

ANOTHER  
"MP"  
WEBINAR

# RECORD INSIGHTS

## HOW-TO



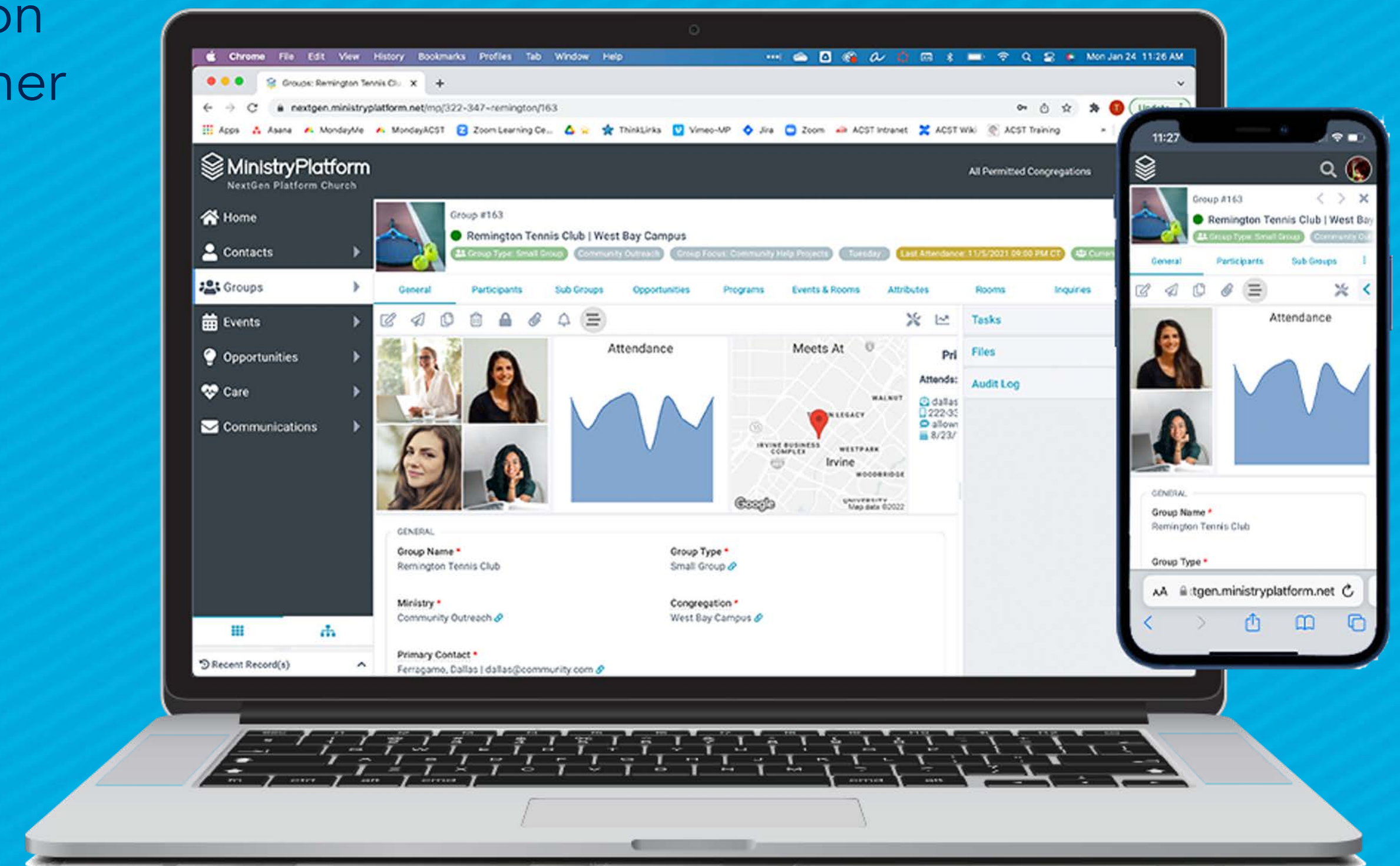


# WHAT ARE THEY AGAIN?

## INSIGHT:

1. The power or act of seeing into a situation
2. The act or result of apprehending the inner nature of things or of seeing intuitively

Record Insights give access  
to see more deeply at a glance!





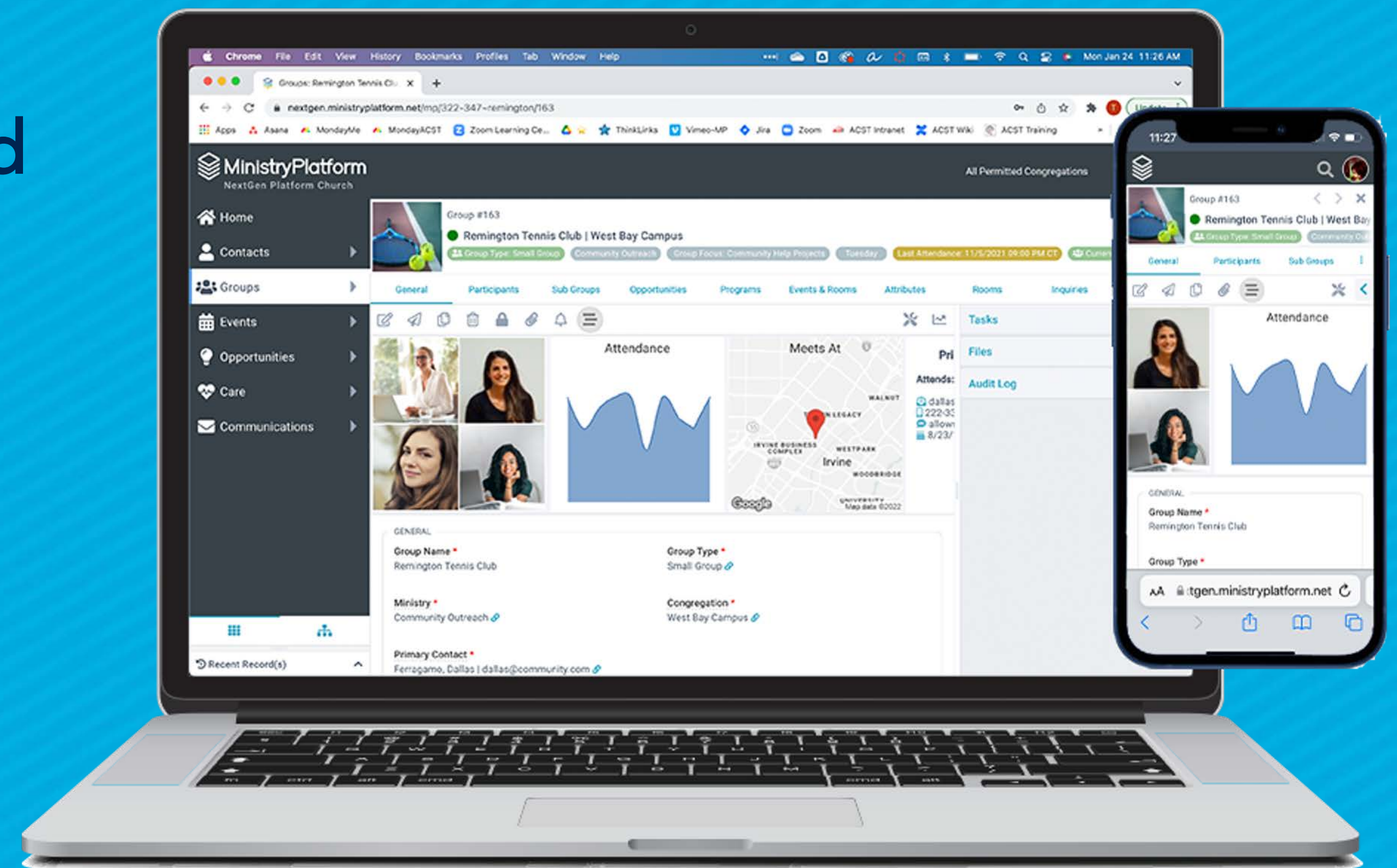


# WHERE DO THEY LIVE?

On ANY PAGE throughout the system

Record insights display on the  
**GENERAL** tab of an open record

They are controlled via the  
**INSIGHTS** page in the  
"System Setup" folder\*



\*System Setup should only be accessed by very limited users at your organization.





# WHAT ARE THE OPTIONS?

- **Image Collection:** A view-based collection of images associated with the record.
- **Single Image:** A single image associated with the record—but not necessarily the default image, because you get to do YOUR church YOUR way.
- **Map:** A map showing a single location, for example, a Group meeting location or Household address
- **Multi-Map:** Because sometimes one location just isn't enough, a view-based collection of locations displayed on a map.
- **Chart:** A view based chart of information related to the record
- **Text & Token:** A flexible, completely customizable HTML-based insight highlighting what matters most to YOUR church





# UNDERSTANDING THE INSIGHT RECORD

**Title:** Shows on Insight

**Page:** Where does this live?

**Sub Page View:** Optional –  
Where the data lives

**Template:** Format determined  
by Insight type

**View order:** Order of insights  
per page

**Active:** Is this viewable or not?

The screenshot shows a web form for editing an insight record. At the top, it says 'Insight #28' and 'Family Pic | Contacts' with a green status dot. Below this is a 'General' tab. A toolbar with icons for edit, delete, lock, and other actions is visible. The form fields include:

- Title \***: Family Pic
- Page \***: Contacts (with a link icon)
- Sub Page View**: (empty field)
- Template \***: { Image: pageId=327, recordId=[Household\_ID\_Table.Household\_ID],text='Family Photo' }
- View Order \***: 1
- Active \***: Yes





# TIPS BEFORE YOU START

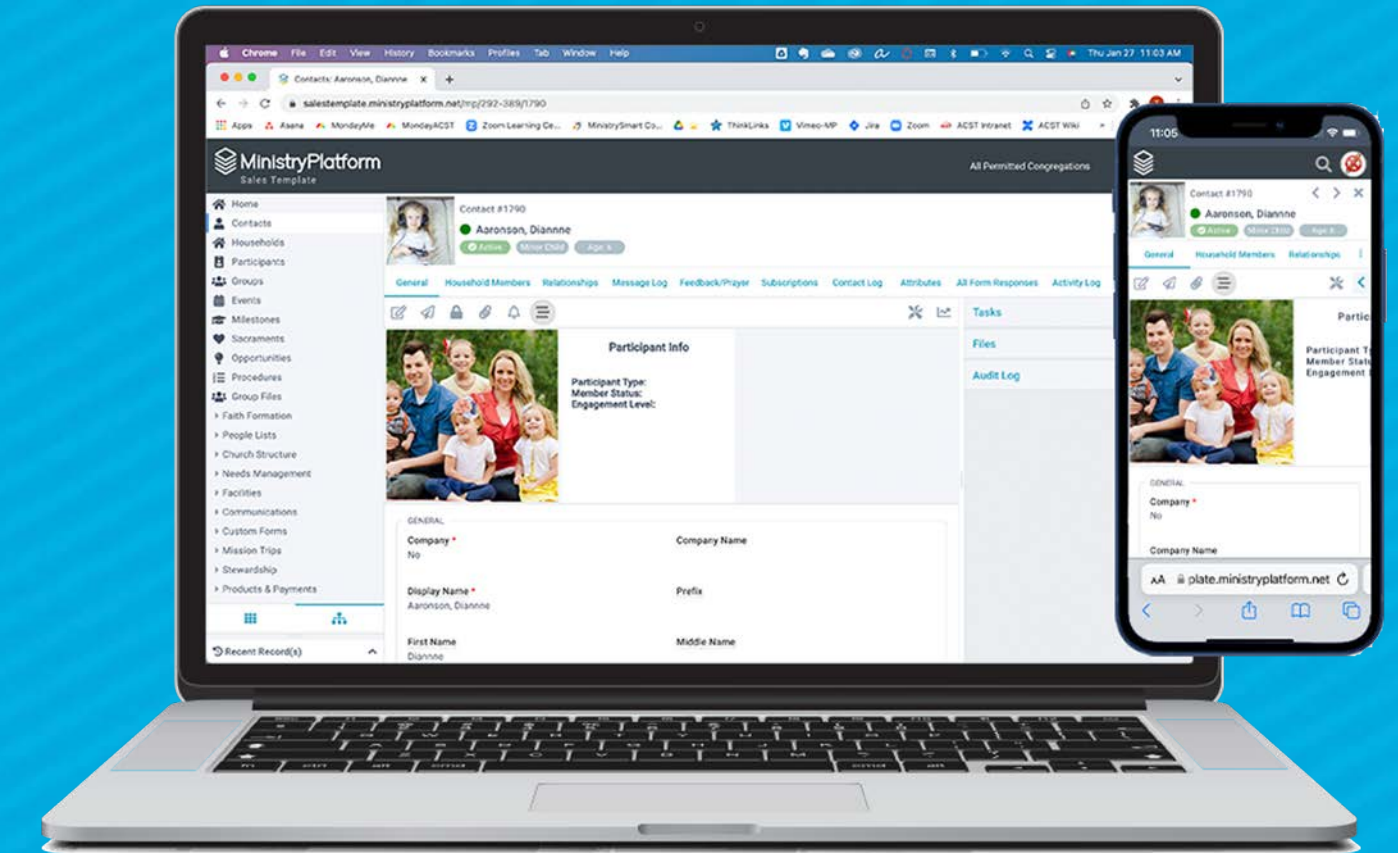
- Template Field
  - Always work in source code (click the <> button)
- Field names: Entire field name should be in one set of brackets
  - Advanced view creator:  
Household\_ID\_Table\_Address\_ID\_Table.[Address\_Line\_1] AS [Address Line 1]
  - Field for Insight:  
[Household\_ID\_Table\_Address\_ID\_Table.Address\_Line\_1]
- Use the KB!
  - The KB has template codes for all of the Record Insights
- Use Existing!
  - Copy and edit existing Record Insights as a GREAT starting point





# SINGLE-IMAGE

- **Template Needs:**
  - **Page ID of the Page where the image lives**
    - `PagelD=314` - Find on Pages page
  - **Record ID - Primary key of page where image lives -**
    - `recordId=[Group_Focus_ID_Table.Group_Focus_ID]` - find using Advanced Search
  - **Label Field or Label - dynamic or static - find with Advanced Search**
    - `text=[Group_Focus_ID_Table.Group_Focus]` OR `'text=label'`



Code Samples:

```
{ Image: pagelD=314,  
  recordId=[Group_Focus_ID_Table.Group_Focus_ID],text=[Group_Focus_ID_Table.Group_Focus] }
```

```
{ Image: pagelD=314, recordId=[Group_Focus_ID_Table.Group_Focus_ID],text=    'Label' }
```

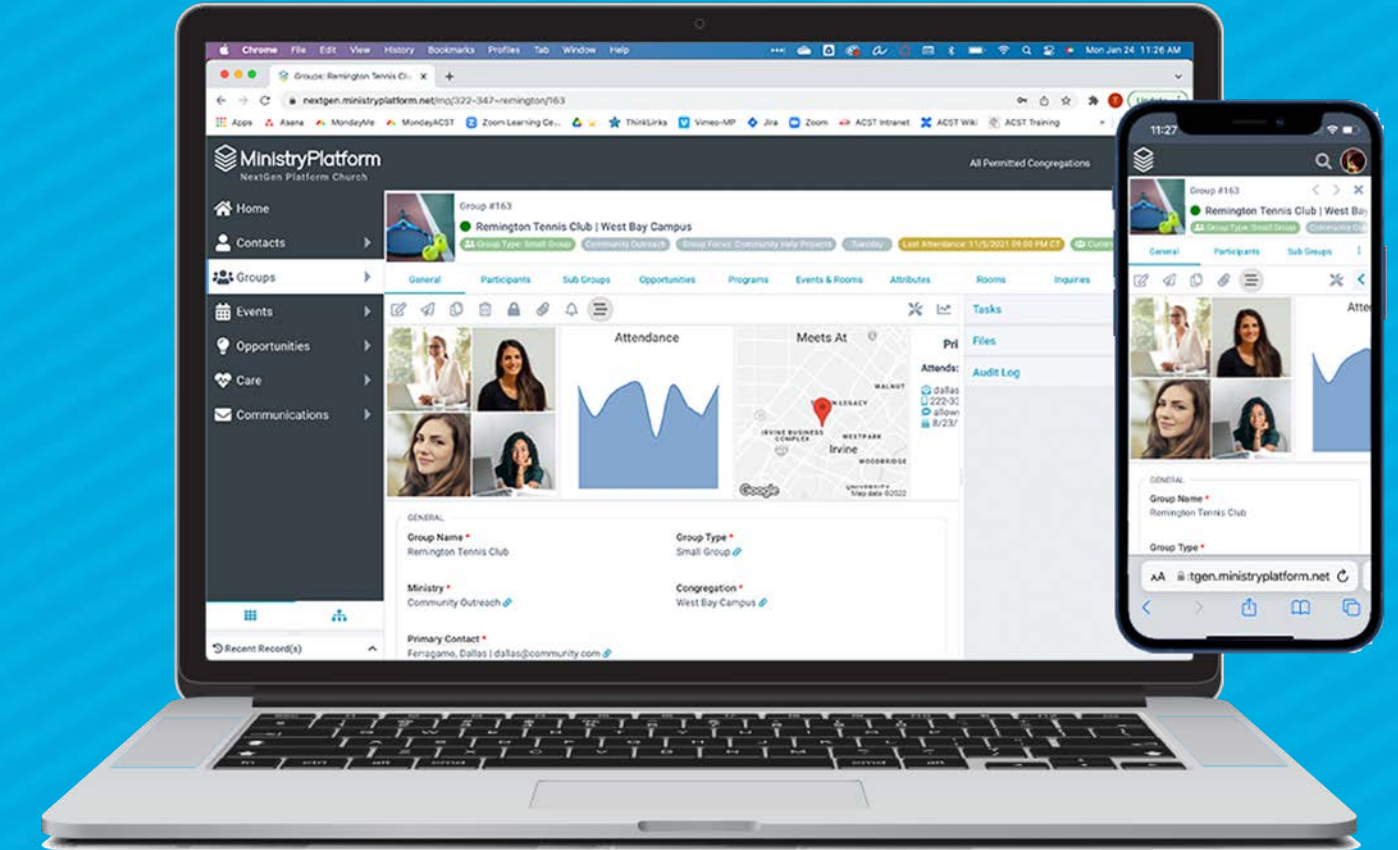




# IMAGE-COLLECTION

- **Template Needs:**
  - **Subpage View**  
(Use the Record tabs)
    - View is used for Filter  
(Grid will display 4-16 images)
  - **Sub-page Image Reference Field**
    - **Determines WHICH image displays**

Code Sample:  
{ImageCollection}



GENERAL	
<b>Title *</b> Group Leaders	<b>Page *</b> Groups <a href="#">🔗</a>
<b>Sub Page View</b> Leaders <a href="#">🔗</a>	
<b>Template *</b> {ImageCollection} <a href="#">🔗</a>	
<b>View Order *</b> 5	<b>Active *</b> Yes



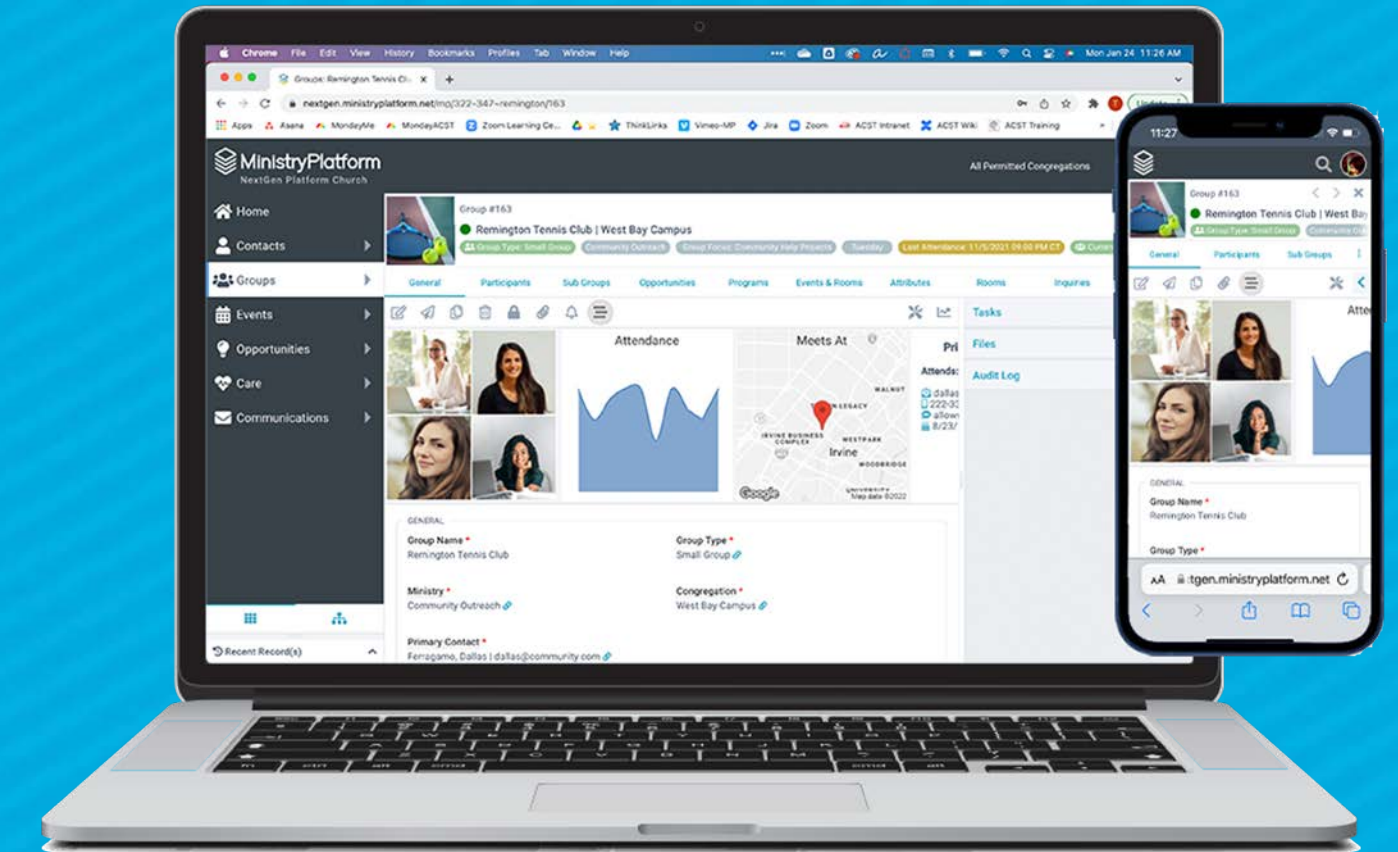


# MAP

- **Pre-Requisite:**
  - **Google Maps API Key**
    - View is used for Filter (Grid will display 4-16 images)
- **Template Needs:**
  - **Map Name: (Field Lookup)**
    - name=Offsite\_Meeting\_Address\_Table.Address\_Line\_1] -Use Advanced Search
  - **Map Latitude: (Field Lookup)**
    - lat=[Offsite\_Meeting\_Address\_Table.Latitude] - Use Advanced Search
  - **Map Longitude: (Field Lookup)**
    - lon=[Offsite\_Meeting\_Address\_Table.Longitude] - Use Advanced Search

Code Sample:

```
{Map: name=[Offsite_Meeting_Address_Table.Address_Line_1],  
lat=[Offsite_Meeting_Address_Table.Latitude], lon=[Offsite_Meeting_Address_Table.Longitude] }
```





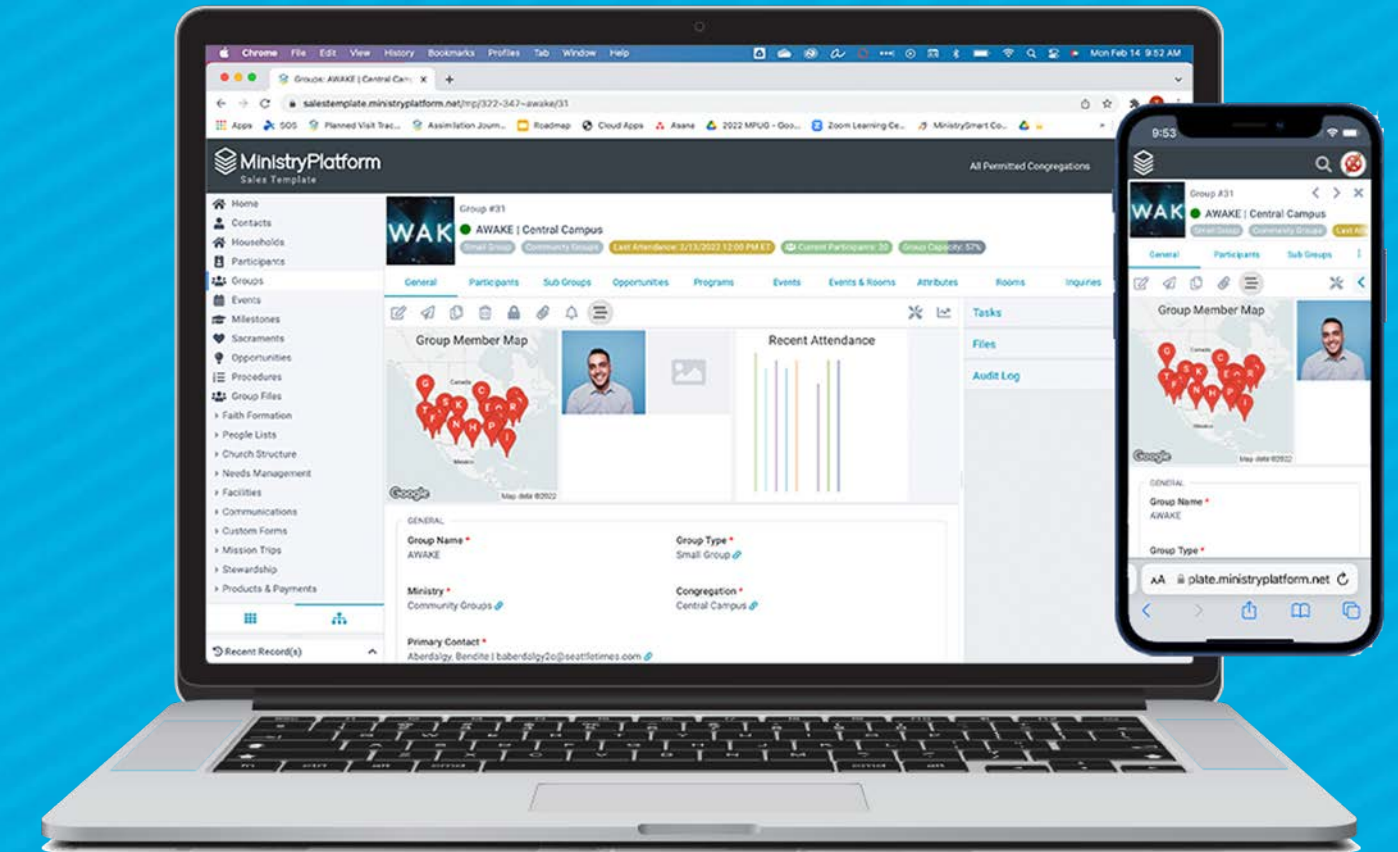


# MULTI MAP

- **Pre-Requisite:**
  - **Google Maps API Key**
    - View is used for Filter (Grid will display 4-16 images)
- **Subpage View (Use the Record tabs)**
  - View MUST include Latitude & Longitude
  - View MUST include a Name Field for the Pins
- **Template Needs:**
  - **Name: (View Field)**
    - [Address Pin] - Use Field Alias
  - **Map Latitude: (View Field)**
    - lat=[Latitude] - Use Field Alias
  - **Map Longitude: (View Field)**
    - lon=[Longitude] - Use Field Alias

Code Sample:

```
{MultiMap: name=[Address Pin], lat=[Latitude], lon=[Longitude] }
```



## View Field List:

Participant\_ID\_Table\_Contact\_ID\_Table.[Display\_Name] AS [Display Name],  
Group\_Role\_ID\_Table.[Role\_Title] AS [Role Title],  
Participant\_ID\_Table\_Contact\_ID\_Table\_Household\_ID\_Table\_Address\_ID\_Table.[Address\_Line\_1] AS [Address Pin],  
Participant\_ID\_Table\_Contact\_ID\_Table\_Household\_ID\_Table\_Address\_ID\_Table.[Latitude] AS [Latitude],  
Participant\_ID\_Table\_Contact\_ID\_Table\_Household\_ID\_Table\_Address\_ID\_Table.[Longitude] AS [Longitude]





# CHART

- **Subpage View (Use the Record tabs)**
  - View **MUST** include the X & Y axis
- **Template Needs:**
  - **Chart Type:**
    - [Type=Spline] - Use KB
  - **X: (View Field)**
    - x=[Activity Date] - **Use Field Alias**
  - **Y: (View Field)**
    - y=[Count Per Month] - **Use Field Alias**

Code Sample:

```
{ Chart: type=spline, x=[Activity Date], y=[Count Per Month] }
```

## View Field List:

```
CONVERT(date, Activity_Log.[Activity_Date])  
AS [Activity Date], (SELECT  
COUNT(AL.[Activity_Log_ID]) FROM  
Activity_Log AL WHERE AL.[Contact_ID] =  
Contact_ID_Table.[Contact_ID] AND  
CONVERT(date, AL.[Activity_Date]) =  
CONVERT(date, Activity_Log.[Activity_Date]))  
AS [Count Per Month]
```





# TEXT & TOKENS

- Template Needs:
  - HTML & Field names
  - Design your own!
  - Ensure to use source mode (<>)!

Chris - Take us away!