



Community Insight for housing organisations

User guide

User guide version 5.2

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Section 1 About this user guide

Community Insight gives you the data and analysis you need to ensure your stock are underpinned by the best possible knowledge of local communities, leveraging the power of information right across your organisation, from high level visualisations for Board level to detailed reports on local neighbourhoods.

It requires no training or specialist mapping and data staff.

Managing and using Community Insight

This user guide provides a helpful breakdown of all the key features on Community Insight so you can make the most out of the tool.

The guide starts with information to help Administrators manage Community Insight (Section 2), and then information to help users make the most of the tool's functionality (Section 3). See the full Index of contents on the previous page to find specific sections in the guide.

Things to look out for

Handy Hint!

Look out for the 'Handy Hints' for more on how to make the most out of your account.

Please Note!

We have included information on some key points that will affect functionality when using Community Insight.

Section 2 Managing your Community Insight account

2.1 Introduction

It is easy to set-up community mapping and profiles for the areas in which you have stock following the simple three step guide below.

1

Manage your properties

- Click on the menu item 'Admin' -> 'Manage Stock'
- Either upload your properties (postcodes, UPPRNs and stock types) as a file or copy/paste a list of postcodes
- And hey presto! You can now view all your properties on the Community Insight map!
- Made a mistake, or need to change some of the details? Don't worry, it is easy to add, delete or edit properties later



Head to section **2.2** for more on managing your property data

2

Set up groups and neighbourhoods

- Click on the menu item 'Admin' -> 'Manage Stock Groups'
- 'Add a new stock group', by drawing on the map, uploading a list of properties, or selecting from standard area(s) such as LSOAs
- Give the new group a name, and you can now quickly zoom to the new area on the map
- In the list of stock groups, "Request report" to generate a profile report, which will be loaded-up within minutes



Head to section **2.3** for more on setting up your groups and section **2.4** for managing them

3

Add users

- Now you're ready to let other users loose on the system
- Click on the menu item 'Admin' -> 'Manage Users'
- Fill in each users details, and email them their log-in information so they can access Community Insight



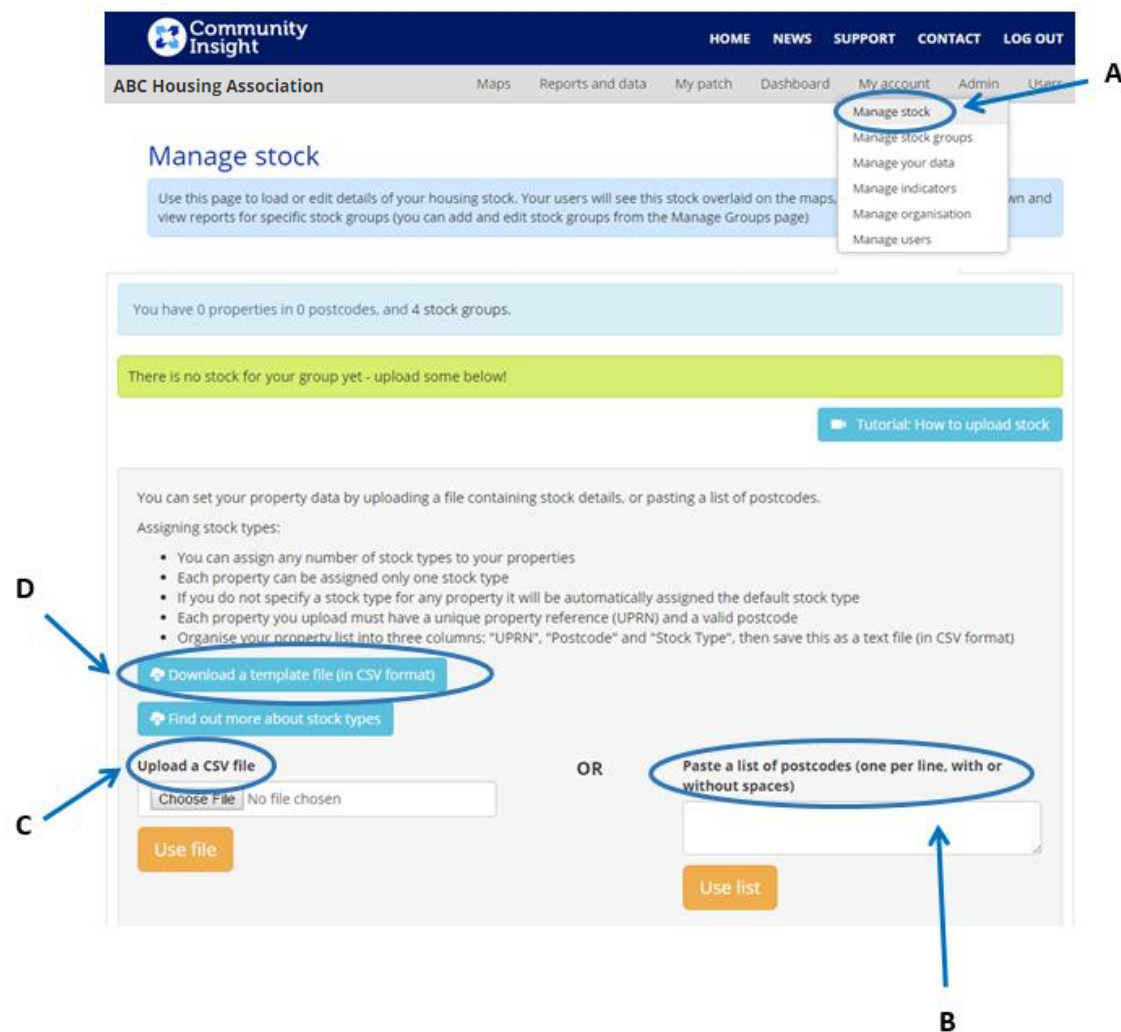
Head to section **2.5** for more on managing your users

2.2 Managing your property data

To set-up Community Insight for your organisation, you first need to load your property data into the system. There are two methods of doing this: you can either copy & paste a list of postcodes or you can upload a CSV file.

2.2.1 Managing your stock

Figure 1- Manage stock



- On the Community Insight browser, click on the menu item 'Admin' → 'Manage stock' (see A in figure 1)
- There are two options for uploading your stock:
- One option is copy/pasting a list of postcodes in the box provided (see B in figure 1)
- Alternatively you can upload your stock as a text file in CSV format (see C in figure 1). This must be a list of postcodes, with the option of adding your own

stock references and stock types (see figure 1a for model format). You must ensure all your stock data is formatted correctly.

- An Excel template in CSV format is available to download on the Community site (see D in figure 1)
- Once you have successfully uploaded your stock, they can be viewed on the Community Insight map

Figure 1a- Example of stock list

	A	B	C	D	
1	UPRN	Postcode	Stock type	Organisations	Organisations (see section 2.2.3)
2	CI_UPRN_1	NG118AD	General Needs	Apple Housing	
3	CI_UPRN_2	NG118AR	Leasehold	Cherry Housing	List of Stock Types (see section 2.2.2)
4	CI_UPRN_3	NG118AR	Rented	Cherry Housing	
5	CI_UPRN_4	NG118AB	Rented	Berry Care Services	
6	CI_UPRN_5	NG118AB	Rented	Berry Care Services	List of postcodes
7	CI_UPRN_6	NG118AT	Library	Neighbourhood Services	
8	CI_UPRN_7	NG118AW	Library	Neighbourhood Services	List of UPRNs or service references (optional)
9	CI_UPRN_8	NG118AT	Community Centre	Neighbourhood Services	
10	CI_UPRN_9	NG118AW	Community Centre	Neighbourhood Services	

2.2.2 Stock types

Stock types are a great way of categorising your data on the Community Insight map (see section 3.2). You can use up to thirty stock types of your choice, and you can assign each of your stock to one of your thirty.

Please note!

- You must use both UPRNs and Postcodes (as above), in order for your stock types to upload.

Handy hint!

- If you do not assign your stock with UPRNs or other stock references, Community Insight will automatically do this for you. You can view your new UPRNs by 'downloading a file containing all of your stock' (see A in figure 1b).

2.2.3 Organisations

You also have a way to split your stock between different group members. During the upload process, when using the CSV file method, there is now an additional field for each property, enabling group administrators to define which organisation is responsible for the specific property.

On the map, all users are then able to specify which Organisation's stock appears. A new drop-down box alongside the 'Choose stock...' drop-down will allow users to toggle organisations on or off using tick boxes. This is independent of 'stock type' so you can choose one or more stock type and one or more organisations at the same time. See section 3.2 for how this looks on the Community Insight map.

Please note!

- Stock to which you do not assign an organisation will be labelled 'No organisation' on the drop-down
- Stock groups created based on "stock within this area" remain based on all stock

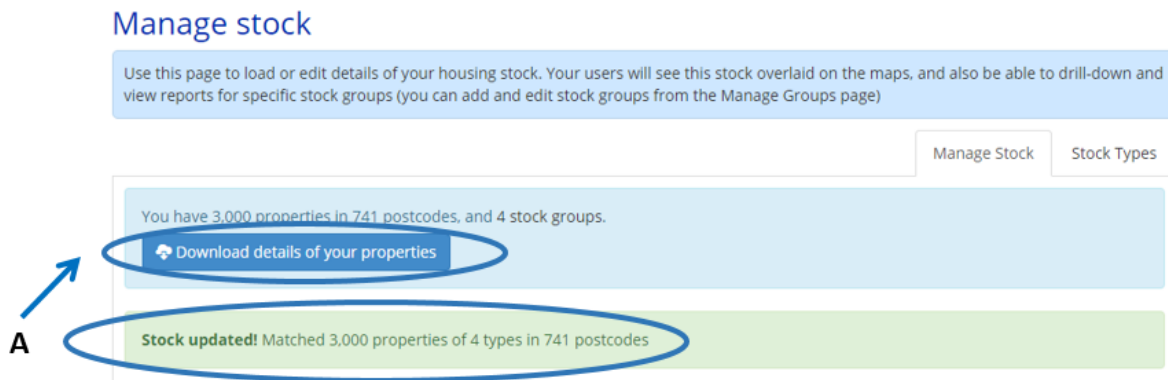
Handy hint!

- You can have an unlimited number of Organisations.

2.2.4 Editing your stock data

- You can make changes to the stock data you have uploaded at any time. You can do this by editing your original stock list, and re-uploading to Community Insight
- A copy of all your stock data loaded onto Community Insight is available to download in the manage stock page (see A in figure 1b)
- Re-upload your edited stock data list using the same steps as in 2.2.1

Figure 1b- Editing your uploaded stock data



Please note!

- When you upload stock into Community Insight any existing stock will be overwritten.
- If you wish to add to or edit your stock data, you must re-upload your entire stock list (following the same steps as in 2.2.1)
- Editing your stock data will affect the groups you have previously created
- Editing your stock data will not affect any reports you have previously created

2.2.5 *Editing your stock type icons*

Using the *Stock Types* tab on the *Manage Stock* page you can edit stock icons and delete stock types.

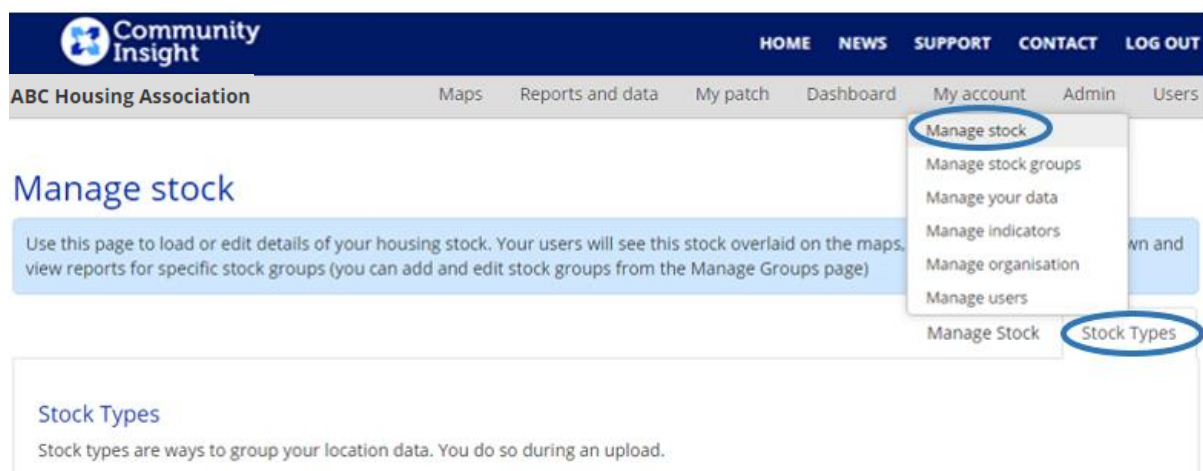
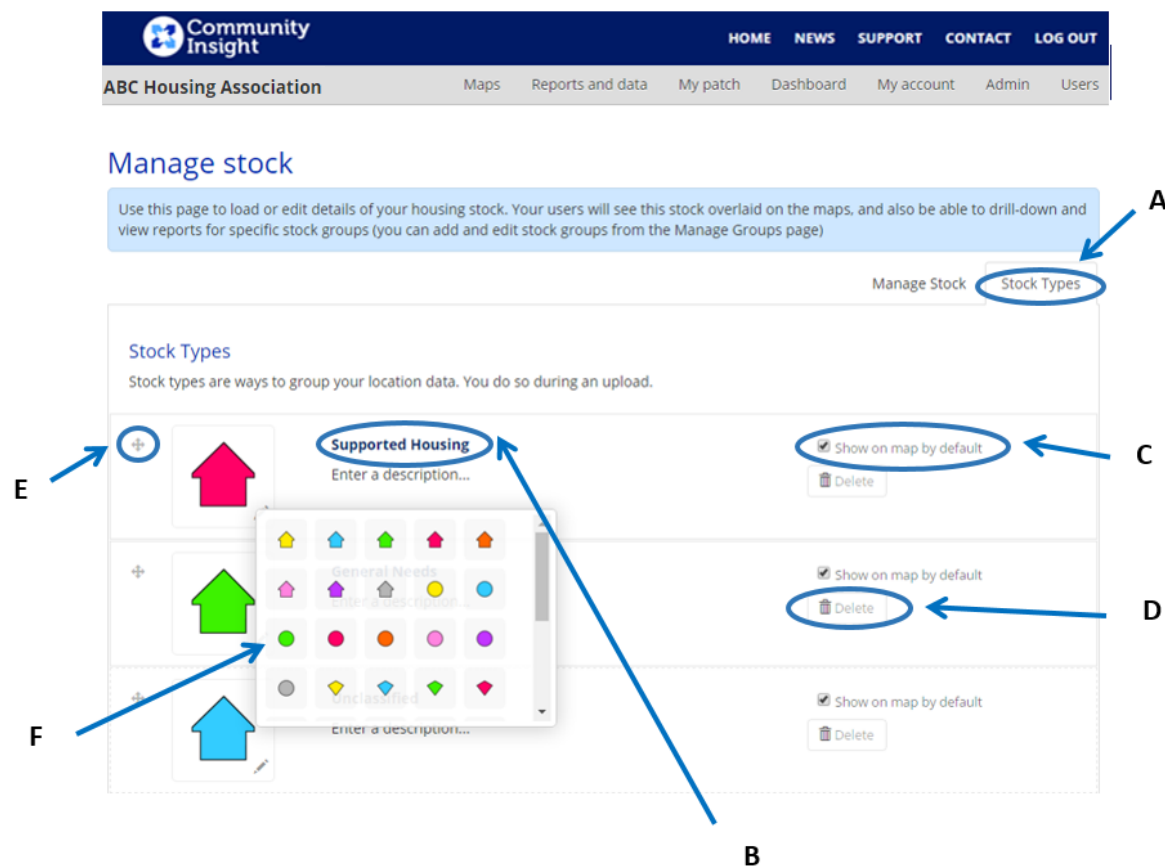


Figure 1c- Editing your stock types



- Once you have uploaded your stock successfully a list of all your stock types will be visible in the Stock Types tab on the Manage Stock page (see A in figure 1c)
- Edit the name of your stock types and add a description (see B in figure 1c)
- All stock types will appear on the map as default, to hide certain stock types simply untick the box (see C in figure 1c)
- Delete stock types using the delete button (see D in figure 1c). The stock which was contained within that deleted stock type will be moved into the unclassified type
- Change which order the stock types appear on the drop-down list on the map by dragging and dropping them (see E in figure 1c)
- Choose the shape and colour of the icon (see F in figure 1c)

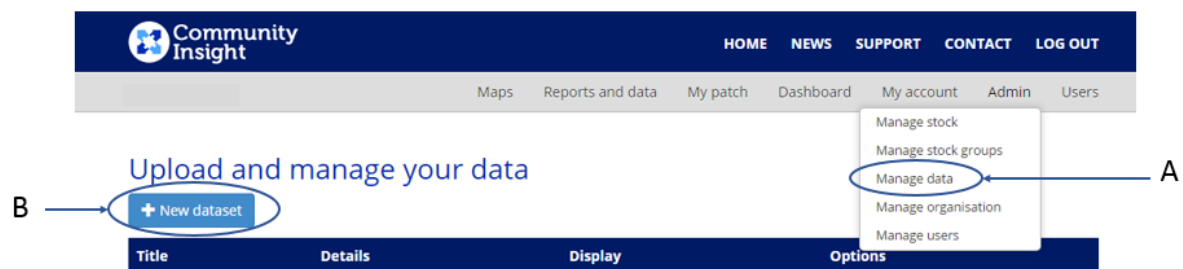
Please note!

- Stock which you do not assign a stock type will be assigned to Unclassified

2.3 Uploading your own data


Group administrators can upload any form of numeric data, and generate map data for your areas.

Figure 3- 'Manage data'



- Under the Admin tab, you can find a link to 'Manage data' (see A in figure 3)
- When you click on '+New dataset' (see B in figure 3), you are taken to a page where you create your new custom dataset (see figure 4). Here you will be asked to set up the metadata, how to sum service-level data to larger areas and whether suppression is to be applied. The required metadata fields are: Long name (this appears as the title in the list of custom datasets), Short name (appears as indicator title on the map), a description, the source of your data, text for the Legend and update frequency

Figure 4 – Creating a Custom dataset


**Community
Insight**

[HOME](#)
[NEWS](#)
[SUPPORT](#)
[CONTACT](#)
[LOG OUT](#)

ABC Housing Association
[Maps](#)
[Reports and data](#)
[My patch](#)
[Dashboard](#)
[My account](#)
[Admin](#)
[Users](#)

Upload and manage your data

[← Back to all datasets](#)

Create new dataset

Long name
REQUIRED

Please enter a name for your dataset

Short name
REQUIRED

This is the name that will be displayed in the "Maps" page, including the navigation bar and legend.

Description
REQUIRED

Source
REQUIRED

Please enter some short text identifying the name of the data source.

Update frequency
REQUIRED

Please enter how often the data should be updated

ABC Housing Association

Please note!

- There are several fields which cannot be updated at a later stage. These are flagged up during the input process
- Once you have filled in all the required fields, your custom dataset will be displayed. You can then proceed to upload your data (see A in figure 5)

Handy hint!

Figure 4a – summing or averaging

How should we create data for higher areas from your uploaded data?

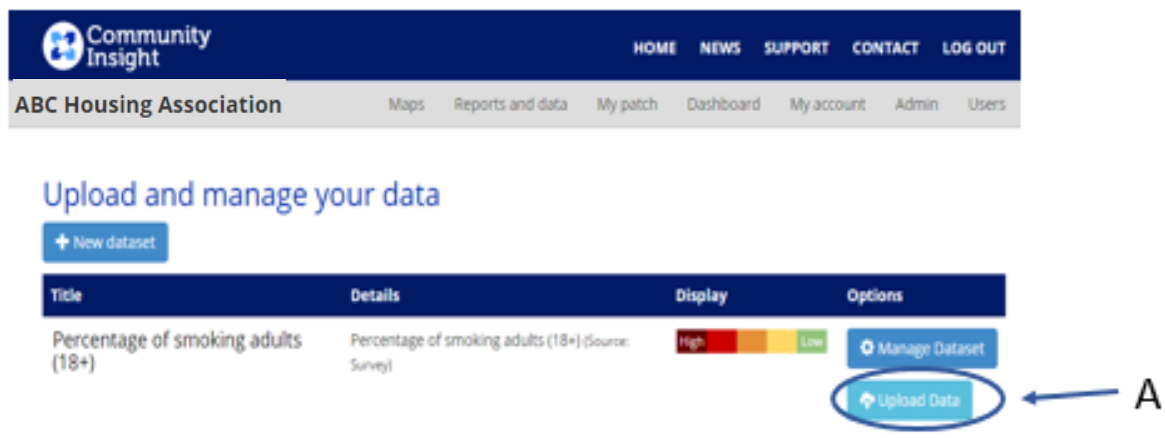
REQUIRED

- ☐ By summing: data is added up to form a total (e.g. number of unemployed people)
 ☐ By averaging: data is an average across an area (e.g. average house prices)

- You will be asked whether you would like to aggregate your data by 'summing' or 'averaging'
- You can upload binary data into Community Insight system using the 'averaging' function, to display percentage figures.

- For example, in Figure 7 you can see data being uploaded for 'percentage of adult smokers'
- Where a cell contains the number 100, this represents somebody saying 'yes' they are a smoker. Where a cell contains a 0, this represents somebody saying 'no' they are not a smoker
- Make sure that you have selected '%' when asked about suffixes
- When this data is uploaded into Community Insight, and aggregated using the averaging function, you will be able to see your data displayed as percentages on a map

Figure 5 – Upload your data



- Enter a title for the upload, specify your time point and then choose an import option for your upload
- There are two methods to choose from when importing: you can either upload an Excel spreadsheet or copy and paste the data directly (see figure 6)

Figure 6 – Choosing an import option

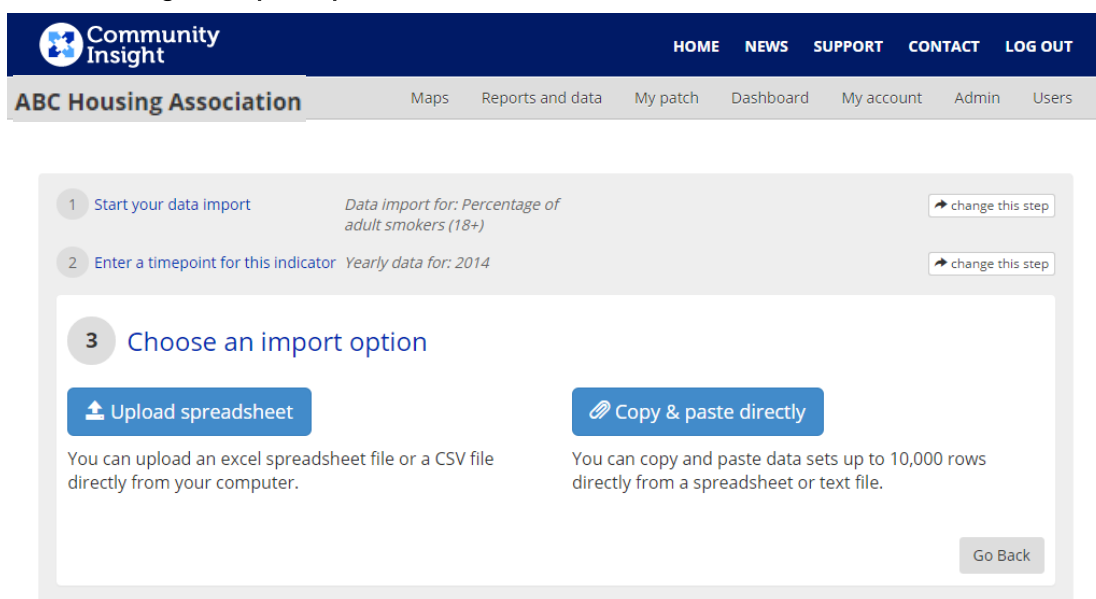


Figure 7 – Model own data list

	A	B	C
1	Postcode	Smoker	Number in household
2	NG1 1AA	100	3
3	NG1 1AB	0	3
4	NG1 1AB	0	3
5	NG1 1AB	0	3
6	NG1 1AB	100	3
7	NG1 1AH	0	3
8	NG1 1AH	0	3
9	NG1 1AH	100	3
10	NG1 1AH	100	3
11	NG1 1AH	100	3
12	NG1 1AJ	0	3
13	NG1 1AJ	0	3
14	NG1 1AN	0	3
15	NG1 1AN	100	3
16	NG1 1AN	0	3
17	NG1 1AN	0	3
18	NG1 1AN	100	3
19	NG1 1AP	0	3

- Don't worry if you have more columns of data than you need for your upload. You will be able to tidy the columns so it is compatible for import (see figure 8)

Figure 8 – Tidying data headers

1 Start your data import
Data import for: Untitled Upload
2015-01-27
change this step

2 Enter a timepoint for this indicator
Yearly data for: 2014
change this step

3 Choose an import option
change this step

4 Import your data
successfully uploaded a file
change this step

5 Tell us about your data
the first row is a header row
change this step

6 Confirm your data headers

Please confirm your data headers for each column to ensure that we can process your data correctly. Each column must match up to those held in our system.

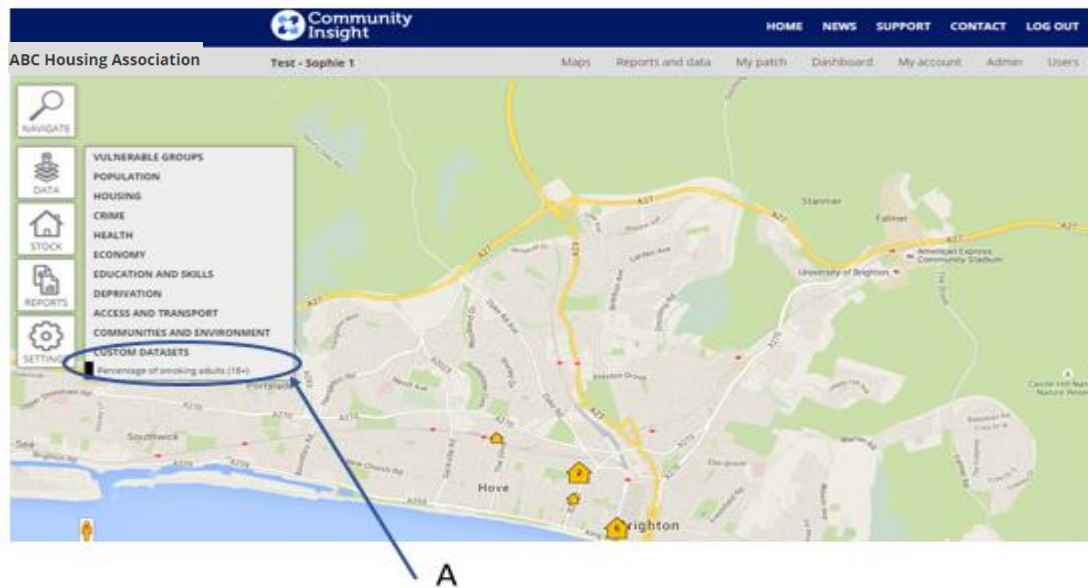
Simply choose a heading from the dropdown list and click next. Repeat this for each column. If you do not wish to include a column, select 'Ignore this column'. Please note: Core data headings cannot be ignored.

postcode	Ignore this column	Ignore this column
Next →	Ignore this column	← Back
Postcode	Percentage of smoking adults (18+)	Number in household
NG2 4QS	0	4
NG2 2HT	0	6
NG163AW	0	2
NG119LQ	0	7
NG1 9FF	0	7
NG2 2DU	0	2
NG3 1DG	0	3
NG119BD	0	3

Showing just 8 rows.

- You will be asked to have a final review of your data upload and then the upload can commence
- Your new custom dataset will then be available for you to view on the main map as its own indicator (see A in figure 9) and under the 'data for your areas' pop-up

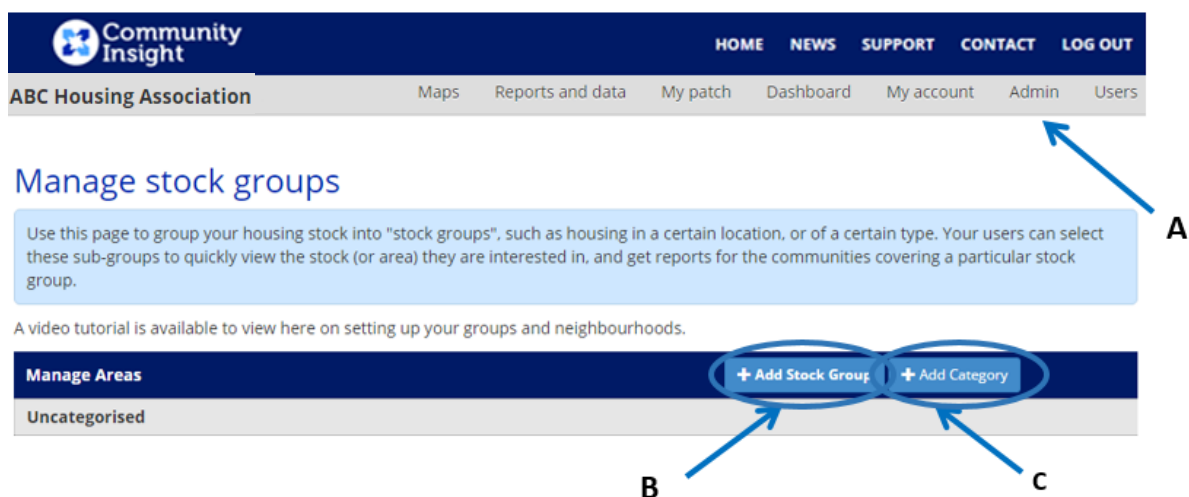
Figure 9 – Viewing you Custom dataset on the map



2.4 Setting up and editing your groups and neighbourhoods

Now you're ready to map your local areas. Doing this will enable you to create profile reports for you and users in your organisation to view at any time.

Figure 10- 'Manage stock groups'→'Add new stock group'



- Click on the menu item 'Admin' → 'Manage Stock Group' (see A in figure 10)
- To create a new stock group click 'Add Stock Group' (see B in figure 10)
- To add a new category for your stock group click on 'Add Category' (see C in figure 10)
- Give your stock group a name
- You can add a description when setting up and editing stock groups

You can create your new stock group in three ways. These are by drawing on a map, uploading a list of stock, or selecting from standard area(s) like Local Authorities. These options are explained in detail below:

Figure 10a - 'Manage Stock Groups → 'Add new Stock Group'

Creating Stock Group ×

Details

Name

Description

Category

Area Type

Stock Group Type

- ☒ **Draw on a map**
Define a stock group by drawing directly onto a map. Groups can be created based on their geographic area or by your postcodes confined by the shape you draw.
- ☐ **Upload a list of postcodes via CSV, or paste them in directly**
Define your shape by providing a list of postcodes or UPRNs. You can upload them from a CSV file or by pasting them into a text field.
- ☐ **Based on standard area**
Choose from existing geographical areas in your country, including Local Authorities, LSOAs or MSOAs.

Save Stock Group

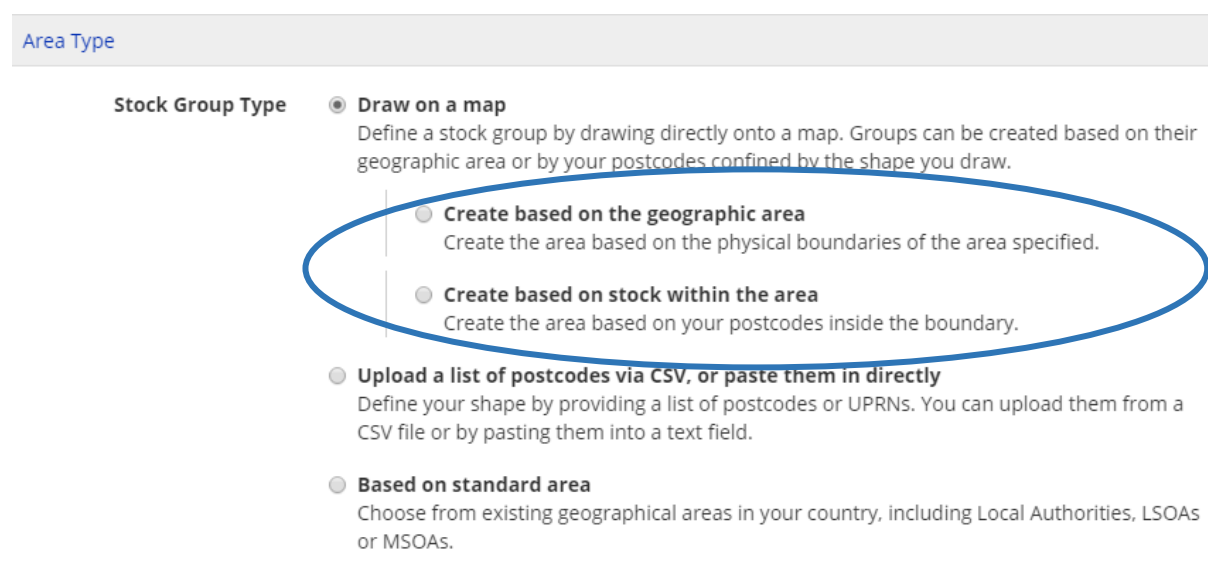
Handy hint!

- Use the category function to organise your stock groups to make it easier to find that group within a long list.
- Wherever stock groups appear (Manage Stock Groups, Dashboard matrix), you can hover your mouse over the stock group name and you'll see a pop-up with info on when the stock group was created and who by.
- Additionally, Group admins and Power Users can click on the stock group names to see more detailed information, with details of creation method (upload list of postcodes/draw on a map/standard area), which regions or areas it encompasses, as well as who it was created by and when.

2.4.1 Drawing on a map

- Firstly you will be given two options, shown in the figure 10b 'Create based on the geographic area' or 'Create based on Stock within that area'. Select one depending on the data you would like to see for this area. In most cases, it will be more appropriate to select the first option, 'create based on the geographic area.'

Figure 10b - 'Manage Stock Groups'



Area Type

Stock Group Type

- ☒ **Draw on a map**
Define a stock group by drawing directly onto a map. Groups can be created based on their geographic area or by your postcodes confined by the shape you draw.
- ☐ **Create based on the geographic area**
Create the area based on the physical boundaries of the area specified.
- ☐ **Create based on stock within the area**
Create the area based on your postcodes inside the boundary.
- ☐ **Upload a list of postcodes via CSV, or paste them in directly**
Define your shape by providing a list of postcodes or UPRNs. You can upload them from a CSV file or by pasting them into a text field.
- ☐ **Based on standard area**
Choose from existing geographical areas in your country, including Local Authorities, LSOAs or MSOAs.

- Draw around any area on your map that you wish to group together (see figure 11 below)
- Click around the area you are interested in, until the shape joins
- Move the white points around until you are happy with the shape
- If you wish to start again select 'Start Over' (see A in figure 11)
- Save (see B in figure 11)

A

Start Over

You've completed your shape. Click Start Over if you wish to try again.

Map Satellite

Rushcliffe School

Rushcliffe Leisure Centre

Edwalton

Glendale Golf & Edwalton Golf Centre

Map data ©2016 Google Terms of Use Report a map error

B

Save Stock Group

Similarly to how you initially uploaded your stock, you can either copy and paste a list of postcodes or you can upload a CSV file.

Area Type

Stock Group Type

Draw on a map

Define a custom area by drawing directly onto a map. Groups can be created based on their geographic area or by your postcodes confined by the shape you draw.

Upload a list of postcodes via CSV, or paste them in directly

Define your shape by providing a list of postcodes or UPRNs. You can upload them from a CSV file or by pasting them into a text field.

Based on standard area

Choose from existing geographical areas in your country, including Local Authorities, LSOAs or MSOAs.

Upload Type

Upload CSV file

Use this tool to upload a CSV file directly

Paste in list of postcodes

Use this tool to paste your service postcodes into a box on this page

A

Data type

Auto-detect

CSV Upload

Choose File

No file chosen

Save Stock Group

- **Option one**, upload a text file (in CSV format) with a list of postcodes and UPRNs/stock references if you wish (see A in figure 12)
- You can specify whether you are uploading using postcodes or UPRNs/stock references, or let Community Insight 'Auto-detect'
- If you are using both postcodes and UPRNs to create your group you can still select either 'Postcode' or 'UPRN' depending on which you would prefer to use to create the group

Please note!

- When using this method to upload a list of stock, with the detection method as Postcodes or UPRNS (as opposed to Auto-detect), there must be no headings on your Excel list, and the method of detection you are using must be in column A. This is demonstrated in figure 13a, whose format differs slightly but crucially from figure 2.

Figure 13- Model Stock list for Stock Group upload based on UPRNS

Bn1 1AA	General rented
Bn1 1AF	Supported housing
Bn1 1AN	Supported housing
Bn1 1FD	General rented
Bn1 1HN	Care home
Bn1 1PJ	General rented
Bn1 3BA	General rented
Bn3 1BJ	Supported housing
Bn3 1GP	Student
Bn3 1PB	Student

- **Option two**, you copy/paste a list of postcodes Or UPRNs/stock references into the space provided (see B figure 12)

Handy hint!

- Data values are not affected by how many times a postcodes appears in a group as Community Insight looks at data for whole neighbourhoods (i.e. Output Areas) surrounding each postcode

Please note!

- Any postcodes you upload must be included in your original stock data upload
- If you decide to just upload a list of postcodes, Community Insight will take into account any duplicate postcodes from the original upload list. This may mean that there is a difference between the number of stock you uploaded, compared to the number of stock shown in the 'Manage Stock Groups' tab

2.4.3 Selecting standard areas

- Create groups based on any standard administrative areas, LA, MSOA or LSOA across England
- **Wales** Create groups based on any standard administrative areas. LA, MSOA or LSOA across Wales.
- **Scotland** Create groups based on LAs, Intermediate Geographies (IG) and Data Zones across Scotland.

Figure 14 - Selecting standard areas

Area Type

Stock Group Type

- ☐ **Draw on a map**
Define a stock group by drawing directly onto a map. Groups can be created based on their geographic area or by your postcodes confined by the shape you draw.
- ☐ **Upload a list of postcodes via CSV, or paste them in directly**
Define your shape by providing a list of postcodes or UPRNs. You can upload them from a CSV file or by pasting them into a text field.
- ☒ **Based on standard area**
Choose from existing geographical areas in your country, including Local Authorities, LSOAs or MSOAs.

A →

- ☐ **Create based on the geographic area**
Create the area based on the physical boundaries of the area specified.
- ☐ **Create based on service within the area**
Create the area based on your postcodes inside the boundary.

B →

C →

Select

- Select
- Local Authority
- MSOA
- LSOA

D →

Hide items with no stock ☐

E →

Save Stock Group

- Select the option create area 'based on standard area' (see A in figure 14)
- You will be given two options regarding the creation of the area (see B in figure 14) 'Create based on the geographic area' or 'Create based on Services within the area'. Select one depending on the data you would like to see for this area. In most cases, it will be more appropriate to select the first option, 'create based on the geographic area drawn.'
- Once you have selected your area type (See C in figure 14), a list will appear displaying standard areas in which you can narrow down to select only areas in which you have stock
- Tick the 'hide items with no stock box' (see D in figure 14) to only show a list of standard areas where you have stock uploaded
- Select the standard area(s) you would like to include in your stock group
- Click the save button (see E in figure 14)

2.4.4 *Setting up stock groups and neighbourhoods where you have no stock*

You are able to create stock groups by drawing on the map or selecting standard areas where you have no stock.

- **"I want to select a standard area"**- follow the instructions above (2.4.3). Do not tick "hide items with no stock" , if you wish to select standard areas in which you do not manage any Stock. Make sure you **"Create based on the geographic area"** (see figure 15)
- **"I want to draw on a map"** – follow the instructions above (2.4.1), but you can draw around any area you are interested in in England. Make sure you "Create based on the geographic area" (see figure 15)

Figure 15– Creating groups based on stock or areas

- ☒ **Create based on the geographic area**
Create the area based on the physical boundaries of the area specified.
- ☐ **Create based on service within the area**
Create the area based on your postcodes inside the boundary.

Handy hint!

- Creating groups based on all neighbourhoods within an area allows you to gather more information about your surrounding areas and neighbourhoods

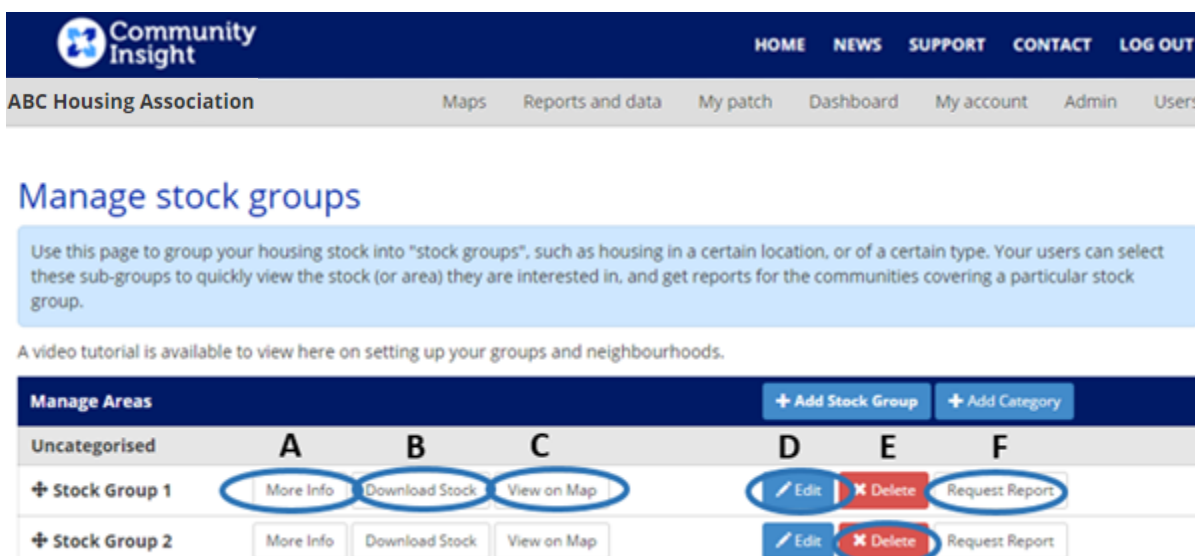
Please note!

- As default we use data for the whole of England as a comparator to all your stock data, in addition to any groups you have created. **Wales** As default we use data for the whole of Wales as a comparator to all your stock data, in addition to any groups you have created.
- **Scotland** As default we use data for the whole of Scotland as a comparator to all your stock data, in addition to any groups you have created.

2.4.5 Editing your stock groups and neighbourhoods

Once you have started setting up your stock groups and neighbourhoods, you can view them on the map (see C figure 16), make edits to the groups, delete them and most importantly request profile reports and download them as customisable Word documents.

Figure 16- 'Manage Stock Groups'



The screenshot shows the 'Manage Stock Groups' page. At the top, there's a navigation bar with 'HOME', 'NEWS', 'SUPPORT', 'CONTACT', and 'LOG OUT'. Below that, a breadcrumb trail shows 'ABC Housing Association' followed by 'Maps', 'Reports and data', 'My patch', 'Dashboard', 'My account', 'Admin', and 'Users'. The main heading is 'Manage stock groups'. A light blue box contains instructions: 'Use this page to group your housing stock into "stock groups", such as housing in a certain location, or of a certain type. Your users can select these sub-groups to quickly view the stock (or area) they are interested in, and get reports for the communities covering a particular stock group.' Below this, a link says 'A video tutorial is available to view here on setting up your groups and neighbourhoods.' The main content area is titled 'Manage Areas' and has two buttons: '+ Add Stock Group' and '+ Add Category'. It features a table with columns A through F. Column A is 'Uncategorised'. Column B is 'Stock Group 1'. Column C is 'Stock Group 2'. Column D is 'More Info'. Column E is 'Download Stock'. Column F is 'View on Map'. The 'Delete' button in the 'Delete' column is highlighted with a red circle.

- Click on 'More info' to see information about how the stock group was created including; when was it created, who created it, by what method it was created and a list of your stock situated within that area (see figure A in figure 16).
- You can download information about your stock within a particular stock group by clicking 'Download Stock (See B in figure 16). The information will be downloaded to a CSV file.
- View the stock group on the map by clicking 'View on Map' (see C in figure 16)

- Changes to your stock group are easy to make. You can change the name, edit, add and remove stock using the 'Edit' button (see D in figure 16)
- Select 'Delete' (see E in figure 16) to permanently delete any group you have created
- Select 'Request Report' (see F in figure 16) to request a report for that stock group. For more information about requesting reports see section 2.5

Please note!

- Deleting a stock group will not affect any reports you have generated based on this area

Figure 17- 'Manage Stock Groups' → 'Edit Stock Groups'

Editing Stock Group 1

Details

Name

Stock Group 1

Description

Editing to make a larger area

Category

Uncategorised

Area Type

Stock Group Type

☐ Draw on a map

Define a stock group by drawing directly onto a map. Groups can be created based on their geographic area or by your postcodes confined by the shape you draw.

☐ Upload a list of postcodes via CSV, or paste them in directly

Define your shape by providing a list of postcodes or UPRNs. You can upload them from a CSV file or by pasting them into a text field.

☒ Based on standard area

Choose from existing geographical areas in your country, including Local Authorities, LSOAs or MSOAs.

☐ Create based on the geographic area

Create the area based on the physical boundaries of the area specified.

☒ Create based on stock within the area

Create the area based on your postcodes inside the boundary.

Select

Hide items with no stock

- Click on 'Edit' (see D in figure 16) to select which area you would like to edit
- Once you select the area you wish to edit, you will be redirected to the page which you used to create the area originally
- Follow the same method used to create each area to make any changes you would like

2.5 Creating profile reports

- Reporting is a key feature of Community Insight, generating detailed profiles of your neighbourhoods within minutes.
- Once you have created your group, it will appear in the 'Manage Stock Groups' page (see figure 16)
- Selecting 'Request report' (see F in figure 16), will start generating your reports which will be ready in under 10 minutes

Once a report is ready, it will be available to view under the 'Reports and data' tab

Please note!

- Reports are not generated automatically when you setup a stock group – you will need to request the report for the new stock group using the method below.

2.5.1 Updating your reports

- You can now produce an up-to-date profile of an area using the latest reporting template.
- Recognising that you might not want to lose access to old reports, the feature is set up so that the new report does not over-write the existing one.

Please note!

- Editing your group will not affect the reports you have already generated.

2.5.2 Define your own comparators

This feature enables you to choose which comparators are used within the reports, in order to benchmark against particular areas. You can choose from national and regional comparators, local authorities and your own custom areas.

- To define your own comparators, select the 'manage organisation' option from the admin tab
- Click on the comparator you would like to choose and select from the available options. You can start typing in the search box to filter (see A in figure 17a)

Figure 17a – Choose your stock group comparators

The screenshot shows the 'Editing Group Options' page for 'XYZ Housing'. On the left, there is a form for 'Organisation name' with the text 'Demo - LI - Wirral Met Borough Council' and a 'Save' button. On the right, the 'Choose Your Stock Group Comparators' section is displayed. It includes a heading, a sub-heading 'You can choose two comparators for each stock group. You can set organisation-wide defaults on this page.', and two rows of comparator selection. The first row is 'Select Comparator 1' with 'North West' selected. The second row is 'Select Comparator 2' with 'England' selected. A blue 'Save Comparators' button is at the bottom. A blue circle highlights the 'Select Comparator 1' button, and a blue arrow points from the letter 'A' to it.

Please note!

- The comparators that you choose will apply to all your custom areas
- The default comparators are currently set to 'Social Housing Areas' and 'England'
- **Wales** The default comparators are currently set to 'Social Housing Areas' and 'Wales'
- **Scotland** The default comparators are currently set to 'Social Housing Areas' and 'Scotland'

2.6 Categorising stock groups

You can categorise your stock group and create custom categories. This is a flexible tool which you can use in the way that makes most sense for your organisation; you could use them to group together different types of area or categorise geographically – it's entirely up to you.

The categories can be used to organise the drop-down selection of areas on the maps page, the dashboard chart page filter of areas and your list of reports.

- To create a category, click on 'Add category' under 'Manage stock groups' (see figure 18)
- Your category will then be created as a grey band
- You can drag you stock groups between the categories as you wish
- You can easily edit the names of your categories, as many times as you wish (see figure 19)

Please note!

- As of yet, it is not possible to delete stock groups categories.

Figure 18 – Create stock groups category

Manage stock groups

Use this page to group your housing stock into "stock groups", such as housing in a certain location, or of a certain type. Your users can select these sub-groups to quickly view the stock (or area) they are interested in, and get reports for the communities covering a particular stock group.

A video tutorial is available to view here on setting up your groups and neighbourhoods.

Manage Areas				+ Add Stock Group		+ Add Category	
Uncategorised							
✚ Stock Group 1	More Info	Download Stock	View on Map	Edit	Delete	Request Report	
✚ Stock Group 2	More Info	Download Stock	View on Map	Edit	Delete	Request Report	
Stock				Edit Category			
✚ Stock Group 3	More Info	Download Stock	View on Map	Edit	Delete	Request Report	
✚ Stock Group 4	More Info	Download Stock	View on Map	Edit	Delete	Request Report	

Figure 19 – Edit stock groups category

testing2.communityinsight.org says: ✕

Please enter a new name for your category

☐ Prevent this page from creating additional dialogs.

OK

Cancel

2.7 Customise your themes and indicators

You can customise your themes and indicators within Community Insight. This feature lets you

- Add, remove and edit the themes which indicators appear under
- Choose which indicators appear in which themes
- Choose which indicators appear on the map
- Choose which indicators appear on the dashboard
- Choose where your custom datasets appear

2.7.1 Start using 'Manage themes'

- In the admin tab, scroll down to *Manage Themes*
- If you haven't used custom themes before you will see a *Start using custom themes* button – click on this.

2.7.2 Adding, editing and deleting themes

Through using the themes section on the left hand side of the screen (see Figure 19a) you can

- Change the order of the themes (See A1 in Fig 19a) through dragging and dropping. These changes will immediately be reflected on the maps page and the dashboard
- Edit the names of the themes to make them more meaningful to you (See A2 in Fig 19a)
- Create completely new themes to add indicators into (see A3 in Fig 19a) and delete unwanted themes (see A4 in Fig 19a)
- If you delete a theme that holds some indicators within it, these indicators will be moved to the *Unassigned* category (see A5 in Fig 19a) and will not appear on the maps page or in the dashboard. However, it is easy to drag them into new themes (see section 2.7.3)

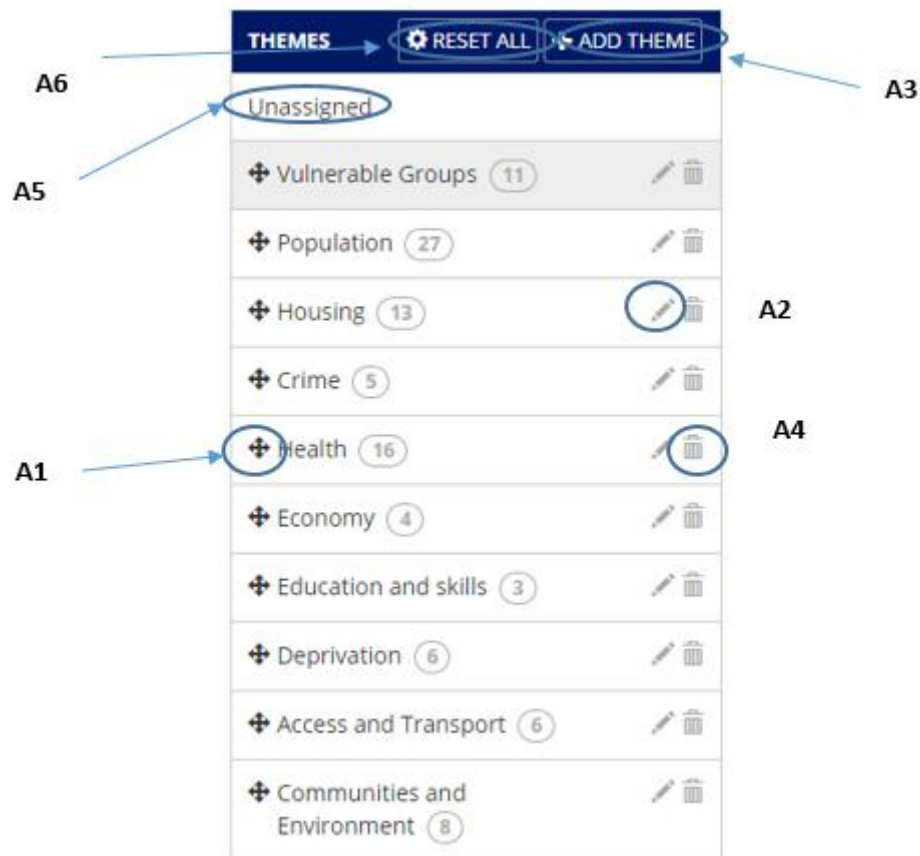
Handy hint!

- You can revert back to the default themes and indicators, through clicking the *reset all* button (see A6 in Fig 19a)

Please note!

- As we add new indicators to the system, they will first appear in the *Unassigned* category, so that you can allocate to the appropriate theme.

Figure 19a- Customise themes



2.7.3 Choose which indicators appear on the map and the dashboard

You can choose which theme indicators appear in & also the order, including any custom datasets you have imported using *Upload your data* (see section 2.3).

This is controlled through the *indicators and custom data* box on the right hand side of the screen (see Fig 19b).

- Move indicators around within a theme to change the order that they appear in on the map, you can do this by dragging and dropping.
- Change which themes indicators appear in, by dragging and dropping indicators into any theme you wish.
- You can also move your custom data sets around themes. These are indicators that you have uploaded yourself. Custom datasets are differentiated from the

standard indicators in Community Insight through the coloured tab (see B1 in fig 19b), which is orange rather than blue for custom datasets.

- Select which indicators you want to display on the maps and the dashboard by selecting or deselecting the tick boxes (see B2 in Fig 19b).

Handy hint!

- You can have an unlimited amount of indicators on your dashboard

Please note!

- Empty themes will not display on the maps page nor on the dashboard
- Custom datasets currently do not appear on the dashboard, but do on the maps
- Indicators that are *Unassigned* cannot appear on the maps and dashboard. You'll just need to move them into a different theme.

2.8 Select your colour scheme for maps and dashboards

You can choose the colour scheme that is used on the maps and dashboards within Community Insight.

- Go to the *Admin* tab and click on *Manage Organisation*.
- Select which colour scheme you would like to use for your maps & dashboards.
- Save your preferences.

Please note!

- Any changes that you make will affect all users within your organisation and will apply to all indicators available.

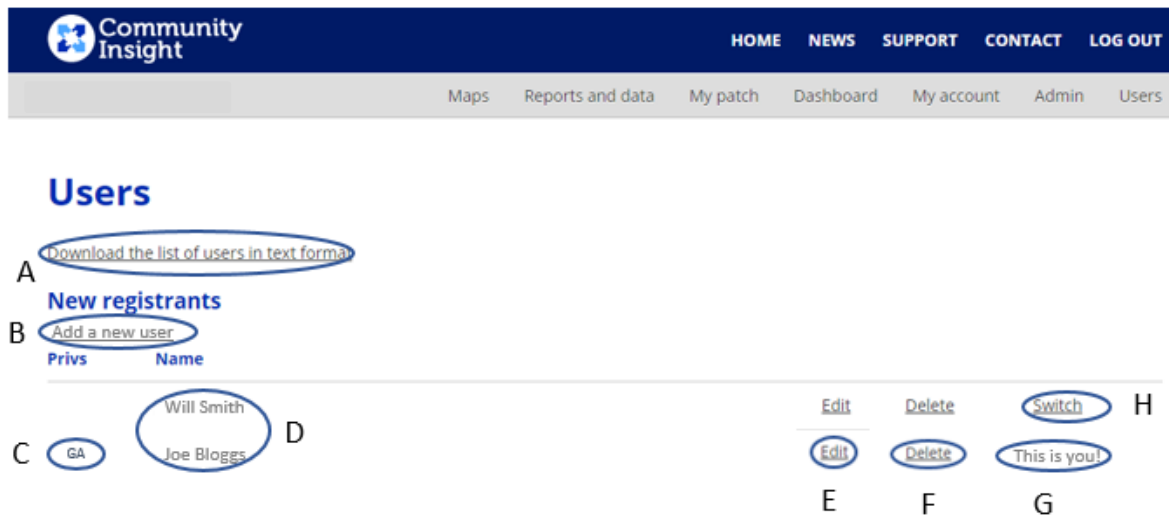
Handy hint!

- If you can't find a colour scheme that you like get in touch on support@ocsi.co.uk . Let us know what colour palette you would like and we will look into getting this set up for you.

2.9 Adding and editing users

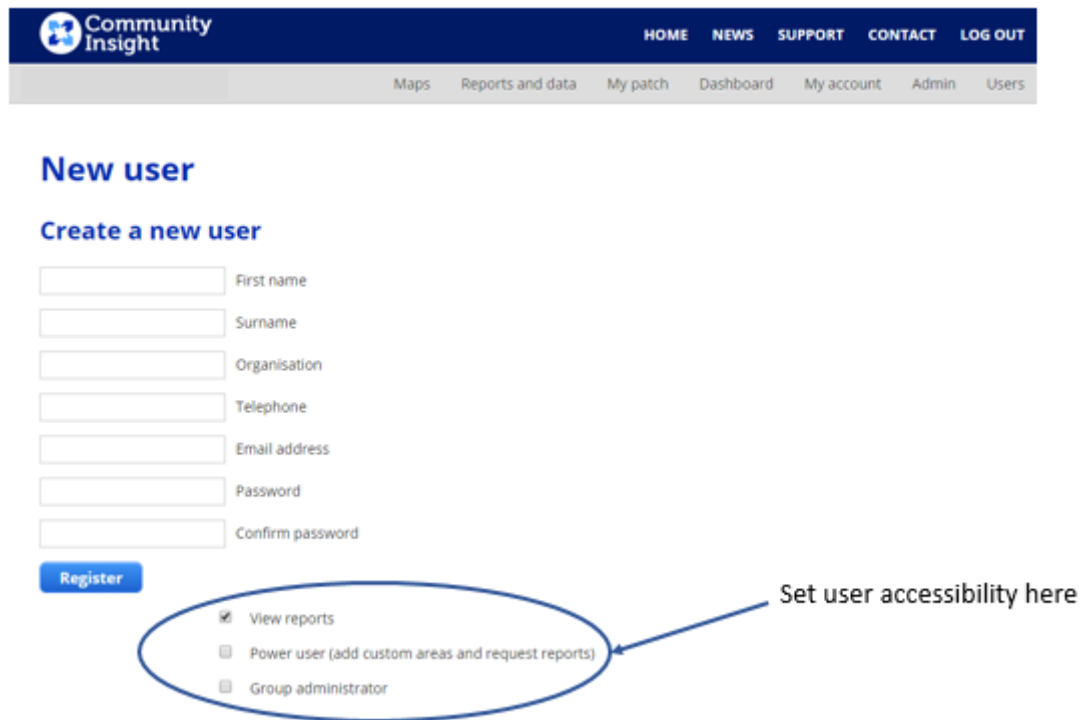
Now you're ready to let others loose onto the system!

Figure 20- 'Manage users'



- Click on the menu item 'Admin' → 'Manage users'
- Here you can see all users already registered to your organisations Community Insight account (see figure 20)
- C in figure 20 shows the accessibility level of each user. 'GA' refers to Group Admin. If this space is blank, then this refers to a general user
- D in figure 20 shows the first and second name of each user. Clicking here will redirect you to their profile page, where you can also make any edits. Selecting 'Edit' (see E in figure 20), will also redirect you to the same page
- F in figure 20 will 'Delete' a user permanently
- G in figure 20 shows which account you are using, you also have the option to 'Switch' between users (see H figure 20)
- Add a new user' by selecting on B in figure 20. The form below (figure 21) shows what details you will need to enter for each user you wish to add

Figure 21- New user registration form



New user

Create a new user

First name

Surname

Organisation

Telephone

Email address

Password

Confirm password

Register

☒ View reports

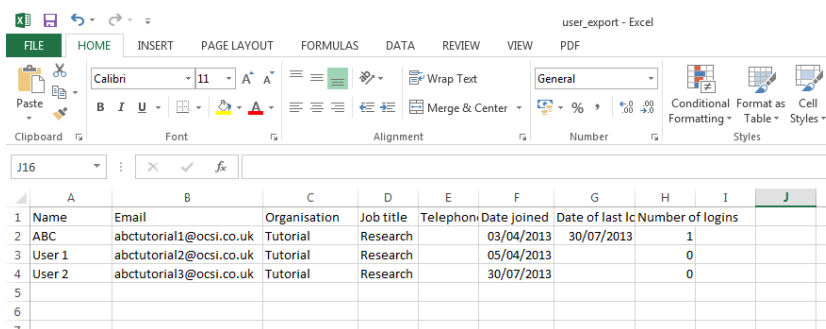
☐ Power user (add custom areas and request reports)

☐ Group administrator

Set user accessibility here

- By selecting just 'View reports', users will only have access to the maps page and access to the reports. Users will not be able to make any edits to property data or to the groups that have been created
- Selecting both 'View reports' and 'Group administrator' will give new users admin accessibility, allowing them to edit property data, create and edit groups and neighbourhoods, in addition to requesting reports
- Send new users their log-in details, and they too are now ready to start using Community Insight

Figure 22- Export showing information and usage for all users in your Community Insight account



	A	B	C	D	E	F	G	H	I	J
	Name	Email	Organisation	Job title	Telephone	Date joined	Date of last login	Number of logins		
1	ABC	abctutorial1@ocsi.co.uk	Tutorial	Research		03/04/2013	30/07/2013	1		
2	User 1	abctutorial2@ocsi.co.uk	Tutorial	Research		05/04/2013		0		
3	User 2	abctutorial3@ocsi.co.uk	Tutorial	Research		30/07/2013		0		
4										
5										
6										
7										

Handy hint!

- Once your users have their log-in details and can access Community Insight, they can return to 'My account', and edit their personal details such as password and telephone number
- Download a file containing a list of all your users (see A in figure 20 and figure 22). This way you can quickly pull out email addresses, telephone numbers and find out when and how often people are using the tool.

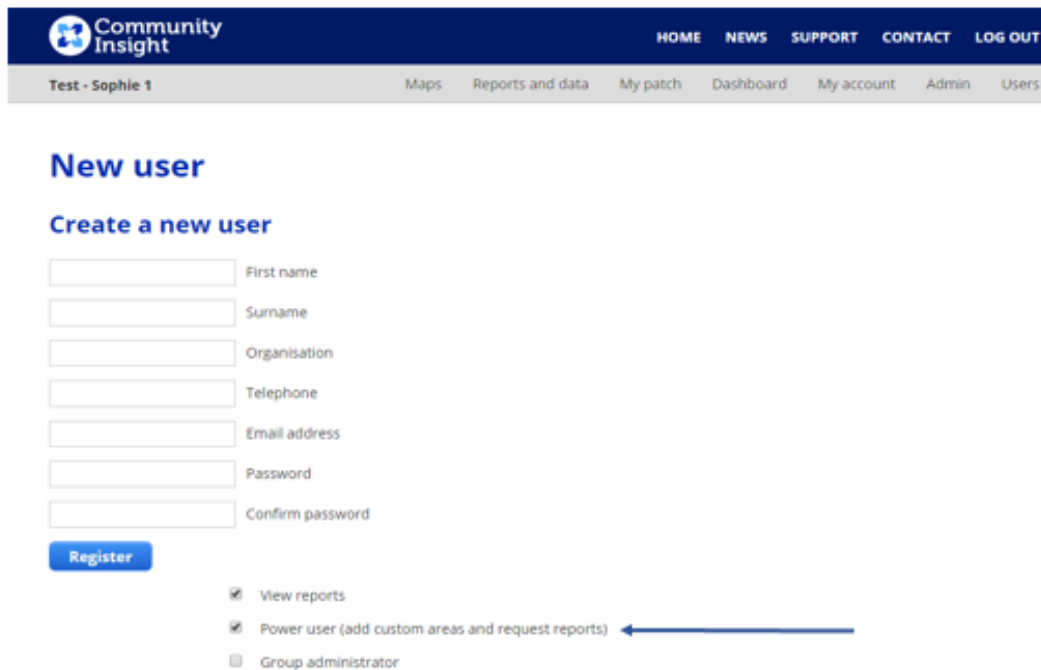
Please note!

- You can change your password, or any of your users passwords by selecting a user profile, or editing a user's details. These options can be found by selecting either D or E in figure 20.

2.9.1 *Power Users*

- Power users can add and edit stock groups as well as request reports, however cannot edit the original stock on your account, or delete stock groups.

Figure 23- Assigning Power User status



Community Insight

HOME NEWS SUPPORT CONTACT LOG OUT

Test - Sophie 1 Maps Reports and data My patch Dashboard My account Admin Users

New user

Create a new user

First name

Surname

Organisation

Telephone

Email address

Password

Confirm password

Register

☒ View reports

☒ Power user (add custom areas and request reports) ←

☐ Group administrator

You are given the option to assign a user 'power user' status when you select 'New user' under the 'users' tab (see figure 23).

2.10 Support

- The Community Insight 'Support' page provides all information on resources available to help you with Community Insight. See the link in the header once you have logged in.
- Email and online support is provided for any further assistance you may require. Email support@ocsi.co.uk for further support.

Section 3 Using Community Insight

3.1 Introduction

Now that you have uploaded your property data and set up your groups, you are ready to reap the benefits of Community Insight and find out what it has to offer for you and your organisation. This section will look at using Community Insight once you have loaded your properties in and set up your groups and neighbourhoods.

Map your stock

Quickly map your organisation's stock, plus focus in on your neighbourhoods



Head to section **3.2** for more on mapping your stock

See data for your neighbourhoods

Overlay key socio-economic indicators to get a picture of your communities



Head to section **3.3** for more on mapping indicators

Profile your Communities

Define your neighbourhoods and generate profile reports to help prioritise community investment

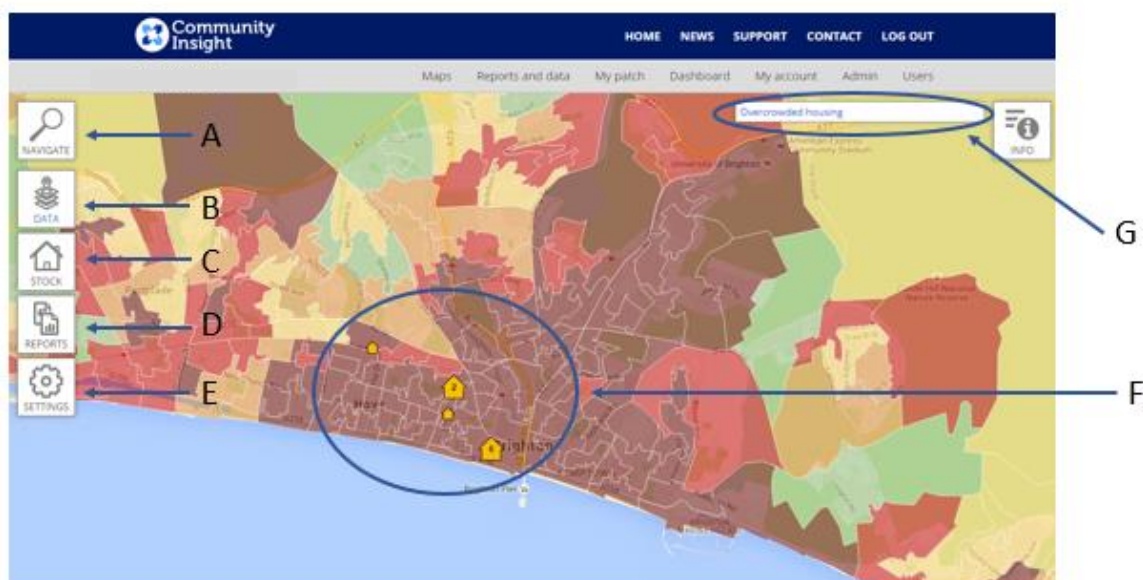


Head to section **2.5** for more on generating your profile reports

3.2 Showing stock

You can view all your organisations' property data, and the groups and neighbourhoods that have been set-up on the Community Insight map.

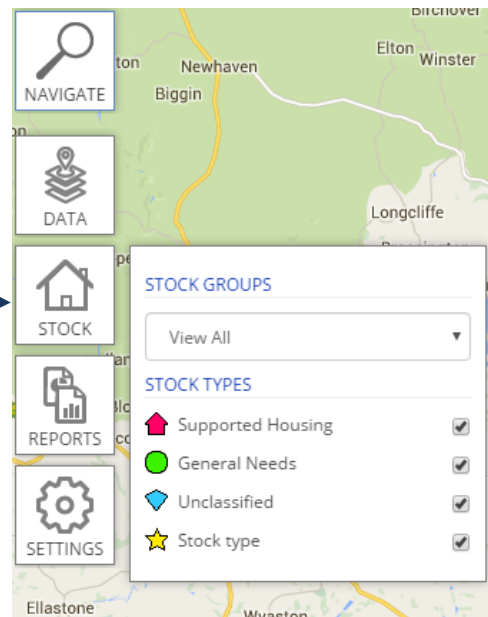
Figure 25- Community Insight 'Map' 1



- Using the icon 'Stock' (see C in figure 25 or figure 26) you can view either all of your stock type data mapped at once (all stock data is uploaded in the Community Insight map shown above in figure 25), or you can select one of the groups or neighbourhoods you have set-up to view on its own (see C in figure 25 and A in figure 26) As explained in section 2.2.2, you can allocate stock types to your properties. Each stock type is represented with a different colour house icon on the map. You can toggle on and off which stock-types are displayed on the map through the 'Stock' icon (see C in figure 25 and A in figure 26)
- As explained in section 2.2.3, you can also select which organisation's data is displayed by toggling your organisations on and off, you can do this through the 'stock' icon (see C figure 25). The organisation feature is not switched on by default. Please contact the Community Insight team if you would like this switched on for you organisation.

Figure 26- 'Show stock'

Each stock type is represented with a different colour icon on the map

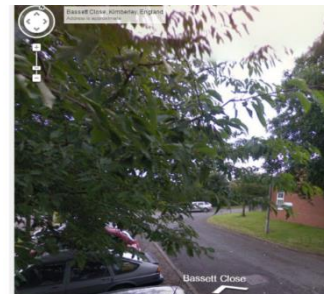


- Icons represent the number of properties you have (see F figure 25). When you have several properties in a small area, the number on each icon represents how many properties are located in that area.
- As you zoom in and out, you can view the location of your properties at greater detail.
- Once a icon no longer shows any number, it now represents just one property.
- You can zoom in right down to street level (see figure 27 and 28)

Figure 27- Properties mapped



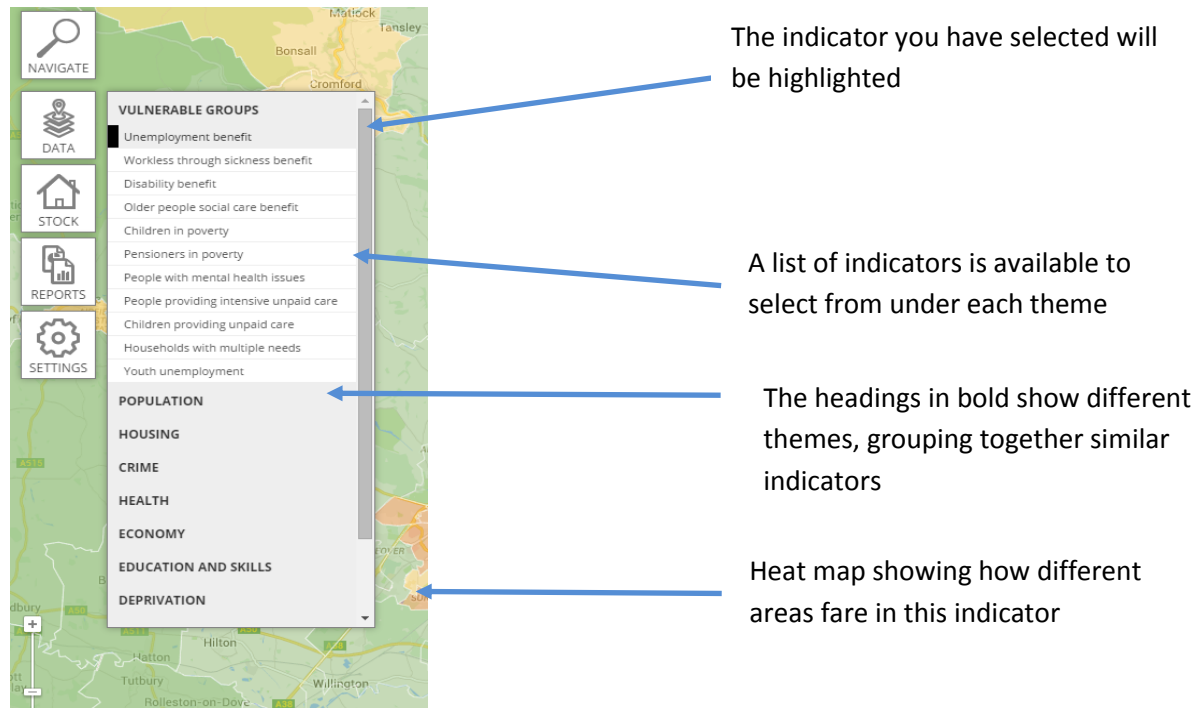
Figure 28- Street view



3.3 Mapping indicators

You can view your Community Insight map overlaid with one of the key socio-economic indicators.

Figure 29- Community Insight 'Map'



- Click on the 'data' icon to bring up the list of social and economic indicators.
- Select one of the themes (e.g. Vulnerable groups) to view its indicators (see figure 29)
- Selecting one of the indicators (e.g. Unemployment benefit (see figure 29)) will colour the map based on the data values, highlighting how different areas fare in the indicator.
- A legend for understanding the data values can be found on the right by clicking on the 'info' pop-up (see G in figure 25)

Handy hint!

- You can zoom in and out of any area, regardless of whether you have stock there

Please note!

Indicator information will be displayed for the whole of England, not just the geographic area covered by your stock

Wales Indicator information will be displayed for the whole of Wales

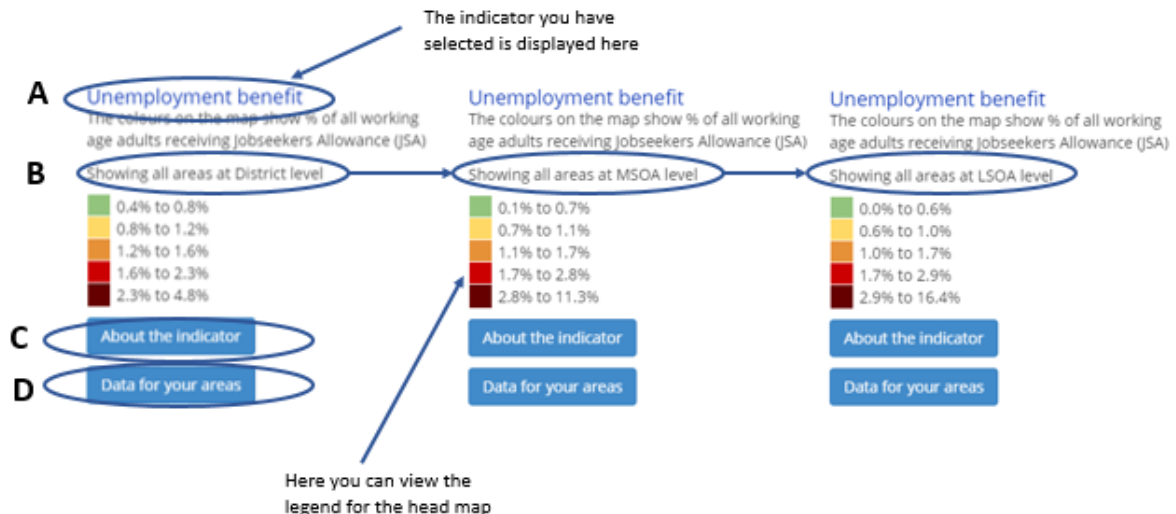
Scotland Indicator information will be displayed for the whole of Scotland

3.4 Indicators in detail

You can find the legend for the data values on the map, as well as more data and information around the indicator you have select (see G in figure 25)

- As you zoom in and out of the map, the legend showing the data breakdown for the indicator you have selected will change from 'District level' to 'MSOA level' to 'LSOA level' (see B in figure 30)
- Scotland** As you zoom in and out of the map, the legend showing the data breakdown for the indicator you have selected will change from 'District level' to 'intermediate geographies level' to 'data zones level' (See figure 30a)

Figure 30- 'About this indicator'



3.4.1 Mapping 'hotspots'

The 'hotspot' functionality allows you to switch between mapping data for all areas on the map (see figure 32), to just 'hotspot areas' (see figure 33), which will only show areas in

the top 20% of the selected indicator. Select the 'settings' icon (E in figure 25) to toggle between the two views (see figure 31).

Figure 31- 'Changing the colours on the map'

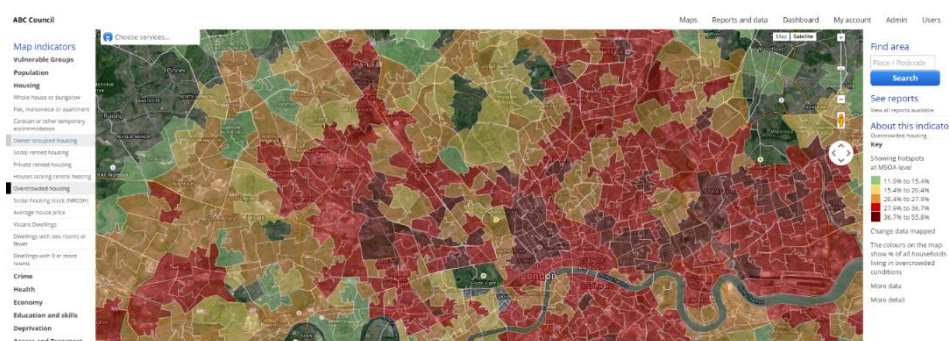


Select whether you would like to view all data on the map or just hotspots here

Figure 32- 'All areas mapped'



Figure 33- 'Hotspots' only mapped



3.4.2 More detail about the indicators

- Selecting 'About the indicator' (see C in figure 30 and figure 34) provides qualitative information, including an up to date description, information about the source and the date published.

Figure 34- "About the indicator"



3.4.3 Viewing and downloading data

- Selecting 'data for you areas' (see D figure 30) will provide a detailed breakdown of the data related to the indicator you have selected, values for all groups you have set-up, all your stock data and for the whole of England (see figure 35), allowing you to compare your neighbourhoods
- Download the dataset in CSV format for further offline reference (see B in figure 35)
- You can rank all LSOAs in which you have stock for further comparison (see A in figure 35 and figure 36)
- **Wales** By clicking on 'data for your areas', you will see values for all groups you have set-up, all your stock data and for the whole of Wales (See figure 35a)
- **Scotland** By clicking on 'data for your areas', you will see values for all groups you have set-up, all your stock data and for the whole of Wales (See figure 35b). You can rank all Data Zones in which you have stock for further comparison (see A in figure 35b and 36a)

Figure 35- 'More data'

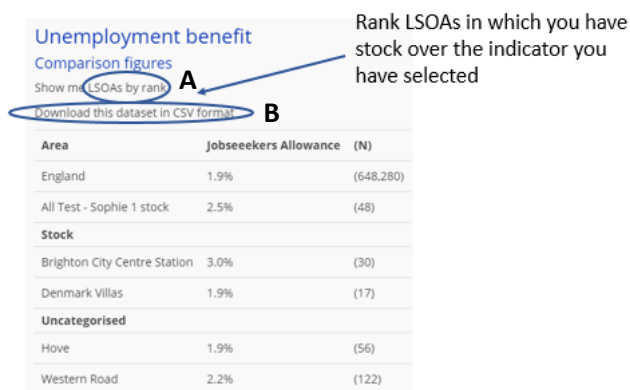


Figure 36 – 'LSOAs by rank'

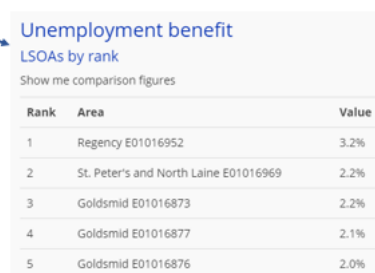
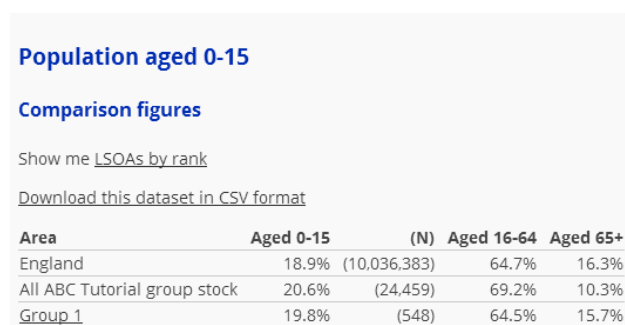


Figure 37 – Related indicators



Handy hint!

- Where appropriate, you can find data shown for related indicators, giving context to selected indicators (see figure 37)

Please note!

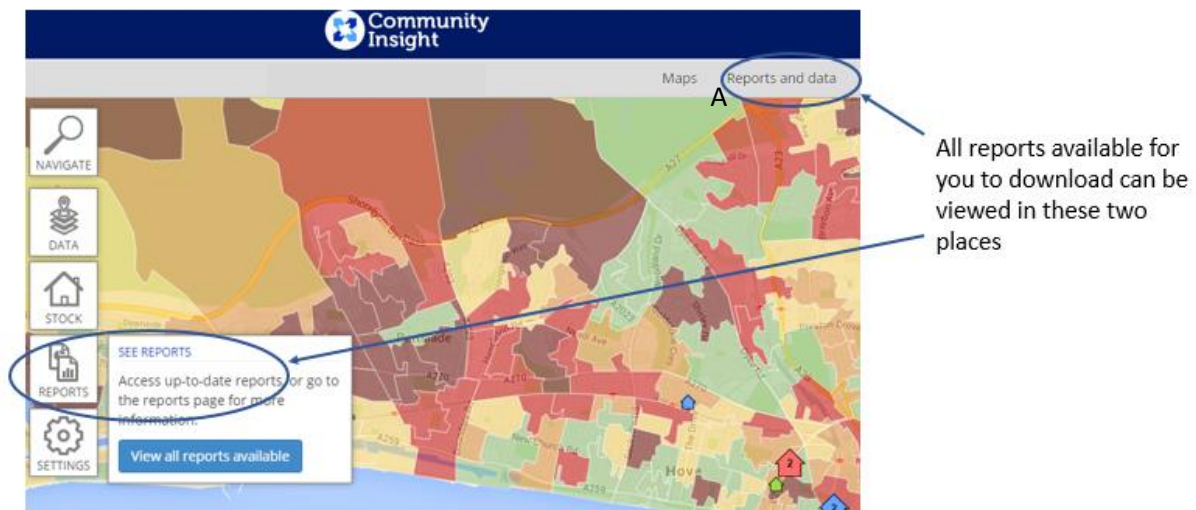
- As default we use data for the whole of England as a comparator to all your stock data, in addition to any groups you have created
- **Wales** As default we use data for the whole of Wales as a comparator to all your stock data, in addition to any groups you have created
- **Scotland** As default we use data for the whole of Scotland as a comparator to all your stock data, in addition to any groups you have created

3.5 Downloading and viewing your reports

You can download profile reports on the stock groups and neighbourhoods which have been set-up for your organisation.

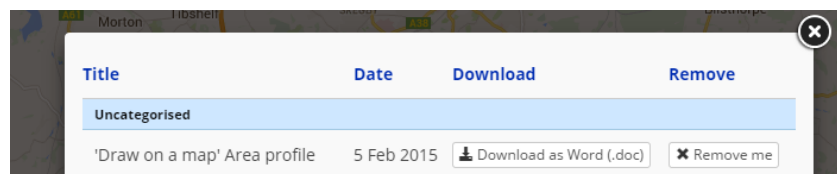
- Selecting 'reports and data' (see A in figure 38) in the header will redirect you to the reports page
- Selecting 'view all reports available' by selecting the reports icon (see D in figure 25) will show a pop-up window where you can view all your reports (see figure 39).
- Group Admins can request a report for any of your stock groups.

Figure 38- Reports



- Reports can be downloaded onto your computer, as a Word document

Figure 39- Reports page pop-up



Handy hint!

- Graphs and content from the reports can be used in your own reports, presentations and displays

Please note!

- Only group admins can set up groups and neighbourhoods for your organisation (if you are group admin see 2.4 on setting up stock groups).

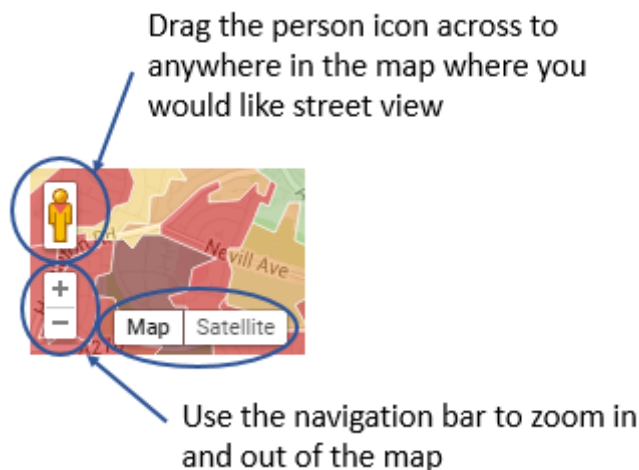
- Only group admins within your organisation are able to request reports, so speak to them if you cannot see the profile report you are interested in (if you are a group admin see 2.5 on requesting reports)

3.6 Navigating around the map

Navigating around the map is easy!

- We use a standard Google map and you can navigate around it as you normally would.
- If unfamiliar with Google maps, navigate around the map by dragging the map page with your mouse, swipe across the map if you are using a touch screen device.
- You can zoom in and out of the map by scrolling in and out with the scroll pad on your mouse, double clicking/tapping on any area you wish to zoom into, or using the navigation pad (see A in figure 40)
- Drag the person icon (see B in figure 40) across to any area on the map to jump to street view

Figure 40- Navigation pad



- You can select from a range of map settings to suit your needs: either map (with or without terrain) or satellite (with or without name place labels)(see C in figure 40)

Handy hint!

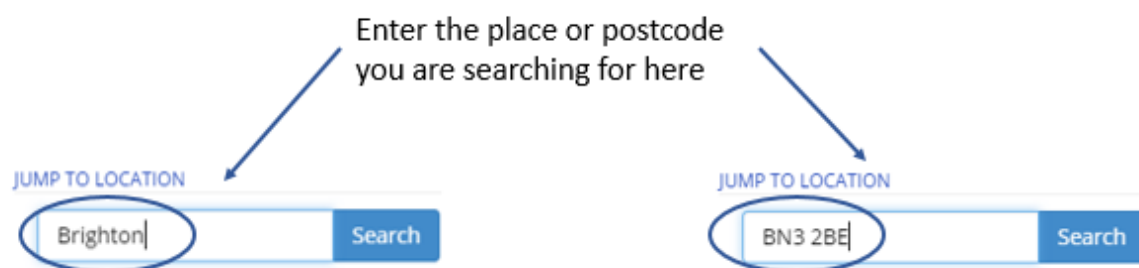
- Remember- zooming in and out of the map will change the heat map, as data will change from District level, to MSOA level, to LSOA the more you zoom in (see section 3.4 for more)
- Scotland** data will change from District level, to Intermediate Geographies level, to Data Zones level the more you zoom in (see section 3.4 for more details).

3.6.1 *Finding areas and searching on the map*

Find, and zoom into any area on the map, allowing you to see how it fares on a chosen indicator.

- Enter a place or postcode (see figure 41) in the search engine and the map will zoom in with this place or postcode at its centre

Figure 41- 'Find an area'



- A red marker will appear for postcodes that have been searched (see figure 42). Community Insight will zoom into this area, taking you right down to LSOA level
- If you search for a place on Community Insight will also relocate you to that area on the map, taking you down to MSOA level

Figure 42 – Marking postcodes on the map



Handy hint!

- Searching for postcodes and places is a quick way to find out how a specific neighbourhood fares based on a selected indicator

Please note!

- You can zoom in and out as normal, even if you searched for a specific place or postcode
- The place or postcodes you search for do not have to be in an area where you have stock

3.7 Who's on my patch?

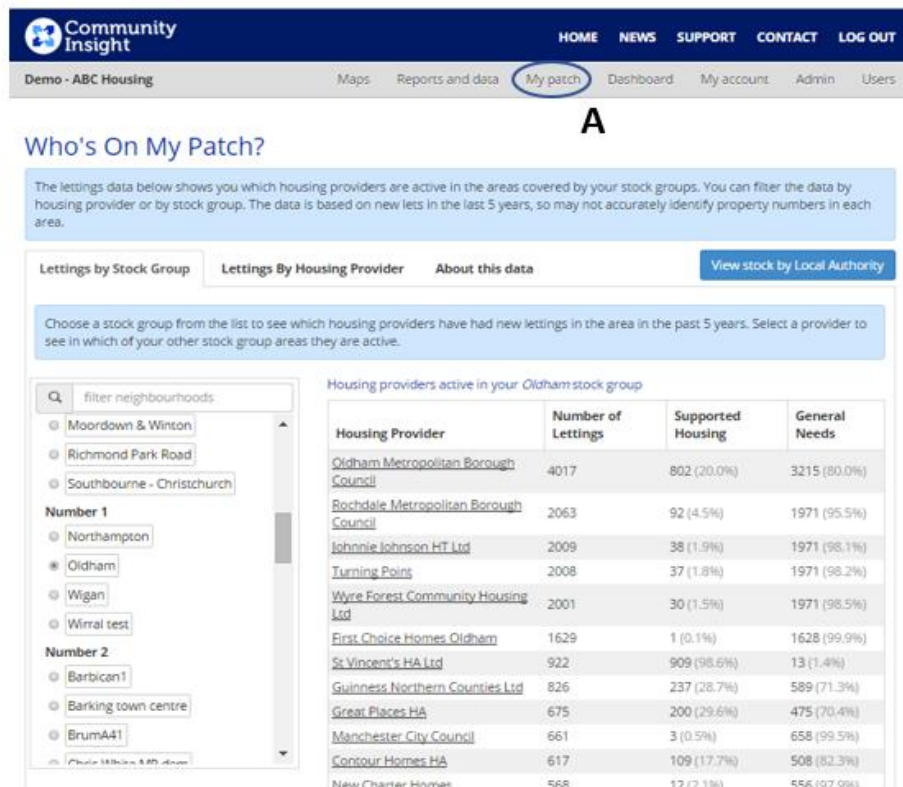
The My Patch functionality was launched following the July 2013 User Group meeting, where users discussed the importance and benefits of sharing information and finding out who else is working in similar areas or dealing with similar challenges. This adds another element to the 'Community' aspect of 'Community Insight'. Perhaps you want to work with other organisations on joint projects to address the needs of a neighbourhood. Or maybe to ensure you are not duplicating services. Or perhaps you have some stock that you want to rationalise, and you want to get an idea of who is already active in that area and might be interested in taking it on.

- All users have a 'My patch' tab on their Community Insight account, located to the right of 'Reports and data'. (See A in figure 43)
- By picking any of your areas you will get a list of every social landlord that has let a least one property in that area in the last five years.

Please note!

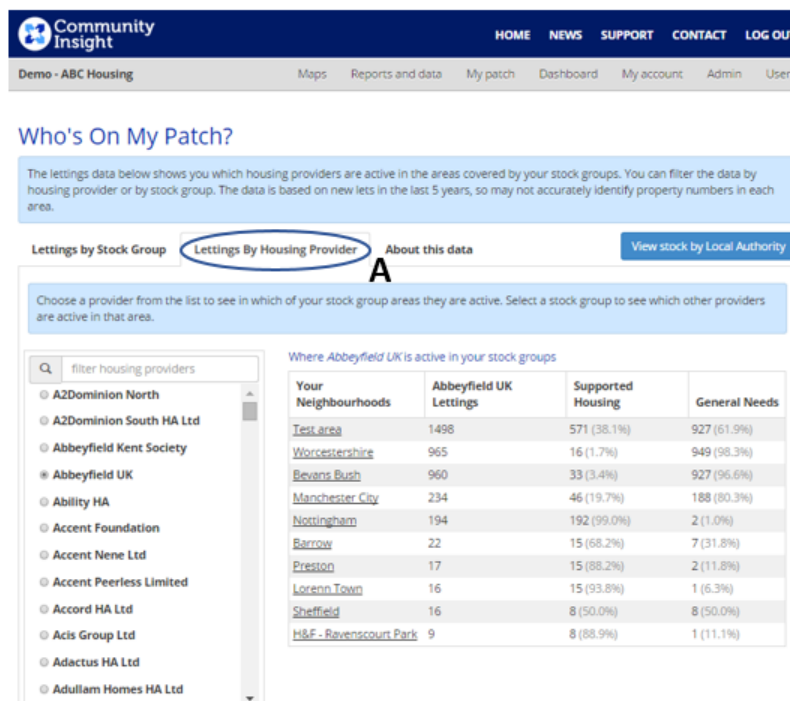
My Patch is currently not available for **Wales** and **Scotland**

Figure 43- 'My patch – Lettings by Stock Group'



- In the 'Lettings By Housing Provider' view (see A in figure 44), you can see in which of your stock group areas certain Housing Providers are active.

Figure 44- 'My patch – Lettings by Housing Provider'



3.8 Dashboard

Here, you can see a selection of meaningful, key indicators in a visual format.

- You can select which custom areas appear in the matrix (see A in figure 45)
- You can view your data either in Matrix view (figure 45) or Chart view (figure 45a)
- You can export the data from the dashboard to a CSV file (see B in figure 45)

Figure 45- Dashboard – Matrix view

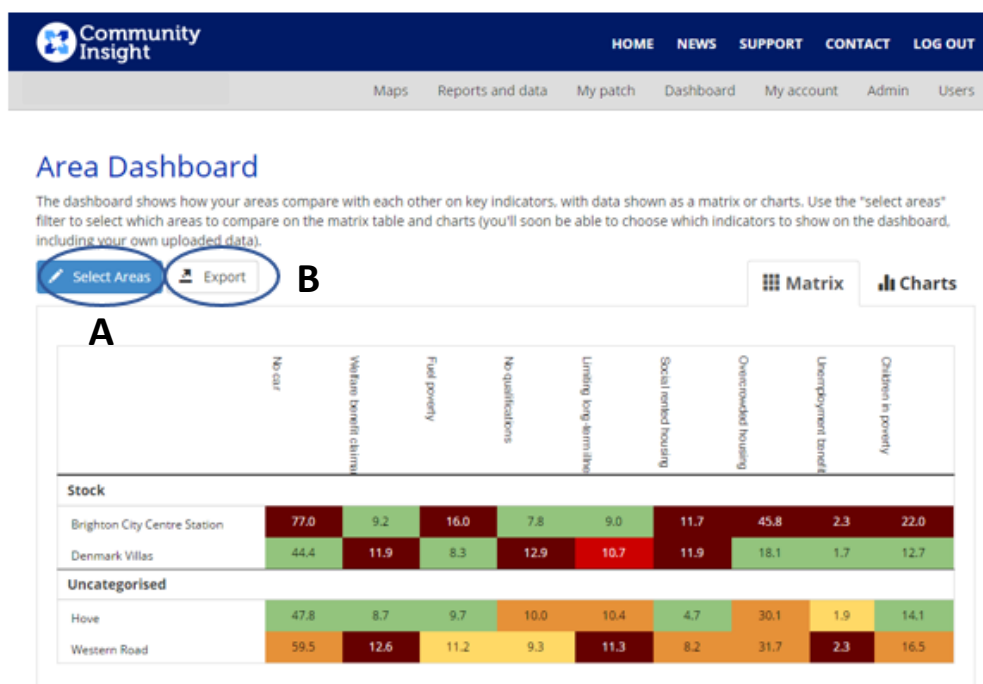
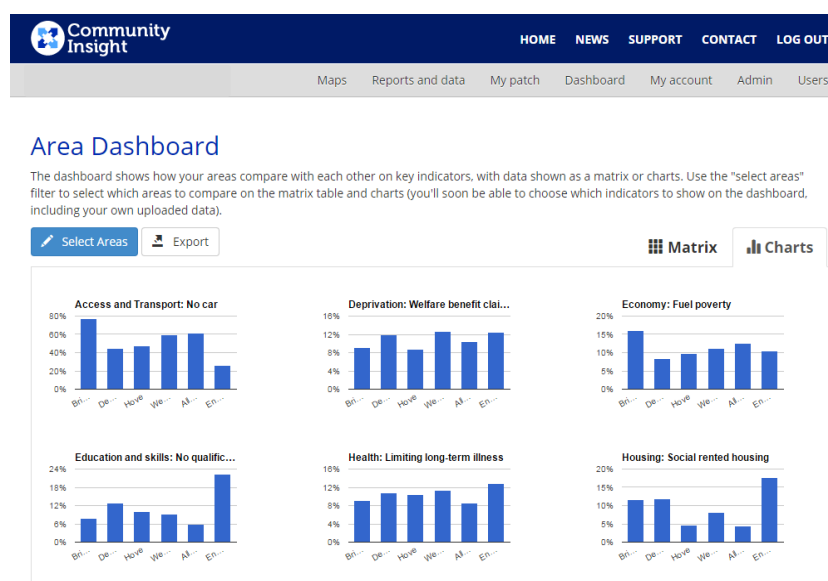


Figure 45a - Dashboard – Chart view



Section 4 Further support

You can get further support with Community Insight through emailing support@ocsi.co.uk or calling OCSI on +44 (0) 1273 810 270.