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1. Profiling Overview

This manual covers the management of two modules in Origin; Stats on Maps and Profiling for Origin version 6.7.

1. The **Stats on Maps** module allows authorised users to create interactive map profiles which visually present statistical information to users. The module displays a single map interface to the end user upon which statistical indicators can be overlaid for multiple geographies (Wards, Neighbourhoods, etc.). The user can switch between indicators as layers within the map.
2. The **Profiler** module allows authorised users to create profiles containing multiple indicators for any geographic areas but differs to Stats on Maps because the user views one area at a time, and each area will display all profile indicators on a single spine chart. The module allows users to browse available profiles by geography or theme.

Both these modules are maintained using the Profile Management tool and this document details the process for creating, maintaining and using these profiles. Prior knowledge of data management and publishing is assumed, for further information please check out the Data Manager Manual and the Publisher Manual which are available at:

<http://www.localinformationsystems.co.uk/manuals.aspx>

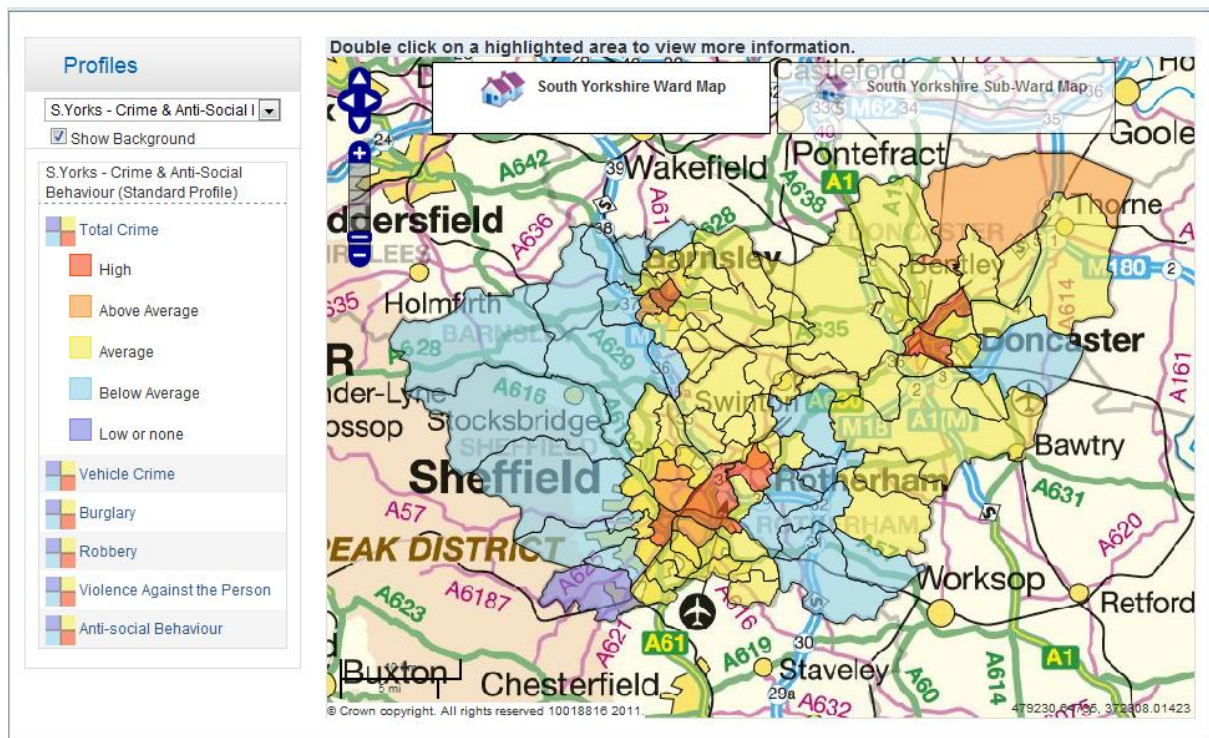
Please note that the modules that are available to you will depend on your Origin implementation.

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2. Stats on Maps

2.1 Overview

Stats on Maps (SOM) is a visual analysis tool, it allows existing data across datasets to be presented in a profile and displayed on an interactive map. The following example shows a crime profile for wards within South Yorkshire:



The map can be zoomed, panned in the same way as you would in any online mapping tools such as Google or Bing maps. The data is presented on the map as thematically shaded boundaries (e.g. districts, wards, neighbourhoods) and the user can double click on a boundary to view summary, comparison and trend information about the area.

Profiles can be configured to be granular so that the boundaries change as the user zooms in, for example the zoomed-out map could display all Wards which then changes to LSOA or Sub Wards as the user zooms into a specific areas.

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2.2 Creating and Maintaining

2.2.1 Data Preparation

In an attempt to make the creation of profiles as simple as possible, automation of the set-up process has been used where possible. The result of this is increased importance of the understanding the source data. With Stats on Maps the source of data is always datasets, so to ensure accuracy it is advisable to briefly check any datasets that are intended to be used in the with particular attention being paid to dimension names, rank orders and data formats. Also, please ensure that data is complete for all regions you are expecting to display information for as regions with missing data will not be displayed.

2.2.2 Profile Setup

The first stage in the set-up of a Stats on Maps profile is to create the profile meta data using the Profile Management tool which is located under the menu:

Data Admin → Manage Profiles or **My Data → My Profiles** depending on your configuration of Origin.

This screen lists all profiles currently configured in the system; click the “Add a new profile” link to start the set-up process.

The profile management tool allows you to create a profile and publish it to be available in:

- a. Just the Stats on Maps module.
- b. Just the Profile module
- c. Both Stats on Maps module and Profile module

Stats on Maps profiles are enabled by simply checking the “Include in Stats on Maps module” check box. This will display the profile options as follows:

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Profile Overview

The profile overview is used to set up the profile and make relevant information available to users of Essex Insight. The profile overview is split into distinct sections:

- Profile Type - What profile tool(s) this profile will be displayed in, the selection here will determine which fields are required.
- Profile Metadata - Enter the name, description and disclaimer information.
- Description & Disclaimer Information - Enter some summary text and an appropriate disclaimer for the profile
- Geographic coverage and map settings - Select which regions will the profile be available in, and which map information to use.
- Publish Information - publication dates, show significance, is this profile the default, and is it archived.

Profile Type

Include in Stats On Maps Module : (Select this checkbox to make this profile available (check) or unavailable (uncheck) in Stats On Maps.)

Include in Profiler Module: (Select this checkbox to make this profile available (check) or unavailable (uncheck) in the Profiler Module)

Profile Metadata

Profile name:*

Period To Display:

Profile Owner:

Geographic coverage and map settings

Coverage:*

Regions to be profiled:*

Region Comparator:

Profile Summary Map:*

Publish Information

Date Published: Expires: Notify expiry days before.

Default Profile: (Make this the default profile for the coverage, if selected this will remove the existing default profile.)

Archive Profile: (Archiving this profile will hide it from all of the selected profile types, you cannot un-archive a profile until dimensions are added.)

The profile setup page is separated into four sections:

1. Profile Type
2. Profile Metadata
3. Geographic coverage and map settings
4. Publish Information.

Profile Type

This defines which modules the profile will be available under.

1. Include in Stats on Maps Module – check this option for the profile to be available in Stats on Maps.
2. Include in Profiler Module - check this option for the profile to be available in the Profiler module.

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Profile Metadata

1. Profile name - This is the name of the profile which will the onscreen display name for the profile.
2. Period to display - Determines what time period of data will be used. By default this is set to “Latest Date Always” which will make the system always display the most up to date data. Selecting “Specific period” will allow you to specify which period of data to use when displaying dimensions/indicators.
3. Profile owner - This is the user that is primarily responsible for maintaining the profile. This should default to your own account and you can only change this if you are a System or Portal manager.

Geographic Coverage and map settings

1. Coverage - This option allows you to select which geographic area the profile will cover. For example it may cover a single Local Authority or the entire County.
2. Regions to be profiled - Stats on Maps profiles are based on a “region collection”, each collection contains a defined set of regions. This option allows you to choose which collection of regions will be used on the maps, for example it may be Local Authorities & Wards, Wards + LSOAs, Wards Only etc. The available options are specific to your implementation of Origin.
3. Region comparator - When a user views data for each region it will be compared with the other regions in the collection. This option allows you to determine which regions it will be compared to. In most cases this should be set to “Compare to regions of the same type” which will only compare a region with other regions of the same type in the collection (e.g. a Ward with all other Wards). However on occasion you may wish to compare a region to a different type, for example compare a Ward with its parent District. The options available will be dependent on the region collection chosen in step 2 above.

Publish Information

The publish options allow you to determine when a profile will be available and if you want to be alerted when it is due to go out of date.

1. Dated Published/Expires - The profile will be made available between these days, the profile won’t be shown outside of these days.
2. Notify expiry – Specifies the number of days before the profile is due to expire, when you will be notified. The default is 30 days.
3. Default Profile - Choosing this option will cause this profile to be the profile that is displayed initially when Stats on Maps is loaded.
4. Archive profile - Determines if the profile is archived or not. An archived profile will never be displayed. **This option is checked by default when the profile is created and cannot be**

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unchecked until dimensions are added and configured. This is to prevent you publishing an incomplete profile.

Once the required profile settings have been chosen, press the “Save Profile” button. This will save the profile unless any required fields haven’t been completed in which case an error message will list the fields that must be completed before saving.

When the profile is saved the following tabs will be available.

2.2.3 Profile Grouping

This is not required for Stats on Maps and can be ignored if Stats on Maps only is enabled. If you are creating a Stats on Maps profile which is also to be available in the Profiler module then see the Profile Grouping section under 3.2.3.

2.2.4 Security

The security tab has the standard role selection options which determine which roles will have access to the profile as found in dataset management or basket creation. For further information please consult the data management or publisher manuals.

2.2.5 Tagging

The tagging tab contains the same tagging functionality found in resource management. These tags are used to tag and index the profile which will assist users when searching content. For further information please consult the publisher manuals.

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2.2.6 Profile Dimensions

The profile dimensions tab allows you to set which dataset dimensions will be available within the profile and how they are configured. If no dimensions have been added, a list of dimensions within the system ordered by theme and dataset will be displayed as illustrated below:

- Children, Young & Older People
- Community Profiles
- Community Safety
- Demographics
- Deprivation & Inequality
 - Syorks - IMD
 - IMD - Deprivation
 - Overall Score
 - Income
 - Employment
 - Health Deprivation & Disability
 - Education Skills & Training
 - Barriers to Housing & Services
 - Crime & Disorder
 - Living Environment
 - Income Deprivation affecting Children
 - Income Deprivation affecting Older People
 - Overall Percentile Rank
 - Income Percentile Rank
 - Employment Percentile Rank
 - Health Deprivation & Disability Percentile Rank
 - Education, Skills & Training Percentile Rank
 - Barriers to Housing & Services Percentile Rank
 - Crime & Disorder Percentile Rank
 - Living Environment Percentile Rank
 - IDAC Percentile Rank
 - IDAOP Percentile Rank
- Sheffield - Households in Poverty (ONS)(MSOA)

Please note that the management tool will attempt to list datasets and indicators for only those regions within the region collection selected in Profile tab.

The nodes can be expanded by clicking the “+” symbol or collapsed by pressing the “-” symbol. To select the required dimensions check the checkbox that is located beside each dimension. Once you have selected all the required dimensions press the “Add New Indicators” button.

This will automatically add each of the selected dataset dimensions and will display them in a grid as illustrated below:

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Profile Dimension Name	Description	Default Profile Dimension	Archive	Actions
Overall Score	Syorks - IMD - IMD - Deprivation - Overall Score	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Income	Syorks - IMD - IMD - Deprivation - Income	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Employment	Syorks - IMD - IMD - Deprivation - Employment	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Health Deprivation & Disability	Syorks - IMD - IMD - Deprivation - Health Deprivation & Disability	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Education Skills & Training	Syorks - IMD - IMD - Deprivation - Education Skills & Training	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Barriers to Housing & Services	Syorks - IMD - IMD - Deprivation - Barriers to Housing & Services	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete

Dimensions added successfully

Each dimension will be automatically configured with the default options, for example the Profile Dimension name will default to the Variable Dimension name. These defaults can be changed by selecting the “Edit” option under “Actions” column on the grid. This will display the editing form as illustrated below:

Edit Form
✕

Dataset:

Variable Dimension:

Profile Dimension Name:

Short Name:

Description:

Show Time Period:

Rate Description:

Column Type:

Rank Order:

Default Profile Dimension Archive

[Update](#) [Cancel](#)

1. Dataset – This lists datasets available within the system, select the dataset which contains the required dimensions.
2. Variable dimension - This is the variable dimension of the profile dimension (i.e. the actual indicator source).

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3. Profile dimension name – The name will automatically be defaulted when the variable dimension is chosen. This can be edited if required, this name will be the name displayed within Stats on Maps.
4. Description - A short description for the profile dimension.
5. Show Time Period - Determines what time period will be used. The default is Latest Data unless specified otherwise during the profile setup (under the Profile tab). The Latest Data option will always display the most up to date information otherwise you need to specify the appropriate time period to display data for.
6. Rate Description – a short text description to give context to rate figures if they are used.
7. Column Type - Determines if the thematic map is to use the values or rates to calculate the thematic classification, you need to understand the structure of the source dataset to ensure you choose the correct option because you may not always have rate information.
8. Rank Order – This is used to determine how values are ranked (highest to lowest or lowest to highest). The default option comes from the Meta data for the corresponding Variable Dimension in the dataset; however this can be changed for the profile if required.
9. Default Profile dimension - If checked this dimensions will be automatically loaded when a user views the profile. Only one default per profile is allowed.
10. Archive - Archives the profile preventing it from being available when a user views it.

Clicking the update button will commit any changes, or an error message at the bottom will indicate if any fields haven't been completed.

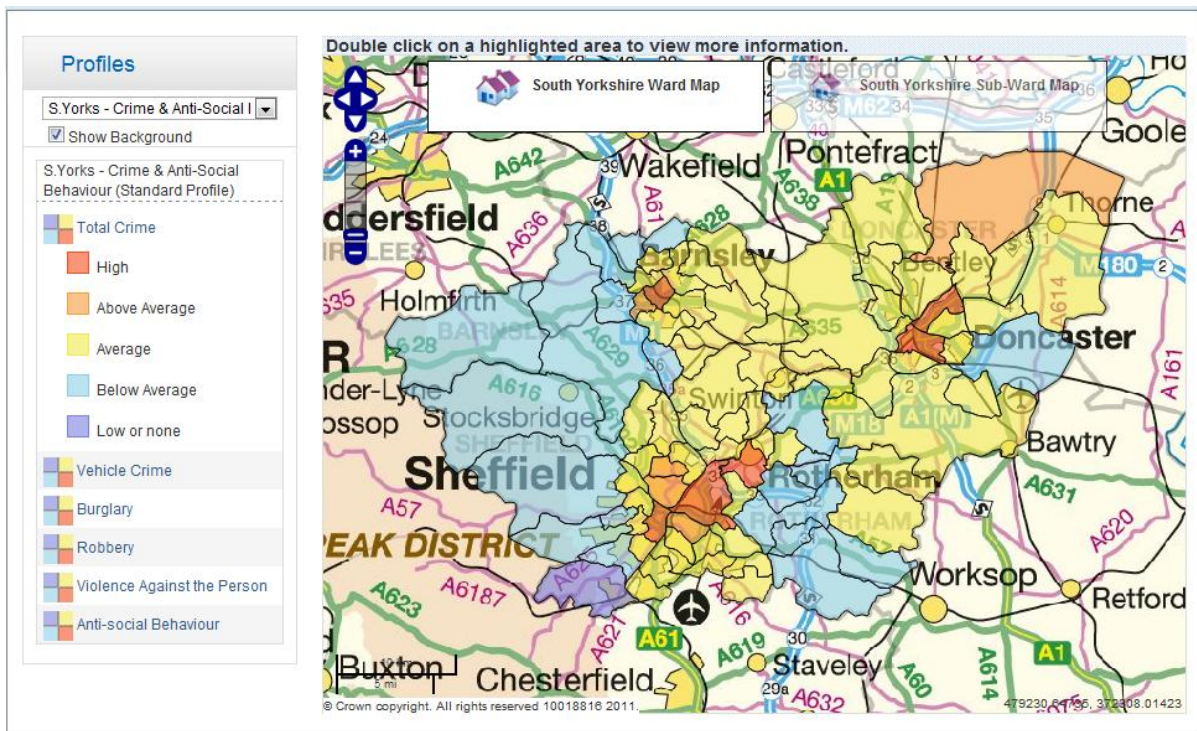
A new dimension can be added manually by selecting the "New" action within the grid, this will display the form as shown above but with no fields completed. Once completed select the update option and the new dimension will be added.

The profile can now be un-archived (under the Profile tab) to make it available to end users. Dimensions can be added/edited/archived at any time. Nearly all profile options can be changed if required with the exception of region collection – once dimensions have been added this cannot be changed.

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2.3 Using Stats on Maps

The access to Stats on Maps depends on your Origin implementation. In most cases it will be via a highly visible icon on the homepage. The Stats on Maps page will look similar to the following screenshot:



The page consists of three major components, the map window, the profile selection drop down list and the layer/dimension selection list.

Profile Selection Dropdown

This drop down list will display all available profiles and if you also have the Origin Partner Portals module this can be filtered by portal. The default profile and dimension is displayed first to the user. Selecting another profile from the drop down list will change the dimensions list accordingly. There is also a checkbox that allows you to turn the background map on or off.

Dimension selection pane (layer selection)

The dimension selection pane lists available dimensions in the profile. Clicking the dimension name will update the map with the selected dimension. A colour key is shown under each dimension.

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Map window

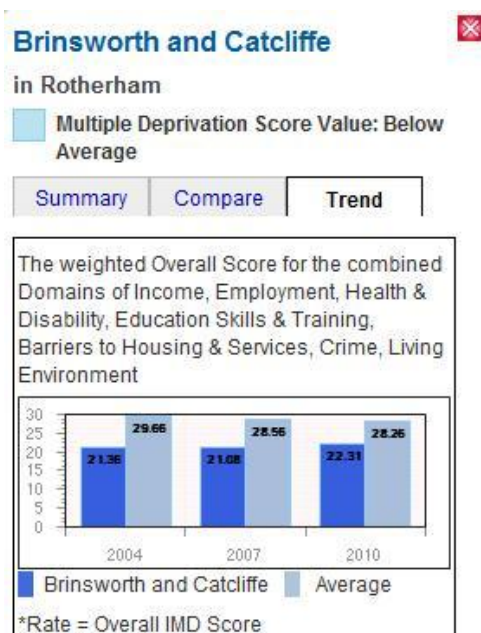
The map window displays the interactive map with the selected dimension as a thematically shaded layer on the map. The map can be panned by using the arrows at the top left of the map or by left clicking and then dragging the mouse. It can also be zoomed by using the “+” and “-” icons in the top left, a scale between these two icons indicates the zoom level.

Depending on the region collection, the number of zoom levels may be different. If the region collection contains more than one type of region the thematically shaded boundaries may change as the user zooms in. For example if the region collection contains Wards and LSOAs the map will initially display Wards, once you zoom in to the 3rd level (depending on the region collection) the LSOAs will be displayed instead of the wards. This allows you to see an overview of larger area but zoom in to discover finer detail if required.

The large icons at the top centre of the map can be used to jump to the appropriate region type by clicking. For example clicking “South Yorkshire Sub-Ward Map” will zoom you to the third level and display the LSOAs. Note the area display will be the centre of the map before you click the icon.

Moving the mouse over the regions will highlight the selected region, double clicking on a region will display an overlaid window containing further information about dimension for the selected region. This popup contains summary, trend and a comparison with the average.

An example of this is shown below.



3. Profiler module configuration

3.1 Overview

The Profiler module allows authorised users to create profiles containing multiple indicators in a single report for any geographic area. It differs from Stats on Maps because the user views one geographic area at a time, but with all profile indicators on a spine chart. The module allows users to browse available profiles by geography or by theme and they can also be integrated with postcode search if this is available in Origin. When a user locates and views a profile of a specific area they can also drill down to view details on each indicator. Profiles are configured using the Profile Management tool and they are created in a similar manner to the Stats on Maps profiles described in section 2.

There are currently two types of profile:

1. **Dataset** based profiles are those that draw their data directly from datasets (in earlier version of Origin these have previously been known as drill down profiles), and
2. **Basket** based profiles are those that draw their data from data baskets*.

* Data baskets are collections of indicators that span multiple datasets. See the Publisher manual for more details.

Dataset based profiles are created based on predefined collections of regions, known as region collections which determine exactly what geographies are available in the profile and the indicators within each profile are linked directly to system datasets. The creation of a dataset based profile is straight forward and utilises the same setup process as Stats on Maps. When an end user views a profile for a specific geographic area all dimensions/indicators are displayed on a spine chart illustrating how it compares with the other regions. Text descriptions and a location map of the region can also be available. End users can click on each dimension/indicator to view further details such as a summary table, thematic map and trend information and in dataset based profiles these all have the same consistent layout. One advantage of dataset based profiles is that they are compatible with Stats on Maps, allowing you to publish a profile to be available in both the Profiler module and Stats on Maps module.

Basket profiles are similar to dataset profiles but take their source data from a data basket rather than a dataset. This leads to much greater flexibility because with a data basket you have control over exactly what geographies and indicators are available. This type of profile also displays the data to the end user in a spine chart allowing them to drill down to view each indicator which can also inherit chart, table and map preferences from the source basket again giving greater flexibility at this level of detail. The only disadvantage of basket based profiles is that they are not compatible with Stats on Maps.

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From the end users perspective both profiles types (i.e. datasets and baskets) are accessible through the standard Profile Browser.

The following table summarises the differences between basket and dataset based profiles:

Feature	Dataset based	Basket based
Indicator source data	Dataset variable dimensions	Data basket items
Geographic source data	Pre-defined region collections	Data basket geographic selections
Available in Stats on Maps module	Yes	No
Available in Profiler module	Yes	Yes
Profile layout	Simple spine chart	Comprehensive spine chart
Profile meta data	Simple	Comprehensive
Indicator layout	Fixed layout of contents.	Flexible layout using customisable templates.
Indicator content	Pre-defined summary table, chart and/or map with short indicator description.	User defined chart, table or map format determined by basket preferences and detailed commentary and formatting.
Indicator links to underlying data	No	Yes
Print to PDF	Yes	Yes

3.2 Dataset based profiles

3.2.1 Data Preparation

As with Stats on Maps, ensuring quality of data is essential so before creating a profile it is advisable to check the datasets that you want to use within the profile. Particular attention should be paid to the dataset variable dimensions (rank order for example). The data should also be checked to ensure that it is complete for the required time periods.

3.2.2 Profile Setup

The first stage in the set-up of a dataset based profile is to create the profile meta data using the Profile Management tool which is located under the menu:

Data Admin → Manage Profiles or **My Data → My Profiles** depending on your configuration of Origin.

This screen lists all profiles currently configured in the system; click the “Add a new profile” link to start the set-up process.

The profile management tool allows you to create a dataset based profile and publish it to be available in:

- a. Just the Stats on Maps module.
- b. Just the Profile module
- c. Both Stats on Maps module and Profile module

Dataset profiles are enabled by simply checking the “Include in Profiler module” check box, i.e. leave the “Use baskets for data source” un-checked. This will display the profile options as follows:

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Profile Overview

The profile overview is used to set up the profile and make relevant information available to users of Essex Insight. The profile overview is split into distinct sections:

- Profile Type - What profile tool(s) this profile will be displayed in, the selection here will determine which fields are required.
- Profile Metadata - Enter the name, description and disclaimer information.
- Description Information - Enter some summary text for the profile
- Geographic coverage and map settings - Select which regions will the profile be available in, and which map information to use.
- Publish Information - publication dates, show significance, is this profile the default, and is it archived.

Profile Type

Include in Stats On Maps Module : (Select this checkbox to make this profile available (check) or unavailable (uncheck) in Stats On Maps.)

Use baskets for data source : (Click this checkbox to make this profile based on Basket data.)

Include in Profiler Module: (Select this checkbox to make this profile available (check) or unavailable (uncheck) in the Profiler Module)

Profile Metadata

Profile name:*

Period To Display: Latest Date Always

Profile Owner: Support System Admin (System Manager)

Description Information

Enter a summary description or choose a summary from Content Library:

Please Select..

Open Editor

Geographic coverage and map settings

Coverage:* Please Select..

Regions to be profiled:* Please Select..

Region Comparator: You must select a region collection before the Region Comparator becomes active.

Profile Summary Map:* You must select a region collection before the Map Region Types becomes active.

Profile Map Background:* Please select..

Default setting for indicator map.:* Please Select..

Publish Information

Date Published: 10/05/2011 Expires: 10/05/2012 Notify expiry 30 days before.

Default Profile: (Make this the default profile for the coverage, if selected this will remove the existing default profile.)

Archive Profile: (Archiving this profile will hide it from all of the selected profile types, you cannot un-archive a profile until dimensions are added.)

Save Profile

The profile setup page is separated into five sections:

1. Profile Type
2. Profile Metadata

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3. Description Information
4. Geographic coverage and map settings
5. Publish Information.

The options available when creating a dataset profile are similar as those described for Stats on Maps profile but with a few additional settings.

Profile Type

This defines which modules the profile will be available under.

1. Include in Stats on Maps Module – check this option for the profile to be available in Stats on Maps.
2. Include in Profiler Module - check this option for the profile to be available in the Profiler module.

Profile Metadata

1. Profile name - This is the name of the profile which will the onscreen display name for the profile.
2. Period to display - Determines what time period of data will be used. By default this is set to “Latest Date Always” which will make the system always display the most up to date data. Selecting “Specific period” will allow you to specify which period of data to use when displaying dimensions/indicators.
3. Profile owner - This is the user that is primarily responsible for maintaining the profile. This should default to your own account and you can only change this if you are a System or Portal manager.

Description Information

1. You can enter a summary description for the profile which will appear in the profile listing page within the profile browser. Pre-defined descriptions are available in a drop down list; these predefined descriptions are maintained by the system administrator.

Geographic Coverage and map settings

1. Coverage - This option allows you to select which geographic area the profile will cover. For example it may cover a single Local Authority or the entire County.
2. Regions to be profiled - Stats on Maps profiles are based on a “region collection”, each collection contains a defined set of regions. This option allows you to choose which collection of regions will be used on the maps, for example it may be Local Authorities & Wards, Wards + LSOAs, Wards Only etc. The available options are specific to your implementation of Origin.
3. Region comparator - When a user views data for each region it will be compared with the other regions in the collection. This option allows you to determine which regions it will be

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compared to. In most cases this should be set to “Compare to regions of the same type” which will only compare a region with other regions of the same type in the collection (e.g. a Ward with all other Wards). However on occasion you may wish to compare a region to a different type, for example compare a Ward with its parent District. The options available will be dependent on the region collection chosen in step 2 above.

4. Profile Summary Map - Determines the type of location map that will be displayed on the indicator summary view page.
5. Profile Map Background - Determines if the map above the spine chart will be shown.
6. Default setting for indicator - This is the default map background tiles that will be used for the maps within the profile.

Publish Information

The publish options allow you to determine when a profile will be available and if you want to be alerted when it is due to go out of date.

1. Dated Published/Expires - The profile will be made available between these days, the profile won't be shown outside of these days.
2. Notify expiry – Specifies the number of days before the profile is due to expire, when you will be notified. The default is 30 days.
3. Default Profile - Choosing this option will cause this profile to be the profile that is displayed initially when Stats on Maps is loaded.
4. Archive profile - Determines if the profile is archived or not. An archived profile will never be displayed. **This option is checked by default when the profile is created and cannot be unchecked until dimensions are added and configured. This is to prevent you publishing an incomplete profile.**
5. Show significance - If this is checked, the spine chart marker will change colour if the local value is significantly higher/lower than the average. If this is not checked the market will remain the same colour.

3.2.3 Profile Grouping

Profile groupings are used to logically group data dimensions/indicators on the spine chart. For example you may wish to group all health related indicators into a “Heath & Well Being” group. A group is created by simply entering the required text into the textbox and then pressing “Add Group” button. As you type the text the system will attempt to suggest group names that have been previously used in other profiles, this is to help you standardise on group labels although you can still overwrite with your own names.

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The group name can be changed by using the edit option on the grid and each group can be assigned a sort order to determine the order in which the group appears on the spine chart. The group page is illustrated below:

Profile Grouping for GS Test.
Profile ID: 20

Profile grouping is an optional categorisation of indicators, when they are displayed in the profile to the user, indicators with the same group will be considered closely linked and will appear close to each other.

Listed below are all the group that are currently assigned to this profile, from this tab you can add new groups, delete existing groups (provided it has not already been assigned to an indicator) or edit the name and/ or sort order for any of the groups.

Groups

Group Name	Sort Order	Actions
Health & Wellbeing	1	Edit Delete
Education	2	Edit Delete
Economy	3	Edit Delete
Count=3		

3.2.4 Security

The security tab has the standard role selection options which determine which roles will have access to the profile as found in dataset management or basket creation. For further information please consult the data management or publisher manuals.

3.2.5 Tagging

The tagging tab contains the same tagging functionality found in resource management. These tags are used to tag and index the profile which will assist users when searching content. For further information please consult the publisher manuals.

3.2.6 Profile Dimensions

The profile dimensions tab allows you to set which dataset dimensions will be available within the profile and how they are configured. If no dimensions have been added, a list of dimensions within the system ordered by theme and dataset will be displayed as illustrated below:

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- Children, Young & Older People
- Community Profiles
- Community Safety
- Demographics
- Deprivation & Inequality
 - Syorks - IMD
 - IMD - Deprivation
 - Overall Score
 - Income
 - Employment
 - Health Deprivation & Disability
 - Education Skills & Training
 - Barriers to Housing & Services
 - Crime & Disorder
 - Living Environment
 - Income Deprivation affecting Children
 - Income Deprivation affecting Older People
 - Overall Percentile Rank
 - Income Percentile Rank
 - Employment Percentile Rank
 - Health Deprivation & Disability Percentile Rank
 - Education, Skills & Training Percentile Rank
 - Barriers to Housing & Services Percentile Rank
 - Crime & Disorder Percentile Rank
 - Living Environment Percentile Rank
 - IDAC Percentile Rank
 - IDAOP Percentile Rank
- Sheffield - Households in Poverty (ONS)(MSOA)

Please note that the management tool will attempt to list datasets and indicators for only those regions within the region collection selected in Profile tab.

The nodes can be expanded by clicking the “+” symbol or collapsed by pressing the “-” symbol. To select the required dimensions check the checkbox that is located beside each dimension. Once you have selected all the required dimensions press the “Add New Indicators” button.

This will automatically add each of the selected dataset dimensions and will display them in a grid as illustrated below:

Profile Dimension Name	Description	Default Profile Dimension	Archive	Actions
Overall Score	Syorks - IMD - IMD - Deprivation - Overall Score	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Income	Syorks - IMD - IMD - Deprivation - Income	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Employment	Syorks - IMD - IMD - Deprivation - Employment	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Health Deprivation & Disability	Syorks - IMD - IMD - Deprivation - Health Deprivation & Disability	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Education Skills & Training	Syorks - IMD - IMD - Deprivation - Education Skills & Training	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Barriers to Housing & Services	Syorks - IMD - IMD - Deprivation - Barriers to Housing & Services	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete

Dimensions added successfully

Each dimension will be automatically configured with the default options, for example the Profile Dimension name will default to the Variable Dimension name. These defaults can be changed by

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selecting the “Edit” option under “Actions” column on the grid. This will display the editing form as illustrated below:

Most of the options available are the same as those found when editing a Stats on Maps Profile.

1. Dataset – This lists datasets available within the system, select the dataset which contains the required dimensions.
2. Variable dimension - This is the variable dimension of the profile dimension (i.e. the actual indicator source).
3. Profile dimension name – The name will automatically be defaulted when the variable dimension is chosen. This can be edited if required, this name will be the name displayed within the profile.
4. Description - A short description for the profile dimension.
5. Spine chart footnote - A footnote can be added to the spine chart for each dimension; this will appear at the bottom of the group that the dimension belongs too.
6. Grouping - This is the group that the dimension belongs to; ungrouped dimensions will appear at the bottom of the spine chart.

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7. Show Time Period - Determines what time period will be used. The default is Latest Data unless specified otherwise during the profile setup (under the Profile tab). The Latest Data option will always display the most up to date information otherwise you need to specify the appropriate time period to display data for.
8. Indicator Region Comparator - This is the region that the selected region will be compared to. For example, if a ward is selected and this is set to Local Authority, the selected ward will be compared to all wards within the local authority.
9. Rate Description – a short text description to give context to rate figures if they are used.
10. Map Region Type - This is the map boundaries that will be displayed in the indicator map.
11. Map Background - This is the background tiles used in the indicator map.
12. Rank Order – This is used to determine how values are ranked (highest to lowest or lowest to highest). The default option comes from the Meta data for the corresponding Variable Dimension in the dataset; however this can be changed for the profile if required.
13. Default Profile dimension - If checked this dimensions will be automatically loaded when a user views the profile. Only one default per profile is allowed.
14. Show Summary - If checked the summary will be shown in the indicator view page.
15. Show Comparison - If checked the comparison will be shown in the indicator view page.
16. Show Trend - If checked the trend will be shown in the indicator view page.
17. Show Map - If checked the map will be shown in the indicator view page.
18. Archive - Archives the profile dimension preventing it from being available when a user views it.

Clicking the update button will commit any changes, or an error message at the bottom will indicate if any fields haven't been completed.

A new dimension can be added manually by selecting the "New" action within the grid, this will display the form as shown above but with no fields completed. Once completed select the update option and the new dimension will be added.

The profile can now be un-archived (under the Profile tab) to make it available to end users. Dimensions can be added/edited/archived at any time. Nearly all profile options can be changed if required with the exception of region collection – once dimensions have been added this cannot be changed.

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3.3 Basket Profiles

3.3.1 Data Preparation

Basket profiles offer the greatest level of flexibility in terms of data structure, layout and formatting but require a greater deal of data preparation compared to dataset profiles. Basket profiles use baskets as their data source rather than the datasets themselves (although ultimately in both cases the raw data comes from the same dataset source). In addition the table, chart and maps displayed in the indicator view are taken directly from the preferences set for each basket item giving the profile author detailed control over the formats.

Basket profiles are also not confined to region collections, the regions used in the profiles are taken directly from the basket items themselves automatically, and there is no additional setup required. This means that profile authors can create profiles for any geographic regions.

Profile authors can create profiles from existing baskets or can setup new baskets specifically for the purpose of using as a profile data source. The system will also provide links automatically link between a profile indicator and a source basket item allowing end user to examine source data.

Before creating a basket profile, the basket being used should be checked to ensure all the data required has been selected as basket items and that any chart, table and map preferences have been set-up for each item.

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3.3.2 Profile Setup

The first stage in the set-up of a dataset based profile is to create the profile meta data using the Profile Management tool which is located under the menu:

Data Admin → Manage Profiles or **My Data → My Profiles** depending on your configuration of Origin.

This screen lists all profiles currently configured in the system; click the “Add a new profile” link to start the set-up process and you will be presented with the following screen.

The profile management tool allows you to create a basket based profile and publish it to be available in the Profile browser (and postcode search if that is available in your implementation of Origin). Basket based profiles are not compatible with the Stats on Maps module.

Basket profiles are enabled by simply checking the “Use baskets for data source”. This will display the profile options as follows:

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Profile
Profile Grouping
Profile Dimensions
Security
Tagging
Back

Profile Overview

The profile overview is used to set up the profile and make relevant information available to users of Essex Insight. The profile overview is split into distinct sections:

- Profile Type - What profile tool(s) this profile will be displayed in, the selection here will determine which fields are required.
- Profile Metadata - Enter the name, description and disclaimer information.
- Description Information - Enter some summary text for the profile
- Geographic coverage and map settings - Select which regions will the profile be available in, and which map information to use.
- Publish Information - publication dates, show significance, is this profile the default, and is it archived.

Profile Type

Use baskets for data source : (Click this checkbox to make this profile based on Basket data.)

Profile Metadata

Profile name:*
 Period To Display: Latest Date Always
 Profile Owner: Support System Admin (System Manager)
 Basket:* Please Select...

Description Information

Enter a summary description or choose a summary from Content Library:

Please Select...

Title Page: Please Select...

Geographic coverage and map settings

Spine chart datasource:* Regions in basket item only
 Spinechart Parent Region: Government Office Region

Publish Information

Date Published: 10/05/2011 Expires: 10/05/2012 Notify expiry 30 days before.

Profile Listing Display Order: Please select

Profile Grouping: Manual - Custom groups

Profile Template: Profile 2*1 1 1 Page

Show Rank Columns: (Show the rank columns on the Spine Chart)

Best Ranked Label: Best

Worst Ranked Label: Worst

Show Significance: (Show Significance on the Spine Chart)

Archive Profile: (Archiving this profile will hide it from all of the selected profile types, you cannot un-archive a profile until dimensions are added.)

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The profile setup page is separated into five sections:

1. Profile Type
2. Profile Metadata
3. Description Information
4. Geographic coverage and map settings
5. Publish Information.

The options available when creating a dataset profile are similar as those described for dataset profiles but with a few additional settings.

Profile Type

1. Use baskets for data source - Check this to use baskets as a source. These profiles cannot be used on Stats on Maps.

Profile Metadata

1. Profile name - This is the name of the profile which will the onscreen display name for the profile.
2. Period to display - Determines what time period of data will be used. By default this is set to "Latest Date Always" which will make the system always display the most up to date data. Selecting "Specific period" will allow you to specify which period of data to use when displaying dimensions/indicators.
3. Profile owner - This is the user that is primarily responsible for maintaining the profile. This should default to your own account and you can only change this if you are a System or Portal manager.
4. Basket - This is the basket that will be used as a data source. The system will list all baskets that are available to you based on your access level.

Note – although you can use any basket (which you have access to) to be the source of your profile data we recommend to avoid accidental deletion that you create your own (or copy an existing one).

Description Information

1. You can enter a summary description for the profile which will appear in the profile listing page within the profile browser. Pre-defined descriptions are available in a drop down list; these predefined descriptions are maintained by the system administrator.

Geographic Coverage and map settings

1. Spine chart data source - This determines what data will be used for the spine chart.
 - a. *Regions in Basket item only* will only use data for regions that are within the actual basket item

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- b. *All Regions in Dataset* will use all data from the entire dataset. The benefit of this option is when the basket only contains a small number of regions then it is better to calculate the average/highest/lowest figures (used in the spine chart) from the entire dataset rather than the few items in the basket. For example, if you created a basket for a handful of wards that fall under a single local authority the highest/lowest/average figures would be based on those wards only, so selecting “All regions in dataset” would allow you to compare these wards with all the wards that fall under the local authority.
- 2. Spine chart parent region - This is the parent region that contains the regions when comparing on the spine chart. For example, if this was set to Local Authority for a Ward profile each ward would be compared to all the other wards that fall under its parent Local Authority, if this was set to County the comparison would be with all wards that fall under the county.

Publish Information

The publish options allow you to determine when a profile will be available and if you want to be alerted when it is due to go out of date.

- 1. Dated Published/Expires - The profile will be made available between these days, the profile won't be shown outside of these days.
- 2. Profile listing order - Used in the postcode search (location summary page) to set the order which profiles appear. Multiple profiles can have the same order number.
- 3. Notify expiry – Specifies the number of days before the profile is due to expire, when you will be notified. The default is 30 days.
- 4. Default Profile - Choosing this option will cause this profile to be the profile that is displayed initially when Stats on Maps is loaded.
- 5. Archive profile - Determines if the profile is archived or not. An archived profile will never be displayed. **This option is checked by default when the profile is created and cannot be unchecked until dimensions are added and configured. This is to prevent you publishing an incomplete profile.**
- 6. Show significance - If this is checked, the spine chart marker will change colour if the local value is significantly higher/lower than the average. If this is not checked the market will remain the same colour.
- 7. Profile grouping - Basket profiles allow greater flexibility in grouping, the manual groups can be used but the dimensions can also be automatically ordered by basket item or variable definition.
- 8. Profile template - This is the template used for the layout of the indicator view screen. New templates can be created by the system administrator.
- 9. Best ranked label - This is the label used on the spine chart for the region value that is the “best”.

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10. Worst ranked label - This is the label used on the spine chart for the region value that is the “worst”.
11. Neutral Category - There may be dimensions/indicators that do not make sense to classify as “Best” or “Worst” (for example population totals) in which case you can specify as neutral. Selecting the neutral category will remove any best/worst labels from the category. This can only be used with manual groups.
12. Show Rank Columns - The best/worst columns can be disabled by checking this.

3.3.3 Profile Grouping

Profile groupings are used to logically group data dimensions/indicators on the spine chart. For example you may wish to group all health related indicators into a “Heath & Well Being” group. A group is created by simply entering the required text into the textbox and then pressing “Add Group” button. As you type the text the system will attempt to suggest group names that have been previously used in other profiles, this is to help you standardise on group labels although you can still overwrite with your own names.

The group name can be changed by using the edit option on the grid and each group can be assigned a sort order to determine the order in which the group appears on the spine chart. The group page is illustrated below:

The screenshot shows a web interface with tabs: Profile, Profile Grouping (selected), Profile Dimensions, Security, Tagging, and a Back button. The main content area is titled "Profile Grouping for GS Test" with Profile ID: 20. It contains explanatory text about profile grouping and a list of current groups. At the bottom of the list, it says "Count=3".

Group Name	Sort Order	Actions
Health & Wellbeing	1	Edit Delete
Education	2	Edit Delete
Economy	3	Edit Delete

3.3.4 Security

The security tab has the standard role selection options which determine which roles will have access to the profile as found in dataset management or basket creation. For further information please consult the data management or publisher manuals.

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3.3.5 Tagging

The tagging tab contains the same tagging functionality found in resource management. These tags are used to tag and index the profile which will assist users when searching content. For further information please consult the publisher manuals.

3.3.6 Profile Dimensions

The profile dimensions tab allows you to set which dimensions will be available within the profile and how they are configured. If no dimensions have been added, a list of dimensions within all the source basket is displayed, as shown below:

- % of Children in Poverty
- Children in families in receipt of CTC (<60% median income) or IS/JSA
- Children in families in receipt of CTC (<60% median income) or IS/JSA - by age
- Children in families in receipt of CTC (<60% median income) or IS/JSA - by age of youngest
- Children in families in receipt of CTC (<60% median income) or IS/JSA - by number of children
- Children in families receiving CTC only and income <60% median income
- Children in families receiving WTC and CTC and income <60% median
- Children in IS/JSA families
- Barnsley Ward IMD 2007: Overall Score
 - Overall Score
- Barnsley Ward IMD 2007: Income
 - Income
- Barnsley Ward IMD 2007: Employment
- Barnsley Ward IMD 2007: Health Deprivation & Disability
- Barnsley Ward IMD 2007: Barriers to Housing & Services
- Barnsley Ward IMD 2007: Crime & Disorder
- Barnsley Ward IMD 2007: Living Environment
- Barnsley Ward IMD 2007: Income Deprivation affecting Children
- Barnsley Ward IMD 2007: Income Deprivation affecting Older People

The nodes can be expanded by clicking the “+” symbol or collapsed by pressing the “-” symbol. To select the required dimensions check the checkbox that is located beside each dimension. Once you have selected all the required dimensions press the “Add New Indicators” button.

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This will automatically add each of the selected dataset dimensions and will display them in a grid as illustrated below:

Profile Dimension Name	Description	Default Profile Dimension	Archive	Actions
Overall Score	Syorks - IMD - IMD - Deprivation - Overall Score	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Income	Syorks - IMD - IMD - Deprivation - Income	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Employment	Syorks - IMD - IMD - Deprivation - Employment	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Health Deprivation & Disability	Syorks - IMD - IMD - Deprivation - Health Deprivation & Disability	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Education Skills & Training	Syorks - IMD - IMD - Deprivation - Education Skills & Training	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete
Barriers to Housing & Services	Syorks - IMD - IMD - Deprivation - Barriers to Housing & Services	<input type="checkbox"/>	<input type="checkbox"/>	Edit New Delete

Dimensions added successfully

Each dimension has been configured with the default options taken from the basket item. These can be changed by selecting the “Edit” option under “Actions” on the grid. This will display the editing form as follows:

1. Basket Item - Lists all basket items for the source basket, select the basket item which contains the required data.
2. Variable dimension - This is the variable dimension of the profile dimension (i.e. the actual indicator source).
3. Profile dimension name – The name will automatically be defaulted when the variable dimension is chosen. This can be edited if required, this name will be the name displayed within the profile.
4. Description - A short description for the profile dimension.
5. Spine chart footnote - A footnote can be added to the spine chart for each dimension; this will appear at the bottom of the group that the dimension belongs too.
6. Grouping - This is the group that the dimension belongs to; ungrouped dimensions will appear at the bottom of the spine chart.
7. Show Time Period - Determines what time period will be used. The default is Latest Data unless specified otherwise during the profile setup (under the Profile tab). The Latest Data option will always display the most up to date information otherwise you need to specify the appropriate time period to display data for.
8. Indicator Region Comparator - This is the region that the selected region will be compared to. For example, if a ward is selected and this is set to Local Authority, the selected ward will be compared to all wards within the local authority.
9. Rate Description – a short text description to give context to rate figures if they are used.
10. Rank Order – This is used to determine how values are ranked (highest to lowest or lowest to highest). The default option comes from the Meta data for the corresponding Variable Dimension in the dataset which the basket item links to; however this can be changed for the profile if required.
11. Preference Regions - These options allow you to change the regions that appear in the chart/table/map. For example, you may have a basket chart preference which includes local authorities only but you may want to ensure the region being viewed by the end user (e.g. a ward) is also visible in the chart. So rather than having to update the preference to include a large number of wards, selecting “Regions in preference including selected region” will ensure the selected ward is included.
12. Header/Commentary - Description text for the dimension/indicator that appears to end users in a separate panel.
13. Map Commentary - Text that will appear above the map (if a map is visible).
14. Table Commentary - Text that will appear above the table (if a table is visible).
15. Chart Commentary - Text that will appear above the chart (if a chart is visible).
16. Default Profile dimension - If checked this dimensions will be automatically loaded when a user views the profile. Only one default per profile is allowed.
17. Show Table - If checked the table will be shown.
18. Show Chart - If checked the chart will be shown.
19. Show Map - If checked the map will be shown.
20. Archive - Archives the profile dimension preventing it from being displayed.

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3.4 Viewing dataset and/or basket profiles

Locating

Both dataset and basket profiles are viewed in the same manner. The first step in locating a profile is to open the Profile Browser, its location will depend on your implementation but in most cases it will be clearly visible on the homepage with a link labelled “Profiles” or “View all Profiles”.

Once the Profile Browser is opened you will be given two options, either to locate a profile via a specific theme or by an area you are interested in. An example of this is as follows:

1. Find a Profile

1. [Select a theme of interest](#) - many themes are available including community safety, health, the economy, environment and much more.

or

2. [Select an area of interest](#) - many areas are available such as neighbourhoods, wards, districts etc.

If you know the area you wish to view profiles for choose “Select an area of interest”, if you wish to view a list of all the profiles available choose “Select a theme of interest”

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By Theme

If *theme* is selected, the next page will display a list of all available profiles grouped by their theme. Please note a profile can appear under more than one theme. The theme that a profile appears under is controlled using the security settings of the profile.

A short description of each profile will also be displayed and an example of this page is as follows:

2. Select a profile of interest:

Education, Training & Skills

- [Sheffield - Education, Skills & Training \(Standard Profile\)](#)

Deprivation & Inequality

- [S.Yorks - Index of Multiple Deprivation \(IMD\) \(Standard Profile\)](#)
This is the Index of Multiple Deprivation (IMD) for England at Sub Ward level (Lower Super Output Area's LSOA's averaging 1500 households)
The values shown are the Score for each SubWard (LSOA)
The values shown for Wards are the Averaged Score of the SubWards linked to that Ward.

Economy & Enterprise

- [S.Yorks - Working Age Benefit Claimants \(Standard Profile\)](#)

The required profile can be selected by clicking the profile name. This will bring you onto the area selection stage.

By Area

If *area* is chosen you will initially be presented with a list of area types for you to choose from as follows:

2. What type of area are you interested in?

There are profiles available for different types of area. Please choose the type of area that you are interested in.

- [Country](#)
- [Government Office Region](#)
- [Local Authority](#)
- [Lower Super Output Area](#)
- [Middle Super Output Area](#)
- [Neighbourhood](#)
- [Ward](#)
- [Wellbeing Localities](#)

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Choose the area type you are interested in by clicking on the appropriate area. This will then display a list of areas for you to choose from as follows.

3. What Local Authority are you interested in?

There are profiles available for the following areas. Please choose the area that you are interested in.

[Barnsley in South Yorkshire](#)
[Sheffield in South Yorkshire](#)

[Doncaster in South Yorkshire](#)

[Rotherham in South Yorkshire](#)

Once an area has been selected from this list, the available profiles for that region will be displayed. If a profile has already been selected then the profile will be loaded.

Profile view page

Once a profile has been chosen, the main profile view page will be displayed:

You are here: [Home](#) : [Profile Selection](#) : Profile

Portal: All Portals (clear filter)

[Download Profile](#) [Generate + Download Profile](#)


Area Type: Ward Area: Cudworth Profile: Barnsley - Well being Locality

Cudworth Ward profile - Barnsley - Well being Locality Profiles

Indicators Data

To support the activities of the Well being Locality Teams in monitoring key indicators about the areas they are covering. These may also include specific performance measures linked to the WBL Team's priorities.

Date Published: 07/04/2011 Date Expires: 07/04/2012
 For further information please contact: [James Leach](#)



Click on an indicator to see more details	Local value	Ward Average	Ward Worst	Ward Range	Ward Best
Community Safety					
1. Anti-social behaviour - Total Quarterly (Fin Yr) 2010-11/Q3	18	19	43		9
2. Crime - Total Crimes Quarterly (Fin Yr) 2010-11/Q3	13	16	64		7
Economy & Financial Support					
3. Benefits - Incapacity Benefit Calendar Year 2009	10.8%	10.38%	16.2%		4.8%
4. Children living in Poverty - Under 16 Month SnapShot Aug 2008	25.8%	23.36%	38.9%		5.6%

3. Employment Support Allowance replaced IB for new claims from October 2008

Reading the spine chart:

The arrow indicates the position of the local value and the significance compared to regional average.
 No significance: significantly worse: significantly better:

Regional range | Regional average | Regional range within 25th-75th percentile
 Local value: This represents the value for the selected area
 Region worst, best and average: These represent the worst/best area values in the region and the average for all areas within the region.

The major components of this page are:

1. Area & profile selection drop down lists
2. Profile/Indicator detail
3. Description and meta data
4. Location map
5. Spine chart
6. Download profile options

Area & profile selection drop downs

The drop down lists allows you to switch between areas and profiles without having to return to the Profile Browser. All three must be completed before a profile will be displayed.

Indicator/Data tabs

This allows you to switch between the profile spine chart and the indicator detail. The tabs won't be available until an indicator in the spine chart is clicked.

Profile description and meta data

This text area contains a brief description of the profile along with meta data detailing when the profile was published and who the main contact is.

Location map

This map shows the location of the area being viewed with its boundary highlighted. If the no map option is selected in the profile setup this map will not appear.

Spine chart

The spine chart displays a list of dimensions/indicators which are logically grouped. The value for the selected region is show as well as the "best" and "worst" values for all the regions. A guide to reading the spine chart appears below it. Clicking the dimension/indicator name will display detailed

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information about the indicator. Further information about the dimension's data source can also be viewed by pressing the information icon.

Download Profile

Two links are available to create a PDF of the profile with all detailed dimension views listed.:

1. The "Generate + Download Profile" will generate the entire profile and download and open it in your web browser. Due to the volume of information potentially within a profile this process may take a minute or two.
2. The first time a profile has been generated as a PDF a "Download Profile" link will be made available; this will allow the user to download the latest PDF version immediately but will not regenerate it. A timestamp of when the profile was last generated is shown.

Indicator detail

When the user clicks to view an indicator within a profile a detailed page is displayed. The content of the detailed page differs depending on whether the profile source is a dataset or basket.

Dataset based profiles

The detailed view of a dataset based profile will appear as follows:

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Benefit Groups aged 16-24 in Cudworth

Indicator: Benefit Groups aged 16-24

Summary

Benefit Groups aged 16-24 within Cudworth is Average and is increasing

Period	Benefit Groups aged 16-24
Aug 2009	250
May 2009	240
Feb 2009	255
Nov 2008	200

Comparison

Area	Benefit Groups aged 16-24
Cudworth	250
Barnsley	5055
Lowest	82
Highest	399
Average	240.71

Trend

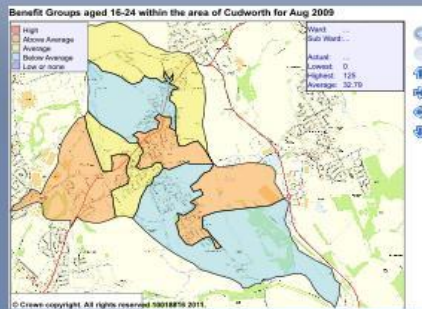
Benefit Groups aged 16-24



Area	Nov 2008	Feb 2009	May 2009	Aug 2009
Cudworth	200	255	240	250
Barnsley	4115	4860	4834	5055
Average	195.95	231.43	230.19	240.71

*Rate not applicable

Map



Colour	Range	Map Values*
High	High	464.73 to 871
Above Average	Above Average	384.61 to 464.73
Average	Average	224.36 to 384.61
Below Average	Below Average	144.23 to 224.36
Low or none	Low or none	0 to 144.23

* The above ranges represent the values shown on the map

The indicator view consists of four panels.

1. Summary table: This table displays summary information showing the direction of travel of the indicator.
2. Comparison table: This displays a comparison data of the selected area with other areas (usually the parent).
3. Trend chart: Visually shows trend information for the past 4 time periods compared against average and another area (usually the parent).
4. Thematic map: Displays a thematically shaded map of the selected area and surrounding areas.

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Basket based profiles

The appearance of a basket based profile can be customised by the profile author but most will consist of a commentary section followed by a table, chart and/or map. The format of the table, chart and maps is taken from the basket item preferences of the source data basket.

The indicator view layout is based on the template used by the profile author but may contain:

1. Indicator descriptions: Information describing the indicator in detail.
2. Table: format and content taken from the basket item table preference.
3. Chart: Table: format and content taken from the basket item chart preference.
4. Thematic map: Table: format and content taken from the basket item map preference.

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