

## Perceptive: Business Insight (Self-Paced)

### Goal

To provide an overview of Business Insight's capabilities, become familiar with building reports, and our report nomenclature.

### Course Description

This course is for Perceptive customers that want to learn how to utilize Business Insight for integrated reporting. Through this self-paced course, you will learn Business Insight's core features. In Business Insight's Report Studio, explore the robust reporting capabilities, create new reports, and create reports from a Perceptive Content View. You will also learn how to copy a pre-configured report from the report library and customize the report to meet your business needs. Lastly, you will discover the security permissions that pertain to reports.

#### Cost:

**Session Length:** 31 days

### Topics Covered

- Product Overview
- Resources
- User Functions
- Report Studio
- Navigating Report Studio
- Report Nomenclature
- Customizing a Canned Report
- Adding Custom Properties
- Create a Report from a View
- Creating New Reports in Report Studio
- Filters
- Charts
- Scheduling Reports
- Permissions

### Certifications

This course does not fulfill the requirements for any certification.

## Measurement

Learners are expected to watch all video-based segments, complete practice activities in the course workbook and/or within the online course, and successfully complete all hands-on labs. Learners are required to complete an online assessment with a score of 80% or higher to earn credit for having completed this course.

## Prerequisites

- ▶ Perceptive Content for Administrators

## Course Agenda

All topics are subject to change and may not appear in the order indicated here.

### *Topics Covered*

- ▶ Resources
- ▶ Product Overview
- ▶ User Functions
  - Run and View a Report
- ▶ Authoring Reports
  - Navigating Report Studio
  - Customize a Canned Report
  - Adding Custom Properties
  - Create a Report from a View
  - Create a New Report in Report Studio
  - Applying Filters
  - Create a Chart
- ▶ Managing Permissions
  - Scheduling Reports
  - Removing a Schedule
  - Adding an Author
  - Setting Report Privileges

## Virtual Classroom Information

### Policies of the Virtual Classroom

The Self-Paced course is valid for use under the following conditions:

- Registered individuals may download and install course files for use on their local workstation. As a courtesy, Hyland Software will provide remote workstation access in the Virtual Classroom.
- The Virtual Classroom is only available for use by the registered individual and can only be accessed for 31 days.
- Use of the materials by any other person other than the registered individual is a violation of the license agreement for this course.
- Materials may only be used in conjunction with completing the course. They cannot be copied, reproduced, modified, or distributed in anyway, in any format to anyone. Registered individuals must use the materials in the formats provided.
- The 31-day session begins from the day payment is officially processed and finishes on the 31st calendar day after that.
- Upon completion of the Final Assessment, students will be notified regarding completion of the course and ending access to the Virtual Classroom.
- Hyland Software is not responsible for Internet, hardware, software, or any other issues that occur during the access period. Contact [training@hyland.com](mailto:training@hyland.com) if you experience an issue with The Virtual Classroom.

**Note:** Workstation availability is subject to change. Periodically, workstations are reset. All notes and study materials should not be saved to the workstation.

### Connection Requirements

High-speed Internet connection is required for both recommended and minimum Internet connection requirements. High-speed Internet connection is recommended for watching course content through video streaming. 2 Mb/s required and 4 Mb/s recommended. Internet connections with less bandwidth will experience longer load times and variable connection issues. To test your internet connection, use the following link [www.speedtest.net](http://www.speedtest.net). Training.onbase.com has variable bitrate enabled so your video quality will depend on your internet connection speed. You may also choose to increase your video quality manually but it is recommended that you set your quality to Auto so that course videos will playback at the proper quality for your connection speed.

## Machine Requirements

The following requirements are necessary to access the dedicated workstation in the Virtual Classroom.  
Test your connection to the Virtual Classroom: <https://training.onbase.com/connection>.

### PC Requirements

- Internet Explorer 6.0 or newer, Mozilla Firefox 2.0 or newer (JavaScript and Java enabled).
- Windows 2000, XP, 2003 Server, Vista or Windows 7, Windows 10
- Cable Modern, DSL, or better Internet connection
- Minimum of Pentium Class 1 GHz CPU with 512 MB of RAM (recommended) (2 GB of RAM for Windows Vista)
- Flash Player Plug-in (Version 10 or higher)

### Mac Requirements

- Safari 3.0 or newer, Firefox 2.0 or newer (JavaScript and Java enabled)
- Mac OS X 10.5 or newer—Tiger, Leopard, and Snow Leopard
- PowerPC G4/G5 or Intel processor (512 MB of RAM or better recommended)
- Cable modern, DSL, or better Internet connection
- Flash Player Plug-in (Version 10 or higher)