

On Key Insights Practical Training

Professional user training for more capable and confident teams

The importance of professional user training

Equipping professional users with end-to-end authoring and governance skills ensures the creation of consistent, publish-ready content. It strengthens standards, streamlines collaboration and elevates trust in data across the organisation. In turn, teams can reuse governed assets, reduce ad hoc effort and make decisions with shared confidence.

It's not just about using On Key Insights; it's about mastering it to deliver governed, reusable content that lifts decisions across the business.

The value of professional user training

Equipping professional users with end-to-end authoring and governance skills ensures the creation of consistent, publish-ready content.

It strengthens standards, streamlines collaboration, and elevates data trust, positioning professional users to champion best practices and measurable performance gains.

Course overview

This course gives professional On Key Insights users a structured, hands-on path to authoring and governing On Key Insight sheets to a publishable standard. Learners will apply master items, expressions, and appearance controls, and manage selections to deliver clear and consistent analysis across teams. Learners complete self-paced modules and submit a practical assessment. Modules include:

- ▶ **Architecture**
Understand the components of the Insights ecosystem (Desktop, Server, AccessPoint) and where applications are created and consumed.
- ▶ **User Type**
Differentiate between Insights user roles; understand the capabilities and permissions for viewing versus creating content.
- ▶ **Sheet Types**
Distinguish sheet types within an Insights document and their purpose and accessibility.
- ▶ **Elements on the Screen**
Identify interface elements (menu bars, toolbars, sheet objects); recognise list boxes, table boxes and chart types.
- ▶ **Creating a New Sheet**
Create a new blank sheet in an existing document, rename it, and organise it effectively.
- ▶ **Reusing Existing Objects**
Duplicate charts, tables and text objects; modify duplicates without altering originals.
- ▶ **Adding Dimensions and Measures**
Add new dimensions to change analysis context; add measures (Sum, Count, Avg) to objects.
- ▶ **Master Items**
Explain and use Master Dimensions and Master Measures to ensure consistency.
- ▶ **Changing the Object Type**
Convert visualisations (eg, bar → pie) and understand the presentation's impacts.
- ▶ **Object Data Configuration**
Adjust data properties and build expressions to return specific values.
- ▶ **Sorting**
Apply alphabetical, numerical and custom sorting; change default orders.
- ▶ **Appearance**
Customise titles, formatting and styling; apply number and date formats.
- ▶ **Selection**
Perform, clear and lock selections; interpret green/white/grey states across related data.

Power up your proficiency

- ▶ Total notional hours: 8 hours
- ▶ Elearning: 4 hours
- ▶ Practical assignment: 4 hours