FellowshipOne™

Insights Dashboard Guide

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Getting Started

Insights dashboards provide visibility into ministry effectiveness by giving you value-driven visualizations of your church's data – all with an easy to use, modern design. You'll find key value indicators and useful charts and graphs for your church's contributions, attendance and attributes data, all with the ability to filter to the data that's relevant to your needs.

If you are finding that you are in need of additional customization for your dashboards, this can be accomplished with Insights' Visualizer. Visualizer brings customized dashboards and reporting through an intuitive, drag-and-drop tool, allowing you to create the dashboards and reports that are most relevant for your specific church's needs. Sign up for FellowshipOne's Visualizer training to gain access to the deeper, customized functionality within Insights.

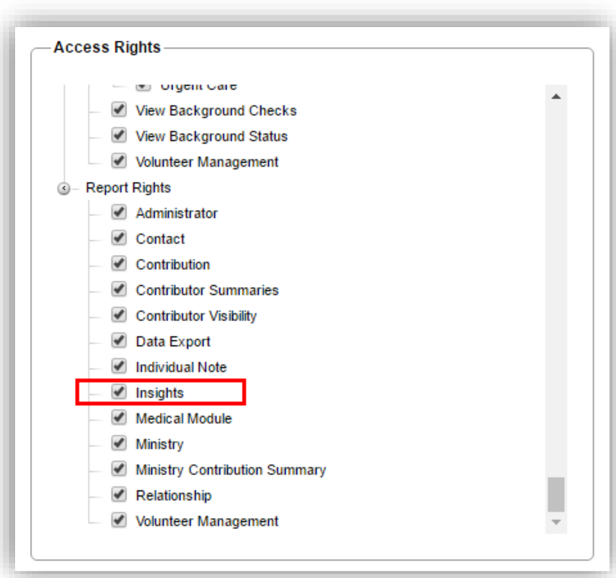
System Requirements

FellowshipOne Insights is available through any device equipped with a web browser and an internet connection. While the dashboards are responsive to different screen sizes, they are fully supported on desktop monitors, tablets, and smartphone screens 5.5 inches or greater – smaller smartphones will not be able to access all functionality.

Access Rights & Permissions

A portal user must be given the “Insights” access right within the FellowshipOne portal to access Insights. This can be assigned to a Security Role and/or assigned on an individual basis.

The “Insights” Access Right can be found under the **Report Rights** section of the Access Rights list. Once selected and saved, the user will immediately gain access to Insights.

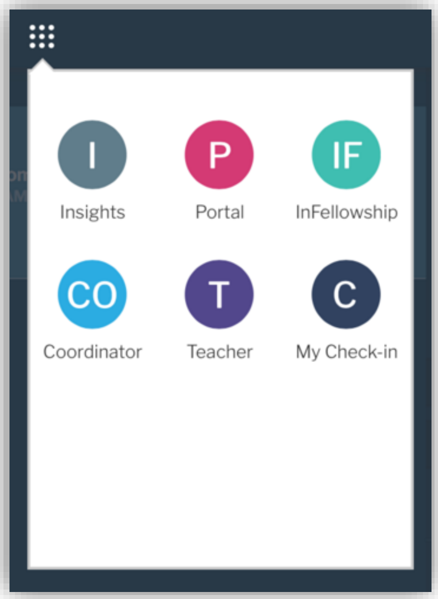


The dashboards within Insights are tied to various Portal access rights. For information on the access rights relevant to each collection of dashboards, see the Overview of

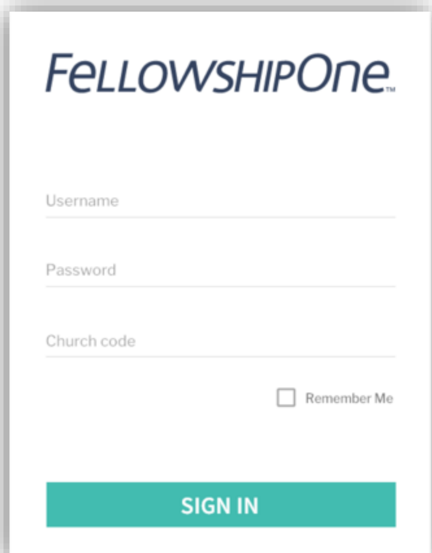
Available Dashboards section of this guide. *Changes to these access rights (and thus which dashboards users will see) are updated in Insights on a nightly basis.*

Logging In

1. Go to the FellowshipOne Insights URL: https://insights.fellowshipone.com
2. Alternatively, click on the Insights icon in the 9-dot grid from Launchpad, Coordinator, Teacher, or My Check-in.



3. Log in using your FellowshipOne Portal Credentials.



Overview of Available Dashboards

Insights dashboards provide various views of your church's data and are updated with new data on a nightly basis. Each collection is tied to specific Portal-given access rights that allow individuals to see the dashboards within that collection. *Changes to users' access rights also take effect within Insights on a nightly basis.*

The FellowshipOne dashboards are categorized into the following 4 collections:

- Overview
- Contributions
- Contribution Details
- Attendance
- Attributes

Overview Collection

The Overview Collection is made up of a single dashboard – the "Overview Dashboard". This dashboard provides a high-level trend over time of your church's:

- **Contributions** – Contributions data in FellowshipOne. Excludes Receipts data.
- **Activity Attendance** – Attendance logged for specific individuals from FellowshipOne's Check-in and Post Attendance functionality. Excludes Head Count Data.
- **Head Count** – Attendance logged through FellowshipOne's Head Count Functionality. Excludes Check-in and Post Attendance data.
- **Groups Attendance** – Attendance logged from FellowshipOne's Groups functionality.

Required Access Rights

To see the Overview Collection, a user must have one of the following 3 Portal access rights selected (found within the Report Rights section):

- Contribution
- Contributor Summaries
- Contributor Visibility

Contributions Collection

The Contributions Collection is made up of multiple views of your church's Contributions data (excludes Receipts data). No identifiable information on specific individuals is found on these dashboards. The Contributions collection is made up of the following dashboards:

- Contributions Overview
- Analysis by Total Contributions
- Analysis by Average Contribution
- Analysis by Contributors
- Analysis by Transactions

Required Access Rights

To see the Overview Collection, a user must have one of the following 3 Portal access rights selected (found within the Report Rights section):

- Contribution
- Contributor Summaries
- Contributor Visibility

Contribution Details Collection

The Overview Collection is made up of a single dashboard – the "Contributions Detail" dashboard. This dashboard gives Contributions details on specific individuals and households in your church (excludes Receipts data).

! Required Access Right

To see the Contribution Details Collection, a user must have this Portal access right selected (found within the **Report Rights** section):

- Contributor Visibility

Attendance Collection

The Attendance Collection is made up of multiple dashboards for your church's attendance data. These dashboards include:

- Activity Attendance Overview
- Activity Attendance Analysis
- Activity Unique Attenders analysis
- Head Count Analysis
- Activity Attendance Detail
- Group Attendance Analysis
- Group Unique Attenders Analysis
- Group Attendance Detail

! Required Access Rights

To see the Attendance Collection, a user must have this Portal access right selected (found within the Report Rights section):

- Ministry

The data each user sees on their dashboards is tied to the Ministry Read/Write and Groups rights they have been given in the FellowshipOne Portal. The Ministries and Groups an individual can see in the Portal are the only Ministries and Groups they will see within Insights.

Key terms to keep in mind when viewing the Attendance Dashboards:

- **Activity Attendance** – Attendance logged for specific individuals from FellowshipOne's Check-in and Post Attendance functionality. Excludes Head Count Data.

- **Head Count** – Attendance logged through FellowshipOne's Head Count Functionality. Excludes Check-in and Post Attendance data.
- **Groups Attendance** – Attendance logged from FellowshipOne's Groups functionality.

Attributes Collection

The Attributes Collection is made up of multiple dashboards for your church's attributes data. These dashboards include:

- Attributes Overview
- Compare Individuals with Attributes
- Attributes Details

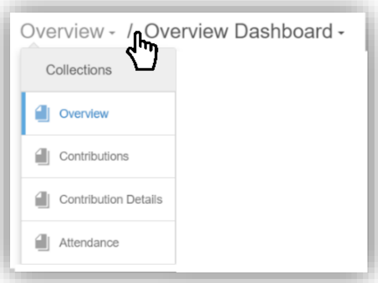
All Insights users will have access to the Attributes dashboards.

Navigating

There are 3 ways you can navigate between Dashboards:

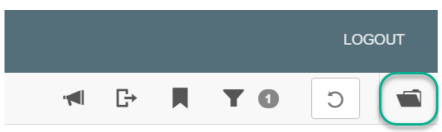
1. Dropdown Menus

Click the dashboards dropdown menu to quickly **navigate between dashboards** and dashboard collections.



2. Dashboard Collections Menus

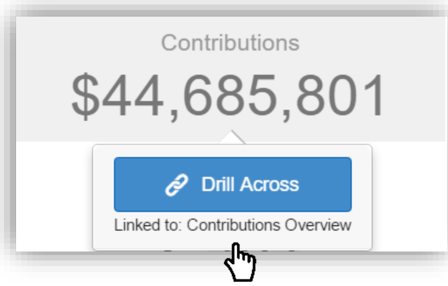
Alternatively, click the Dashboards menu button in the upper right, to browse a list of available Dashboards.



3. Drilling Across Linked Dashboards

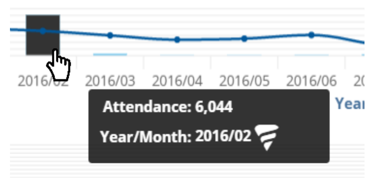
Hover over a KPI to see the name of any dashboards the KPI is linked to. Click the KPI to be taken to its linked Dashboard.

The link icon shows that a KPU or button links to another dashboard. Hover over the KPI to see the name of the linked dashboard and click the KPI to open it.

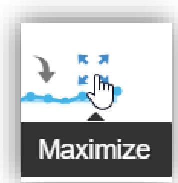


Tips:

- **Hover over charts** to see more detailed information in a popup.



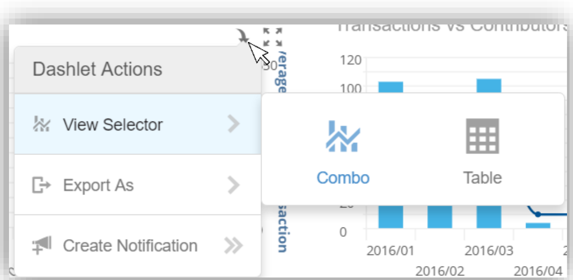
- **Maximize** a report by hovering over it and clicking Maximize. The report expands



  to fill the screen. Click Minimize to restore its original size

- **Change report types** by hovering over a report and clicking Dashlet Actions > View Selector (If enabled for a report). The options reflect the type of charts that most closely match the data. The Table view is a convenient way to see a chart's data in a column/row format.

- **Indicators** reflect how your currently selected time period compares to the same data one year prior.




Green arrows represent an *increase* compared to the previous year.


Red arrows represent a *decrease* compared to the previous year.

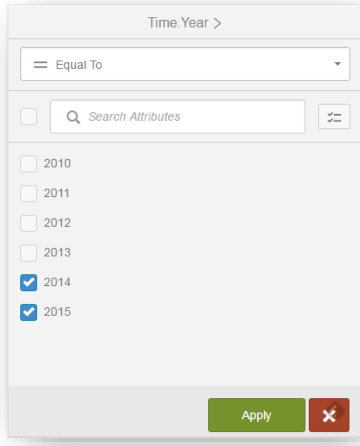
Filtering

Dashboards have filters that let you explore subsets of your data.

1. Click **Filters** at the top right of the dashboard page to use the available filters. To

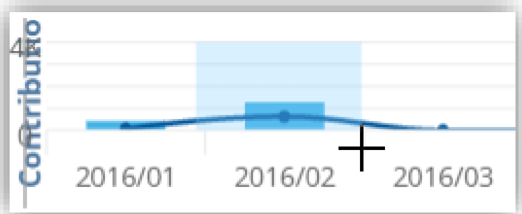
hide the filter drawer without applying new filters, click on the Filters menu button again.

2. Check the filters and operators you want and click **Apply**.

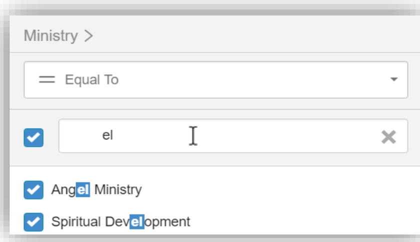


3. Alternatively, you can **drag-select** a part of a chart to visually filter to that level.

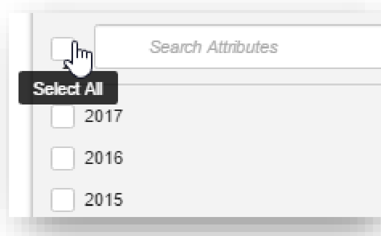
   The chart (and any chart using the same filter) updates to show the details.

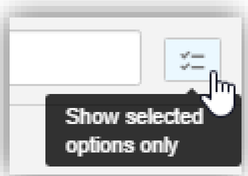


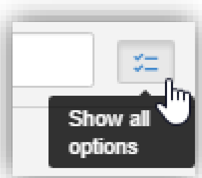
Tips:



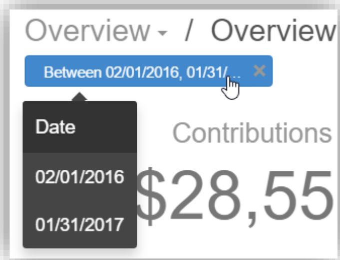
- If there are a lot of filter values, you can search to narrow down your selection.
- Check the box to the left of the search box to select all or deselect all options.
- Click the icon on the right of the search box to toggle between showing all options or only showing selected options.



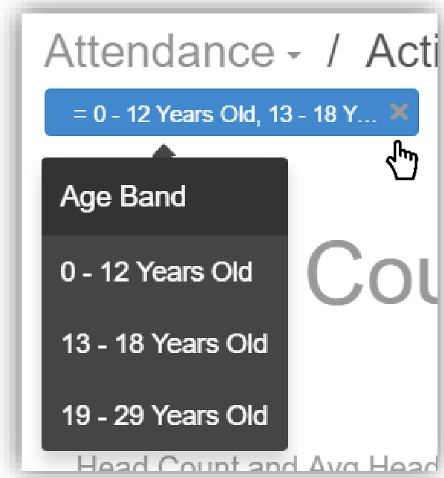




- Filter cards (for the filters you select) appear along the top of the dashboard. Hover over them to see the name of the filter and its current filter value.

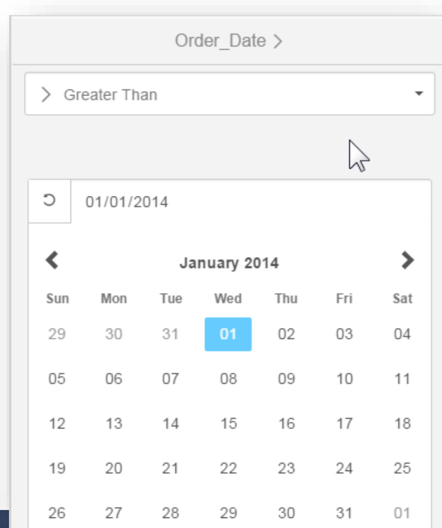

Overview / Overview
Between 02/01/2016, 01/31/...
Date
02/01/2016
01/31/2017
Contributions
$28,55

- **Undo filters** by clicking the X on the filter card.



- **Click Reset** to go back to the original state of the dashboard if you have drilled down into the data or applied a filter and want to return to the previous view.

- Some **filters are based on dates and use a calendar**. For these filters, click the filter card to see the date picker, and select the dates. Use the operator buttons (ie, "Greater Than" or "Between") to refine the selection criteria.



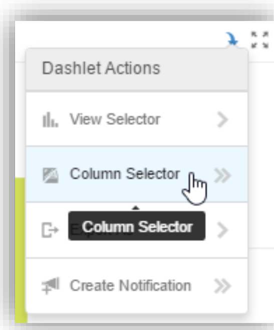
Column Selectors

Some fund-based and status-based dashlets allow you to choose the type of value you would like to view via the Column Selector functionality. This allows:

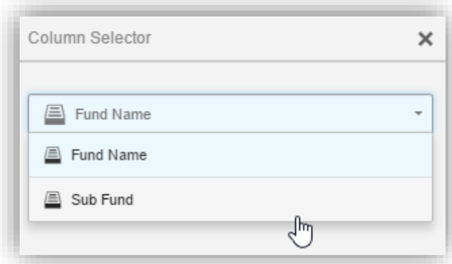
- **Toggling between fund and subfund** on the following dashboards:
  - Analysis by Total Contributions
  - Analysis by Contributors
  - Analysis by Transactions
- **Toggling between status group, status, and substatus** on the following dashboards:
  - Analysis by Average Contribution
  - Activity Unique Attenders Analysis
  - Group Unique Attenders Analysis

1. Select the **Dashlet Actions** icon on the specific dashlet you'd like to change.

2. Select **Column Selector**.

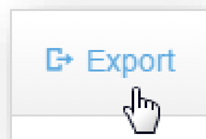


3. Select the value you'd like to display and then select the **X icon** to be taken back to the dashboard. The dashlet is updated to reflect your selection.

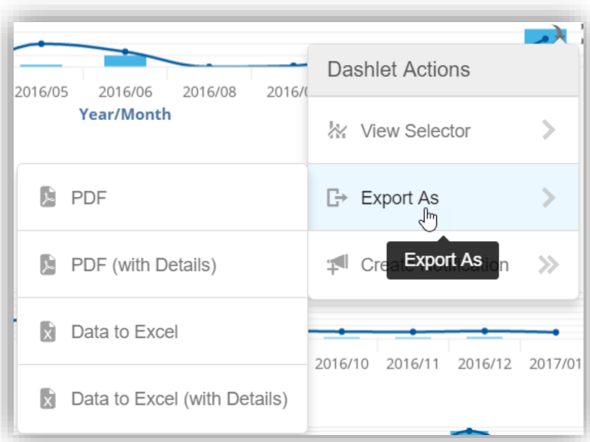


Exporting

Export an entire dashboard to PDF by clicking Export at the top. The PDF downloads immediately.



Export a single report by clicking Dashlet Actions > Export As. The export options that are available, such as PDF, Excel, or Excel Pivot Table, depend upon the type of report.

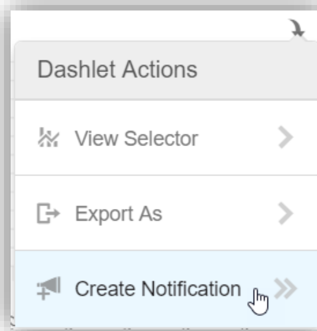


Emailing Reports

You can create a **notification** that sends a specific dashlet (a chart or graph on a dashboard) or an entire dashboard to one or more email recipients.

Share a Dashlet

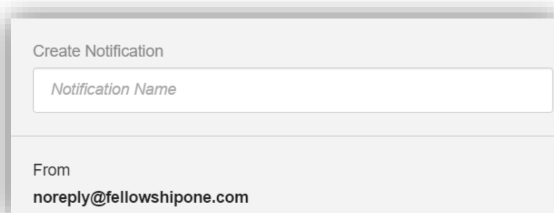
1. Click the **Dashlet Actions icon** on the specific Dashlet you'd like to share.



2. Click **Create Notification**.
3. Click Add (+) and enter the name of the notification, email addresses, frequency, time, and time zone.

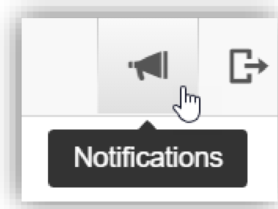
Tip: Separate email addresses for multiple recipients with a semicolon and no spaces. For example:

testaddress@test.com;sample@test.com



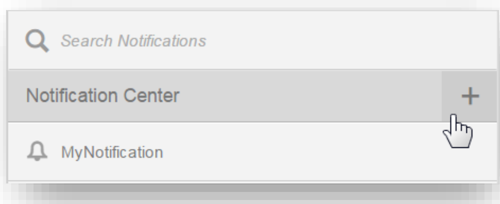
4. Optionally, change the default PDF attachment format. Toggle it on and select another format such as Excel. The type of available format depends on the type of chart.
5. Save the notification, then click Done.
6. A summary of the report notification information shows in the Notifications panel.

7. Click Back to leave the summary.
8. Click the Notifications button in the top menu bar to close the panel.

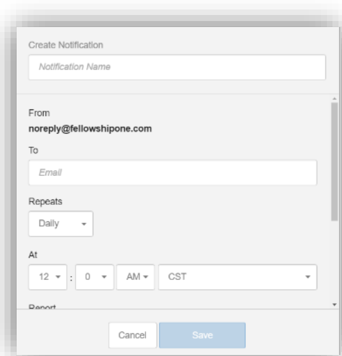


Tip: To see and edit any of your notifications, click the Notifications button.

Share a Dashboard



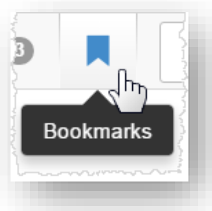
1. Click the Notifications button, then click the Add button in the Notifications Center.
2. Fill in the name, email addresses, and set the frequency, time, and time zone.
3. Click Save, Back and then click the Notifications button. FellowshipOne will send a PDF dashboard notification. Expect an e-mail from noreply@fellowshipone.com.



Using Bookmarks

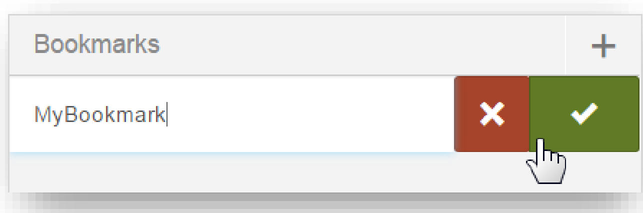
Use bookmarks to save a view of your dashboard so you can easily find it again later. This is particularly helpful if you have filters you apply frequently.

1. When you are on a dashboard that you want to save, click the **Bookmarks icon**



   in the top menu bar

2. Click Add (+) to create a new bookmark, name it, and click the check box to save. The state of the dashboard is saved at the time you create the bookmark.



3. To retrieve a bookmark, click the bookmarks button and select it from the list. The dashboard will refresh to the view that was saved as a bookmark.