



MAY 5-7, 2025

**INNOVATE**

JMT CONSULTING

NASHVILLE

# Unlocking the Power of Sage Intacct Reporting & Dashboards

Presented by: Taylor Bost, Rob Calouri, and Mike Primiani

**JMT**  
CONSULTING

THE EXPERTS IN  
MISSION-DRIVEN  
NONPROFIT FINANCE

©JMT Consulting. All rights reserved.

Thank you to our sponsors!

Sage

bill



KarmaSuite

 **DATABASICS**

 **DAVIDOFF**  
MISSION-DRIVEN BUSINESS STRATEGY

 **MARTUS**

**Velixo**

**kanso**  
SOFTWARE

**COMPLEAT**  
for Non-Profits

 **limelight**

**ADP**

 **emburse**

**THE NONPROFIT TIMES**  
The Leading Business Publication For Nonprofit Management

 **donorperfect**

 **tipalti**



## Taylor Bost

Service Delivery Manager  
[tbost@JMTConsulting.com](mailto:tbost@JMTConsulting.com)



## Mike Primiani

Implementation Consultant  
[mprimiani@JMTConsulting.com](mailto:mprimiani@JMTConsulting.com)



# Welcome and Session Objectives

# Session Objective

*Equip finance leaders and system users with a practical understanding of how to leverage Sage Intacct's standard reports, core report writers, dashboards, and advanced reporting tools to drive transparency, decision-making, and operational efficiency across the organization.*

# By the end of this session, you'll learn how to:

- Design dashboards that *tell your story*
- Build targeted reports for *leadership and stakeholders*
- Visualize data with *clarity and impact*
- Automate and streamline reporting workflows
- Turn raw data into *strategic insight*

# Session Agenda

- Reporting with Purpose – why strategy matters
- Reporting Foundations – core Reporting Options
  - Leveraging Standard Reports
  - Advanced Reporting with the Financial Report Writer
  - Custom Report Writer
- Building Role-Based Dashboards for organizational success
- Advanced Report Writers – Expanding on your Story
  - Interactive Custom Report Writer
  - Interactive Visual Explorer
- Key Takeaways and Next Steps



# Reporting with Purpose



# Why Reporting Strategy Matters

- Grants require clear, dimensional reporting
- Leadership needs actionable summaries
- Funders want transparency and accountability
- Manual reporting wastes time and invites errors
- Strong reports build trust and drive strategy

# Why reporting strategy matters





# Reporting Foundations

# Need a Report

Is it statement or transactional?

sage Intacct

## STATEMENT

Is there a pre-built option?

NO

**Financial  
Report Writer**

YES

**Financial  
Report Library**

## TRANSACTIONAL

Is there a pre-built option?

NO

*Choose your  
report method*

YES

**Standard/Custom  
Report Libraries**

Are you experienced with data structures?

NO

*Contact Services*

YES

Do you want to analyze data inside Sage Intacct?

NO

Do you have an external data warehouse?

NO

**Custom  
Report Writer**

YES

**Data Delivery  
Services**

YES

Do you need output while building,  
time comparison,  
dynamic output,  
pivot tables, or  
trend data?

NO

**Custom  
Report Writer**

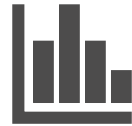
YES

**Interactive Custom  
Report Writer**

# Strong Reports Start with a Strong Foundation



Know your audience: tailor to roles



Use **dimensions** to parse out data meaningfully



Organize reports for clarity and reuse



Combine your Reports with Dashboards and Performance Cards to maximize impact



Think strategy first, format second

# Standard Reports – Simple but Mighty



Library of standard reports that are ready to use with minimal customization options



Attached to a module in Sage Intacct



Able to memorize and embed directly in a Dashboard for real time data analysis without requiring users to manually run reports every time



# Financial Report Writer

## Powerful Financial Statements at your Fingertips



# Key Strengths of Financial Report Writer

- Flexibility - Pre-built financial structure utilizing Categories and Category based Account Groups OR custom financial structure utilizing custom account groups
- Highly customizable rows and columns
- Easy use of dimensions for filtering, expanding, or prompts





# Advanced Techniques for stronger reports

- Conditional Formatting - Highlight variances or warning thresholds
- Calculated Columns - Show KPIs like % of Grant Used or Expense Ratios
- Dimension Filters - Slice reports instantly by Grant, Program, or Fund
- Rolling Periods and Dynamic Date Ranges - Auto-update reports month-over-month, quarter-over-quarter
- Suppress Zero Rows - Cleaner, focused outputs
- Reporting Groups - Group grants, programs, or departments logically for rollups



# Custom Report Writer

## Your Transaction Reporting Starting Point

# Custom Report Writer

Standard, user-friendly report builder

Great for operational and transaction or transaction detail level reports

Includes filters, groups, totals, and basic formulas

Export to excel or publish to dashboards

Ideal for: payables by payment date, custom aging reports, vendor summaries, transaction detail based reports

# Custom Report Writer

## Project Progress Billings

[Customize](#)[Graph](#)[View](#)[Print](#)[Process & store](#)[Email](#)[Add to dashboard](#)[Memorize](#)[Export](#)

▼ Subtotal name	Customer Name	Project ID	Project Name	Project Start Date	Budgeted Billing Amount	Billed To Date	Remaining to be Billed	Budgeted Hours	Hours Billed To Date	Remaining Hours to be Billed
Sum for C-1001	Health Initiative 1				1,053,000.00	1,427,698.75	(374,698.75)	0.00	5,166.00	(5,166.00)
Sum for C-1004	REDC	110	Templeton Expansion		46,000,000.00	0.00	46,000,000.00	0.00	0.00	0.00
Sum for C-1012	Dupont Foundation	403	Dupont Foundation Award	01/01/2020	0.00	0.00	0.00	0.00	0.00	0.00
Sum for C-1013	Travis County				300,000.00	0.00	300,000.00	0.00	0.00	0.00
Sum for C-1014	Rural Health Network	404	Rural Health Network	10/01/2020	0.00	0.00	0.00	0.00	0.00	0.00
Sum for C-1015	Slytherin	405	Slytherin Award	01/01/2021	125,000.00	125,000.00	0.00	0.00	0.00	0.00
Sum for C-1016	Claremont				6,900,000.00	3,900,000.00	3,000,000.00	0.00	0.00	0.00
Sum for C-1017	Tarrant County	141	Tarrant County Contract	01/01/2020	8,740,000.00	4,680,000.00	4,060,000.00	0.00	0.00	0.00
Sum for C-1018	Holcombe Foundation	142	Holcombe Federal Grant	03/01/2020	6,900,000.00	8,220,000.00	(1,320,000.00)	0.00	0.00	0.00
Sum for C-1019	Skuski Foundation	150	Skuski Foundation Award	01/01/2021	15,600,000.00	26,000,000.00	(10,400,000.00)	0.00	0.00	0.00
Sum for C-1020	Global Research	160	Global Research Grant	01/01/2020	34,500,000.00	19,500,000.00	15,000,000.00	0.00	0.00	0.00
Sum for C-1021	Resource Network	161	Resource Network Grant	01/01/2020	23,000,000.00	13,000,000.00	10,000,000.00	0.00	0.00	0.00
Sum for C-1022	Digital Humanities		Digital Humanities		15,200,000.00	9,360,000.00	5,840,000.00	0.00	0.00	0.00
Sum for C-1023	CRS Corp.	750	CRS GRANT- Overhead Calculation	01/01/2021	0.00	0.00	0.00	0.00	0.00	0.00
Sum for No Customer ID					3,630,430,000.00	26,713,222.60	3,603,716,777.40	0.00	0.00	0.00
Sum Total					3,788,748,000.00	112,925,921.35	3,675,822,078.65	0.00	5,166.00	(5,166.00)

# Custom Report Writer

## Project Progress Billings

[Customize](#)[Graph](#)[View](#)[Print](#)[Process & store](#)[Email](#)[Add to dashboard](#)[Memorize](#)[Export](#)

▼ Subtotal name	Customer Name	Project ID	Project Name	Project Start Date	Budgeted Billing Amount	Billed To Date	Remaining to be Billed	Budgeted Hours	Hours Billed To Date	Remaining Hours to be Billed
Sum for C-1001	Health Initiative 1				1,053,000.00	1,427,698.75	(374,698.75)	0.00	5,166.00	(5,166.00)
Sum for C-1004	REDC	110	Templeton Expansion		46,000,000.00	0.00	46,000,000.00	0.00	0.00	0.00
Sum for C-1012	Dupont Foundation	403	Dupont Foundation Award	01/01/2020	0.00	0.00	0.00	0.00	0.00	0.00
Sum for C-1013	Travis County				300,000.00	0.00	300,000.00	0.00	0.00	0.00
Sum for C-1014	Rural Health Network	404	Rural Health Network	10/01/2020	0.00	0.00	0.00	0.00	0.00	0.00
Sum for C-1015	Slytherin	405	Slytherin Award	01/01/2021	125,000.00	125,000.00	0.00	0.00	0.00	0.00
Sum for C-1016	Claremont				6,900,000.00	3,900,000.00	3,000,000.00	0.00	0.00	0.00
Sum for C-1017	Tarrant County	141	Tarrant County Contract	01/01/2020	8,740,000.00	4,680,000.00	4,060,000.00	0.00	0.00	0.00
Sum for C-1018	Holcombe Foundation	142	Holcombe Federal Grant	03/01/2020	6,900,000.00	8,220,000.00	(1,320,000.00)	0.00	0.00	0.00
Sum for C-1019	Skuski Foundation	150	Skuski Foundation Award	01/01/2021	15,600,000.00	26,000,000.00	(10,400,000.00)	0.00	0.00	0.00
Sum for C-1020	Global Research	160	Global Research Grant	01/01/2020	34,500,000.00	19,500,000.00	15,000,000.00	0.00	0.00	0.00
Sum for C-1021	Resource Network	161	Resource Network Grant	01/01/2020	23,000,000.00	13,000,000.00	10,000,000.00	0.00	0.00	0.00
Sum for C-1022	Digital Humanities		Digital Humanities		15,200,000.00	9,360,000.00	5,840,000.00	0.00	0.00	0.00
Sum for C-1023	CRS Corp.	750	CRS GRANT- Overhead Calculation	01/01/2021	0.00	0.00	0.00	0.00	0.00	0.00
Sum for No Customer ID					3,630,430,000.00	26,713,222.60	3,603,716,777.40	0.00	0.00	0.00
Sum Total					3,788,748,000.00	112,925,921.35	3,675,822,078.65	0.00	5,166.00	(5,166.00)



# Financial and Custom Graphs

## Built-in Visual Tools in the Core Subscription



# Financial and Custom Graphs

- Included with all core Intacct subscriptions
- Add graphs directly to **dashboards**
- Visualize data from financial reports and custom reports
- Chart types: Bar, Column, Line, Pie
- Filter by dimensions and date ranges

# Telling Your Story

## What can you include in your Dashboard





# Available Component Types

- Reports – Display full or summarized reports
- Performance Cards – Highlight KPIs at a glance
- Graphs and Charts – Visualize trends, comparisons, and performance or show relationships among dimensions
- Records & List Views – View dynamic transaction or master record lists
- Web Content (Smart Links) – Embed external links or videos
- Tasks & Reminders – Show upcoming actions or deadlines



# Common Dashboard Components



Quick Financial Snapshots:  
Add Income Statement  
YTD or Cash Flow  
Statement



Cash Flow Monitoring:  
Bank Balance reports by  
institution



Grant/Program Oversight:  
Project or Grant Actuals to  
Budget



Risk Management: AP  
Aging Overdue Summary



Operational Efficiency:  
Outstanding Purchase  
Orders, Unposted  
Transactions



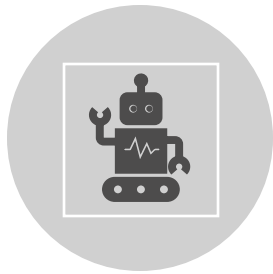
Audit and Compliance  
Tracking: Bank  
Reconciliations Completed  
Status



# Dynamic Dashboards That Tell a Story



# Dashboards with Purpose



ROLE-BASED INSIGHTS  
(LEADERSHIP, GRANTS,  
PROGRAMS)



COMBINE REPORTS,  
PERFORMANCE CARDS, AND  
VISUALS

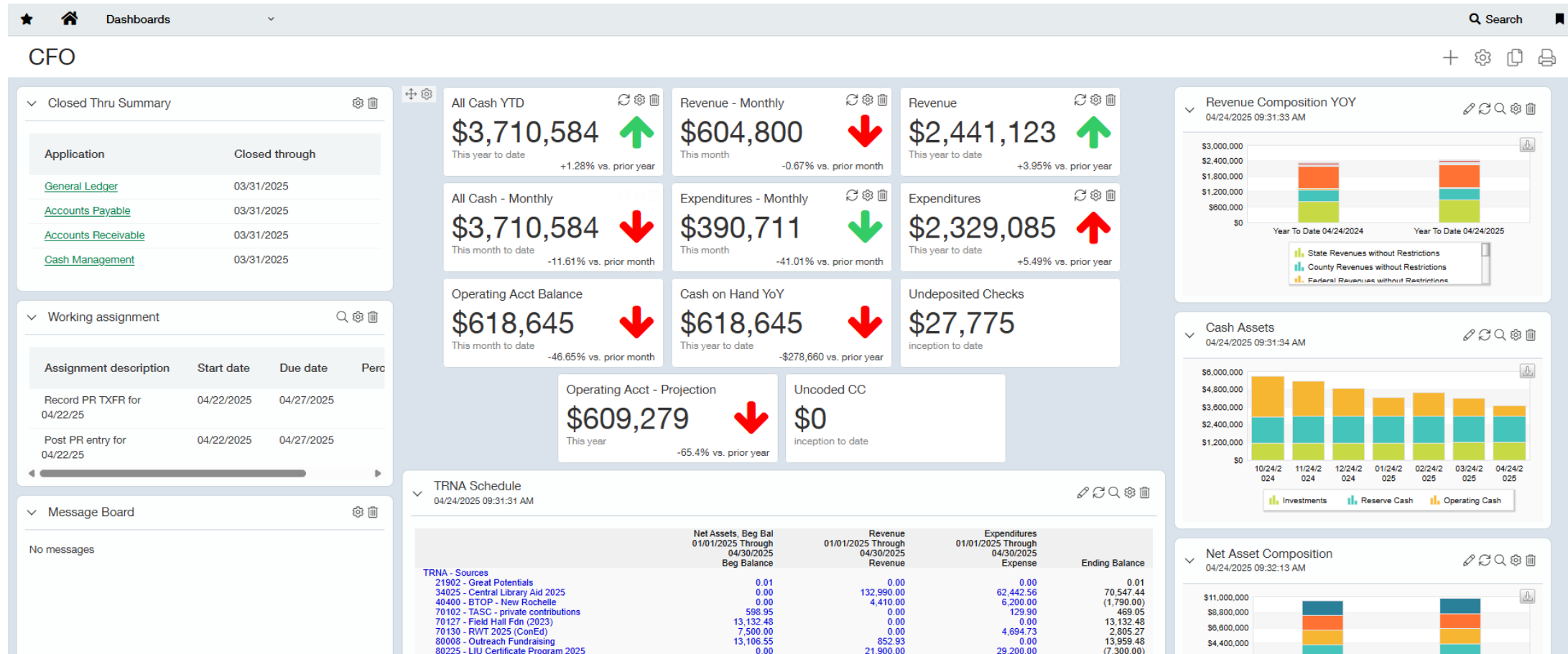


USE FILTERS (DIMENSIONS,  
AS OF DATE) TO MAKE  
DASHBOARDS DYNAMIC



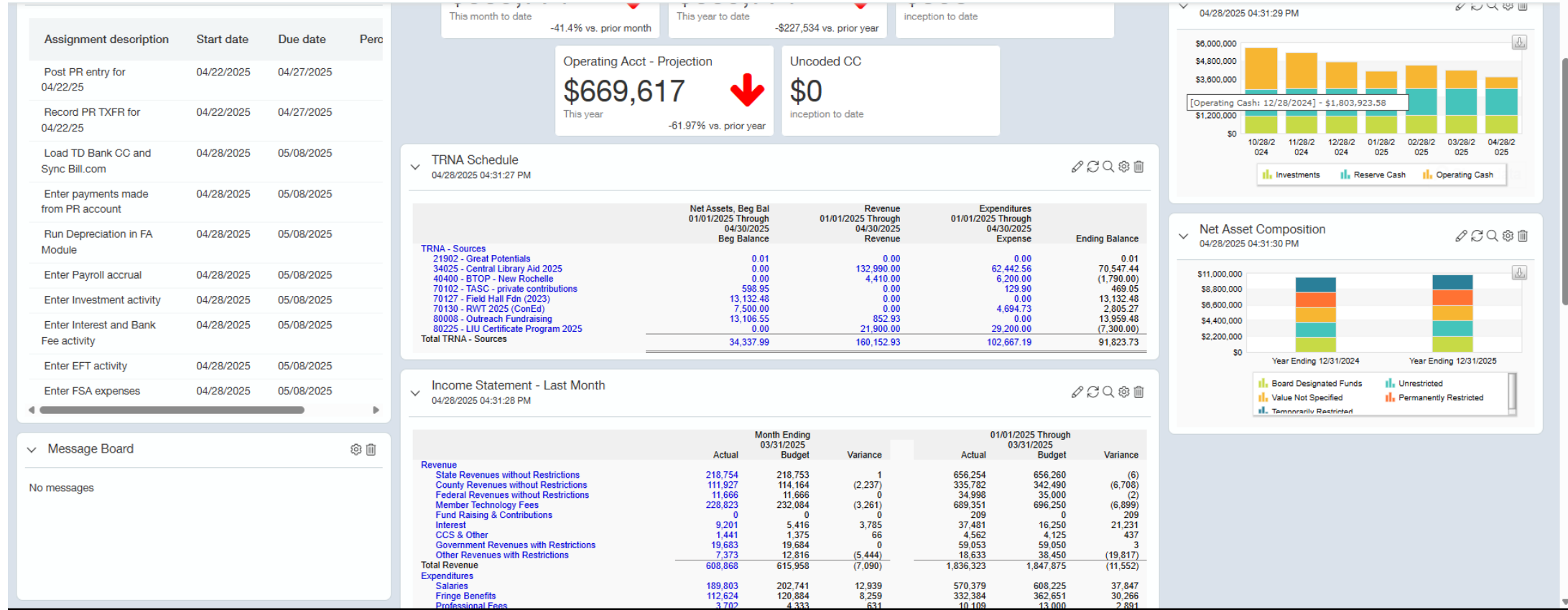
HIGHLIGHT TRENDS, NOT  
JUST NUMBERS

# Example: CFO Dashboard

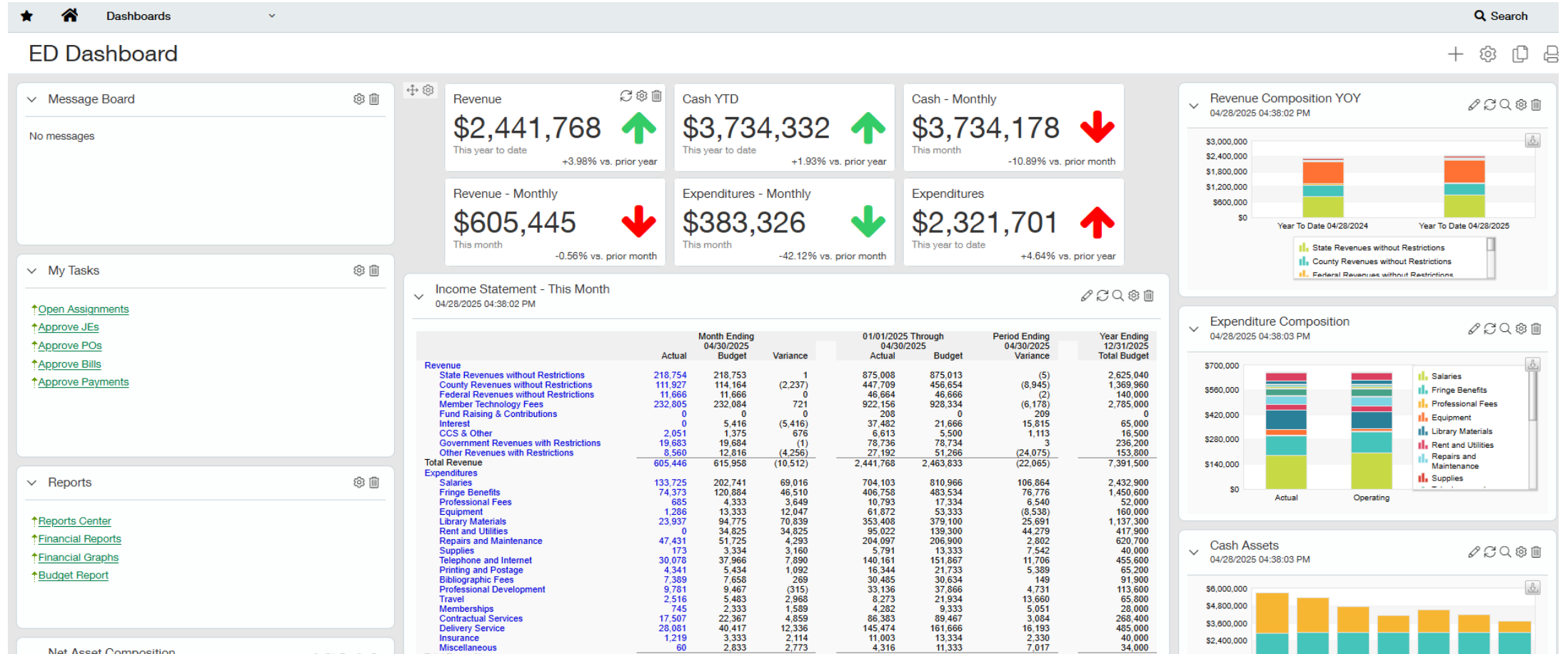


# Example: CFO Dashboard

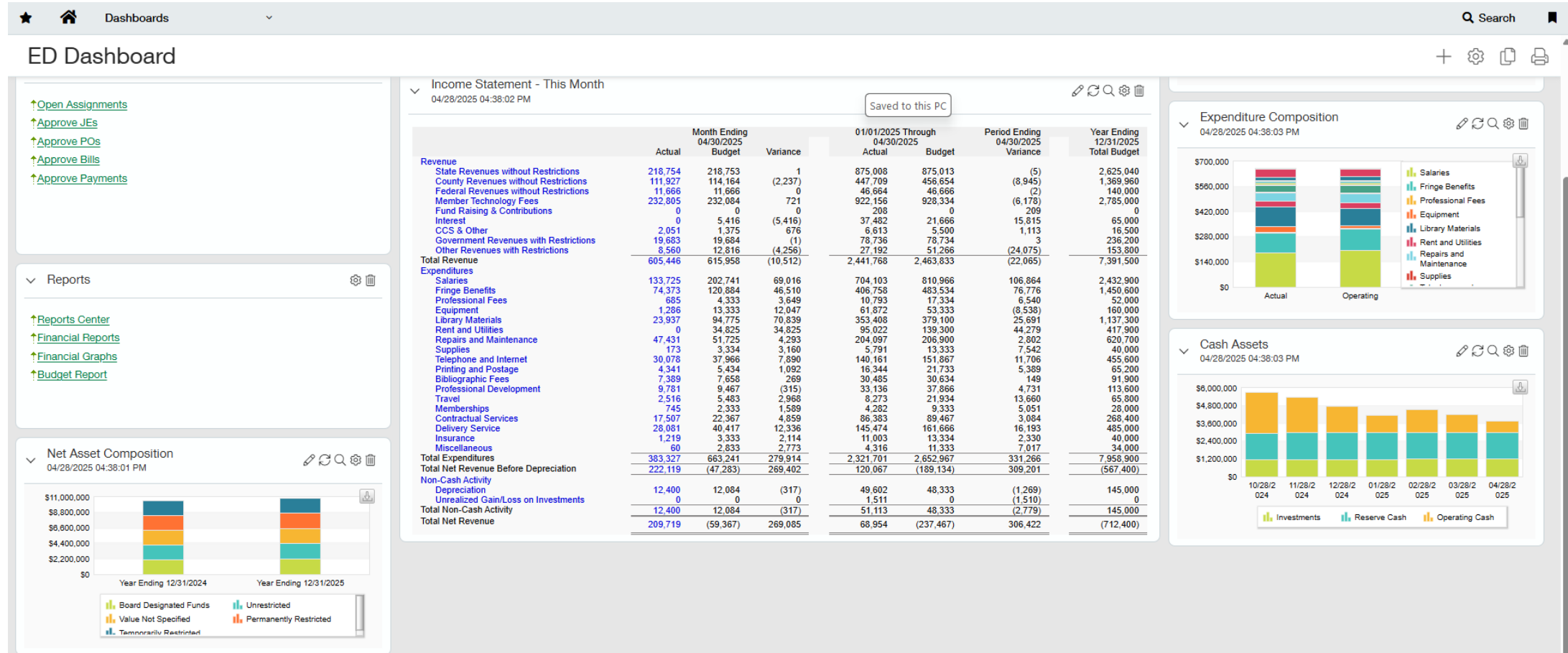
## CFO



# Example: Executive Director Dashboard



# Example: Executive Director Dashboard





# Example: Executive Director Dashboard

★ Applications

IT Director

AR Aging  
04/28/2025 04:41:00 PM

Based on: Invoice date		As of date: 04/28/2025					-0	1-30	31-60
Funder ID	Funder name	Invoice	GL posting date	Invoice date	Due date	Days aged			
C00006		AR00000411	02/19/2025	02/19/2025	11/01/2024	68	0.00	0.00	0.00
Total for C00006							0.00	0.00	0.00
C00009		AR00000561	04/10/2025	04/10/2025	05/10/2025	18	0.00	900.00	0.00
Total for C00009							0.00	900.00	0.00
C00011		EFT	02/12/2025	02/12/2025		75	0.00	0.00	0.00
Total for C00011							0.00	0.00	0.00
C00012		AR00000558	04/10/2025	04/10/2025	05/10/2025	18	0.00	900.00	0.00
Total for C00012							0.00	900.00	0.00
C00014		AR00000529	01/31/2025	02/03/2025	03/05/2025	84	0.00	0.00	0.00
Total for C00014							0.00	0.00	0.00
C00016		AR00000557	04/10/2025	04/10/2025	05/10/2025	18	0.00	1,800.00	0.00
Total for C00016							0.00	1,800.00	0.00
C00021		AR00000507	01/31/2025	01/31/2025	04/01/2025	87	0.00	0.00	0.00
Total for C00021							0.00	0.00	0.00
C00023		AR00000556	04/10/2025	04/10/2025	06/09/2025	18	0.00	3,675.00	0.00
Total for C00023							0.00	3,675.00	0.00
C00028		AR00000555	04/01/2025	04/01/2025	05/31/2025	27	0.00	21,968.58	0.00
Total for C00028							0.00	21,968.58	0.00
C00029		AR00000038	09/25/2023	09/25/2023	10/25/2023	581	0.00	0.00	0.00
Total for C00029							0.00	0.00	0.00
C00032		AR00000559	04/10/2025	04/10/2025	05/10/2025	18	0.00	900.00	0.00
Total for C00032							0.00	900.00	0.00
C00034		AR00000560	04/10/2025	04/10/2025	05/10/2025	18	0.00	900.00	0.00
Total for C00034							0.00	900.00	0.00
Grand totals							0.00	31,043.58	0.00

Income Statement  
04/28/2025 04:41:30 PM

	Actual	Month Ending 04/30/2025 Budget	Variance	01/01/2025 Through 04/30/2025 Actual	Budget	Period Ending 04/30/2025 Variance	Year Ending 12/31/2025 Total Budget
Revenue							
State Revenues without Restrictions	218,754	218,753	1	875,008	875,013	(5)	2,625,040
County Revenues without Restrictions	111,927	114,164	(2,237)	447,709	456,654	(8,945)	1,369,960
Federal Revenues without Restrictions	11,666	11,666	0	46,664	46,666	(2)	140,000
Member Technology Fees	232,805	232,084	721	922,156	928,334	(6,178)	2,785,000
Fund Raising & Contributions	0	0	0	208	0	209	0
Interest	0	5,416	(5,416)	37,482	21,666	15,815	65,000
CCS & Other	2,051	1,375	676	6,613	5,500	1,113	16,500
Government Revenues with Restrictions	19,683	19,684	(1)	78,736	78,734	3	236,200
Other Revenues with Restrictions	8,560	12,816	(4,256)	27,192	51,266	(24,075)	153,800
Total Revenue	605,446	615,958	(10,512)	2,441,768	2,463,833	(22,065)	7,391,500
Expenditures							
Salaries	133,725	202,741	69,016	704,103	810,966	106,864	2,432,900
Fringe Benefits	74,373	120,884	46,510	406,758	483,534	76,776	1,450,600
Professional Fees	685	4,333	3,649	10,793	17,334	6,540	52,000
Equipment	1,286	13,333	12,047	61,872	53,333	(8,539)	160,000
Library Materials	23,937	94,775	70,839	353,408	379,100	25,691	1,137,300
Rent and Utilities	0	34,825	34,825	95,022	139,300	44,279	417,900
Repairs and Maintenance	47,431	51,725	4,293	204,097	206,900	2,802	620,700
Supplies	173	3,334	3,160	5,791	13,333	7,542	40,000
Telephone and Internet	30,078	37,966	7,890	140,161	151,867	11,706	455,600
Printing and Postage	4,341	5,434	1,092	16,344	21,733	5,389	65,200
Bibliographic Fees	7,389	7,658	269	30,485	30,634	149	91,900
Professional Development	9,781	9,467	(315)	33,136	37,866	4,731	113,600
Travel	2,516	5,483	2,968	8,273	21,934	13,660	65,800
Memberships	745	2,333	1,589	4,282	9,333	5,051	28,000
Contractual Services	17,507	22,367	4,859	86,383	89,467	3,084	268,400
Delivery Service	28,081	40,417	12,336	145,474	161,666	16,193	485,000
Insurance	1,219	3,333	2,114	11,003	13,334	2,330	40,000
Miscellaneous	60	2,833	2,773	4,316	11,333	7,017	34,000
Total Expenditures	383,327	663,241	279,914	2,321,701	2,652,967	331,266	7,958,900
Total Net Revenue Before Depreciation	222,119	(47,283)	269,402	120,067	(189,134)	309,201	(567,400)
Non-Cash Activity							
Depreciation	12,400	12,084	(317)	49,602	48,333	(1,269)	145,000
Unrealized Gain/Loss on Investments	0	0	0	1,511	0	(1,511)	0
Total Non-Cash Activity	12,400	12,084	(317)	51,113	48,333	(2,779)	145,000
Total Net Revenue	209,719	(59,367)	269,085	68,954	(237,467)	306,422	(712,400)



# Interactive Custom Reports Deliver Clarity to Your Users



# Interactive Custom Reports (ICRW)

- Build reports with *any* dimension
- Add calculated columns (e.g. remaining budget, percent utilized)
- Group/sort by funding source, grant, or time period
- Use filters for dynamic slicing and dicing of data
- Export or add to dashboards

# ICRW Example – Grant Summary Report



## zGrant Summary-Detail Report

Grant Name **Health Initiative 1 Grant - SEFA Details ▼**

Grant ID	Grant Name	Award Amount	Total Entry Amount	Billable amount	Billed amount	Remaining Funds	% Utilized	Declining Balance
400	Health Initiative 1 Grant - SEFA Details	10,000,000	1,212,386	732,386	580,507	8,787,614	12%	9,995,548
401	Health Initiative 1 Grant Award year 1	2,500,000	494,301	286,301	286,301	2,005,699	20%	1,765,741
401B	Health Initiative 1 Grant Award year 2	2,500,000	540,225	343,225	318,800	1,959,775	22%	1,478,316
401C	Health Initiative 1 Grant Award year 3	2,500,000	185,318	123,318	6,066	2,314,682	7%	1,135,091

Grant ID	Award Amount	Entry type	Item name	Document date [Billable expense]	Document ID [Billable expense]	Quantity	Total Entry Amount	Billable amount	Billed amount	% Utilized	Declining Balance
400	10,000,000	AP Bill	Billable Charge	1/28/2020	AP-396	1.00	4,452	4,452	4,452	0%	9,995,548
				4/28/2020	AP-397	1.00	4,910	4,910	4,910	0%	9,990,638
				6/28/2020	AP-398	1.00	4,971	4,971	4,971	0%	9,985,667
				7/28/2020	AP-399	1.00	6,159	6,159	6,159	0%	9,979,508
				9/28/2020	AP-400	1.00	6,362	6,362	6,362	0%	9,973,146
				10/28/2020	AP-401	1.00	5,493	5,493	5,493	0%	9,967,653
				11/28/2020	AP-402	1.00	6,325	6,325	6,325	0%	9,961,328
				12/28/2020	AP-403	1.00	4,248	4,248	4,248	0%	9,957,080
				1/28/2021	AP-404	1.00	4,576	4,576	4,576	0%	9,952,504
				2/28/2021	AP-405	1.00	5,706	5,706	5,706	0%	9,946,798
					AP-414	1.00	4,656	4,656	4,656	0%	9,942,142
				3/28/2021	AP-406	1.00	4,577	4,577	4,577	0%	9,937,565
					AP-413	1.00	5,429	5,429	5,429	0%	9,932,136
				4/28/2021	AP-407	1.00	5,030	5,030	5,030	0%	9,927,106
				5/28/2021	AP-408	1.00	5,661	5,661	5,661	0%	9,921,445
				6/28/2021	AP-409	1.00	4,512	4,512	4,512	0%	9,916,933
				7/28/2021	AP-410	1.00	4,882	4,882	4,882	0%	9,912,051
				8/28/2021	AP-411	1.00	6,381	6,381	6,381	0%	9,905,670
				9/28/2021	AP-412	1.00	4,676	4,676	4,676	0%	9,900,994
				12/28/2021	AP-415	1.00	4,426	4,426	0	0%	9,896,568
				1/28/2022	AP-416	1.00	4,143	4,143	0	0%	9,892,425
				2/28/2022	AP-417	1.00	5,213	5,213	0	0%	9,887,212
				3/28/2022	AP-418	1.00	4,017	4,017	0	0%	9,883,195
			Program Supplies Misc	12/5/2021	Example - Src Attachment	1.00	2,000	2,000	0	0%	9,881,195
			Subcontractor Expenses	3/28/2020	PO0029	1.00	72,000	0	0	1%	9,881,195
					PO0033	1.00	23,000	0	0	0%	9,881,195
				6/28/2020	PO0034	1.00	49,000	0	0	0%	9,881,195
				9/28/2020	PO0037	1.00	36,000	0	0	0%	9,881,195
				12/28/2020	PO0039	1.00	76,000	0	0	1%	9,881,195

## ICRW Example – Grant Analysis Master

**\_Grants Analysis Master - MMT - 2025.04.21**

Grant ID (Drill)	Grant Name (Expand)	Award Amount	Incurred Amount	Billable Amount	Billed Amount	Amount Billed To Date	Amount Billable To Date	Remaining Billable Balance	Pct Billable To Date
141	Tarrant County Contract	50,000	1,205	0	0	0	0	50,000	0.0%
161	Resource Network Grant		5,000	0	0	0	0		
400	Health Initiative 1 Grant - SEFA Details	10,000,000	1,212,386	732,386	580,507	580,507	732,386	9,267,614	7.3%
401	Health Initiative 1 Grant Award year 1	2,500,000	494,301	286,301	286,301	286,301	286,301	2,213,699	11.5%
401B	Health Initiative 1 Grant Award year 2	2,500,000	540,225	343,225	318,800	318,800	343,225	2,156,775	13.7%
401C	Health Initiative 1 Grant Award year 3	2,500,000	185,318	123,318	6,066	6,066	123,318	2,376,682	4.9%
402	Travis County Contract		59,000	0	0	0	0		
999	Non-Project or Grant Related		6,313	0	0	0	0		

Refresh

Export



## ICRW Example – Grant Analysis Master

Grant Details ▼

Award Amount \$10,000,000

Grant ID (Drill)	Grant Name	Entry Date	Document ID	Entry Type	Item Name	Incurred Amount	Billable Amount	Billed Amount	Amount Billed To Date	Amount Billable To Date	Remaining Billable Balance	Pct Billable To Date
400	Health Initiative 1 Grant - SEFA Details	12/1/2018	EmpExp-00039	Employee Expense	Billable Charge	4,798	4,798	0	0	4,798	9,995,202	0.0%
400	Health Initiative 1 Grant - SEFA Details	1/28/2020	AP-396	AP Bill	Billable Charge	4,452	4,452	4,452	4,452	9,250	9,990,750	0.1%
400	Health Initiative 1 Grant - SEFA Details	2/28/2020	EmpExp-00019	Employee Expense	Billable Charge	11,818	11,818	11,818	16,270	21,068	9,978,932	0.2%
400	Health Initiative 1 Grant - SEFA Details	3/28/2020	PO0029	AP Bill	Subcontractor Expenses	72,000	0	0	16,270	21,068	9,978,932	0.2%
400	Health Initiative 1 Grant - SEFA Details	3/28/2020	PO0033	AP Bill	Subcontractor Expenses	23,000	0	0	16,270	21,068	9,978,932	0.2%
400	Health Initiative 1 Grant - SEFA Details	3/28/2020	Vendor Invoice-VI0027	Purchasing Transaction	Subcontractor Expenses	72,000	72,000	72,000	88,270	93,068	9,906,932	0.9%
400	Health Initiative 1 Grant - SEFA Details	3/28/2020	Vendor Invoice-VI0030	Purchasing Transaction	Subcontractor Expenses	23,000	23,000	23,000	111,270	116,068	9,883,932	1.2%
400	Health Initiative 1 Grant - SEFA Details	4/28/2020	AP-397	AP Bill	Billable Charge	4,910	4,910	4,910	116,180	120,978	9,879,022	1.2%
400	Health Initiative 1 Grant - SEFA Details	5/28/2020	EmpExp-00020	Employee Expense	Billable Charge	13,339	13,339	13,339	129,519	134,317	9,865,683	1.3%
400	Health Initiative 1 Grant - SEFA Details	6/28/2020	AP-398	AP Bill	Billable Charge	4,971	4,971	4,971	134,490	139,288	9,860,712	1.4%
400	Health Initiative 1 Grant - SEFA Details	6/28/2020	PO0034	AP Bill	Subcontractor Expenses	49,000	0	0	134,490	139,288	9,860,712	1.4%
400	Health Initiative 1 Grant - SEFA Details	6/28/2020	Vendor Invoice-VI0031	Purchasing Transaction	Subcontractor Expenses	49,000	49,000	49,000	183,490	188,288	9,811,712	1.9%
400	Health Initiative 1 Grant - SEFA Details	7/28/2020	AP-399	AP Bill	Billable Charge	6,159	6,159	6,159	189,649	194,447	9,805,553	1.9%
400	Health Initiative 1 Grant - SEFA Details	7/28/2020	EmpExp-00021	Employee Expense	Billable Charge	11,743	11,743	11,743	201,392	206,190	9,793,810	2.1%

## Related Dimensions

Grant ID (Drill)	Grant Name	Location	Employee	Customer	Vendor
400	Health Initiative 1 Grant - SEFA Details (400)	Health Initiative 1 Grant	Grace, Karla	Health Initiative 1 (C-1001)	
400	Health Initiative 1 Grant - SEFA Details (400)	Health Initiative 1 Grant		Health Initiative 1 (C-1001)	
400	Health Initiative 1 Grant - SEFA Details (400)	Health Initiative 1 Grant		Health Initiative 1 (C-1001)	Able Courier
400	Health Initiative 1 Grant - SEFA Details (400)	Health Initiative 1 Grant		Health Initiative 1 (C-1001)	Ransom Counselling Services

Other Views

[Jump to...](#)[Refresh](#)[Export](#)

# Real-Time Visuals with Interactive Visual Explorer



# Interactive Visual Explorer (IVE)



Analyze trends over time  
or by dimension



Use timelines, heatmaps,  
and drill-downs



Ideal for funding,  
expense trends, and  
program comparisons



Export visualizations or  
embed in dashboards



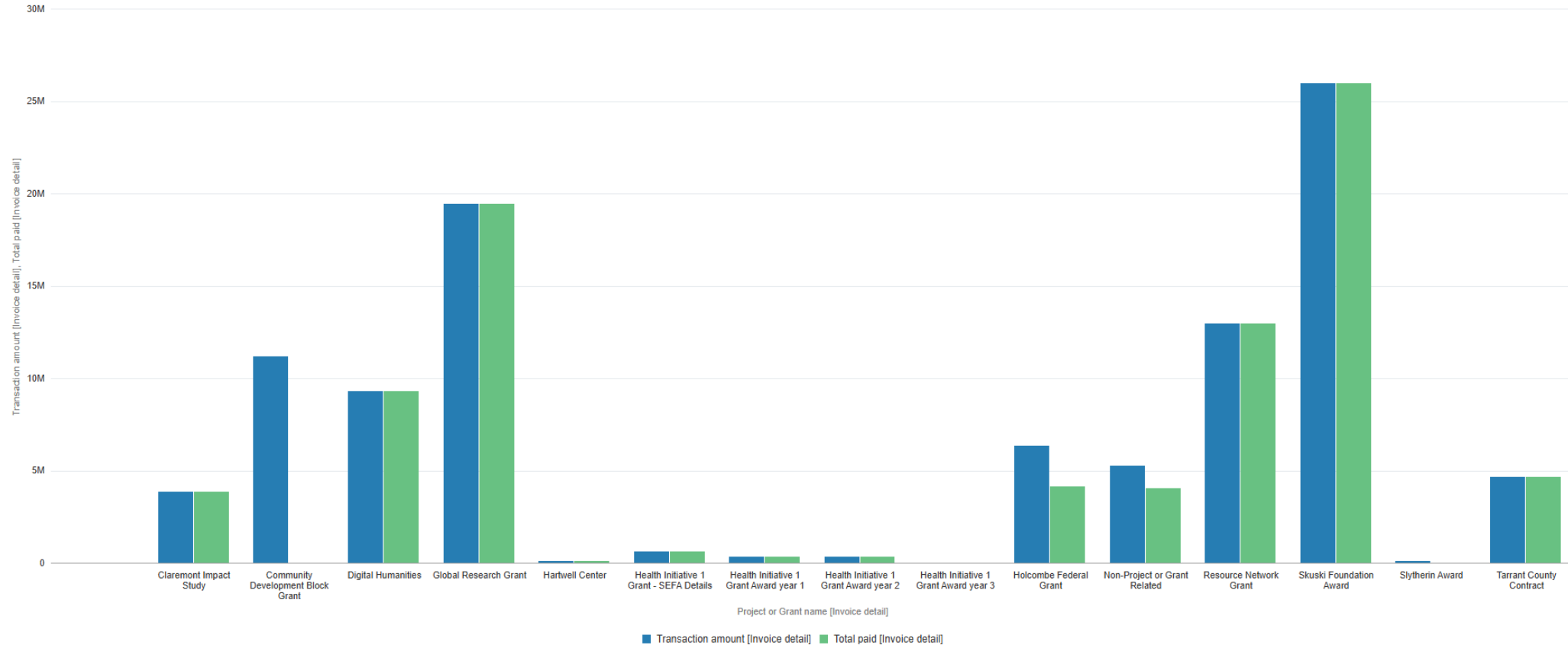
# IVE Example – Funding Analysis



Date [Invoice]    Restriction name [Invoice detail]    Customer name [Invoice detail]    Project or Grant [Invoice detail]    Entry date Calendar Year



Transaction amount [Invoice detail], Total paid [Invoice detail] by Project or Grant name [Invoice detail]



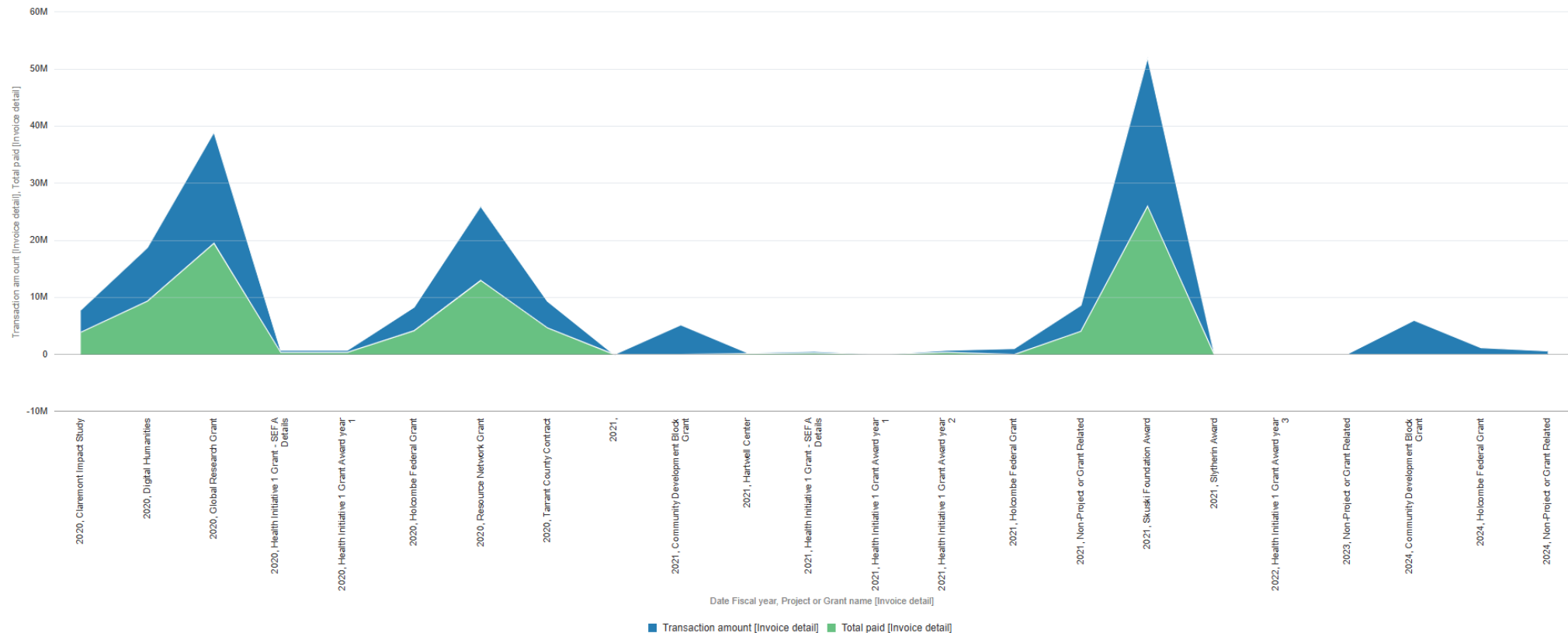
# IVE Example – Funding Analysis



Date [Invoice]    Restriction name [Invoice detail]    Customer name [Invoice detail]    Project or Grant [Invoice detail]    Entry date Calendar Year    Date Fiscal year



Transaction amount [Invoice detail], Total paid [Invoice detail] by Date Fiscal year, Project or Grant name [Invoice detail]



Invoiced and Paid    **Funding Analysis by Grant and Fiscal Year**

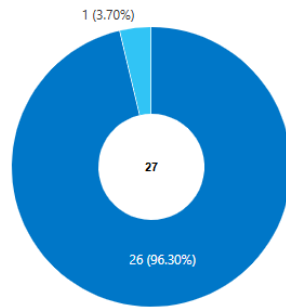
# IVE Example – Project/Grant Analysis



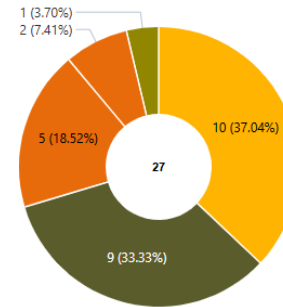
Project Manager Project Status Project Type Project Location Customer Root Project Project Start Year Project Status (3)



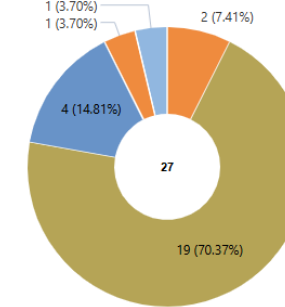
Projects Count by Project Status



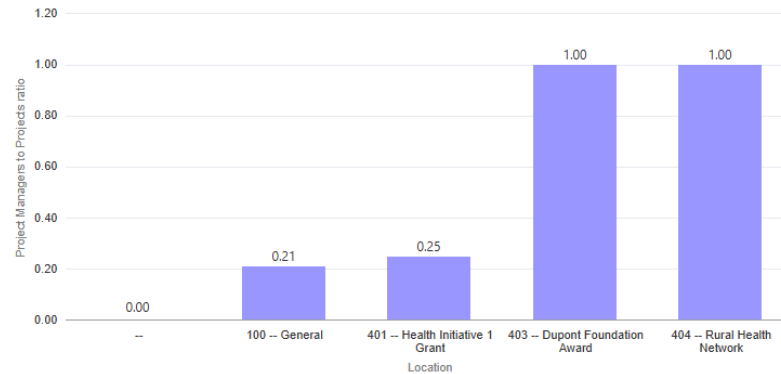
Projects Count by Project Manager



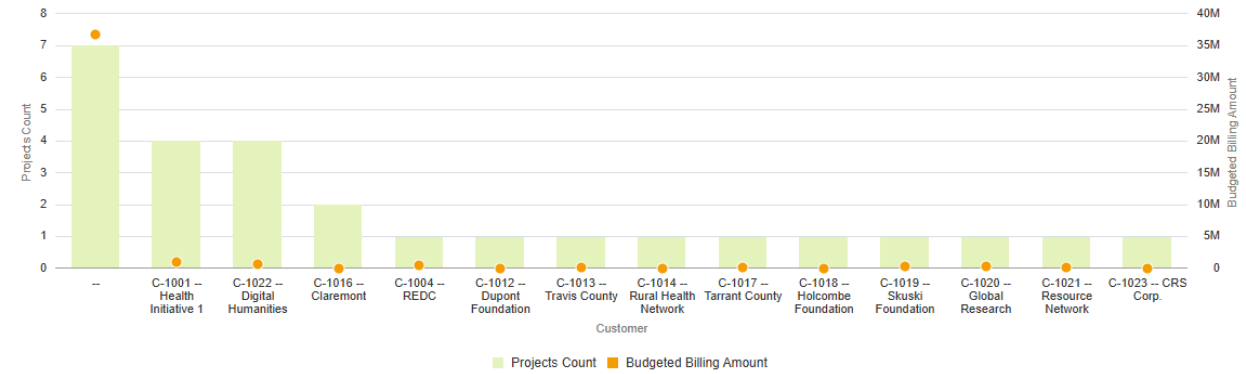
Projects Count by Location



Project Managers to Projects ratio by Location



Projects Count, Budgeted Billing Amount by Customer



MAY 5-7, 2025

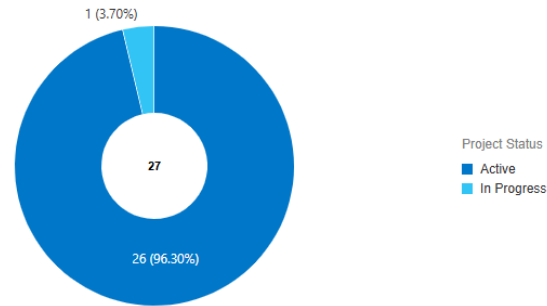


# IVE Example – Project/Grant Analysis

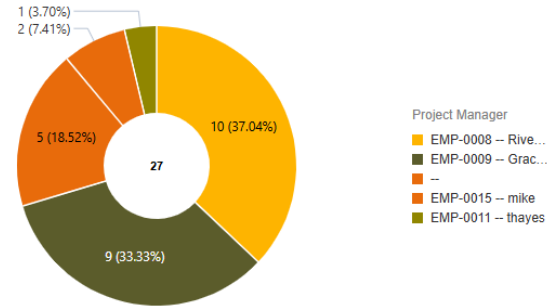


Project Manager	Project Status	Project Type	Project	Location	Customer	Root Project	Project Start Year	Project Status (3)
-----------------	----------------	--------------	---------	----------	----------	--------------	--------------------	--------------------

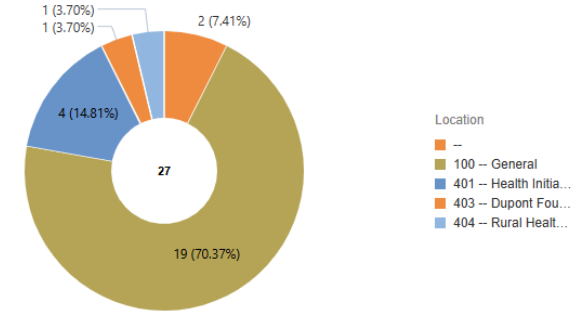
Projects Count by Project Status



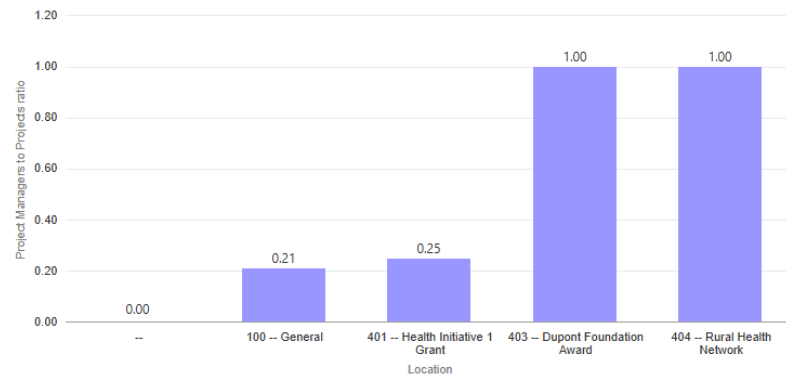
Projects Count by Project Manager



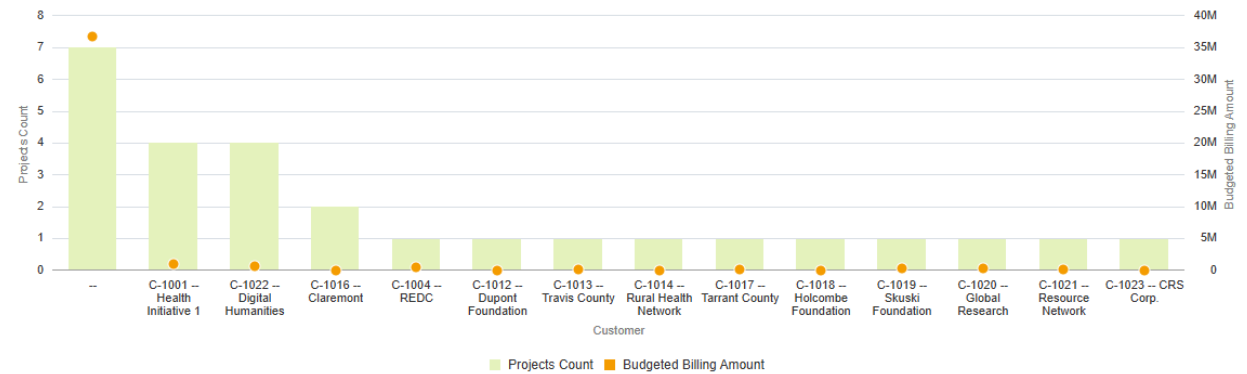
Projects Count by Location



Project Managers to Projects ratio by Location



Projects Count, Budgeted Billing Amount by Customer





# Automating Reporting Workflows



# Automate & Share Reports



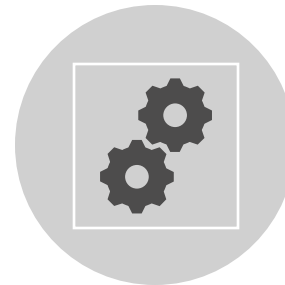
Schedule reports to run  
and be delivered by  
email



Share dashboards by role  
or user group



Publish key visuals to  
non-finance users



Reduce manual  
processes

# Automate & Share Reports





# Turning Insights into Action



# From Insights to Impact



Ask: What action will this report support?



Build reports that answer recurring questions



Use real-time data to influence decisions



Close the loop: report > analyze > act > repeat

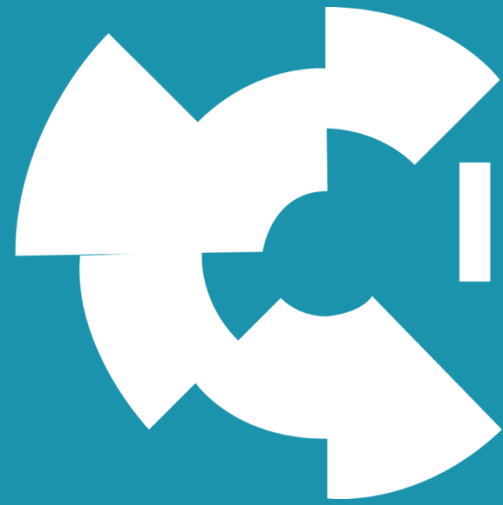


# Wrap-up & Key Takeaways



# Key Takeaways

- Build dashboards by role or function
- Maximize the report builders you have for what they're best at
- Use ICRW for dynamic analysis of data and information when CRW doesn't cut it
- Leverage IVE to visualize impact over time
- Automate where possible
- Report to *drive action*, not just share data



MAY 5-7, 2025

**INNOVATE**

JMT CONSULTING

---

NASHVILLE