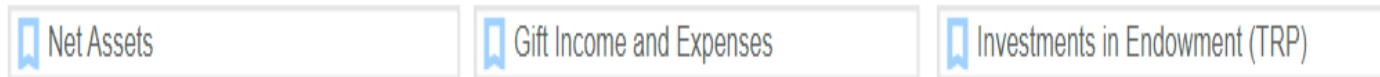This release adds a Power BI Dashboard tab to the current Blackbaud Reporting. The default page will be the dashboards (to get to the Reports main page, click on the Reports tab at the top of the page). There are three dashboards available that can be accessed by clicking on the tabs at the top of the screen (as shown below):

The Net Assets and Gift Income and Expenses dashboards provide at-a-glance views of information from the C1 and C2 reports in the form of charts and graphs. The results are based on the applied filters for Campus, College, Department, and Sub-Department. To select multiple options within one filter, press and hold the ctrl key while selecting the desired options.

1. **Net Assets Dashboard (Default)** - This dashboard contains two Pie Charts with current data:
   - Current Net Assets by Type – the types are listed in descending order based on totals by type.
   - Current Net Assets by Gift Purpose – the gift purposes are listed in descending order based on totals by purpose. You can drill down to the primary purpose breakdown on this chart by right clicking and choosing "Drill through-primary purpose breakdown". To return to the main dashboard, click on the back arrow "Back to Net Assets".

2. **Gift Income and Expenses Dashboard** – This dashboard contains two Line Graphs with prior fiscal year and current fiscal year to date data:
   - Fiscal YTD Gift and Pledge Income
   - Fiscal YTD Expenses

3. **Investments in Endowment (TRP) Dashboard** – This dashboard contains one Bar Graph that displays Cash invested in the Total Return Pool for the current fiscal year to date as well as four prior fiscal years:
   - Fiscal YTD Investments in Endowment (TRP)

Specific details can be viewed by hovering over specific areas on the chart or graph. The filters will remain the same as you maneuver through each dashboard. To remove the filter, hover over the filtered tab and click on the eraser.

There are additional view options for each dashboard when you right click on the chart/graph. The only option that is relevant is "Show as a table". Due to program limitations, we are not able to remove the other options; however, we do not recommend clicking on any of the other options. To return from table view back to the main dashboard click on the back arrow "Back to report"

You can also export data to Excel by clicking on the ellipsis (series of 3 dots) to the right of the chart/graph name. You will need to hover or click on the chart/graph to see the ellipsis.

Any time you want to go back to the main dashboard page, click the Dashboard tab at the top of the page.