Insights Training Course Pre-reading

WORLD CLASS, DATA DRIVEN INSIGHT & DECISION MAKING

INSIGHTS OVERVIEW

Accessed from the **Analyse** | **Insights** menu in Timegate, Insights is a tool that provides your company an easy to use, easy to implement Business Intelligence tool set. It enables you to begin your analysis journey. Insights offers access to data in new ways, above and beyond the standard Timegate reports. It offers exciting, fresh visualisation of your data. With Insights you can scrutinise and evaluate the different aspect of your business. As standard, you will have access to a series of standard reports in Timegate that you can filter. As your confidence grows during your Insights training journey, you will be able to use it to produce reports and dashboards meeting your business needs.

KEY TERMS

Data Source A data source is a table, view or stored procedure that is used to query within a report.

Table A relational database, like Timegate, is made up of one or more tables. Tables are the structure within which data is stored e.g. Employee data may be stored in an Employee table, Site data may be stored in a Site table etc. Tables comprise multiple fields.

Field (**Data Source Field**) A field from within a table, view or stored procedure that can be displayed, used in calculations or used to filter upon inside your reports. An example of a fields within an Employee table could be: Name, Address etc.

Calculated Field A user-defined field whose value is calculated on the fly from other data source(s) or calculated field(s)

Key Field A special field that is a unique identifier of a record from all the other records in a table. An example could be a PIN in an Employee table - every employee has their own unique PIN.

Join A database join combines columns from one or more relational database tables. This is done using values that are common to each table. See *Understanding Joins"* for more information.

Report A report displays data from tables and queries in an attractive format. Within a report you can select data sources and build data visualisations in containers called Report Parts. They are useful for decision-making and analysis. Often reports are printed.

Report Part An individual representation of the report data, which can be graphical or textural e.g. a chart, map, data grid, etc.

Report Template A pre-built report that enables the user to quickly generate reports on an ad-hoc basis

Dashboard A dashboard is a hub of visual information. It combines information from various data sources. It could be metrics, key performance indicators and graphs. Like reports, dashboards have an elemental container called a tile. These tiles act as a collection of report parts combined into a single visualisation.
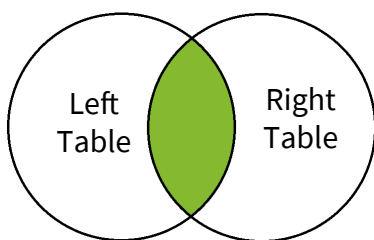
Dashboard part An area within a dashboard that contains a report part.

System Variable A named place holder that will be replaced by an actual value while being used.
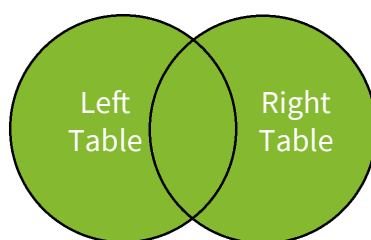
UNDERSTANDING JOINS

A database join is used to combine rows from multiple tables, using related columns between them. There are four join types in Insights as follows:
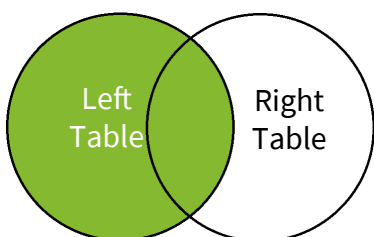
Inner Join

Returns records were values match in both tables
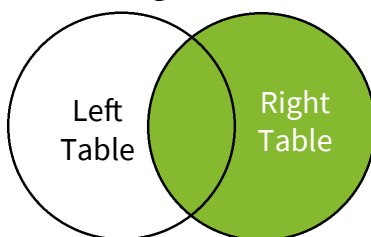
Full Join

Returns all records where there is a match in either the left or right table

Left Join

Returns all records from the left table, and those records that match in the right table

Right Join

Returns all records from the right table, and those records that match in the left table

SAMPLE INSIGHTS MENUS

Main / Page Menus (View | Report example)

Select to view Reports/Dashboards

Select to create a new Report/Dashboard

Select to subscribe

Select to e-mail

Select for export

Select to Save

Select to Cancel

Select to open settings

Select to print

Select to view/select Filters, then select Apply Filters

Report results

Select for edit functions

Select to Close report

Timegate — View | Designers | Settings — Logout

Reports | Dashboard — Report Designer | Dashboard Designer

Total Hours Worked

Filters — Apply Filter

Employee Duty Pay

Subscribe | Print | Email | Export | Edit | Save | Cancel | Close

Export: Word, Excel, PDF, CSV, XML, JSON, Query Execution

Edit: Quick Edit, Design, Copy, Move, View History

Save: Save, Save As

	Duty Start	Duty Finish	Hours	Total
	03/01/2019 00:00:00	04/01/2019 00:00:00	24.00	24
1873	03/01/2019 00:00:00	04/01/2019 00:00:00	24.00	24

Context Sensitive Side Menu (Report | Designer example)

Select item of choice from menu

On screen help for selected item

Select the data sources containing the fields you would like to use to design

- Data Source
- Design
- Format
- Exporting
- Schedule
- Access

Create report parts and filters, and use the fields to create report body

Customise report with header, footer, title and description

Preview report and make changes to layout for export

Create scheduled report instances and alerts and share via e-mail

Audit Employees Dia...

Set access rights for who can see the report and their level of access