



Analyze your Granting Program with Reporting Studio

Custom visualization how-to guide

This guide walks you through a series of custom visualization how-tos you can use in Reporting Studio to gain insight into your granting program

Each how-to helps you quickly surface key insights so you can see and share your impact with ease.

How to use this guide

Each how-to in this guide outlines a simple, repeatable process you can follow to build a custom report or visualization in Reporting Studio.

Before you begin, we recommend completing these on-demand courses:

- [Introducing Reporting Studio](#)
- [Custom Reporting with Benevity Reporting Studio](#)

What's inside each how-to

Each how-to follows a 5-step structure:

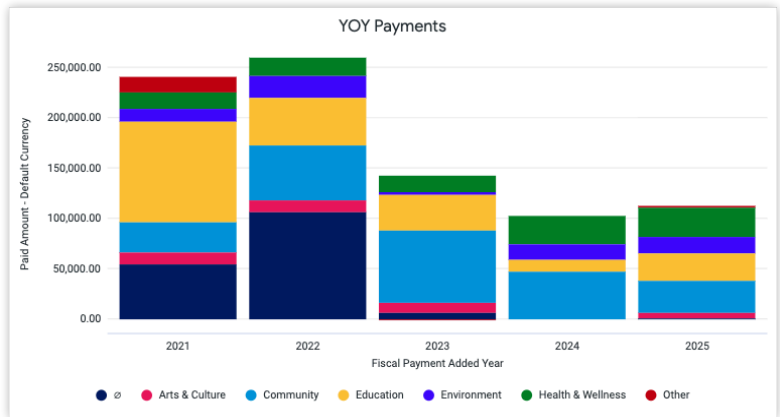
- 1. Explore**
Choose the dataset (or "Explore") that contains the metrics you want to visualize.
- 2. Data**
Add or adjust the fields used in your chart or report.
- 3. Filters**
Refine your data with filters like date range or transaction type.
- 4. Visualization**
Select your chart style (bar, gauge, map, etc.).
- 5. Run**
Select Run to generate your visualization.

Helpful resources *(B-Hive login required)*

- [Discovering Quick Starts](#)
- [Using Explores](#)
- [Creating a data visualization](#)
- [Customizing visualization colors](#)

Payments by focus area and year

Compare investments in each focus area by year.



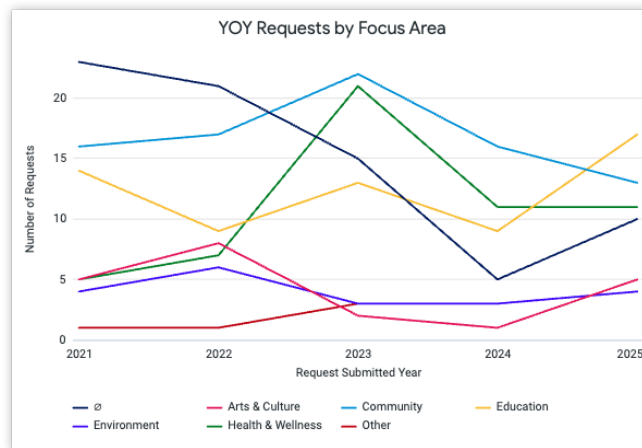
Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Year-Over-Year Summary Quick Start
2. Data	<ul style="list-style-type: none"> From Request: <ul style="list-style-type: none"> Remove the Country pivot Add the Focus Area pivot
3. Filters	<ul style="list-style-type: none"> From Payment: <ul style="list-style-type: none"> Add the Payment Status filter
4. Visualization	<ul style="list-style-type: none"> Select the Column visualization type Select Edit in the right corner From Series Positioning <ul style="list-style-type: none"> Select Stacked
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner

Request Focus Area >	Arts & Culture	Community	Education	Environment	Health & Wellness	Other
1 2021	54,000.00	12,000.00	30,000.00	100,280.70	12,500.00	16,760.00
2 2022	106,238.45	11,446.97	54,562.68	47,851.00	22,049.43	17,864.83
3 2023	6,000.00	10,000.00	71,545.78	36,220.64	2,000.00	16,998.73
4 2024	0	0	47,126.76	11,538.94	15,500.00	28,652.89
5 2025	520.00	5,150.00	32,284.84	27,418.20	16,000.00	29,499.99

Requests by focus area year-over-year

Use this view to see the number of requests submitted year-over-year by focus area.



Creating the visualization

1. Explore	<ul style="list-style-type: none"> • Select Grants explore
2. Data	<ul style="list-style-type: none"> • From Request > Submitted date <ul style="list-style-type: none"> ◦ Add Year dimension • From Request > Request Count <ul style="list-style-type: none"> ◦ Add Number of Requests measure • From Request > Request Category <ul style="list-style-type: none"> ◦ Add Focus Area dimension as a pivot
3. Filters	<ul style="list-style-type: none"> • From Request > Request Category <ul style="list-style-type: none"> ◦ Add Focus Area filter • From Request > Submitted Date <ul style="list-style-type: none"> ◦ Add Year filter ◦ Adjust Submitted Year filter to be is in the last 5 years
4. Visualization	<ul style="list-style-type: none"> • Use the line chart or modify as needed
5. Run	<ul style="list-style-type: none"> • Select Run in the top-right corner.

Explore 5 rows - from cache - 2h ago [See performance details](#) [Run](#) 5

Grants 1

Find a Field Search Options

[All Fields](#) In Use

- ▶ Custom Fields + Add
- ▶ Budget
- ▶ Cause
- ▶ Company
- ▶ Event
- ▶ Payment
- ▶ Request 3

Filters 3

- Request Submitted Year is in the last 5 years ×
- AND Request Focus Area is any value ×

[+ Filter](#)

[+ New group](#) [+ Custom expression](#)

Visualization Forecast Edit

Data Results Add calculation Row Limit 500 Column Limit 50 Totals Row Totals

Request Focus Area >	Arts & Culture	Community	Education	Environment	Health & Wellness	Other
Request Submitted Year ↓	Request Number of Request	Request Number of Request	Request Number of Request	Request Number of Request	Request Number of Request	Request Number of Request
1 2025	10	5	13	17	4	11
2 2024	5	1	16	9	3	11
3 2023	15	2	22	13	3	21
4 2022	21	8	17	9	6	7
5 2021	23	5	16	14	4	5

Budget usage year-over-year

Use this view to display how the budget is being allocated and its percent usage.

		Year-Over-Year Budget Usage							
		United States Corporate		United States East		United States West			
Level 1 Budget Name	> United States								
Level 2 Budget Name	> Central								
Fiscal Payment Added Year	▼	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount
1 2025		2% Budget balance: 975	1,000,000	4% Budget balance: 962	1,000,000	3% Budget balance: 965	1,000,000	1% Budget balance: 994	1,000,000
2 2024		9% Budget balance: 907	1,000,000	0% Budget balance: 1,00	1,000,000	3% Budget balance: 966	1,000,000	0% Budget balance: 998	1,000,000
3 2023		17% Budget balance: 83	100,000	25% Budget balance: 75	100,000	59% Budget balance: 41	100,000	10% Budget balance: 89	100,000

Creating the visualization

1. Explore	<ul style="list-style-type: none"> Select Grants Explore
2. Data	<ul style="list-style-type: none"> From Payment > Fiscal Payment Added Date <ul style="list-style-type: none"> Add year dimension From Budget > Budget Usage (%) <ul style="list-style-type: none"> Add Level 1 Budget Usage (%) measure From Budget > Budget Amount - Default Currency <ul style="list-style-type: none"> Add Total Level 1 Budget Amount measure From Budget <ul style="list-style-type: none"> Add Level 1 Budget Name dimension as a pivot
3. Filters	<ul style="list-style-type: none"> From Payment <ul style="list-style-type: none"> Add Payment Type filter <ul style="list-style-type: none"> Set to is Cash Add Fiscal Payment Added Date > Year filter <ul style="list-style-type: none"> Set to is in the last 5 years From Request > Request Category <ul style="list-style-type: none"> Add Focus Area Set to is any value
4. Visualization	<ul style="list-style-type: none"> Select the Table visualization
5. Run	<ul style="list-style-type: none"> Select Run in the top-right corner.

Explore 5 rows - from cache - 3m ago [See performance details](#) Run Settings

Grants 1

Find a Field Search Options

Start typing to search

All Fields In Use

Custom Fields + Add

- Budget** 3
- Cause
- Company
- Event
- Payment 2
- Request 1

Filters 3

Payment Payment Type is **Cash** X

Payment Fiscal Payment Added Year is in the last **5** years X

Request Focus Area is any value X

+ Filter

+ New group + Custom expression

Visualization 4

Level 1 Budget Name	Canada	Foundation	Not allocated to a budget	United Kingdom	United States					
Fiscal Payment Added Year	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount	Level 1 budget usage (%)	Total Level 1 Budget Amount
1 2025	2% Budget balance: 980,412.69	1,000,000	5% Budget balance: 572,806.39	600,000	Budget not set	0	0% Budget balance: 499,058.39	500,000	9% Budget balance: 955,567.20	1,000,000
2 2024	5% Budget balance: 948,131.06	1,000,000	0% Budget balance: 599,953.48	600,000	0	0	1% Budget balance: 495,565.08	500,000	13% Budget balance: 873,344.71	1,000,000
3 2023	50% Budget balance: 47,943.55	95,000	47% Budget balance: 31,762.58	60,000	0	0	67% Budget balance: 19,847.27	60,000	111% Budget balance: -10,600.00	100,000
4 2022	15% Budget balance: 847,252.48	1,000,000	8% Budget balance: 277,460.15	300,000	Budget not set	0	1% Budget balance: 197,392.15	200,000	60% Budget balance: 401,500.00	1,000,000
5 2021	22% Budget balance: 781,969.30	1,000,000	0	0	Budget not set	0	1% Budget balance: 197,253.22	200,000	13% Budget balance: 872,240.00	1,000,000

Data 2

Budget Level 1 Budget Name	Canada	Foundation	Not allocated to a budget	United Kingdom	United States					
Payment Fiscal Payment Added Year	Budget Level 1 budget usage (%)	Budget Total Level 1 Budget Amount	Budget Level 1 budget usage (%)	Budget Total Level 1 Budget Amount	Budget Level 1 budget usage (%)	Budget Total Level 1 Budget Amount	Budget Level 1 budget usage (%)	Budget Total Level 1 Budget Amount	Budget Level 1 budget usage (%)	Budget Total Level 1 Budget Amount
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5 rows - from cache - 3m ago [See performance details](#) Run Settings