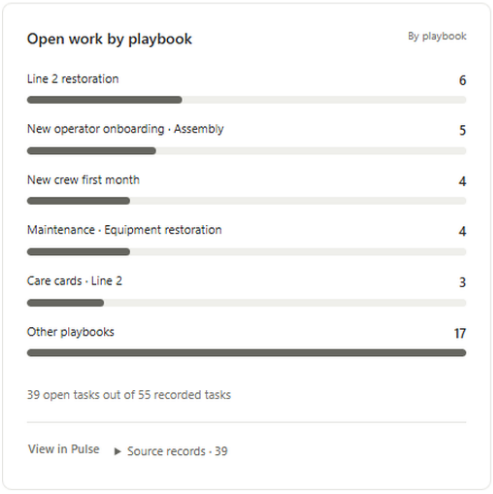
CONFIGURE PULSE AND INSIGHTS TEMPLATES

Build a reporting panel around the team's actual question

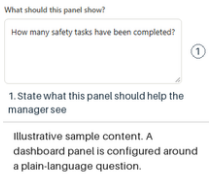
Choose columns, grouping, a panel title and display type, then preview the result against the data question the team needs to explore.

Edit layout; Add panel > Describe data; Choose display > Save and preview

SkillSmith · Review open work by playbook and open its source records



SkillSmith · Describe the question a dashboard panel should answer



SkillSmith · A recorded observation stays attached to its task



Review open work by playbook and open its source records

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

Who can use this product method

The method keeps the stated role and access scope. Your team confirms the people involved.

Your role	The contribution	SkillSmith support
Resource owner or administrator	Edit layout, Add panel, Describe data, Choose display and Save and preview	Use the method within the permitted scope for the selected information.

Clarify the question and preview the result

In a worked example, a chart is visually clear but its data question is ambiguous; define the question and preview the result before making it the team's reporting view.

WORKED DECISION

Decision point	Information to use	Responsible next step
Inputs to review	Columns and Grouping	Edit layout.
Method action	Panel title, Data question and Display type	Add panel and Describe data.
Result to inspect	Reusable report or dashboard	Inspect the available result within the permitted scope.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Configure Pulse and Insights templates

Start with columns and grouping. The steps below show the actions and information available for this method.

01 Edit layout; Add panel

Start with columns and grouping. Edit layout and Add panel.

02 Describe data; Choose display

Describe data and Choose display with panel title, data question and display type in view.

03 Save and preview

Save and preview. The result includes reusable report or dashboard.

Use the supporting product method

Review the available actions and the result within the method's stated scope.

Configure Pulse and Insights templates

The configured template is available for permitted reporting.

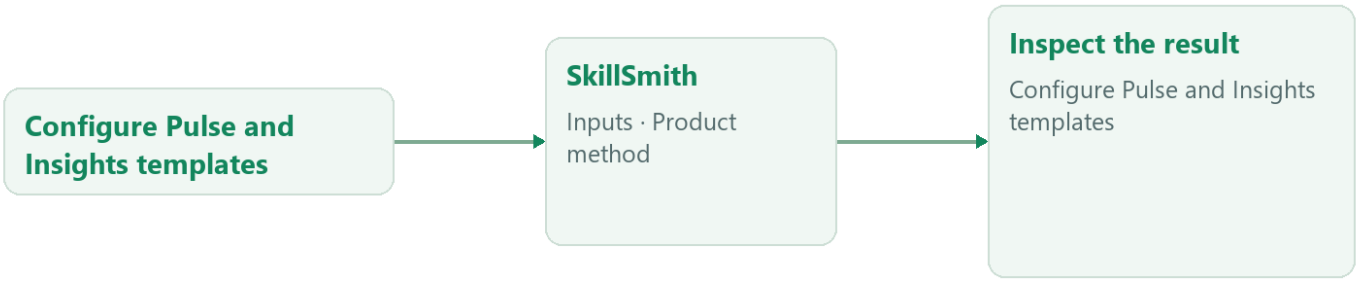
Build a reporting panel around the team's actual question

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Configure Pulse and Insights templates Reusable report or dashboard.

A team needs a useful view

YOUR DELIVERY PLAN / OUR TEAM

Set up a useful first example

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Choose the working inputs

Review columns, grouping, panel title, data question and display type.

02 Agree who will use the method

Confirm the relevant people and their permitted scope: Resource owner or administrator.

03 Try the useful actions

Edit layout, Add panel, Describe data, Choose display and Save and preview.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What can we inspect after using this method?

The method provides reusable report or dashboard. The configured template is available for permitted reporting.

Who uses this method?

The permitted roles are Resource owner or administrator. Confirm the people and their access for the selected example.

Which choices do we need to make first?

Review columns, grouping, panel title, data question and display type. Use those choices to prepare the first example and its permitted scope.

Which data question, grouping and display make this panel useful?

A chart is visually clear but its data question is ambiguous; define the question and preview the result before making it the team's reporting view.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
Missing information is read as a confirmed result.	Inspect supporting records and distinguish missing evidence from a confirmed outcome.
Automation activity is used as a substitute for assessed quality.	Use Real Metric to inspect change accuracy, process adherence, human review and understanding checks separately.

Walk through this method with us

Bring one real example and the information needed for this method. We will walk through its actions, result and permitted scope.

- Which data question, grouping and display make this panel useful?
- The inputs and available actions
- The people and permitted scope
- The result to inspect

Request a demo

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