

Presenter Training Module

Estimated Training Time: 1 Hour

Presenters are users that create reports and present the various information that InsightVision contains. These users learn how to present the information either using projectors in board meetings or by printing out various screens from the application.

How to Use this Training Module

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](#)

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](#)

View & Print the Scoreboard View

Overview

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


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

Overview

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

1. Login to your InsightVision Site
2. Click on **Select** button next to Featured Measures on the homepage
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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

Overview

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

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

Overview

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

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

Overview

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

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