FellowshipOne

Insights

Quick Start Guide

A brand-new Insights dashboard is available to provide visibility into ministry effectiveness by giving you value-driven visualizations of your church's data – all within your FellowshipOne portal. This easy-to-use design will help you find key value indicators displayed in useful charts and graphs that will help you better understand your church's contributions, attendance, and attribute data.

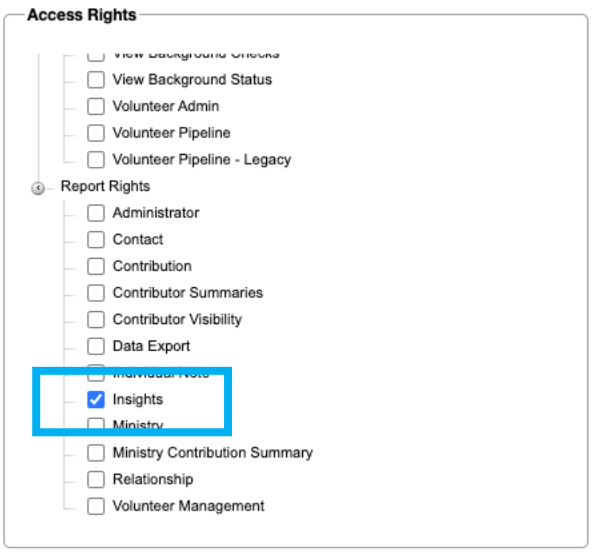
This Quick Start Guide will help get you started using Insights and finding the information you want quickly and easily. Let's get started.

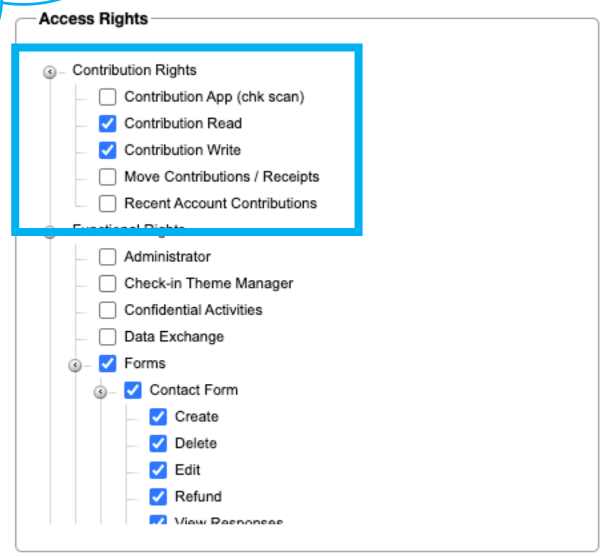
Security Rights

Insights now includes two dashboards to find the data you want: Overview and Church Demographics.

CHURCH DEMOGRAPHICS: A portal user must be given the **Insights** security right within the FellowshipOne portal to access this area of Insights.

This can be found under the Report Rights section of the Access Rights list. Once selected and saved, the user will immediately gain access to the Church Demographics view of Insights.





OVERVIEW: A portal user must be given the **Insights** security right AND a **Contribution**-related security right within the FellowshipOne portal to access this area of Insights.

This can be found under the Contribution Rights section of the Access Rights list. Once selected and saved, the user will immediately gain access to the Overview view of Insights.

Accessing Insights

Insights is now available directly within your FellowshipOne portal – no need to access and log into another site!

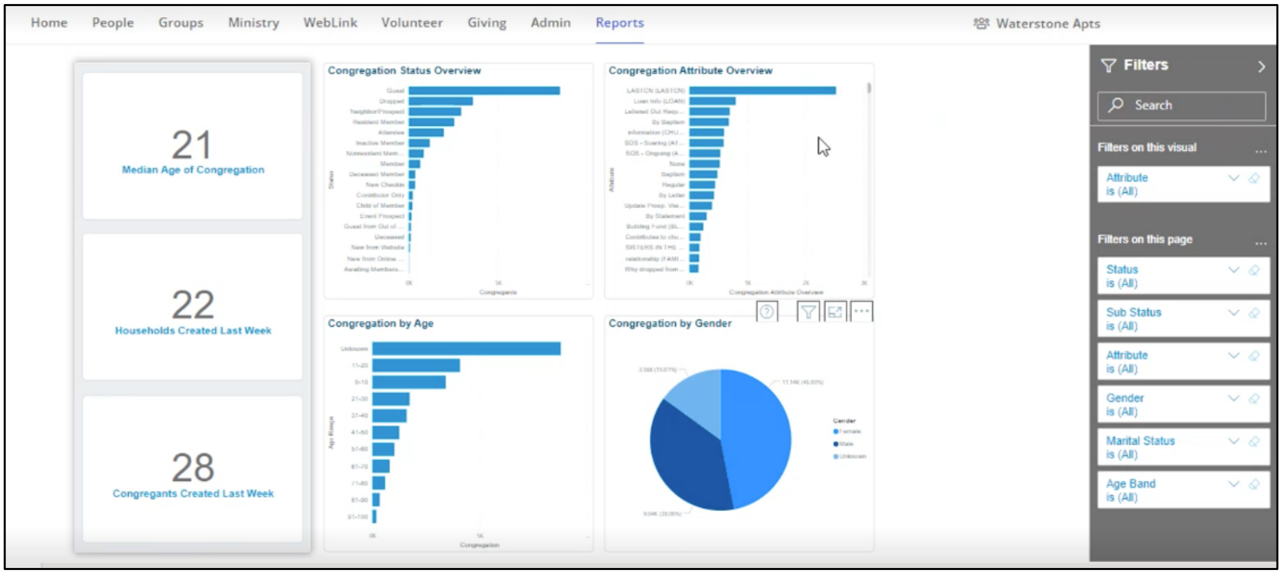
You will find Insights by clicking the **Reports** tab in FellowshipOne. Depending on the security rights you've been given, you will see under the Insights column your dashboard options for accessing Insights – Overview, or both Overview and Church Demographics.

Overview vs. Church Demographics

The two available dashboards for Insights will each give you a deeper look into various areas of your church data.

OVERVIEW: This dashboard allows you to take a look into the contributions, activity head count, and activity attendance for your church and ministries. The Overview dashboard gives you a quick snapshot of the past week's information, but the data is also customizable using filters.

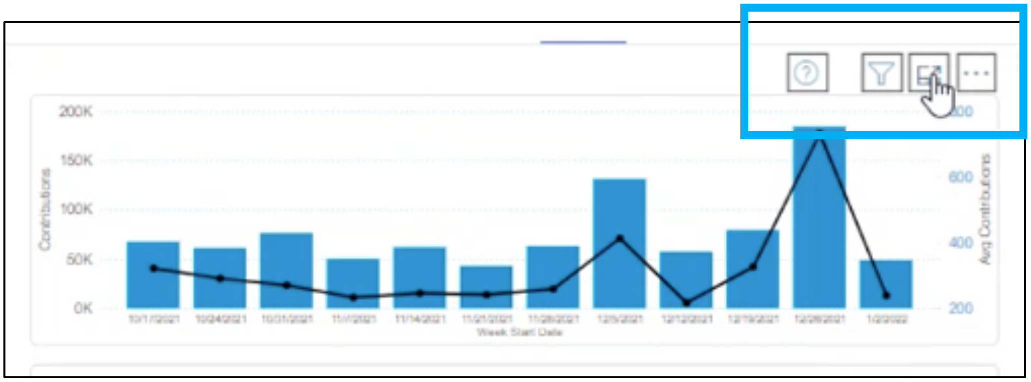
CHURCH DEMOGRAPHICS: This dashboard allows you to take a look into the demographics of your church and ministries, including the median age of congregation, the number of households created in the last week, and the number of individuals created in the last week. The Church Demographics dashboard also lets you see a breakdown of your church members by status, attribute, age, and gender. All of the data is customizable using filters.

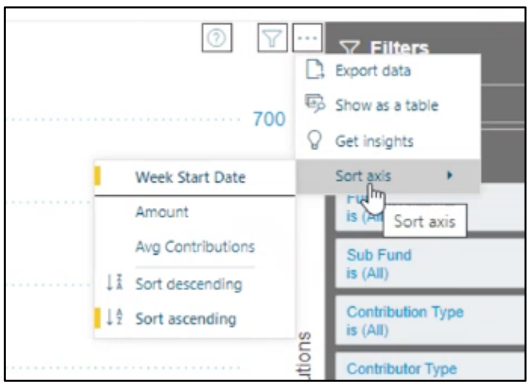


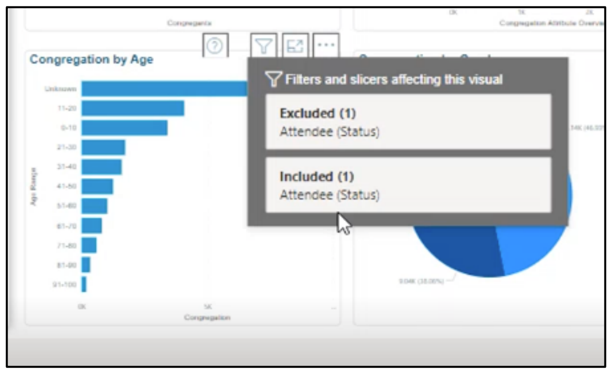
Navigating Insights

The two Insights dashboards are easy to use and contain many of the same elements including a high-level overview, detailed data tiles, and a filter menu. We'll go over filters in the next section of the Quick Start Guide.

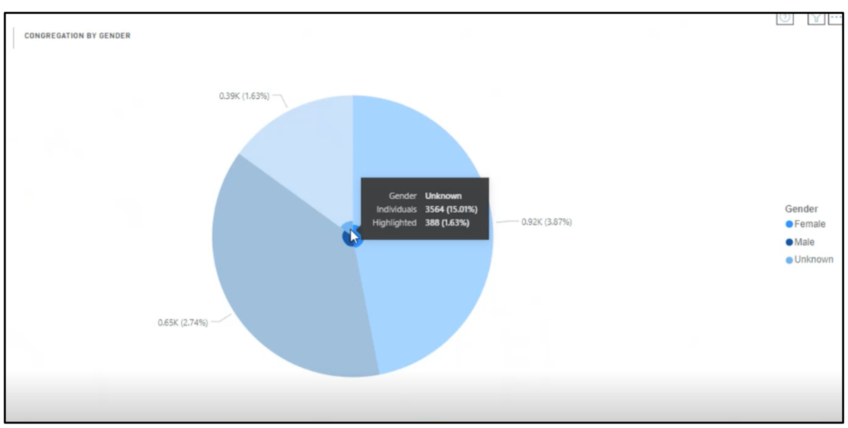
Each tile on the dashboard contains an additional menu when you click inside that tile. This menu allows you to view more information about the specific data showing in that tile, see what filters are currently applied to that data, view the tile in Focus mode (on a new page), and to see additional options including to export the data, sort the axis, or show the data as a table.

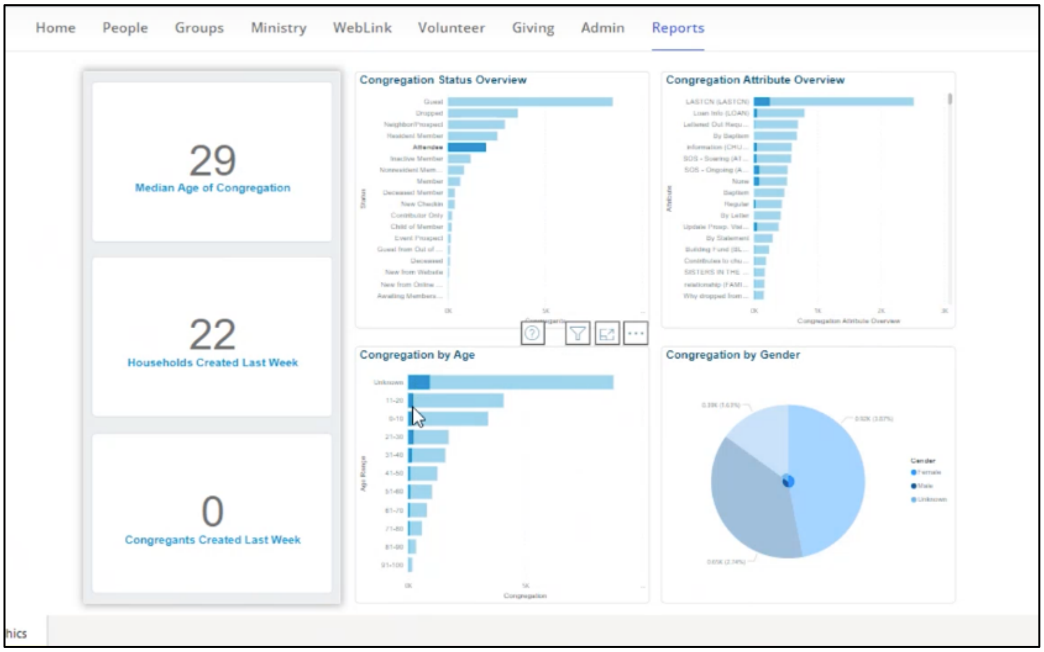




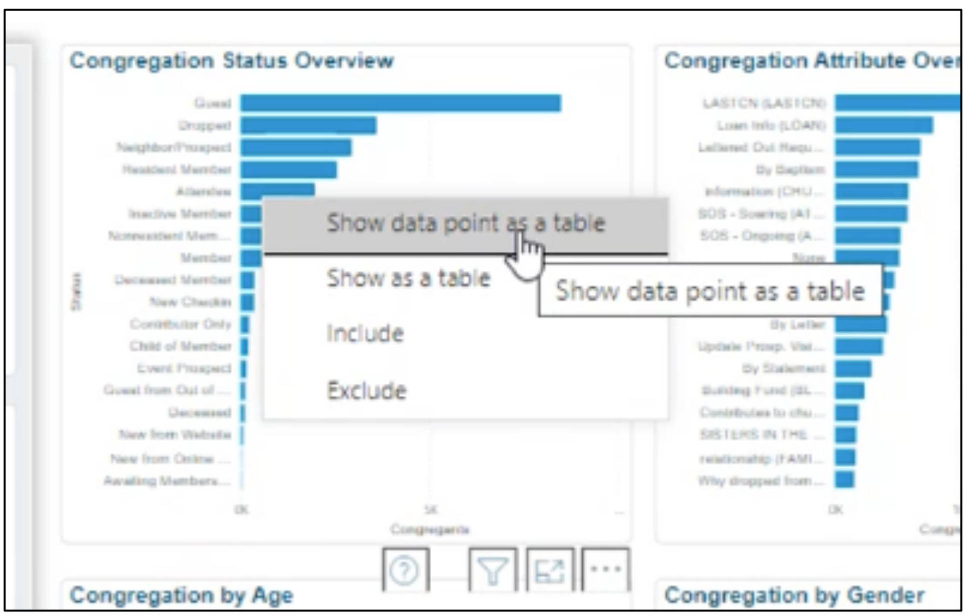


When you click a data point within a tile, all of the other tiles adjust to highlight the selected data within the data showing on that tile. For example, on the Church Demographics dashboard, when you click the "Attendee" data point on the Congregation Status Overview tile, the Attendee information will be highlighted on all the other tiles in both the dashboard and Focus view.





Right-clicking on a data point in a tile will open up an additional menu of options that allows you to view that specific data point as a table, or to include/exclude that data point within the data set you're viewing. This can be done in both the dashboard or Focus view.

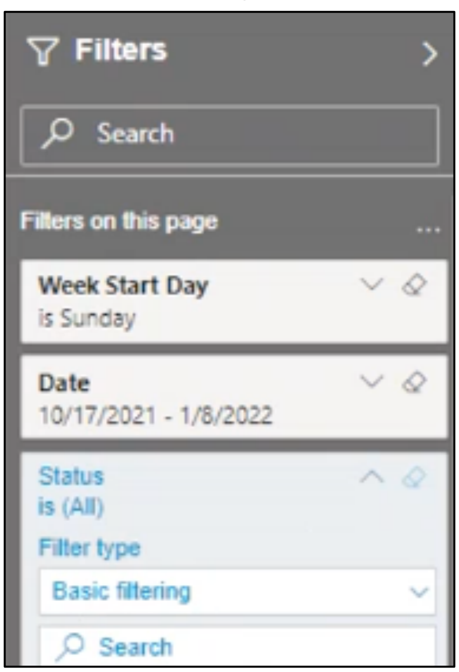


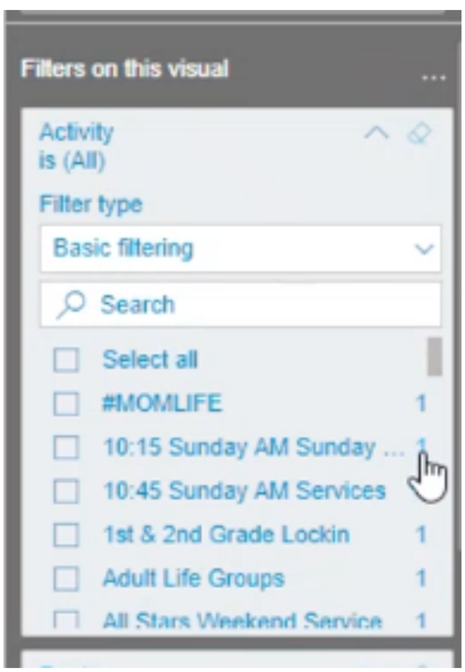
Hovering your mouse over a data point in a tile in the dashboard or in Focus view will give you more specific information about that specific data point.

Using Filters

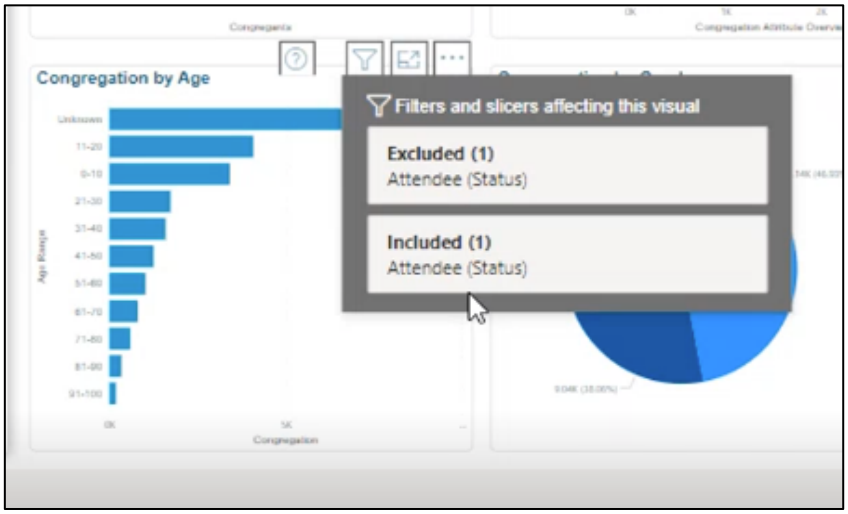
The filters in Insights allow you to change the data shown on an entire dashboard or within a specific tile. The filters are also searchable, allowing you to find and alter the data you're looking for quickly and easily. The filter menu is always shown on the right side of the screen, and can be collapsed or expanded at any time.

There are two main areas of the filter menu. **Filters on this page** show the filters that apply to every data set shown on the dashboard. **Filters on this visual** show the filters that apply to a specific data tile that is actively selected.





You can easily see which filters are applied to a data tile. Once you've clicked in the white space of a tile to select it, click on the filter menu to see which specific filters have been applied.



Exporting Data

When you have filtered through your data and finally have the information you were looking for, it's easy to export that data to view and use later or share with another staff member. This can be done from both the dashboard and Focus views.

With the data tile selected or when viewing a data set in Focus view, click the additional options tri-dot menu and then click **Export Data**. A pop-up menu will appear asking to confirm how you'd like your export to appear. Once exported, you will have the data from Insights in a CSV or Excel format.