

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.

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, CDIA 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.

*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 the 'Associations' tab in the Data Portal. At the top, there's a 'Dashboard' tab and an 'Associations' tab. Below the tabs, there's a search bar for '*Issuer:' with a help icon. A yellow arrow points to the dropdown menu showing 'Pomodoro Public Financing Authority'. 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 '+ Dashboard' link. The 'Filters' section is highlighted with a yellow arrow. It contains two radio buttons: 'Issuance' (selected) and 'Ongoing/Annual Reports'. Below this is a '*Select Type of Report:' dropdown menu with a yellow arrow pointing to it. Below the dropdown are two radio buttons: 'New and Pending Reports' and 'View Previous Reports', both with yellow arrows pointing to them. To the right of these is a 'GO' button. At the bottom, there's a '+ Associated Issuers (On this account)' section with a yellow arrow pointing to it, and a '+ Authorized Filers (For selected Issuer)' section below it.

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.

Proposed Debt Reports							
Search: 							
<input type="text" value="Search"/>		<input type="button" value="Clear"/>					
CDIAC #	Status	Issue Name	Issuer Name	Project Name	Proposed Sale Date	Principal Amount	Action 
Unassigned	Draft		Pomodoro Public Financing Authority				<input type="button" value="Action"/>
2022-0874	Proposed	Refunding Series 2022	Pomodoro Public Financing Authority		06/15/2022	\$50,000,000.00	<input type="button" value="Action"/>
2022-0873	Reviewed	Test Series 2022	Pomodoro Public Financing Authority	Test Project	06/01/2022	\$25,000,000.00	<input type="button" value="Action"/>
<input type="text" value="10"/>		<input type="button" value="1"/>					

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.

A screenshot of a web application's 'Issuer' selection dropdown. The dropdown is open, showing a list of issuers. A yellow arrow points to the 'Pomodoro CFD No 2001-1' option. The list includes '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 'Quick Reference Guide' button is visible in the top right corner of the dropdown menu.

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</i> RPDI	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</i> RFS	Issuance	Report of Final Sale	New and Pending Reports
Edit a <i>Reviewed</i> RFS	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</i> ADTR	Ongoing/Annual Reports	Annual Debt Transparency	New and Pending Reports
Edit a <i>Reviewed</i> ADTR	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</i> Mello-Roos YFSR	Ongoing/Annual Reports	Mello-Roos Yearly Fiscal Status	New and Pending Reports
Edit a <i>Reviewed</i> Mello-Roos YFSR	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</i> Marks-Roos YFSR	Ongoing/Annual Reports	Marks-Roos Yearly Fiscal Status	New and Pending Reports
Edit a <i>Reviewed</i> Marks-Roos YFSR	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</i> Mello or Marks Draw on Reserve/Default/ Replenishment	Ongoing/Annual Reports	Draw on Reserve/Default/ Replenishment	New and Pending Reports
Edit a <i>Reviewed</i> Mello or Marks Draw on Reserve/Default/ Replenishment	Ongoing/Annual Reports	Draw on Reserve/Default/ Replenishment	View Previous Reports