

# Data Entry Training Module

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## Estimated Training Time: 1 Hours

Data entry training is for users that are planning on entering data into the InsightVision application on scorecards that have already been created. They often enter data on a monthly or quarterly basis depending on the Measures they are responsible for.

## How to Use this Training Module

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Click on the links below to watch online training videos and then click on the exercises to get on screen instructions to assist you in completing various exercises related to this role.

### 1. Videos to Watch (select the video from the page that loads)

- [Introduction to InsightVision](#)
- [Additional Information Screens](#)
- [Customizing your Homepage](#)
- [Adding Actual Values \(Entering Data into Measures\)](#)

### 2. Exercises to Do (attached below)

- [View & Print the Scoreboard View](#)
- [Add Featured Measures to Your Homepage](#)
- [Add Featured Initiatives to Your Homepage](#)
- [View & Print the Measure-at-a-Glance View](#)
- [View & Print the Objective Presentation View](#)
- [Add Data Points to a Measure](#)

# *View & Print the Scoreboard View*

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## **Overview**

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The Scoreboard View is the main view in the InsightVision application. It presents Objectives and Measures sorted by perspectives on one screen in a hierarchical layout. The various columns present information on the current values of measures, their trend directions, and links to other information, comments, and Initiatives related to each. The Scoreboard View allows the user to look at the big picture while providing links to further analysis on each item.

## **Exercise**

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1. Login to your InsightVision Site
2. Select the **Scoreboard** menu item
3. Select a **Scorecard** from the drop-down
4. Click on the **Expand All** link.
5. Click on the **Print** button

# *Add Featured Measures to Your Homepage*

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## **Overview**

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The InsightVision homepage allows for a high degree of customization to make using the software quicker and easier. Each user can set up what Measures appear on their homepage so they can quickly see the status of the metrics that they are responsible for reporting on and managing.

## **Exercise**

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1. Login to your InsightVision Site
2. Click on **Select** button next to Featured Measures on the homepage
  - a. 
3. Click the **checkbox** next to a measure you wish to add.
  - a. Note - you can select more than one.
4. Click the **Select and Close** button

# *Add Featured Initiatives to Your Homepage*

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## **Overview**

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The InsightVision homepage makes using the software quicker and easier by allowing each user can add a customized list of Initiatives and Tasks to their homepage so they can easily monitor the status and details of those that they are involved in.

## **Exercise**

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1. Login to your InsightVision Site
2. Select the **Home** menu item
3. Scroll down to the **Featured Initiatives** Section
4. Click on the **Select** button.

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5. Select each Initiative that you want to add by clicking the box next to its name.
6. Click on the **Select and Close** button

# View & Print the Measure-at-a-Glance View

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## Overview

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The Measure-at-a-Glance screen is one of the key informational tools that the InsightVision application utilizes. It provides accountability and analysis of a chosen Measure. By printing and sharing the information displayed on the Measure-at-a-Glance screen you can easily engage and educate others on the current situation.

## Exercise

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1. Login to your InsightVision site
2. Select the **Scoreboard** menu item
3. Select a Scorecard from the drop-down
4. Click on the **trend arrow**  next to the Measure or click on the **Yellow Measure Icon** on the left
5. Click on the **Print** button

\*Note - Anywhere that a trend arrow appears in the software, clicking on it will open the Measure-at-a-Glance Screen. This includes the featured Measures on your homepage and the Objective View on the scoreboard

# *View & Print the Objective Presentation View*

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## **Overview**

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The Objective Presentation View gives a brief, yet detailed, status report of a particular Objective. It lists out any Measures that are connected to the particular Objective in tablet view for a quick analysis of the trends. There is also a tabbed section for entering text about the Objective's purpose and its desired outcomes.

## **Exercise**

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1. Login to your InsightVision site
2. Select the **Scoreboard** menu item
3. Select a **Scorecard** from the drop-down
4. Click on the **Objective's Name** or the **Blue Objective Icon** to open the Objective Presentation view pop-up
5. Click on the **Print** button

# Add Data Points to a Measure

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## Overview

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This exercise will illustrate how to add data to a Measure. For convenience, there are a number of ways to enter Measure data into the system. Two of which are demonstrated here:

- A.) from the Scoreboard
- B.) from the Scorecard Builder.

## Exercise 9a.

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5. Login to your InsightVision Site
6. Select the **Scoreboard** menu item
7. Click on the **Edit Mode** Button
8. Click on the **Actions** button next to the Measure you want to add data to
9. Select **Add Data Values**
10. Click on the **Select Time Period** drop-down box and select the time period for your data value.
11. Click on the **Target Value** box and enter the target data.
12. Click on the **Actual Value** box and enter the actual value data.
13. Click the **Save** button.

## Exercise 9b.

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1. Login to your InsightVision Site
2. Select the **Scoreboard Builder** menu item
3. Select **Measures**
4. Click on the Measure name that you want to add data to.
5. On the edit screen, Select the **Data Values** tab.
6. In the data values section, click on the **Add New** button.
7. Click on the **Select Time Period** drop-down box and select the time period for your data value.
8. Click on the **Target Value** box and enter the target data.
9. Click on the **Actual Value** box and enter the actual value data.
10. Click the **Add** button
11. Click the **Save** button.