

# Insight<sup>®</sup>

## Functional User Training

The Functional User Training course is our introductory course into the features of Insight. The course is designed to give new users exposure to the full range of features and the ability to develop key inquiries for use immediately in their business. The course is 1 day and eligible for 7 CPE credits. Pre-requisite course: None. Advanced preparation: None. Topics include:



- ▶ **Selecting Data**
  - ▶ Filters and Visual Assist
  - ▶ Query By Example
- ▶ **Inquiry Data Layout**
  - ▶ Value and Label Columns
  - ▶ Descriptions and Titles
- ▶ **Inquiry Display**
  - ▶ User Defined Captions
  - ▶ Formatting and Other Design Options
- ▶ **Structuring, Ranking and Export to Excel/PDF**
  - ▶ Pivoting and Sorting Data
  - ▶ Exporting Data to Excel and/or PDF
- ▶ **Using Calculations and Hierarchies**
  - ▶ Uses for Calculations
  - ▶ Creating Hierarchies
- ▶ **Managing and Distributing Inquiries**
  - ▶ Folder Management
  - ▶ Setting Permissions