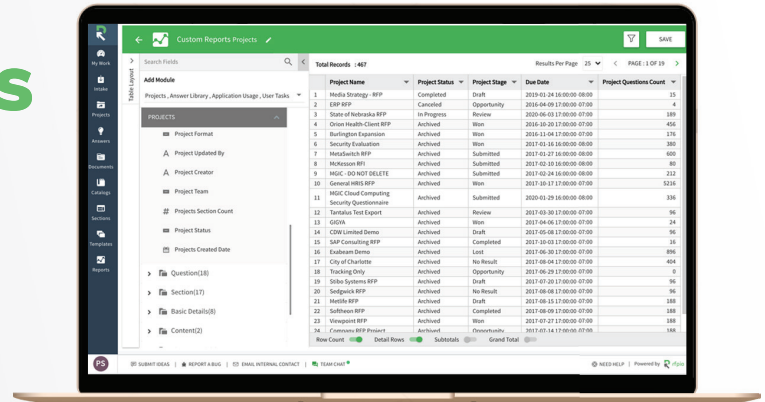


Custom Reports & Dashboards

Take Control of Your Data for a More Proactive Process

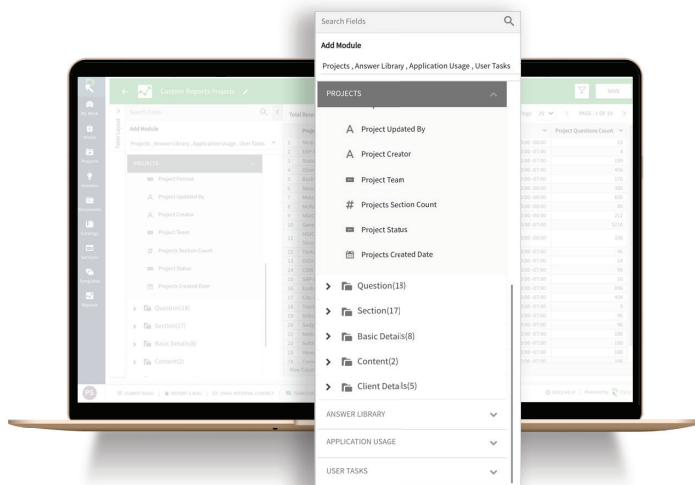


The core of an effective response management program is the ability to measure and act on project performance, revenue attribution, content usage, and user behavior. If you're looking for more insight into your process, you can customize reports with more detailed and actionable insights specific to the metrics and business objectives your organization uses to define success.



Access Insights to Measure Performance and Optimize Resource Planning

An interactive report building module makes it easy to generate reports and dashboards using any combination of data points within RFPIO. Build, name, and save as many ongoing reports as you need.

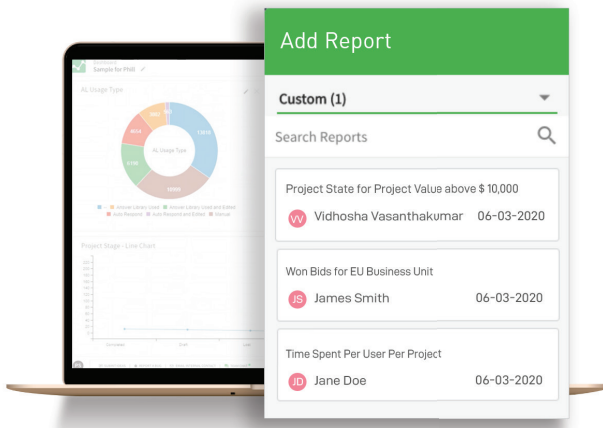


- Report against 100+ Project, Content, User, Usage, or Intake data points
- Filter reports by column field, dates, and specific value ranges
- Group up to 3 different columns



Visualize Key Insights and Metrics with Charts, Graphs, and Modular Dashboards

After saving your custom report, visualize the data with a combination of pre-configured charts and graphs that can be pinned to dashboards for easy access and consumption.

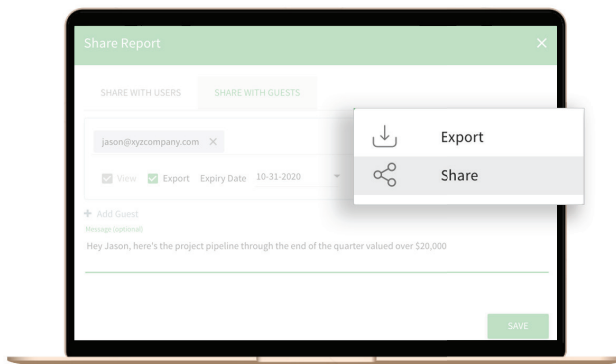


- Build multiple dashboards using any combination of standard and custom reports
- Reorder, resize, and position modules within dashboards
- Visualize modules using pie, bar, column, donut, line, bubble, funnel, or table charts



Communicate the Value of Your Program with Shareable Reports & Dashboards

Easily toggle between reports you've created and reports shared by other users. Flexibly share reports and dashboards with anyone needing visibility.



- Share reports with specific RFPIO users or guests through system generated emails or exportable PDFs
- Adjust permission preferences, controlling whether recipients can view or download
- Set expiration dates to control visibility of time-sensitive reports