

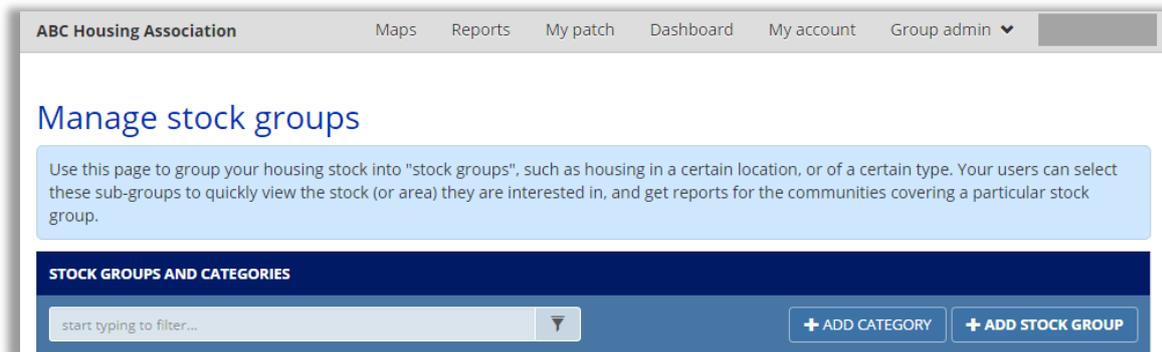
How to create stock groups and generate reports in Community Insight

NB: You need to be a Power User or a Group Admin to use these features.

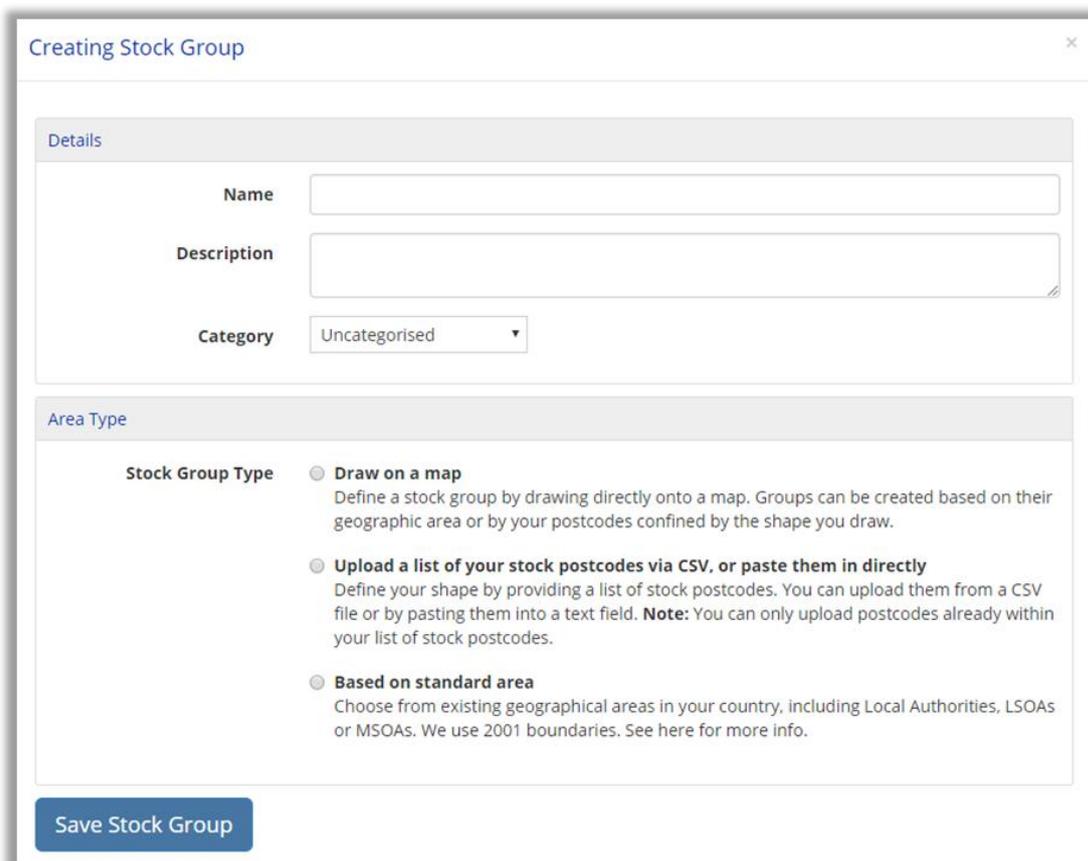
There is in-depth [guidance on creating stock groups](#) available on the Knowledge Base

Creating stock groups

On Community Insight navigate to *Group Admin -> Manage Stock Groups -> Add Stock Group*



- Name your stock group and provide a description.
- The description is not required but it is a useful way to explain to others within your organisation how and why the group was created.
- Then, there are three methods of creating stock groups within Community Insight.

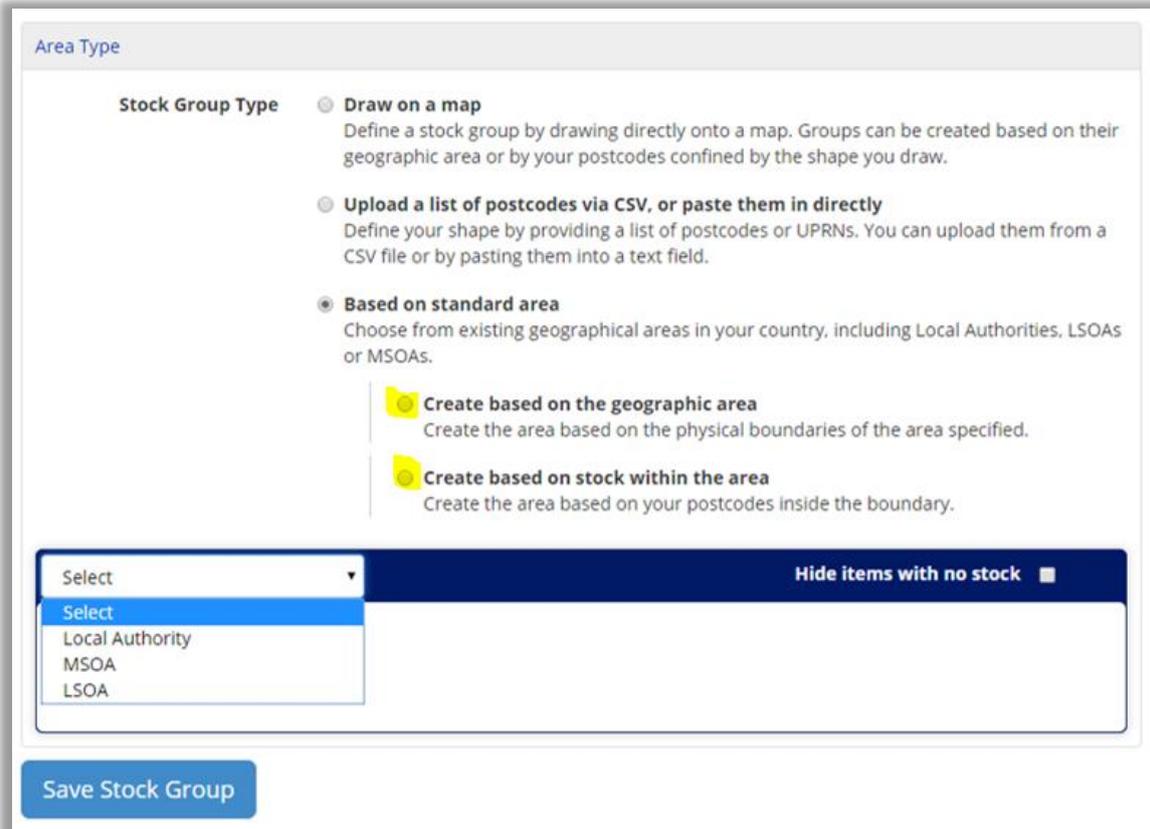


The 'Creating Stock Group' form is divided into two sections: 'Details' and 'Area Type'. The 'Details' section has three fields: 'Name' (text input), 'Description' (text area), and 'Category' (dropdown menu with 'Uncategorised' selected). The 'Area Type' section is titled 'Stock Group Type' and has three radio button options: 'Draw on a map' (selected), 'Upload a list of your stock postcodes via CSV, or paste them in directly', and 'Based on standard area'. Each option has a brief description. At the bottom of the form is a blue 'Save Stock Group' button.

Based on standard area:

Use this method to create areas based on one or a selection of LSOAs, MSOAs or Local Authorities.

1. There are two options for how your area is created. Choose between:
 - a. 'Create based on the geographic area': This will create an area based on all constituent areas that have been selected
 - b. 'Create based on stock within the area': This will create an area based only on the constituent areas in which you have stock.
2. Select whether you would like to see a list of Local Authority areas, MSOA areas or LSOA areas
3. Use the hide items with no stock box in the bottom right corner to hide standard areas where you have no stock. This will make it easier to find your areas. Remember, you can create stock groups where you have no stock, Community Insight contains a full list of all LAs, MSOAs and LSOAs within England
4. You can also select multiple areas at once to create a larger area. Use this if the area which you work in is made up of a number of different LSOAs
5. Click the save button when you are ready to create your stock group



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

Select
Local Authority
MSOA
LSOA

Save Stock Group

Upload a list of your stock postcodes

Use this method to understand in depth the areas where your stock is based.

NB: Any postcodes you upload must be included in your original stock data upload. More information on [managing stock is available on the Knowledge Base](#).

Upload CSV file

1. Specify whether you are uploading using postcodes or UPRNs, or let Community Insight 'Auto-detect'
 - a. 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. For example, if you select the method of detection as postcodes then Row 1 Column A must be your first postcode.

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 your stock postcodes via CSV, or paste them in directly
Define your shape by providing a list of stock postcodes. You can upload them from a CSV file or by pasting them into a text field. **Note:** You can only upload postcodes already within your list of stock postcodes.

Based on standard area
Choose from existing geographical areas in your country, including Local Authorities, LSOAs or MSOAs. We use 2001 boundaries. See here for more info.

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

Data type

Auto-detect ▼

Auto-detect

UPRNs

Postcodes

[Save Stock Group](#)

Paste in a list of your stock postcodes

1. Simply copy your UPRNs or Postcodes and paste them into the box provided. Only paste in UPRNs or Postcodes; no header is required- this will cause an error.

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

Data type

Auto-detect ▼

Paste Postcodes

BN3 3PE

BN3 2DG

[Save Stock Group](#)

Draw on a map

Use this method to create bespoke geographies that do not fit to standard area definitions.

1. There are two options for how your area is created. Choose between:
 - a. 'Create based on the geographic area': This will create an area based on all constituent areas that have been selected

- b. 'Create based on stock within the area': This will create an area based only on the constituent areas in which you have stock.

Area Type

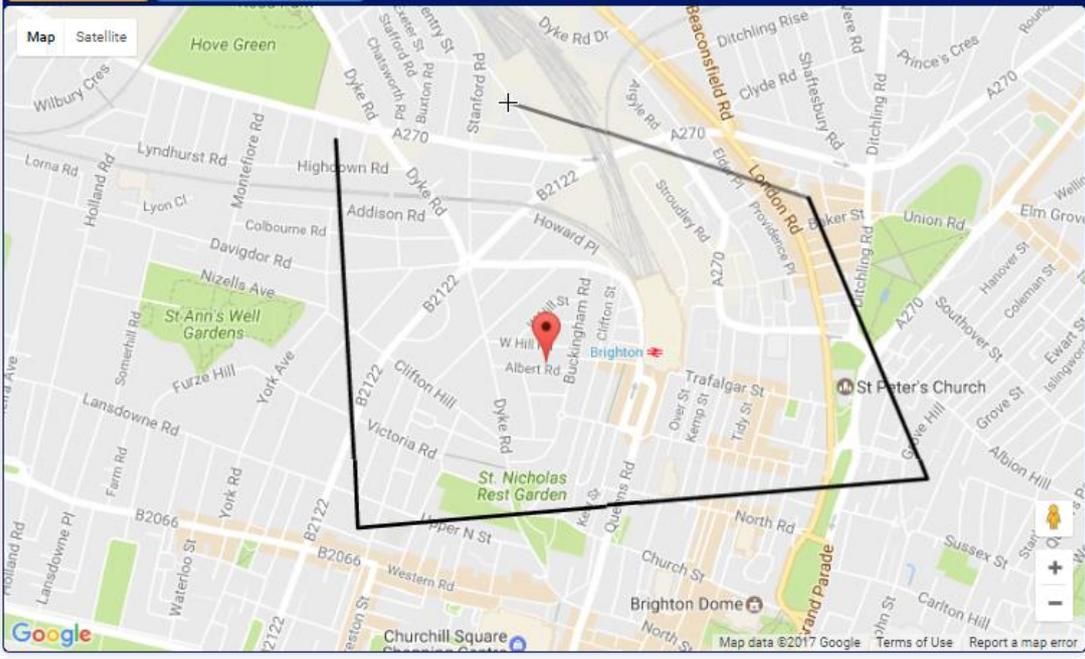
Stock Group Type

- 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.

2. Zoom in / out to the area you are interested in
3. Click your mouse once to leave a point and then move your cursor along.
4. Continue to leave points until your area is completed (the middle should shade in grey)
5. If you would like to start again, simply click *Start Over* in the top left of the box.
6. Once you are happy with your shape, select *Save Stock Group* at the bottom of the page and you will return to the main *Manage Stock Groups* page.

Start Over
Jump to Location
Click to draw on the map. Continue clicking until you have completed your shape.

Map Satellite



Save Custom Area

Generating reports

There is in-depth [guidance on generating reports](#) available on the Knowledge Base.

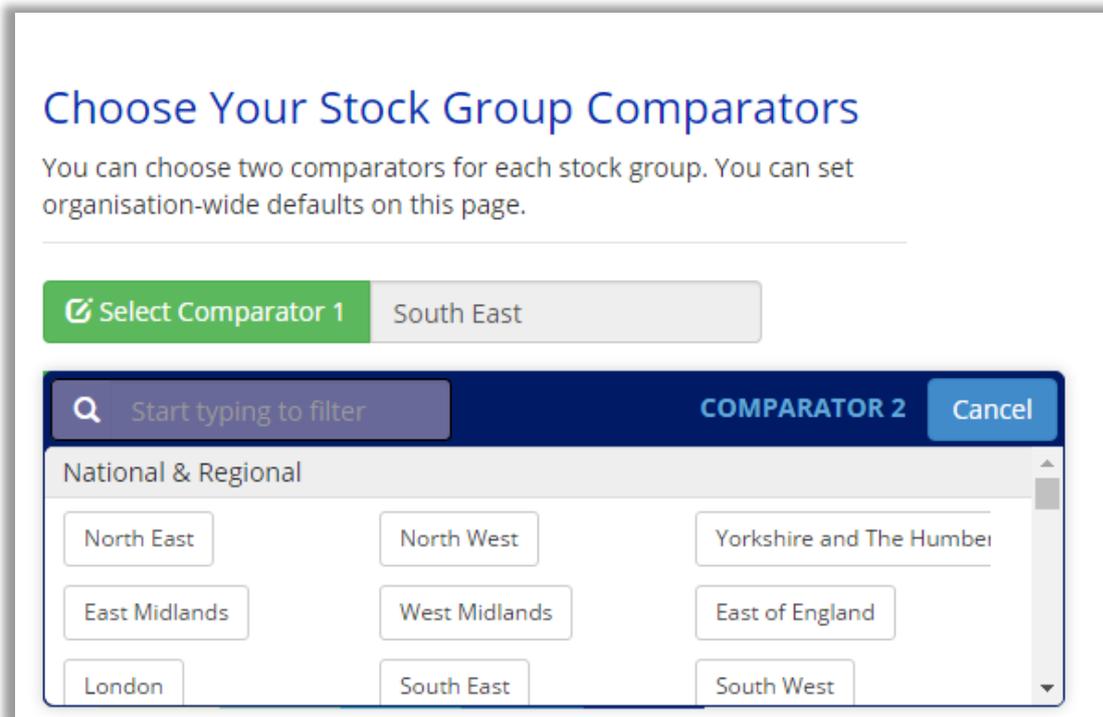
For each stock group that you create, you can generate an in-depth area profile report. The reports are generated in MS Word, so that you can easily re-use the information in your own reports, presentations and publications.

Define your report comparators

NB: Only Group Admins can access this feature

You may choose 2 different areas to compare your stock groups against. Select from either standard National and Regional areas, County areas, Local Authority areas or even your other stock groups.

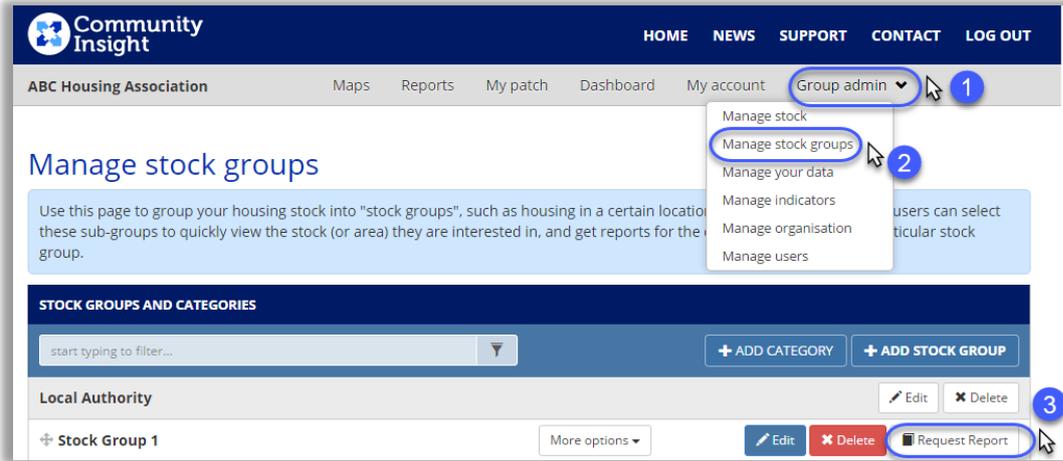
1. Navigate to *Group Admin -> Manage Organisation*
2. In the box called *Choose your stock group comparators*, start typing to find the area you are looking for.



Changing your comparators will affect any future reports you or anybody else in the organisation generates and will not affect any that have been previously generated.

Generate a report

1. Navigate to *Group Admin -> Manage Stock Groups*
2. Find the stock group you would like to request a report for
3. Click the *Request Report* button



Community Insight

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ABC Housing Association Maps Reports My patch Dashboard My account Group admin

Manage stock groups

Use this page to group your housing stock into "stock groups", such as housing in a certain location. These sub-groups to quickly view the stock (or area) they are interested in, and get reports for the group.

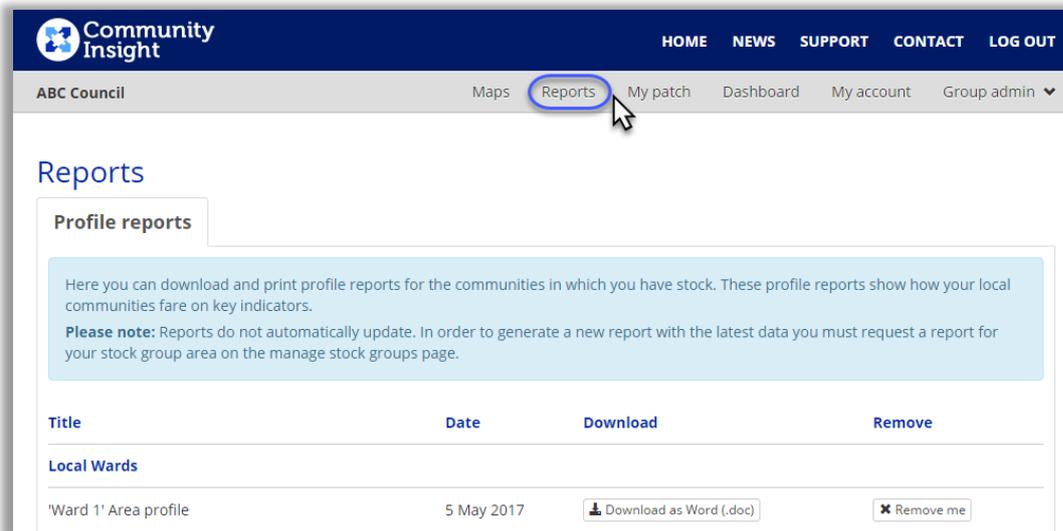
STOCK GROUPS AND CATEGORIES

start typing to filter... [+ ADD CATEGORY](#) [+ ADD STOCK GROUP](#)

Local Authority [Edit](#) [Delete](#)

Stock Group 1	More options	Edit	Delete	Request Report

4. Reports can take up to 30 minutes to generate
5. Once completed, reports can be found in the *Reports* tab to download.



Community Insight

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ABC Council Maps Reports My patch Dashboard My account Group admin

Reports

Profile reports

Here you can download and print profile reports for the communities in which you have stock. These profile reports show how your local communities fare on key indicators.

Please note: Reports do not automatically update. In order to generate a new report with the latest data you must request a report for your stock group area on the manage stock groups page.

Title	Date	Download	Remove
Local Wards			
'Ward 1' Area profile	5 May 2017	Download as Word (.doc)	Remove me