



RNL Smart View Engagement Center Dashboards FAQ

What should I do if I can't access the dashboards or the client portal?

Please reach out directly to your client service director and they will work to ensure you have the correct level of access to the dashboards for your institution/organization.

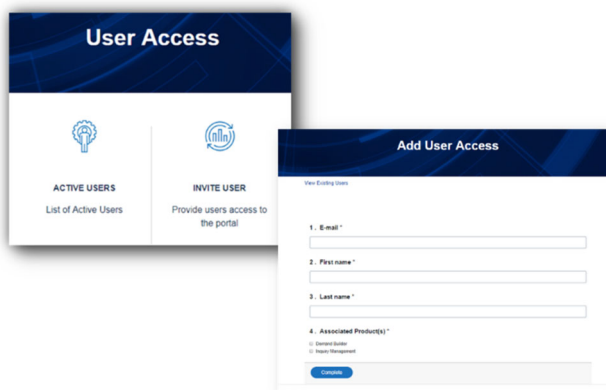
How do I know who from my institution/organization has access to these dashboards?

Your client success director can provide you with a list of who from your institution has access to the dashboards, or you can review the Active Users list in the RNL client portal.

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How can I request another user be added to the dashboards?

Within the RNL client portal, use the User Access app to add additional users to the platform.



How do I suggest enhancements to the dashboards?

[Please Use this link](#) or scan the QR code below with your phone to recommend enhancements to any of the SmartView dashboards. Our product team will be reviewing on a regular basis.



Where can I find dashboards for my other Engagement Center channels?

You will find dashboards for Texting and Personalized Video listed under the available SmartView dashboards for your institution.

Are there more dashboards planned for 2021?

There are additional fundraising dashboards on our product roadmap for 2021. Direct mail dashboards for institutions that leverage our RNL Ecosystem will be available this fall. We also will have an aggregated engagement center executive summary that combines all our digital engagement center channels into a single view.

Will RNL have access to the same types of dashboards as clients?

Yes. Your RNL team will have access to the same dashboards that you see, but the RNL team also has access to a SmartView Sandbox that allows them to quickly see trends across all of our RNL partner clients. Our RNL team will use that sandbox environment to share trends that are relevant for your institution.

How will RNL communicate any dashboard availability?

RNL will follow the same release strategy for any new dashboards or enhancements. Every release will include at least one email communication, and may include additional video training guides as needed.

Is there a data dictionary or glossary available so I can make sure I understand how these metrics are calculated?

Yes. The data dictionary is included with any release and will be available in the knowledge center within the portal.

If I want to give an individual academic unit at our institution access, will they only see data for their unit?

No. They will see all the dashboards for your program.

What training materials are available?

In addition to this FAQ, there are a series of short video training videos, a how to access SmartView guide, and a data dictionary that can be accessed via the following link and that will be available in the Client Portal within the knowledge center app.

How often are dashboards updated?

Dashboards will be refreshed by 10:00 CST each day with data available through the previous night.

How are outages communicated?

Planned outages will be communicated ahead to time via email and will generally be related to enhancements made to the RNL SmartView capabilities that are being released into production. If unexpected outages occur, we will notify you via email.