\$2,989,782	
Endowments	\$2,500,000	\$1,034,800	41.4%	\$1,465,200	
Total Commitments	\$14,000,000	\$7,925,868	56.6%	\$6,074,132	



DETAIL SPOTLIGHT

Reports Suite

Upload New Data | Settings | Show/Hide Data Sheets

Custom Excel Interface

Leadership Report

Commitments by Donor Designation

	Goal	Actual to Date	% of Goal	Balance Needed
Annual Fund	\$8,000,000	\$6,380,850	79.8%	\$1,619,150
Special Projects	\$3,500,000	\$510,218	14.6%	\$2,989,782
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Total Commitments	\$14,000,000	\$7,925,868	56.6%	\$6,074,132

Client Branding

Annual Fund Details

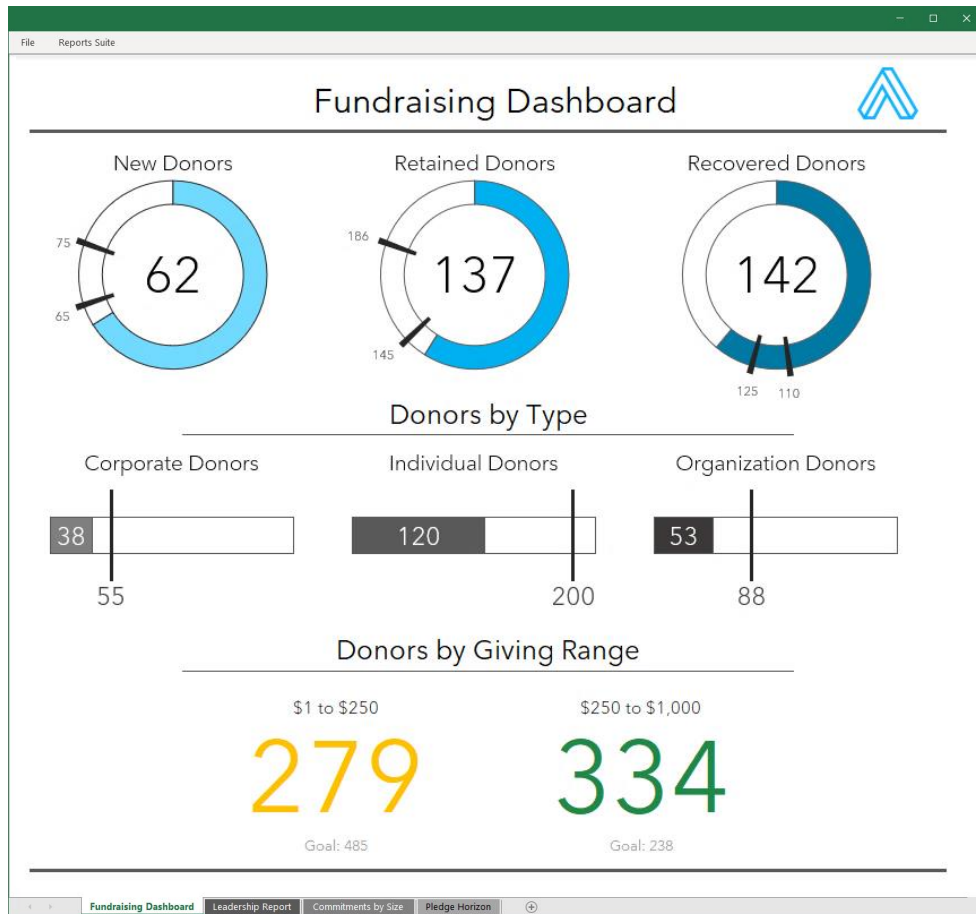
- Tim Hunter | \$536,000
- Heather Hamilton | \$469,574
- Rebecca Martin | \$457,401
- Nicola Rampling | \$355,017
- Diane Duncan | \$154,125
- Janis Campbell | \$150,000
- Sue Manning | \$93,253
- Christopher Oliver | \$83,462

Automatically Updated Report Data

Detailed Data Drill Downs

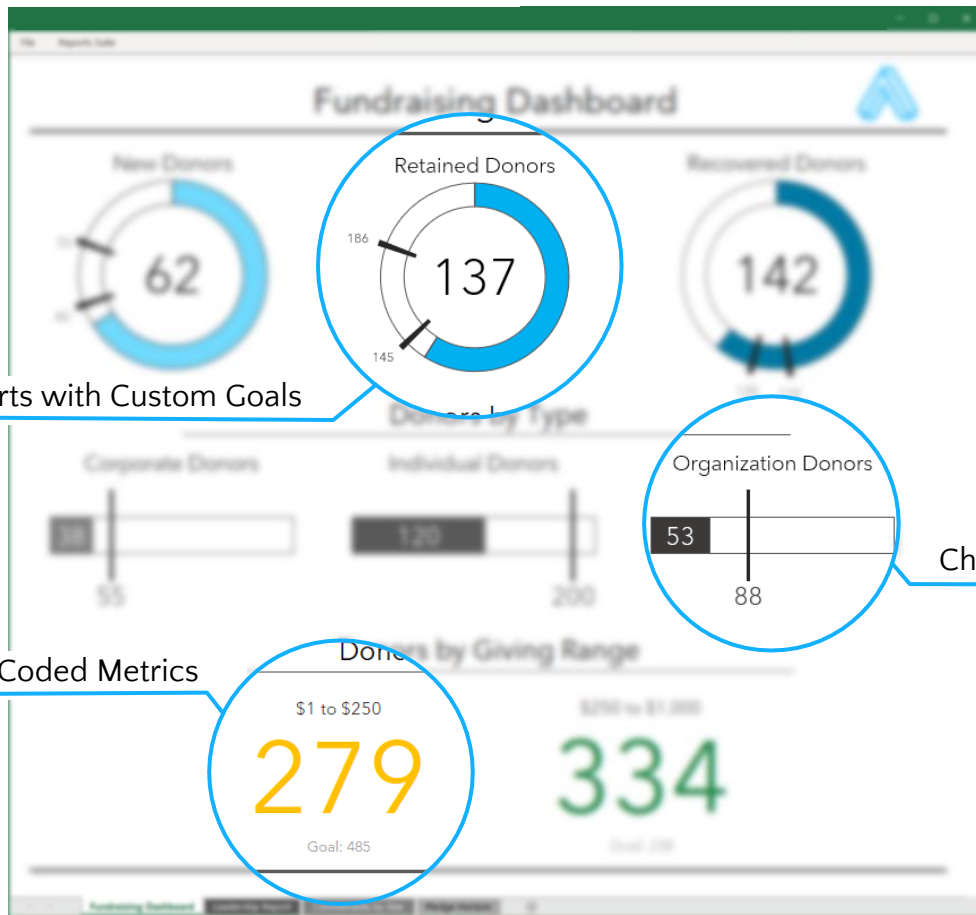


FINAL DELIVERABLE





DETAIL SPOTLIGHT



Beautiful Charts with Custom Goals

Charts Update Automatically

Automatically Color-Coded Metrics



FINAL DELIVERABLE

File

Reports Suite

Upload New Data

Settings

Show/Hide Data Sheets

Settings

Data Files

Gift Data

Pledge Data

Soft Credit Data

Recurring Gift Data

Branding

Logo

Data Needed

FY Start Month

10

Current FY

2023

Current FY Start

10/1/2022

Current FY End

9/30/2023

Current FY to Date

2/1/2023

Last FY Start Date

10/1/2021

Last FY End Date

9/30/2022

Last FY To Date

2/1/2022

Gift Data

Data Header Name

Constituent ID

Constituent Name

Name

Gift Date

Gift Amount

Gift Category

Gift Campaign

Gift Appeal

Gift Constituency

Gift Type

Gift FY

Constituent ID

Name

Gift Date

Fund Split Amount

Fund ID

Campaign Description

Appeal Description

Gift Constituency

Gift Type

Gift FY

Data File Upload Tool

Gift Data File

☒ GIFT_DATA.xlsx

Pledge Data File

☒ PLEDGE_DATA.xlsx

Soft Credit Data File

☒ SOFT_CREDIT.xlsx

Recurring Gift Data

☒ RECURRING_DATA.xlsx

Calculating Data & Refreshing Reports

Fundraising Dashboard

Leadership Report

Commitments by Size

Pledge Horizon

Settings



DETAIL SPOTLIGHT

Settings

Data Files

- Gift Data
- Pledge Data
- Soft Credit Data
- Recurring Gift Data

Data Needed

FY Start Month **10**

Current FY **2023**

Current FY Start **10/1/2022**

Current FY End **9/30/2023**

Current FY to Date **2/1/2023**

Last FY Start Date **10/1/2021**

Last FY End Date **9/30/2022**

Last FY To Date **2/1/2022**

Gift Data

	Data Header Name
Constituent ID	Constituent ID
Constituent Name	Name
Gift Date	Gift Date
Gift Amount	Fund Split Amount
Gift Category	Fund ID
Gift Campaign	Campaign Description
Gift Appeal	Appeal Description
Gift Constituency	Gift Constituency
Gift Type	Gift Type
Gift FY	Gift FY

Branding ☒ ☐

Logo

Customizable Client Branding

Data File Upload Tool

Gift Data File

☒ GIFT_DATA.xlsx

Pledge Data File

☒ PLEDGE_DATA.xlsx

Soft Credit Data File

☒ SOFT_CREDIT.xlsx

Recurring Gift Data

☒ RECURRING_DATA.xlsx

Calculating Data & Refreshing Reports

Automated Data Upload Tool

Adjustable Data Settings



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