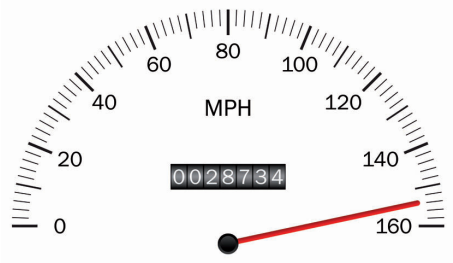
Giving in Grace

Stewardship Tasks

Dashboard plus instructions

The Dashboard Plus pulls together all the resources for financial analysis into a single, handy booklet which presents financial data in a graphical format with questions for discussion. This paper offers practical guidance on entering into the spreadsheet and producing the linked dashboard document for printing.



The Dashboard Plus is an enhanced version of the Finance Dashboard. It does not add any new resources for financial analysis. Rather, building on the material in the Finance Dashboard your Dashboard Plus additionally includes all the visual data and questions from the Finance Dashboard and adds the charts for a Giving Profile and a simplified selection of Age Giving Profile charts. The Dashboard Plus has two benefits:

- It pulls all the financial analysis material in the Stewardship Tasks strand of Giving in Grace into a single, convenient booklet
- Modelled on the simpler finance dashboard the Dashboard Plus adds questions for discussion in small groups, questions note found in the standalone Giving Profile and Age Giving profile resources.

Please note

The Giving Profile charts in the Dashboard Plus will only work if all the information to populate the Excel data sheet is provided. Thus you will need to complete the column for tax efficient giving (Yes or No; Y or N) and the column for method of giving (Bank or Envelope; B or E). If either column is blank the charts will not work. More flexibility is found in the standalone resource on the Giving Profile web page.

The Age Giving Profile charts in Dashboard Plus are full of insight but simplified and less comprehensive than those found in the standalone resource on the Age Giving Profile page.

This paper offers step by step guidance to create your Dashboard Plus. Please note that currently you must have versions of Excel and Word in Microsoft Office 2010. The Dashboard Plus will not work with Office 2007.

Requirements

To generate your Dashboard Plus you will need access to some financial information and will need to do some preparatory work.

- If you have already generated a Finance Dashboard, a Giving Profile and an Age Giving Profile then you already have all the financial and other information that you need. Follow the guidance below to quickly and easily re-use that information to generate your Dashboard Plus.

- If you are coming fresh to the Dashboard Plus you will need to gather and enter a range of financial data. It will take a little longer but the guidance below will help you navigate the process.

Step One: how to generate your Dashboard

The Dashboard Plus comprises of two linked documents: an Excel workbook for the financial data and a Word document which contains text and links to the Excel workbook. Once data is entered in the spreadsheet, open the Word document and respond 'Yes' to update the links. The financial graphs and charts in the document will automatically configure themselves to your information from the spreadsheet.

1. From the Dashboard Plus web page click the Dashboard Plus files link in the Downloads box. This is a zipped file and will automatically create a compressed folder named '*GiG-DB-Plus*' in your download folder. Now, this compressed file contains a folder called *GiG-Dashboard-Plus*, in fact, this may well be the folder you first see on screen. It is this *GiG-Dashboard-Plus* folder which you will extract from the compressed folder and save to your hard disk.

2. To do this, go to your download folder where you will see the compressed file *GiG-DB-Plus*. Right mouse click on this compressed folder (not the folder GiG-Dashboard-Plus) and choose Extract All from the menu. [i] Choose the folder 'C:\' (also known as the root of drive C) as the destination for the extracted files. You should finish up with a folder on your C:\ drive called *GiG-Dashboard-Plus*. In this folder there are two files: a Word file called *Dashboard-Plus* and an Excel file called *Dashboard-Plus-Data*. If you have these you are good to go with Step Two below.

   Important: after extraction from *GiG-DB-Plus* the GiG-Dashboard-Plus folder must sit on your C:\ drive for the links between the Word document and Excel spreadsheet to work correctly. If you accidentally place the folder in the wrong place, simply move the folder to your C:\ drive.

Step Two: the orange data entry sheet

3. Open the Excel workbook *Dashboard_Plus_Data.xlsx*. There are several worksheets, that is, tabs at the bottom of the screen. Select the orange worksheet called *Data Entry Sheet*. All the cells that are colour highlighted are unprotected and the cell value may be modified.

4. Now if you have already created the simpler, shorter Finance Dashboard then you will already have all the data you need to complete the orange Data Entry Sheet. You will simply need to retrieve that data and manually re-enter it into the orange Data Entry Sheet.

5. If you have not previously created a Finance Dashboard then you will need to gather the necessary data from your church accounts and planned giving records. Click to the Finance Dashboard web page and open the file called *Guidance notes on preparing the Dashboard*. Read the introductory notes and then simply follow the guidance for Steps One through Eleven only. These steps will populate a file called *Dashboard-Data*. Then simply transfer the data into the orange Data Entry Sheet Dashboard_Plus_Data.xlsx. [ii]

Step Three: the yellow giving data sheet

6. In the Excel file *Dashboard_Plus_Data.xlsx* now select the yellow Giving Data worksheet. Once again, cells that are colour highlighted are unprotected and the cell value may be modified.

7. If you have already created a Giving Profile and an Age Giving Profile then again you have all the data you need. You will have previously created an Excel file called *Giving_Data* which was used to generate your Giving Profile and an Age Giving Profile. Again, manually re-enter the data into the yellow *Giving Data Sheet*. [iii]

8. If you have not previously created a Giving Profile or Age Giving Profile then you will need to gather the data to populate the yellow *Giving Data Sheet*. To do this, click to the Giving Profile tab and open the file *Step One: creating a Giving Data file*. Follow the guidance in that file and you will have all the information you need. Then you can very simply copy the data from your newly created *Giving_Data* file and paste it into the coloured cells in the yellow *Giving Data Sheet* in your *Dashboard_Plus_Data* file. Save the file but don't close it just yet.

Step Four: creating the Dashboard document

That's the preparation work complete. The next step is to create your Dashboard Plus document for discussion with your finance or stewardship committee or church council.

9. Ensure that you have saved the Excel workbook and while the workbook is still open, open the Word document *Dashboard_Plus.docx*. A warning will normally appear informing you that there are linked files. To any question asking if you wish to allow these links to update, answer 'Yes'. This 'update link' confirmation will be requested each time the Word document is opened. The charts within the Word document will be automatically be updated to contain your church's data. Now save the Word document.

10. The next step is cosmetic. You can add your church logo or maybe a picture of the church or some other appropriate picture, to the text box on the title page (page 1) and save the updated Word document.

11. And that is that! One Dashboard Plus, good to go. You can now print off paper copies of the Word document but better still create a PDF copy of the document, especially if you plan to email the Dashboard to other people. The problem with the Word document is that every time someone opens it the document will ask about updating the linked files.

Creating a PDF version is very easy to do. Use the Save As command in Word, simply select PDF from the drop down options and save the PDF to wherever you like on your computer. The PDF file can easily be distributed by email, or other electronic media, independently of the Word or Excel files.

It should be noted that the document's pages are A5 in size and can be printed directly on to A4 paper in a booklet format.

Notes and Resources

i If you have proprietary compression software on your computer you may need to follow a slightly different process

ii This double entry of data here is clumsy but helps avoid mistakes. If you are confident by all means follow the steps but enter the data directly into the orange Data Entry Sheet.

iii As above, if you are confident you can enter the data directly into the yellow Giving Data worksheet.