

NAVIGATING THE DATA PORTAL DASHBOARD

WHAT IS THE DASHBOARD?

The Dashboard is your personalized view of the Data Portal and the front door through which you will: report a new proposed issue of debt; view and fulfill all pending issuance and annual reporting obligations; and view and edit previously reviewed reports.

Your Dashboard view is based on three factors:

1. Whether you are a representative of an **issuer** (agency staff) or you are a **filer** (external party authorized to file on behalf of an issuer);
2. The issuers with whom you are associated; and
3. The filter selections you make.

The screenshot shows the top navigation bar with 'Dashboard' and 'Associations' tabs. Below the navigation bar is a form for selecting an issuer. A yellow arrow points to the '*Issuer:' label and the dropdown menu. The dropdown menu is open, showing a 'Select' option and a list of issuers. A 'Submit' button is located below the dropdown. Another yellow arrow points to the '+ Associated Issuers (On this account)' section.

Dashboard Associations

*Issuer: [Quick Reference Guide](#)

Select

Please select Issuer.

Submit

+ Associated Issuers (On this account)

+ Authorized Filers (For selected Issuer)

HOW TO BUILD YOUR DASHBOARD

The first step is to select the **Issuer** from the pull-down list of proper issuer names and press the **Submit** button. If you are authorized to act on behalf of an issuer, the issuer will be listed. Make sure you are choosing the correct **Issuer** from the drop-down list. For example, CDIAC has historically created Community Facilities Districts (CFDs) as separate Issuers. Another example includes Issuer names for certain pooled tax and revenue anticipation note (TRANS) debt that include an acronym in parenthesis to denote the issuing joint powers entity.

The screenshot shows the '*Issuer:' dropdown menu with a list of issuers. A yellow arrow points to the 'Pomodoro CFD No 2001-1' option.

*Issuer: [Quick Reference Guide](#)

Select

Select

Pomodoro CFD No 1999-1

Pomodoro CFD No 2000-1

Pomodoro CFD No 2001-1

Pomodoro CFD No 2022-1

Pomodoro CFD No 2023-1

Pomodoro Public Financing Authority


If the issuer does not appear in the list, scroll to the bottom of the Dashboard to the **Associated/Authorized Issuers** section and select the **Add Issuer** button. Pick from the list of issuers. Your request will run an approval cycle, and you will be notified when your request is approved.

The next step to building your dashboard is to select from the **three** Dashboard filter choices.

- 1) Choose between *Issuance* or *Ongoing/Annual Reports*. *Issuance Reports* are the Report of Proposed Debt Issuance and the Report of Final Sale. *Ongoing/Annual Reports* are the Annual Debt Transparency, Mello- and Marks Roos Yearly Fiscal Status, and the Mello & Marks Default/Draw Replenishment Reports.
- 2) Select the reports you would like to view or edit from the pull-down list.
- 3) Lastly, decide if you want to view the workload for the issuer - *New and Pending Reports*, or if you would like to see a dashboard of all previously **Reviewed** reports – *View Previous Reports*. If you select, *View Previous Reports*, a secondary filter will help narrow your search.

The screenshot shows a web interface for a dashboard. At the top, there are tabs for "Dashboard" and "Associations". Below the tabs is a search bar labeled "*Issuer:" with a help icon. The text "Pomodoro Public Financing Authority" is entered in the search bar. To the right of the search bar is a "Quick Reference Guide" button. Below the search bar is a "Submit" button. Underneath is a "Quick Actions" section with a "+" sign, followed by a "Dashboard" section with a "-" sign. The "Filters" section is expanded, showing two radio button options: "Issuance" (selected) and "Ongoing/Annual Reports". Below this is a dropdown menu labeled "*Select Type of Report:" with "Select..." in the dropdown. There are two more radio button options: "New and Pending Reports" and "View Previous Reports". A "GO" button is located to the right of these options. At the bottom, there are two expandable sections: "+ Associated Issuers (On this account)" and "+ Authorized Filers (For selected Issuer)". Yellow arrows point to the search bar, the "Submit" button, the "Issuance" radio button, the dropdown menu, the "New and Pending Reports" radio button, and the "+ Associated Issuers" section.

INSTRUCTIONS AND ON-SCREEN MESSAGES

Instructions and guidance are imbedded within the Data Portal wherever you see a . Most will allow you to “hover-over” to view the guidance. More extensive instruction requires a “click-and-close”.

HOW TO SUBMIT OR EDIT A REPORT

If you would like to start a Report of Proposed Debt Issuance (RPDI) for the issuer selected, click on the **New Report of Proposed Debt Issuance** button and begin.

All other actions must be taken from your dashboard by using the **Action** button. The action choices available to you are dependent on the status of the filing and whether or not, a subsequent annual report for an issue has been submitted and reviewed by CDIAC. **Issuance and annual reports, may only be initiated if the precedent report has a *Reviewed* status indicating that CDIAC staff have reviewed and accepted the submitted report. All reports may be edited while in a *Reviewed* status, as long as no subsequent year *Ongoing/Annual Report* has been submitted.**

WHAT DOES THE STATUS MEAN?

The Data Portal allows issuers and their filing delegates ongoing access and ownership of their data, but there are limitations due to the need to maintain the integrity and validity of the database. The limitations are based on the *status* of the specific report. Following is a key to the status definitions displayed in the Dashboard.

- Draft** A report, of any type, has been started, is in-progress, but has not been submitted (Validate & Submit).
- Proposed** An RPDI has been submitted to CDIAC for review.
- Submitted** Any report, except for the RPDI, has been submitted to CDIAC for review.
- Reviewed** A report, of any type, has been Reviewed and validated by CDIAC.
- Edited-Resubmitted** A report, of any type with a Reviewed status, has been edited by the issuer or filer and submitted again to CDIAC for review.
- Pending** An ADTR, Mello YFSR, or Marks-YFSR is due by the statutory filing deadline for the previous annual (July-June) reporting period indicated.
- Past Due** An ADTR, Mello YFSR, or Marks-YFSR has not been submitted and more than 12 months have passed since the end of the indicated annual (July-June) reporting period ended.

CDIAC #	Status	Issue Name	Issuer Name	Project Name	Proposed Sale Date	Principal Amount	Action
Unassigned	Draft		Pomodoro Public Financing Authority				Action
2022-0874	Proposed	Refunding Series 2022	Pomodoro Public Financing Authority		06/15/2022	\$50,000,000.00	Action
2022-0873	Reviewed	Test Series 2022	Pomodoro Public Financing Authority	Test Project	06/01/2022	\$25,000,000.00	Action

WHAT ARE AUTHORIZED FILERS?

Filers are specific people with organizations that are authorized by Issuer representatives to submit reports and manage data for specific issuers. Often these organizations are law firms or dissemination service providers, among others. *An Issuer representative may remove an Authorized Filer.* They are also able to approve or deny a filer's request to access an Issuer's reports. Issuers should monitor the Filer organizations in its list to be certain only those authorized to access all reports of the selected issuer are listed.

WHAT ARE ASSOCIATED/AUTHORIZED ISSUERS?

These are the specific Issuers, on whose behalf, you (based on your login credentials) are allowed to submit, edit, and view reports. Issuer representatives and Filers may delete Issuers from their list or request access to Issuers not in their list. An **Add Issuer** request will run an approval cycle through the representatives of the Issuer selected.

SPECIAL NOTE FOR USERS

Make sure you are choosing the correct Issuer from the drop-down list. For example, CDIAC has historically created Community Facilities Districts (CFDs) as separate Issuers. Another example includes Issuer names for certain pooled tax and revenue anticipation note (TRANS) debt that include an acronym in parenthesis to denote the issuing joint powers entity.



The screenshot shows a web interface for selecting an issuer. At the top left, there is a label '*Issuer:' with a help icon. To the right is a button labeled 'Quick Reference Guide'. Below this is a dropdown menu with a search bar containing the word 'Select'. The dropdown list is open, showing several options: 'Select', 'Pomodoro CFD No 1999-1', 'Pomodoro CFD No 2000-1', 'Pomodoro CFD No 2001-1', 'Pomodoro CFD No 2022-1', 'Pomodoro CFD No 2023-1', and 'Pomodoro Public Financing Authority'. A yellow arrow points to the 'Pomodoro CFD No 2001-1' option.

ADDITIONAL GUIDES ON THE WEBSITE

To view additional guides about using the Data Portal please visit the [Reporting Debt Issuance](#) webpage.



The next page contains common filter combinations for viewing and creating reports. Always start by selecting the **Issuer** and click Submit. Then use these filter combinations to populate your dashboard with the selected type of report and click GO.

COMMON DASHBOARD FILTER COMBINATIONS

Start by selecting the **Issuer** and press **Submit**. Then use these filter combinations to allow the following common **Actions**.

Action	Filter 1	Filter 2	Filter 3
Submit a new RPDI	Click New Report of Proposed Debt Issuance		
Edit/continue a <i>Draft</i> or <i>Proposed RPDI</i>	Issuance	Report of Proposed Debt	New and Pending Reports
Submit a new RFS	Issuance	Report of Proposed Debt	New and Pending Reports
Edit/continue a <i>Draft</i> or <i>Submitted RFS</i>	Issuance	Report of Final Sale	New and Pending Reports
Edit a <i>Reviewed RFS</i>	Issuance	Report of Final Sale	View Previous Reports
Submit a new ADTR	Ongoing/Annual Reports	Annual Debt Transparency Report	New and Pending Reports
Edit/continue a <i>Draft</i> or <i>Submitted ADTR</i>	Ongoing/Annual Reports	Annual Debt Transparency	New and Pending Reports
Edit a <i>Reviewed ADTR</i>	Ongoing/Annual Reports	Annual Debt Transparency	View Previous Reports
Submit a new Mello-Roos YFSR	Ongoing/Annual Reports	Mello-Roos Yearly Fiscal Status	New and Pending Reports
Edit/continue a <i>Draft</i> or <i>Submitted Mello-Roos YFSR</i>	Ongoing/Annual Reports	Mello-Roos Yearly Fiscal Status	New and Pending Reports
Edit a <i>Reviewed Mello-Roos YFSR</i>	Ongoing/Annual Reports	Mello-Roos Yearly Fiscal Status	View Previous Reports
Submit a new Marks-Roos YFSR	Ongoing/Annual Reports	Marks-Roos Yearly Fiscal Status	New and Pending Reports
Edit/continue a <i>Draft</i> or <i>Submitted Marks-Roos YFSR</i>	Ongoing/Annual Reports	Marks-Roos Yearly Fiscal Status	New and Pending Reports
Edit a <i>Reviewed Marks-Roos YFSR</i>	Ongoing/Annual Reports	Marks-Roos Yearly Fiscal Status	View Previous Reports
Submit a new Mello or Marks Draw on Reserve/Default/ Replenishment	Issuance	Report of Final Sale	View Previous Reports
Edit/continue a <i>Draft</i> or <i>Submitted Mello or Marks Draw on Reserve/Default/ Replenishment</i>	Ongoing/Annual Reports	Draw on Reserve/Default/ Replenishment	New and Pending Reports
Edit a <i>Reviewed Mello or Marks Draw on Reserve/Default/ Replenishment</i>	Ongoing/Annual Reports	Draw on Reserve/Default/ Replenishment	View Previous Reports