

CAPITA



Insight for OPEN Housing Training Course list

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Training Courses for Insight products

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Overview of these courses

By getting your training delivered by CAPITA, you will have the benefit of courses that are tailored to our products. This means that unlike generic training providers, we will provide examples and exercises that relate to your business.

These courses are designed for OPEN Housing customers who have purchased and installed Insight Transactional or Data Warehouse solutions. The courses here utilise Microsoft report building tools such as Report Builder 3.0, SQL Server Data Tools and SQL Server Integration Services which can be connected to a variety of data sources including OPEN Housing. By using your own data, participants will be able to see concepts come to life in the context of your organisation.

The courses here are intended for those people who will be writing reports within your organisation unless otherwise stated.

Note: *the courses will include the creation of example reports but there are for the purposes of demonstrating technique and are not intended to be used by the business after training has been completed. We regret that we will not support their ongoing maintenance.*

Before each course, the assigned training consultant will provide you with an overview of the course content in the form of a work package containing agenda and overview to ensure that the syllabus is suitable.

During the courses, the consultant will utilise your TEST data sources (unless explicitly instructed to do otherwise) or the Data Warehouse data sources to minimise disruption caused by multiple users running reports against a LIVE database.

We always welcome suggestions for improvement and so after each course, we will ask participants to complete a course feedback form.

How to book

If you are interested in purchasing one of these courses, please contact your Account or Project Manager for details on pricing and availability. They will then create a Work Package that will be used to collate the information required to deliver the training.

Courses covering Insight for CAPITA Housing are available upon request. Please contact your Account Manager who will put you in touch with the appropriate business consultant.

Can't see what you're looking for here?

If you can't see what you are looking for in this list of modules, then please inform your Account or Project manager and request a Course Specification Form. Once you complete the form, we will then work with you to build a course tailored to your needs. If we are unable to deliver the course you require for any reason, we will point you in the right direction.

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Technical Pre-requisites

These courses require that you have purchased, successfully installed and tested the products in which you wish to receive training.

Note: The training consultant will not be expected to resolve technical issues during the course. If the installation is not working when the trainer arrives the day will be cancelled, and you may still be charged for the time utilised.

Participant Pre-requisites

Please take the time to read the participant pre-requisites for each course. The courses in this guide have also been given a difficulty rating of between 1 and 5 stars to indicate the level of experience required to successfully understand the course content.

Difficulty ratings explained	
	Easy level of difficulty. Participants are expected to be aware of Report Builder 3.0 and its purpose but require no experience of creating reports. A basic level of IT literacy is required, preferably with experience in using Excel, Office and other such applications as these skills will be useful
	Participants can use Report Builder 3.0 to create basic reports with minimal formatting utilising data models or views but are not expected to be able to confidently perform joins or format reports using all the Report Builder 3.0 features
	Intermediate level of difficulty. Participants can create reports using views as a data source and can confidently perform joins between tables using the visual designer. Users should also be able to use nearly all report builder 3.0 report parts. Users may also be using SSDT to reports instead.
	Feeling limited by visual designers and wizards, participants should have started to learn Transact SQL to write their own text-based queries. In addition, they can create visually engaging and interactive reports in Report Builder 3.0 or using SSDT
	Advanced level of difficulty. Participants are competent with Transact SQL to create complex queries. They may also be able to create stored procedures and views on their SQL server and their reports have a high level of interactivity and visual appeal

<h2>Introduction to Report Builder 3.0</h2> <p>RB3001</p>	
Duration	2 days
Difficulty	★☆☆☆☆
Overview	
<p>This course would suit customers who:</p> <ol style="list-style-type: none"> 1. Have just installed Insight transactional and Report Builder 3.0 2. Are new to Report Builder 3.0 3. Have worked with Report Builder 3.0 before but require a refresher session <p>The course will show users how to develop basic reports, either using data models or views created against a transactional database. The course involves hands on work within Report Builder 3.0.</p> <p>By the end of the course participants will be able to:</p> <ul style="list-style-type: none"> ➤ Open and navigate Report Builder 3.0 ➤ Connect to a data source ➤ Construct a query using data models and views ➤ Create tabular, chart and matrix reports using the appropriate wizards ➤ Apply filters, prompts (parameters) sorting and grouping to data ➤ Use expressions to perform calculations and conditional formatting ➤ Understand the basic principles of inner and outer joins to query 2 or more tables (views) ➤ Understand the importance of report specifications and the life-cycle of a report 	
Participant Pre-requisites	
<p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence or performance function (though this is not essential) 	
Delivered by:	
<p>Adam Parkhouse: Business Consultant</p> <p>Mark Mace: Business Intelligence Consultant</p>	

<h2>Moving from Data Models to Views in Report Builder 3.0</h2> <p>RB3002</p>	
Duration	1 day
Difficulty	★ ★ ★ ★ ★
<h3>Overview</h3> <p>This is designed for users who have been on the “Introduction to Report Builder 3.0” course but who didn’t come away from the session feeling comfortable in using Views to create queries.</p> <p>By the end of the course participants will be able to:</p> <ul style="list-style-type: none"> ➤ Connect to a View ➤ Construct a query using the Views and the visual designer ➤ Apply filters, prompts (parameters) sorting and grouping to data ➤ Understand the basic principles of inner and outer joins to query 2 or more tables (views) ➤ Understand the benefits of using Views over Models 	
<h3>Participant Pre-requisites</h3> <p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence or performance function (though this is not essential) ✓ Have completed the Introduction to Report Builder 3.0 course or have experience of using the product to create queries against data models. 	
<h3>Delivered by:</h3> <p>Adam Parkhouse: Business Consultant</p> <p>Mark Mace: Business Intelligence Consultant</p>	

<h2>Introduction to the Data Warehouse</h2> <p>DWH001</p>	
Duration	1 Day
Difficulty	★★★★☆
<h3>Overview</h3> <p>This course is for people who have been using Report Builder 3.0 for some time and are familiar with its features. Having installed a CAPITA data warehouse, attendees will be looking to write reports against the data warehouse tables.</p> <p>This course covers the basic concepts and benefits of a data warehouse, allowing users to create reports against the optimised reporting database. By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Provide a basic explanation of the data warehouse contents, Fact and Dimension tables and of the Extract, Transform and Load process (ETL) ➤ Connect to the data warehouse with Report Builder 3.0 ➤ Produce simple reports using the warehouse ➤ Know the benefits and potential limitations of a data warehouse 	
<h3>Participant Pre-requisites</h3> <p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence or performance function (though this is not essential) ✓ Ability to use Report Builder 3.0 and its features confidently ✓ Have at least a basic understanding of a database and how to join data tables together using inner and outer join types. <p>Note: <i>it is recommended that the data warehouse be fully functional for at least 2 months before issuing this training, this is to ensure that there is sufficient data in the warehouse to demonstrate its features.</i></p>	
<h3>Delivered by:</h3> <p>Adam Parkhouse: Business Consultant</p>	

<h2>Creating Reports and Dashboards with the Insight Data Warehouse</h2> <p>DWH002</p>	
Duration	2 Day
Difficulty	★★★★☆
<p>Overview</p> <p>This course is for people who have been on the “Introduction to the Data Warehouse” course and wish to utilise the warehouse to create advanced reports against the optimised reporting database. The course can be geared towards the abilities of the participants; however, to get most value from this course attendees should have a working knowledge of Transact SQL.</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Explain the contents of the data warehouse in detail ➤ Know the contents of the Fact and Dimension tables and how to utilise their properties ➤ Create powerful trend reports and dashboards using features of Report Builder 3.0 	
<p>Participant Pre-requisites</p> <p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ An understanding of OPEN Housing and your organisations business processes ✓ Be experienced working within a business intelligence or performance function ✓ Have a grasp of Transact SQL (T-SQL) language including knowledge of different join types (including subqueries), T-SQL calculations and filtering with subqueries. ✓ Ability to use Report Builder 3.0 and their features confidently <p>Note: <i>it is recommended that the data warehouse be fully functional for at least 2 months before issuing this training, this is to ensure that there is sufficient data in the warehouse to demonstrate its features.</i></p>	
<p>Delivered by:</p> <p>Adam Parkhouse: Business Consultant</p>	

<h2>Creating Visual reports with Report Builder 3.0</h2> <p>RB3003</p>	
Duration	1 Days
Difficulty	★★★★★
Overview	
<p>This course is for users who have experience in using Report Builder 3.0 but struggle to produce visually appealing reports.</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Create a variety of chart types using the chart wizard and can modify their properties ➤ Add multiple data series to a chart (overlying information) ➤ Represent data in the form of gauges and dials and understand how to alter their appearance ➤ Control the formatting of several different report parts based on dataset values, expressions and parameter values. ➤ Introduce indicators and spark lines into tables 	
Participant Pre-requisites	
<p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence or performance function (though this is not essential) ✓ Ability to use Report Builder 3.0 and its features to create datasets 	
Delivered by:	
Adam Parkhouse: Business Consultant	

<h2>Creating Interactive reports with Report Builder 3.0</h2> <p>RB3004</p>	
Duration	1 Day
Difficulty	★★★★☆
Overview	
<p>This course is for users who can create a report but wish to offer a level of interactivity for report users by adopting the principles of drill down, drill through and drill to. This is useful for organisations that distribute reports via the Insight Dashboard or other platforms such as SharePoint.</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Understand the principles of Drill Down, to and through ➤ Add drill down to matrix reports ➤ Add actions to report items that render sub reports ➤ Add actions to charts and dials that render sub reports ➤ Use actions linked to bookmarks as a way of offering interactivity to report users 	
Participant Pre-requisites	
<p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence or performance function (though this is not essential) ✓ Ability to use Report Builder 3.0 and its features to create datasets 	
Delivered by:	
Adam Parkhouse: Business Consultant	
Mark Mace: Business Intelligence Consultant	

<h2>Introduction to SQL Server Data Tools (SSDT)</h2> <p>SSDT001</p>	
Duration	1 Day
Difficulty	★★★★☆☆
Overview	
<p>SSDT is an alternative platform for the development of reports and offers many of the same features of Report Builder 3.0 but in a package more suited to those with a development background or good IT skills.</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Locate Launch and navigate SSDT from within the SQL server where Insight is hosted ➤ Understand the concept of Projects and Solutions ➤ Create a query against your OPEN Housing TEST data ➤ Utilise the different report parts offered within the application (many of which feature in Report Builder 3.0) 	
Participant Pre-requisites	
<p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence or performance function (though this is not essential) ✓ Ability to use Report Builder 3.0 and its features to create datasets 	
Delivered by:	
Mark Mace: Business Intelligence Consultant	

Introduction to SQL Server Management Studio (SSMS) SSMS001	
Duration	1 Day
Difficulty	★★★★☆
Overview	
<p>This course is intended for users who work within the IT support or Business Systems team and wish to understand the basic maintenance of a SQL server database. This is not a Database Administrators course but gives an outline of the basic functions of management studio you are likely to encounter when using Insight products, including connections to a database, browsing contents of tables and views, managing permissions and SQL server agent jobs</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Locate and open Management Studio ➤ Connect to the Insight instance from management studio ➤ Browse table contents by executing a “SELECT” statement ➤ Define server roles and grant permissions to users and groups within Active Directory ➤ Convert an excel spreadsheet into a SQL table through a SQL server agent job 	
Participant Pre-requisites	
<p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ A good grasp of the concepts of a database and its structure ✓ A working knowledge of Microsoft Office applications such as Word or Excel ✓ An understanding of OPEN Housing and your organisations business processes ✓ A business intelligence, performance or systems analyst function and an administrator role within the organisation ✓ Permissions to access SQL Server Management Studio and the Insight instance on the SQL server 	
Delivered by:	
Mark Mace: Business Intelligence Consultant	

<h2>Creating and using Stored Procedures for report writing</h2> <p>SSSP001</p>	
Duration	2 Day
Difficulty	★★★★★
Overview	
<p>Stored procedures are extremely powerful and offer the ability to perform tasks on your database as well as return a dataset that can be used by SQL Server Reporting Services as a data source. This course will examine its ability to act as a dataset.</p> <p>Stored Procedures can offer an improvement in speed over views and offer a functional alternative to having shared datasets within Report Builder. In addition, they offer features such as syntax checking and the ability to use data base functions to perform calculations.</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Explain what a stored procedure is and when to use one ➤ Understand the best way to layout a stored procedure for easy reading ➤ Create a basic stored procedure that returns data from several different tables ➤ Understand the OPENQUERY function and how to use it to increase the speed of your reports ➤ Connect SSDT or Report Builder 3.0 to your stored procedure ➤ Amend a stored procedure and update on the server 	
Participant Pre-requisites	
<p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ An understanding of OPEN Housing and your organisations business processes ✓ Experience working within a business intelligence or performance function ✓ An understanding of a databases structure and its components ✓ Experience using Transact SQL (T-SQL) language including knowledge of different join types (including subqueries), T-SQL calculations and filtering with subqueries. ✓ Ability to use Report Builder 3.0 or SSDT and their features confidently ✓ Permissions to access SQL Server Management Studio and the Insight instance on the SQL server 	
Delivered by:	
Mark Mace: Business Intelligence Consultant	

<h2>Administering the Insight Desktop Dashboard</h2> <p>DASH001</p>	
Duration	1/2 Day
Difficulty	★ ★ ★ ★ ★
<p>Overview</p> <p>This course is for customers who choose to deploy their reports via the Insight Dashboard. Participants will be responsible for publishing reports to user groups and controlling the creation of user accounts within the Dashboard application.</p> <p>By the end of the course, participants will be able to:</p> <ul style="list-style-type: none"> ➤ Launch and navigate all features of the Dashboard ➤ Create a dashboard profile ➤ Manage and publish reports ➤ Create and manage users, their licenses and permissions ➤ Use all the viewing features within the Dashboard such as creating, saving and deleting bespoke layouts, auto refreshing and creating subscriptions. 	
<p>Participant Pre-requisites</p> <p>To successfully engage with the course material, attendees should have:</p> <ul style="list-style-type: none"> ✓ Awareness of the role of the Insight dashboard within their organisation ✓ An understanding of OPEN Housing and your organisations business processes ✓ A role within a business intelligence, performance or IT support function (as these roles typically control the distribution of reports) ✓ A basic level of IT literacy 	
<p>Delivered by:</p>	
<p>Adam Parkhouse: Business Consultant</p>	