

Handout for Impact DashBoard Users

September 2020 Update

This handout is intended to help existing Impact DashBoard users get the most out of the app update released on September 14, 2020. Specifically, the two sections of this document will help you (1) Customize Your Account and (2) Create a Data Form Template.

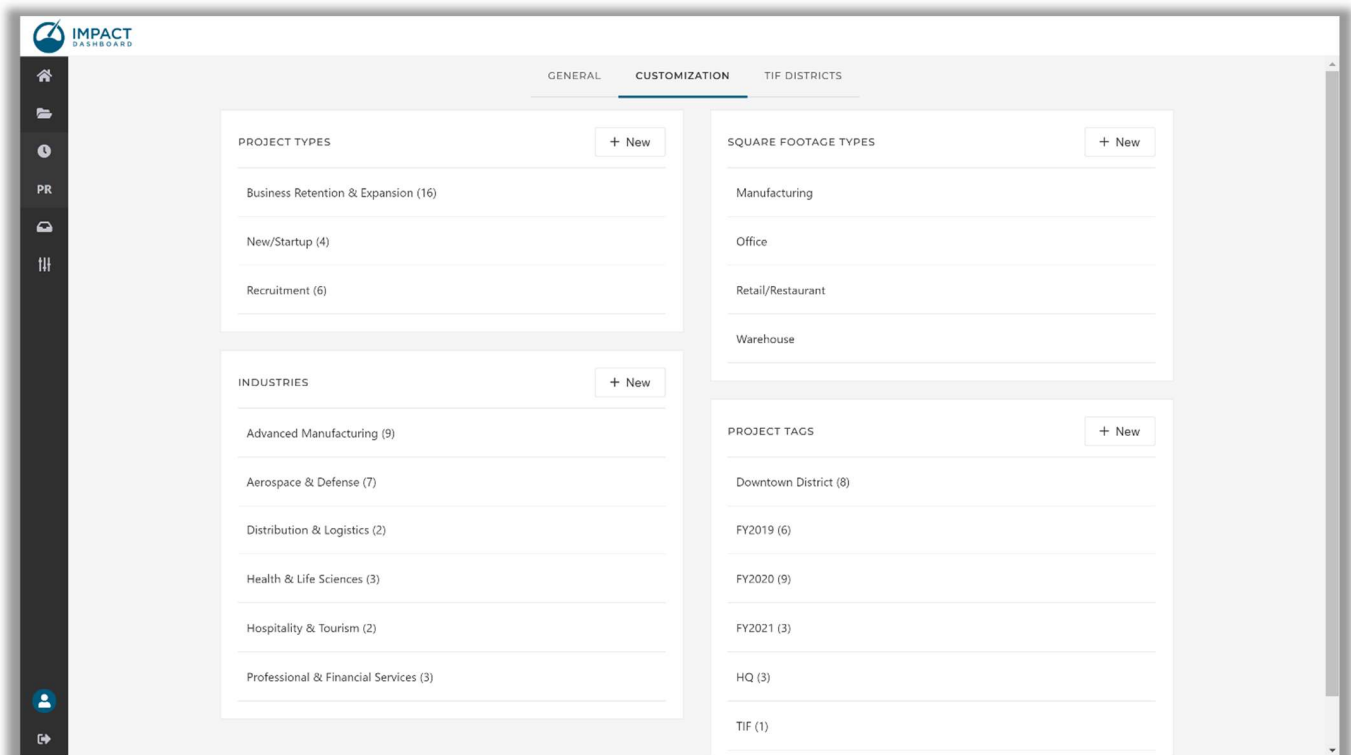
For detailed information on all new features, see our Support page.

Customize Your Account

Impact DashBoard lets you customize your account with your organization's specific terminology. Projects can be categorized based on attributes such as Project Type and Industry. Additionally, you can apply one or more user-defined Tags to Projects to identify a specific quality or attribute. Finally, you can also define specific square footage use types to help track development uses.

To create or edit user-defined Project categories, click on the Customization page of the My Account area to find the following items:

- Project Types
- Industries
- Square Footage Types
- Project Tags



You can rename a specific item by hovering over the line and clicking Rename (pencil icon). You can delete a specific item by hovering over the line and clicking Delete (trash icon). New items can be added by clicking the New button for the specific category.

The number in parentheses after each Project Type, Industry, or Project Tags indicates how many of your Projects have been assigned the given term.

Details & Defaults

Project Types

Project Types allow you to categorize Projects based on your organization's internal terminology. By default, your account will include the following Project Types:

- Business Retention & Expansion
- Recruitment
- New/Startup

You should add, delete, rename these Project Types to align with your organization's terminology.

Industries

Industries allow you to categorize Projects based on your organization's key industry groupings. By default, your account will include one placeholder prompt Industry labeled **<enter key industries>**.

You should add, delete, rename Industries to align with your organization's key industries.

Examples of Industries include:

- Advanced Manufacturing
- Aerospace & Defense
- Hospitality & Tourism
- Professional & Financial Services

Notice these Industries are broad industry groupings not specific NAICS codes. The NAICS Code associated with a project is a separate input from this new Industry field.

Square Footage Types

Square Footage Types allow you to collect information regarding space needs by type of use. By default, your account will include the following Square Footage Types:

- Manufacturing
- Office
- Retail
- Warehouse

You should add, delete, rename these Square Footage Types to align with your organization's terminology.

Create a Data Form Template

This section provides a brief overview of the Data Form Template and Wizard. Detailed information can be found on our [Knowledge Base](#) under Data Gathering Basics and Data Gathering Advanced. The end of this section includes:

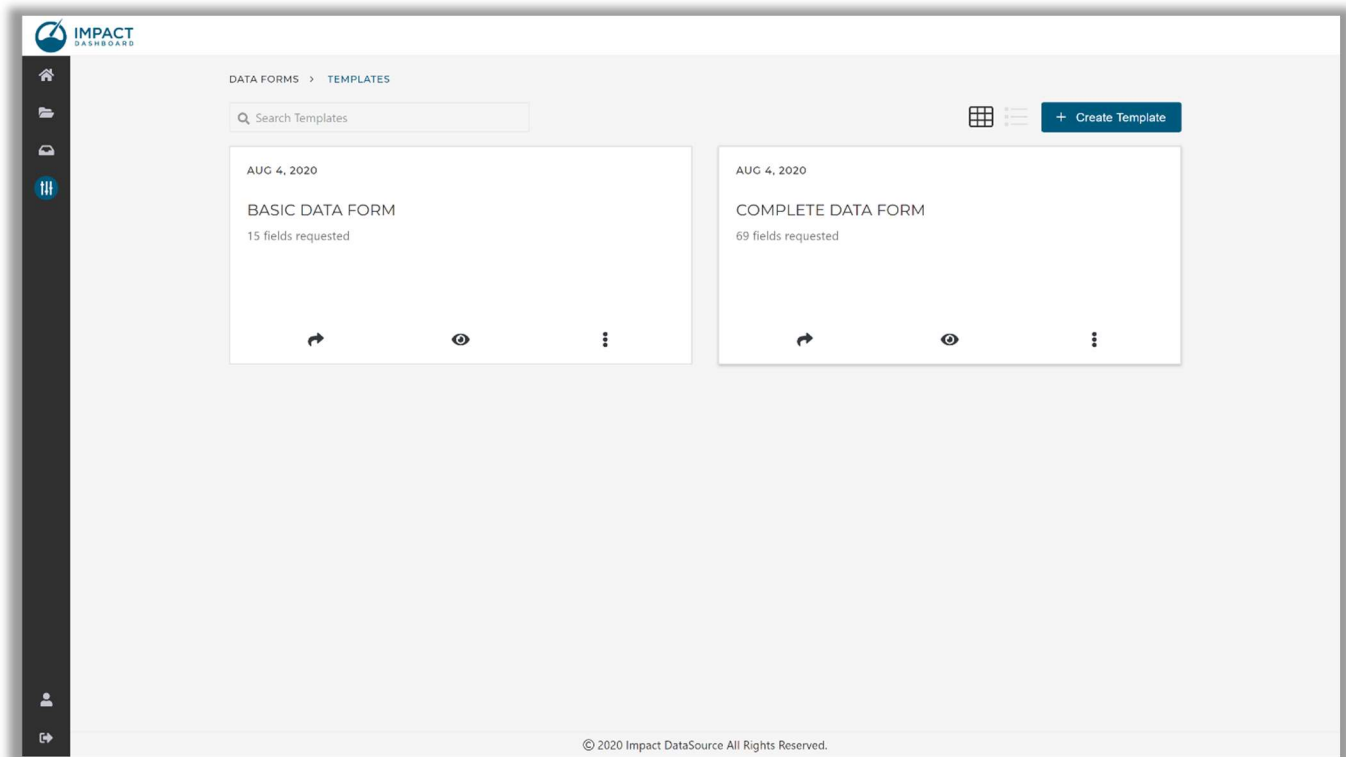
Data Form Wizard Flow Chart

Data Form Field List

Impact DashBoard enables you to configure a Data Form Template to gather relevant project and company information from prospective businesses interested in your community. You can select which questions you'd like to include on the Data Form from a fixed list and customize various fields.

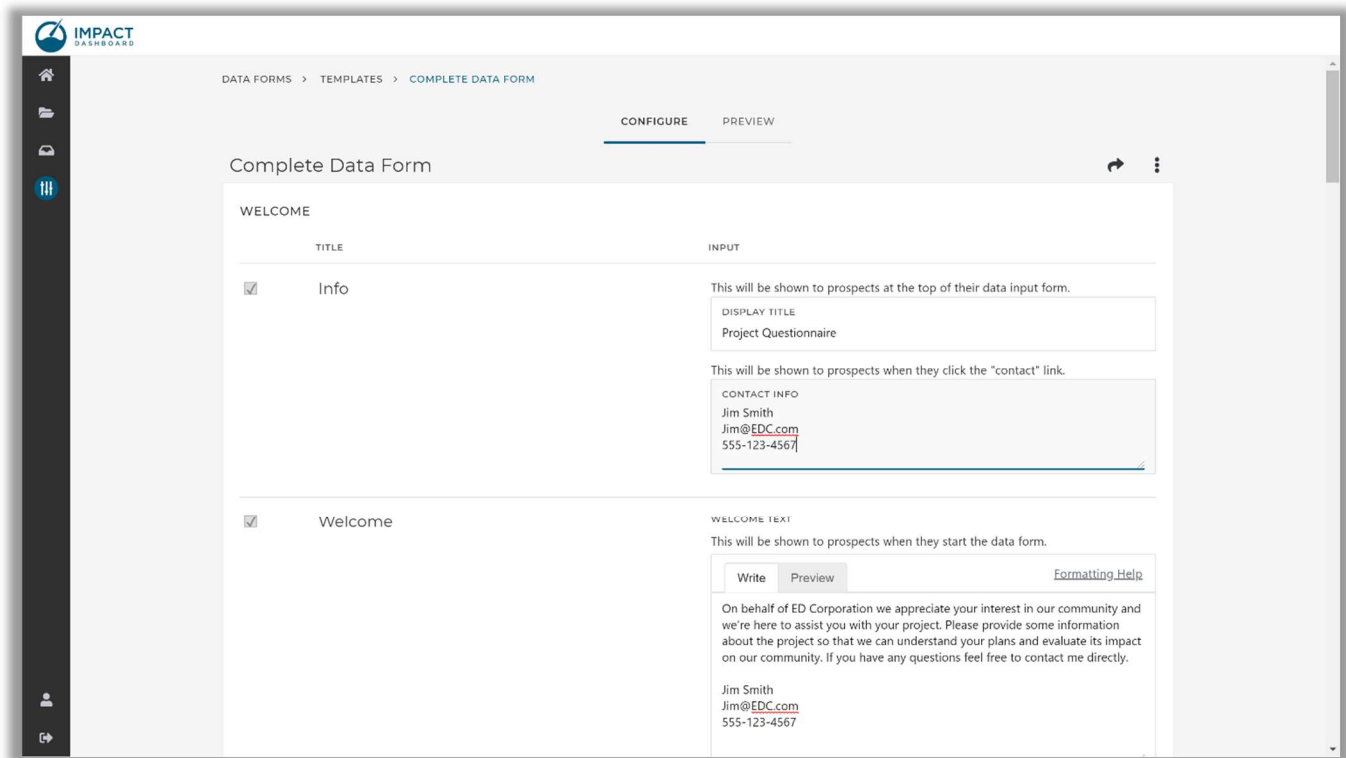
You can create a new Data Form Template or edit an existing Data Form Template. Data Form Templates can be accessed by clicking on the Templates item in the left side navigation menu of Impact DashBoard.

Your account will include two default Data Form Templates that you can use or edit. Alternatively, you can create additional Data Form Templates by clicking the Create Template button on the Data Form Templates page.



Configure a Data Form

Clicking on Template will allow you to Configure the Data Form. You can select which questions you'd like to include on the Data Form from a fixed list and customize various fields.



You can also preview the data form by clicking on Preview.

The Data Form Wizard

The Data Form Wizard is a central feature of Impact DashBoard. The feature enables you to gather economic development project and company information electronically in an engaging, dynamic, and well-designed wizard. As an integrated Impact DashBoard feature, a completed Data Form enables instant analysis with no need to re-enter information in a separate system.

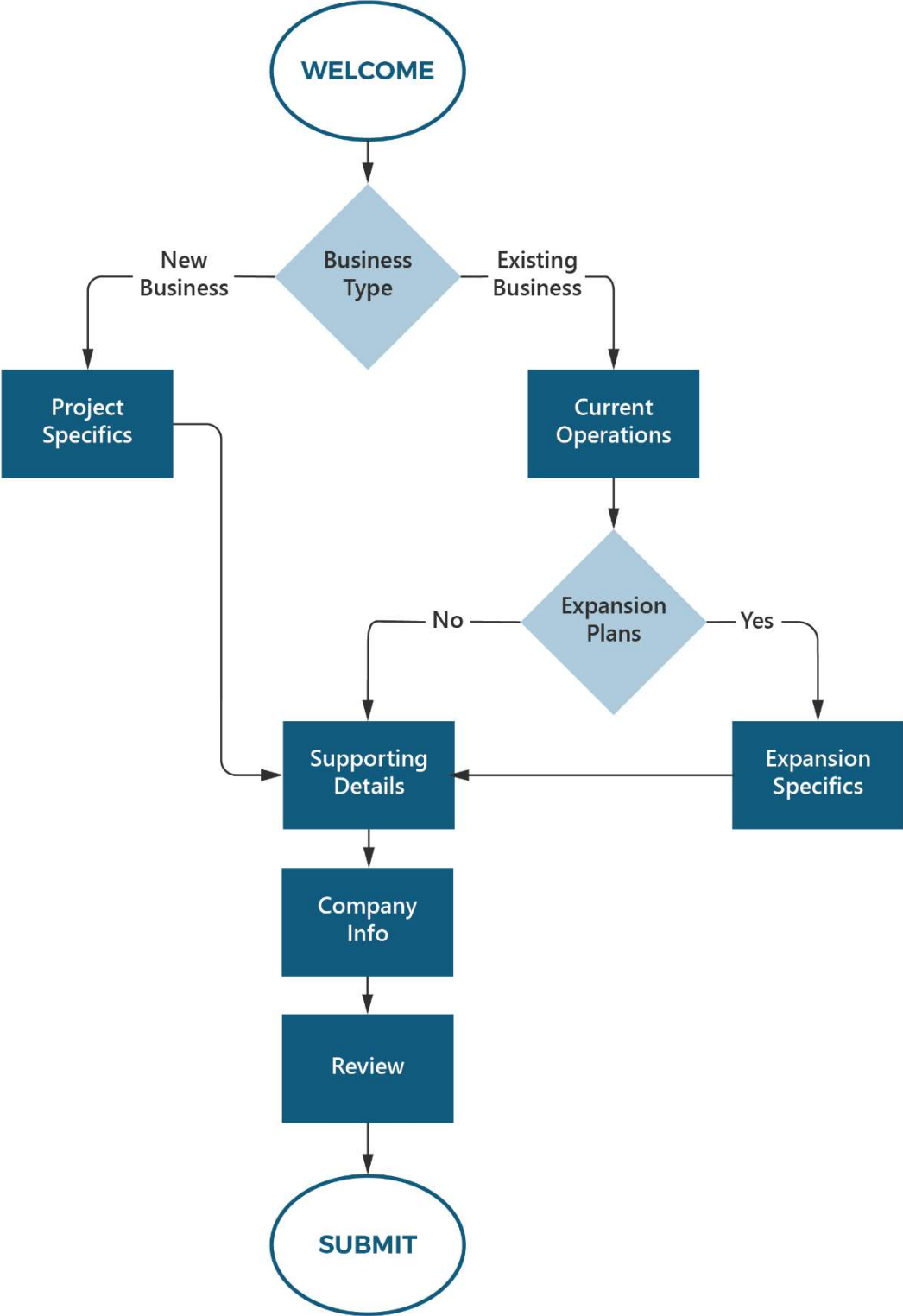
The Impact DashBoard Data Form Wizard methodically and dynamically walks a prospect through the information needed about their economic development project, skipping irrelevant inputs and eliminating confusion.

Here are a couple resources regarding the Data Form Wizard:

[Understand the Data Form Wizard](#)

[Your Prospect's Experience with the Data Form Wizard](#)

DATA FORM WIZARD FLOWCHART



The Data Form Field List

Welcome	
Welcome	Custom Welcome Message with your branding
The Basics	Collect Name, Email, and Role
Business Type	Determine New or Existing Business
Project Specifics / Expansion Specifics	
Plans	<ul style="list-style-type: none"> • Lease space with Renovations • Lease Space – Build to Suit • Land Purchase and Construction of a New Building • Purchase of Existing Building with Renovations • Addition to Existing Building already Owned • Other
Timeline	<ul style="list-style-type: none"> • Break Ground/Begin Reno Date • Begin Operations Date
Site	<ul style="list-style-type: none"> • Address • Site Requirements
Square Footage	<ul style="list-style-type: none"> • SF by use type (Office, Warehouse, Manufacturing, etc.) <i>Customize the use types</i>
Products & Industry	<ul style="list-style-type: none"> • Service or Product Produced Locally • Main Service or Product Produced Companywide • Primary NAICS Code
Jobs	<ul style="list-style-type: none"> • Jobs including phase in <i>Multi-year phase in accepted</i>
Salaries	<ul style="list-style-type: none"> • Average Annual Wages <i>Multi-year increases accepted</i>
Positions & Wages	<ul style="list-style-type: none"> • Accept a table of Positions, Headcounts, & Wages
Benefits	<p>Benefits Offered</p> <ul style="list-style-type: none"> • Paid Time Off • Health Insurance • Other Insurance (Dental, Vision, Life, or Disability) • Retirement • Tuition Reimbursement • Other <p>Average Annual Value of Employer-Provided Benefits Eligibility Requirements</p>

Capital Investment	Acquisition Price of Land Building Investment FF&E Investment
Inventories	Taxable Inventories, if applicable
Local Sales Tax	Taxable Purchases and Sales, if applicable
Hotel Nights/ Visitors	Number of Hotel Nights Average Cost of Hotel Night Other Visitor Spending
Supporting Details	
Additional Background	Customizable text area to request additional info
Attach Documents	Request specific documents to be uploaded
Company Info	
Company Info	<ul style="list-style-type: none"> • Company Name • Company HQ Address • Parent Company • Company Website
Company Background	<ul style="list-style-type: none"> • Year Established • State of Formation • Business Structure • Ownership
Employment Distribution	Workers employed <ul style="list-style-type: none"> • State • USA • World
Point of Contact	<ul style="list-style-type: none"> • Name • Title • Phone • Email
Review	
Review/Edit	Data Summary View Raw Data View
Submit	
Submit	Confirm Submission <i>Data Form can be viewed but not edited</i>

Current Operations	
Current Operations	Current Address <ul style="list-style-type: none"> • Own • Lease • Other
Square Footage	<ul style="list-style-type: none"> • SF by use type (Office, Warehouse, Manufacturing, etc.) <i>Customize the use types</i>
Products & Industry	<ul style="list-style-type: none"> • Service or Product Produced Locally • Primary NAICS Code
Jobs & Salaries	<ul style="list-style-type: none"> • Current Jobs and Average Annual Wages Paid
Property	Market Value of <ul style="list-style-type: none"> • Land • Buildings • FF&E • Taxable Inventories
Other Activity	<ul style="list-style-type: none"> • Taxable Purchases • Taxable Sales • Hotel Nights
Expansion Plans	Determine if Expansion is Planned