

AWARDS InSights is a powerful business intelligence and health analytics tool that supercharges your AWARDS data into live interactive dashboards. This **Quick Start Guide** is designed to jump-start you on your path to using InSights, and to provide you with quick and easy access to other valuable resources that can help guide you on your journey.

**Topics Covered:** [Access](#) | [InSights Basics](#) | [Analytics](#) | [Pulse](#) | [Frequently Asked Questions](#) | [Learn More](#)

## Access

InSights automatically pulls data from your AWARDS database but is accessed *separately* from AWARDS.

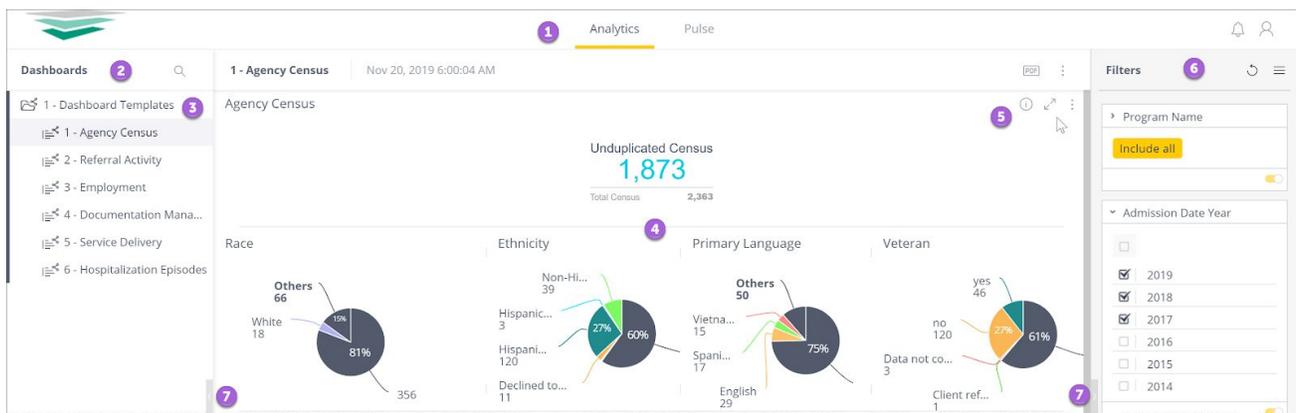
1. Navigate to <https://insights.footholdtechnology.com>
2. Enter your **InSights credentials** and click **Login**.

✳ **Tip:** If you forget your password, you can recover it by clicking the link on the login page. If you don't receive the password recovery email, please contact the Foothold Help Desk for further assistance.

A Welcome screen is displayed. From there, you'll navigate to your data dashboards and other key InSights tools.

## InSights Basics

Understanding the basics of how InSights is structured will provide you with the foundation for your work there. The following screenshot shows a view of InSights once you have navigated to a dashboard, and highlights some of the key system components you'll be working with.



- 1 **Analytics and Pulse** - **Analytics** is your primary InSights workspace, where dashboards are displayed and worked with. **Pulse** is a centralized view of those pieces of data from any dashboard that you set as being most valuable to you. It is also where you can manage alerts so that you are emailed when pre-defined thresholds are hit. Links are available at the top of the Insights page to toggle between the **Analytics** and **Pulse** tools.

**2 Dashboards Pane - Dashboards** are your starting point for work in the system, with each dashboard designed to focus on a specific set of related AWARDS data variables for the purposes of analyzing key components of how your agency operates. All dashboards are accessible from the left-hand menu pane (which also contains a search option), and from the bottom of the *Welcome* page via Search or an All/Recent dashboards display.

**3 Dashboard Templates - Dashboard Templates** are a set of templates pre-built for you by Foothold Technology. To access them click the folder in the left-hand pane, and then click any of the listed dashboards to view it. Examples of available templates:

Template	Can be used to analyze...
Agency Census	Current agency census, broken down by various demographic data variables.
Referral Activity	Referral and admission trends over time - including the conversion rate for referral to admission and average conversion time - along with deeper dives into demographics related to referrals.
Employment	Employment trends, including the average number of interviews before an individual is hired. Which programs are doing well at placing their clients and which aren't?
Documentation Management	Productivity, including how many notes workers are writing, what types of services are being provided, and service duration aggregates.
Service Delivery	Trends within the population you're serving, including types of services clients are receiving and which insurances and diagnoses those clients have.
Hospitalization	Hospitalization outcomes, including tracking whether programs are reducing hospitalizations, helping clients stay out of the hospital, and quickly engaging with clients post hospitalization.

**4 Widgets** - Within dashboards each individual data variable from AWARDS is represented by a **widget**. Widgets are visualizations such as pie charts and graphs that help you look at specific data values and from there drill down into those values to get in-depth views.

**5 Widget Tools** - Each widget has a set of **tools** in its upper-right corner, accessible when you move your mouse cursor into that portion of the screen.

Tool	Description
	<b>Clear Selection</b> - Available when you have selected or drilled down into a widget's data. Clears your selections from the dashboard and filters and returns the widget to its original default display.
	<b>Info</b> - Click to view full widget details, including the date and time at which the data set was last updated and a description of that data set, if available.
	<b>Full Screen</b> - Click to expand the widget to full screen mode. Useful for viewing graphs and charts in more detail. From full screen you can choose to apply selections / drill-downs you make to the main dashboard view if needed.
	<b>Options</b> - Click to access a menu from which the widget can be downloaded as a PDF or image or, when applicable, added to your Pulse view and alerts.

**6 Filters Pane - Filters** change what data is presented in the dashboard across ALL widgets, and enables you to focus on data subsets such as a specific timeframe or worker.

Tool	Description
	<b>Reset my default filters</b> - Returns the filter selections to the default setting.

- 7 Show / Hide Toggles** - Need more screen real estate to dig into a dashboard? The **Show/Hide Toggles** allow you to adjust which panes are displayed on the screen.

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## Analytics

All of your InSights dashboards are accessible from within **Analytics**. To get started:

1. If it's not already selected, click **Analytics** at the top of the InSights page.
2. From the left-hand **Dashboards** pane, select or search for the dashboard to be worked with.

The selected dashboard and all of its widgets are displayed in the central viewing pane. You're now ready to dig in.

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★ **Important!** *Keep in mind that when you are using a shared dashboard (such as the pre-built Dashboard Templates provided by Foothold Technology), any changes you make to the dashboard using the instructions provided below only affect your local copy. To revert back to the original version at any time, click the dashboard's **Options** icon > **Restore Dashboard**.*

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## Showing / Hiding Widget Data

When a widget has a legend beneath it, any of its data elements can be hidden as needed. Doing so omits the data for that element from the widget display, which can help you see how other elements interact with one another.

- **To hide a data element** - Click it in the legend. It is then grayed out and removed from the widget display.
- **To show a hidden data element** - Click the grayed out item in the legend to restore it to the widget.

## Filtering Data

Filtering data changes what's presented in the dashboard across ALL widgets, enabling you to focus on data subsets. Filtering can be done in two ways:

- **From the filters pane** - In the filters pane on the right-hand side of the page you'll see any filters that were created by the dashboard designer. Those filters can be:
  - **Enabled / disabled** - To turn a filter off entirely, click the toggle in the bottom right corner of that filter box. When the toggle is yellow the filter is enabled. Gray is disabled.
  - **Edited** - To adjust how a filter is working (for example to narrow or expand a date range), it must be edited. In some cases that can be done directly in the filters pane by selecting and de-selecting options. In other cases, you'll need to click into the filter using the **yellow button** or **pencil** icon, make your changes, and then click **OK** to save/apply.

To set your filters back to their defaults at any time, click the **Refresh** icon in the top-right corner of the filters pane.

- **Within a widget** - To filter on a single data variable within a widget, **left-click** that variable or **right-click** > choose **Select**. To select multiple variables, press <Ctrl> and then **right-click** > choose **Select**. In either case a dashboard filter is automatically added for the selected item(s), and applied across all widgets in the dashboard.

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✦ **Tip:** Like how you've set your filters and want to make them your standard view for this dashboard? Click the **Menu** icon in the top-right corner of the Filters Pane > **Set as My Default Filters**.

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## Drilling Down into Data

Drilling down into the data within a widget gives you an in-depth, granular view of a selected value.

1. **Right-click** the widget data element > select **Drill Into**.
2. In the *Drill Into Field* window that is displayed, search for and/or select the additional dimension to be looked at.
3. The widget is automatically refreshed for your selection.
4. When you're done, click the **x** at the top of the widget to close the drill down and return to the previous display.

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✦ **Tip:** When working with a pie chart widget there is an additional drill down option; specifically, if there are several small slices they are combined into an "Other" slice. Click **Other** to see a second pie chart that breaks down the elements aggregated into the Other category. Click the yellow **Back** button to return to the full display.

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## Downloading Data

Your dashboards and widgets can be downloaded from InSights in various forms for work outside of the system and are great tools to share with your teams.

- **Download a Dashboard as a PDF or Image** - From the Dashboard Panel, or while the dashboard is being viewed, click the **Options** icon. Click **Download** > select **Download PDF** or **Download Image**.
- **Download a Widget as an Image or CSV File** - While the corresponding dashboard or widget is displayed, click the **Options** icon > **Download** > select **Image** or **CSV File**.

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## Pulse

InSights' **Pulse** is a great way to stay up to date with your agency's Key Performance Indicators (KPIs). By adding KPIs from different dashboards to Pulse, you can get a comprehensive picture of your data in one location. Not only that, but by using the **alerting** component of Pulse, you can easily track pre-defined events such as milestones or minimum thresholds and have emails sent to you when a monitoring target is hit.

### Add a Widget to Pulse / Setting Alerts

1. From **Analytics** view, click the **Options** icon for the widget to be added > **Add to Pulse**.

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 **Note:** Not all widgets are available for use with Pulse.

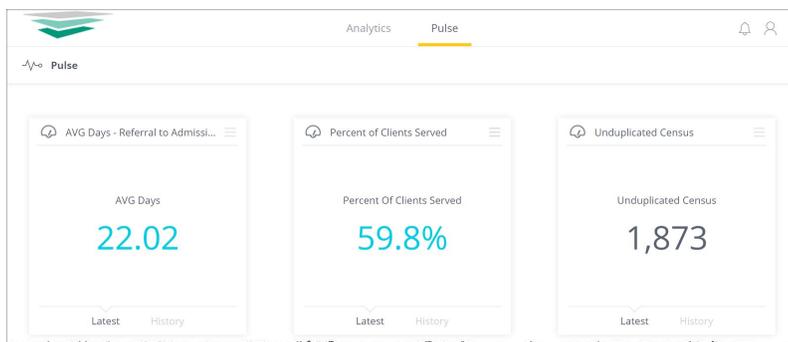
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2. Configure the options in the *Add to Pulse* window. Keep in mind that while an alert condition must be specified, alerts can later be turned off for this widget or adjusted as needed.
3. Click **Add**.

## Viewing Pulse

To access the Pulse view, click the **Pulse** link at the top of the InSights page.

A simplified version of each widget previous added to Pulse is displayed here. At the bottom of each widget are **Latest** and **History** options, to allow you to toggle between current and historical views of the corresponding data.



**Tip:** Historical data is not immediately available after adding a value to Pulse.

## Managing Pulse Widgets and Alerts

To manage the settings of existing Pulse widgets, including their alerts:

1. If it's not already selected, click **Pulse** at the top of the InSights page.
2. Click the **Menu** icon in the top-right corner of the widget. From there you can choose to:
  - **Edit** - Click to adjust the settings for the widget's Pulse view, including its name, filter(s), and alert threshold.
  - **Duplicate** - Click to create a second view of the widget in Pulse for the purposes of using different settings.
  - **Turn Off** or **Receive Notifications** - Click to turn off related alerts or turn them back on, respectively.
  - **Delete** - Click to remove the widget from Pulse, along with any alerts set for it.

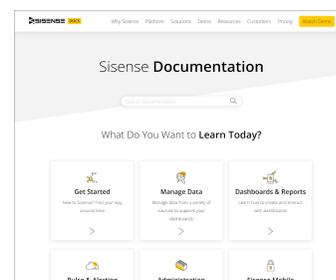
## Frequently Asked Questions

### What Is An Integer Date Filter, and How Do I Use It?

In AWARDS we define a date range for a roster by a range of two dates, meaning that anyone admitted in the program in that date range would have their records display in the date range. In AWARDS InSights that would require usage of a “greater than/less than or equal to modifier” to see “in range” historical data. This is not presently supported by the typical date filters. As a result, if you'd like to view historical data in a range we can enable **Integer Date filters**, which can do the necessary “greater than/less than or equal to” modifiers. When dates are expressed as integers ex: 20200425, the more recent the date the higher the number and the older the date, the lower the number.

## Learn More

Insights is a comprehensive solution that includes all of the training, service, and support that you've come to know and love from Foothold, available at all times in our secure cloud and powered by [Sisense](#).



In addition to Foothold-provided resources like this Quick Start Guide and AWARDS Online Help, Sisense provides its own comprehensive documentation that can help you take your InSights use to the next level.

Access the full Sisense documentation system at <https://documentation.sisense.com/>.

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 **Tip:** Start with the **Dashboards & Reports** module > **Interacting with Dashboards**.

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