Discovering Instant Insights

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Overview

Instant Insights are enabled via the Auto Analyze option available in the tooltip. This leads to two options: **Explain** and **Compare.** Refer to the procedures below to understand how both of these work.

- This feature is not available for all chart types. See the list of limitations below.
- Only users with the appropriate security functions are able to access this feature. Learn more about these here.
- The system administrator needs to configure the underlying view to make Instant Insights available for users. This guide shows how to do that.

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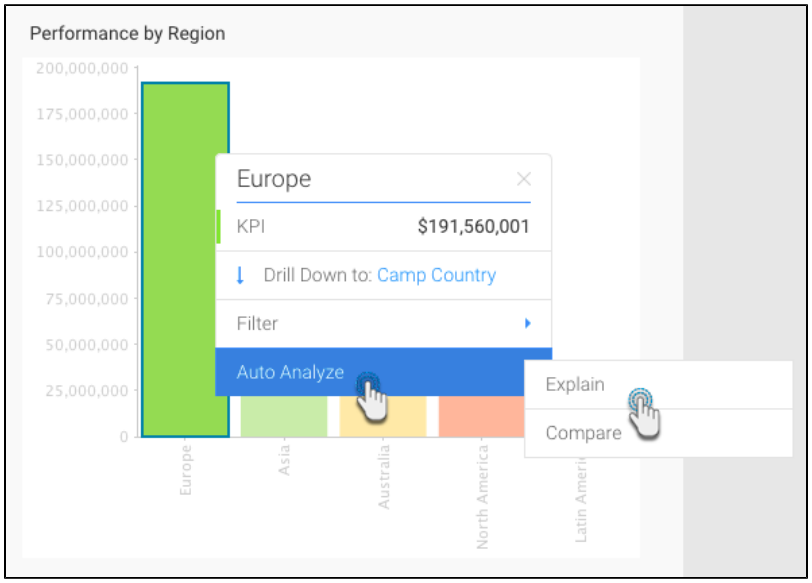
Explain

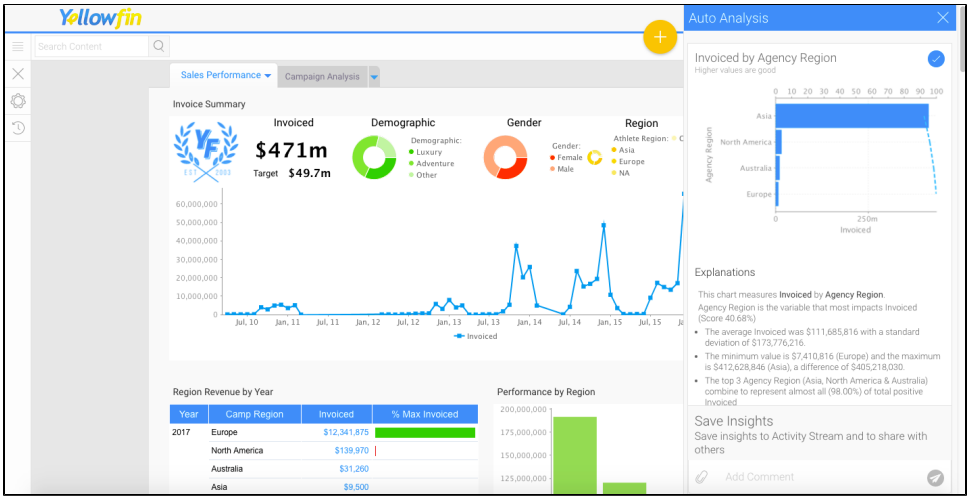
Using this option, Yellowfin will explain the underlying data drivers that impact the particular metric you have chosen. In our example below, the business user has selected Sales for Europe and then chosen the Explain option from the tooltip. Yellowfin will access additional data elements from the underlying data view, and then run a series of algorithms to determine statistically relevant insights and present these back to the user.

1. Locate the chart that you want to analyze (perhaps there is a spike or pattern in the data that you are interested in).
2. Right-click on a chart element (bar, data point) or hover your cursor over it to bring up the tooltip.
3. Click on the Auto Analyze option, and then select Explain.

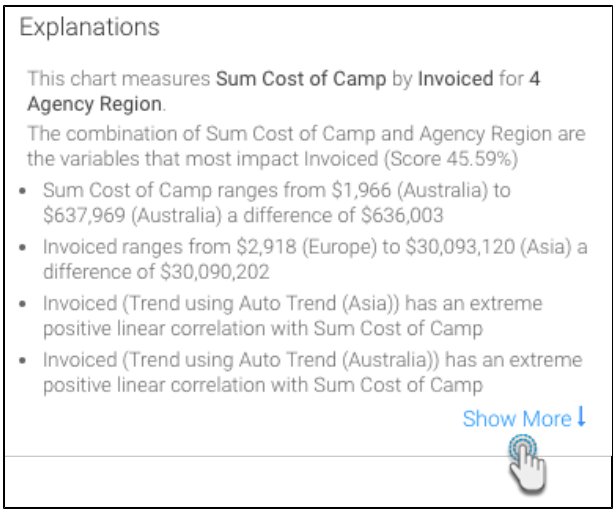


4. A new Auto Analysis panel will appear, displaying the results of the analysis process. These insight results will be displayed in order of statistical relevance.

> ⚠ The chart type selected by Yellowfin depends on the type of data. For example, if the values are both metrics, then a scatter plot graph will be generated.



5. A narrative explanation is also provided with each of the charts, allowing you to better interpret the results of the analysis.
6. Click on Show More at the end of the explanations, to view the complete set of narratives that are provided with your insight.



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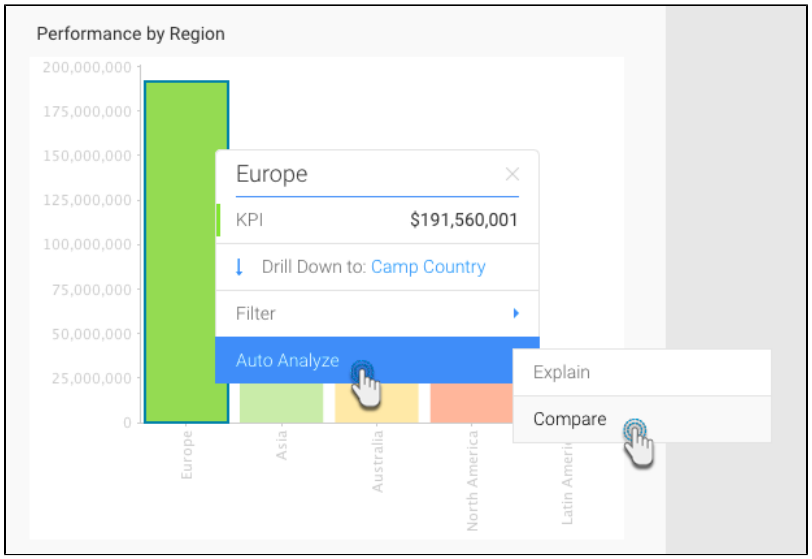
Compare

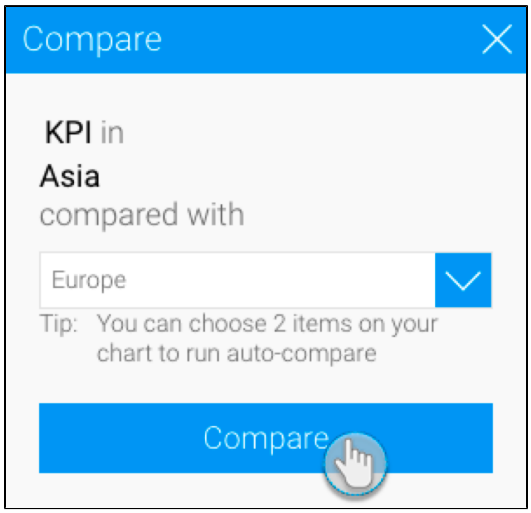
Using this option, Yellowfin will analyze the data that best explains the difference in values for a particular metric between two dimension or date values. For example, in the screen shot below – the business user has selected Sales for Asia and then chosen the Compare option from the tooltip. The user can

then compare Asia to another region. Yellowfin will access additional data elements from the underlying data view, and then run a series of algorithms to determine statistically relevant drivers of difference and present these back to the user. The steps are:

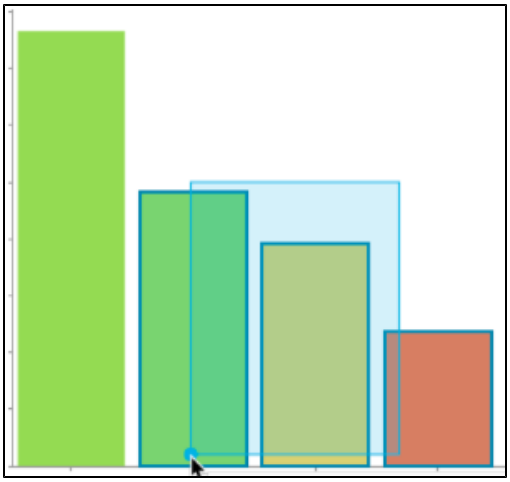
1. Navigate to the chart that you want to analyze (perhaps there is a large difference between two elements on a chart that you are interested in exploring).
2. Right-click on a chart element (bar, data point) or hover your cursor over it to bring up the tooltip.
3. Click on the Auto Analyze option, and then select Compare.



4. Select the data that you want to compare to from the list in the popup that appears.
5. Click on the Compare button.

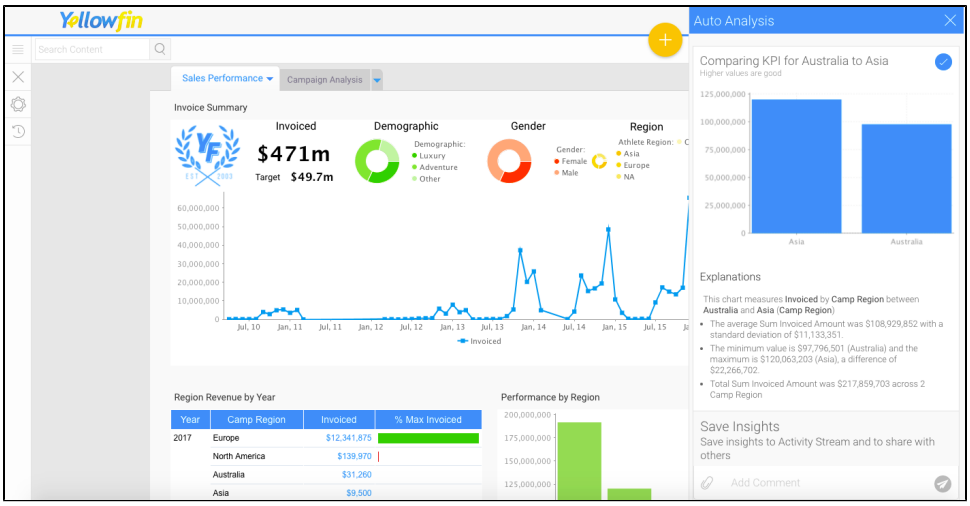


a. Alternatively, you can select two bars to compare by clicking and dragging the cursor over them (brushing).

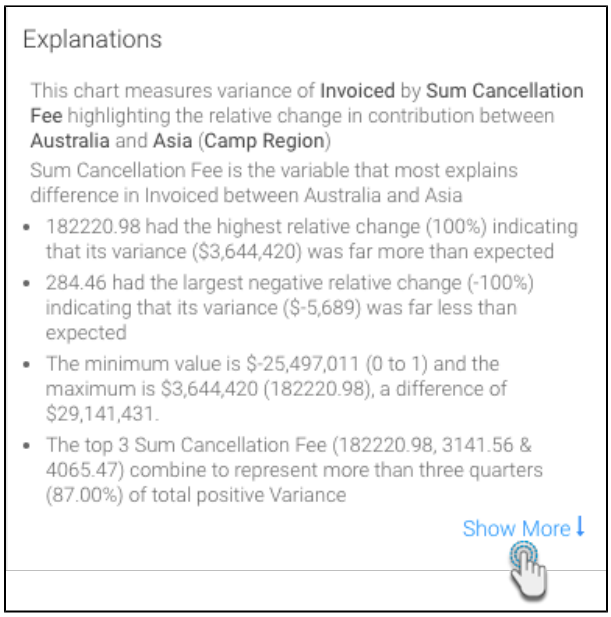


b. Or, clicking on one, pressing the Shift key and selecting the other one.

6. The result of the comparison will appear in an Auto Analysis panel displaying charts with explanations, based on your selected data.



Click on Show More at the end of the explanations, to view the complete set of narratives that are provided with your insight.



On performing Assisted Insights, a report is generated by Yellowfin in the background and saved in the configuration database, which is the basis for the auto insights charts and narratives. If the insights get discarded by the user, these reports will be unused. The system will carry out a check for these orphan reports every 48 hours, and delete the unused ones.

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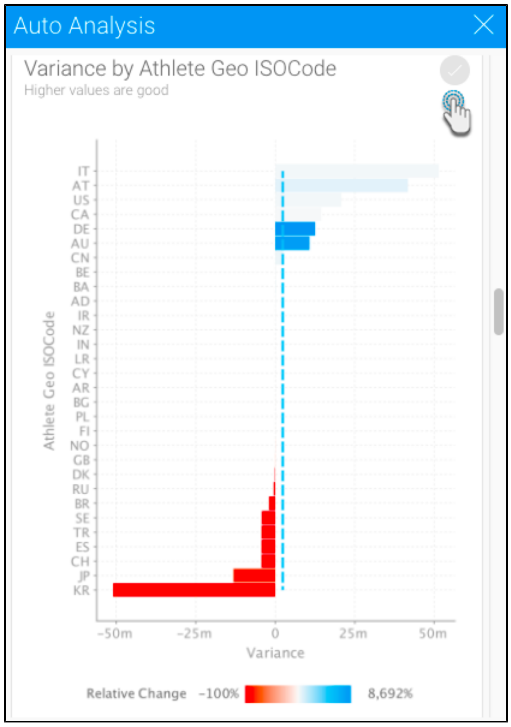
Editing Insights

Yellowfin's Instant Insights functionality analyzes your data and generates useful insights. The system enables you to create a new report from the insights that were generated - including the charts that appear in the Auto Analysis panel. The report that is generated can be used like any other Yellowfin report. In this way, you can turn interesting insights discovered by Yellowfin, into reports that you can run regularly and include in your dashboards.

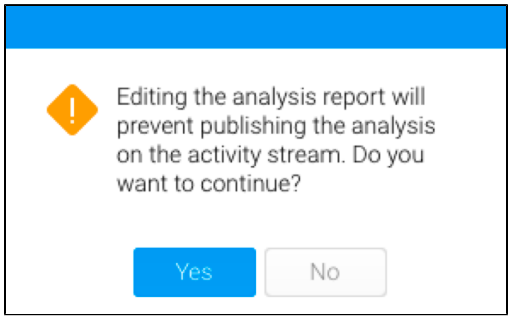
This tutorial will show you how to create a new report from your Instant Insights.

1. On generating Instant Insights, the Auto Analysis panel will appear, displaying the insights produced by Yellowfin.
2. Select the charts that you want to edit or view the reports of, by clicking on their select icon.

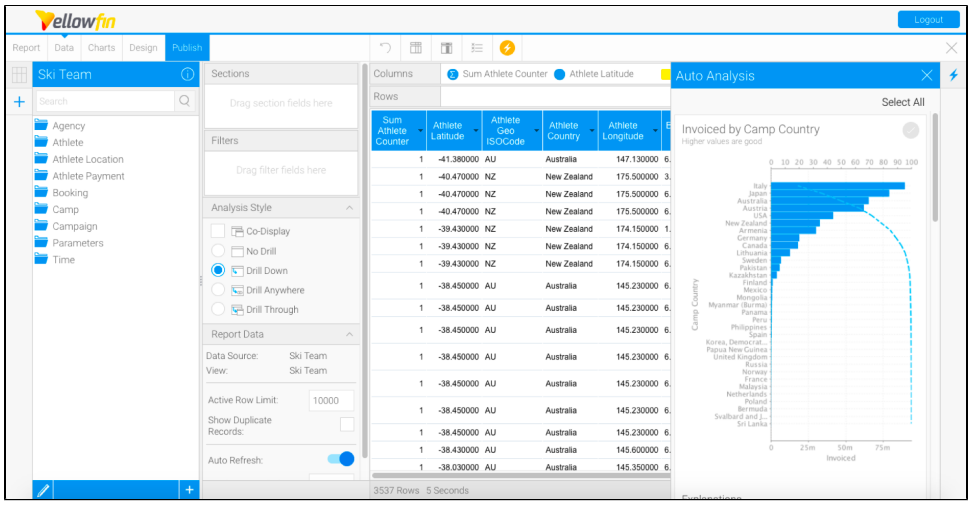


3. Note: All the charts will be selected by default; un-select the ones that you don't want to edit or view in detail, by clicking on their select icon.
4. Click on the menu option in the Save Insights panel, and click Edit Analysis. **Note:** This function is only available to users with report editing security access. (If you choose the Discard option instead, then the Insights will be discarded, without saving the report.)

5. An alert will appear indicating users that editing the analysis will prevent them from publishing the results on the activity steam. To continue, click Yes.



6. You will be taken to the Report builder, where you can view the reports and charts that you have selected.



7. If you wish to make any changes to the reports, you can do that here.
8. To see an enlarged version of a chart and clear narratives, simply click on it.

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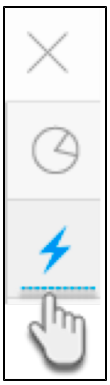
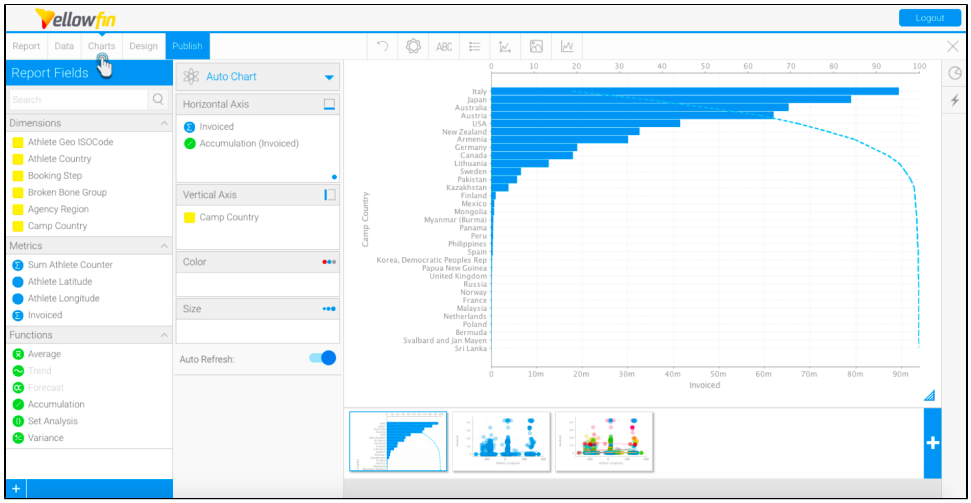
9. Note: To close the Auto Analysis panel, simply click on the Insights button on the right side of the screen.

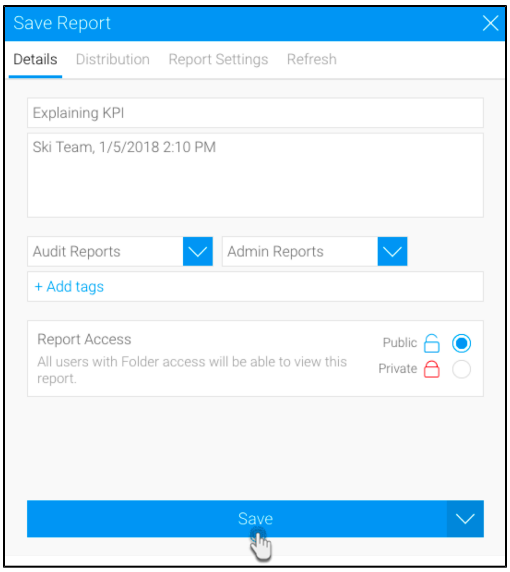


10. To update charts, click on the Charts button to navigate to the Chart Builder.



11. You can edit the chart(s) further if you wish to.
12. Then save the new report by clicking on the Publish button.

13. Provide report details, and select it's destination folder, and then click Save.



14. These reports and charts can now be used as any other Yellowfin reports.

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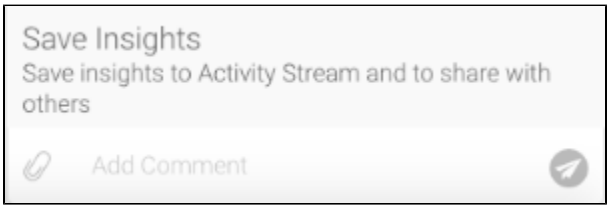
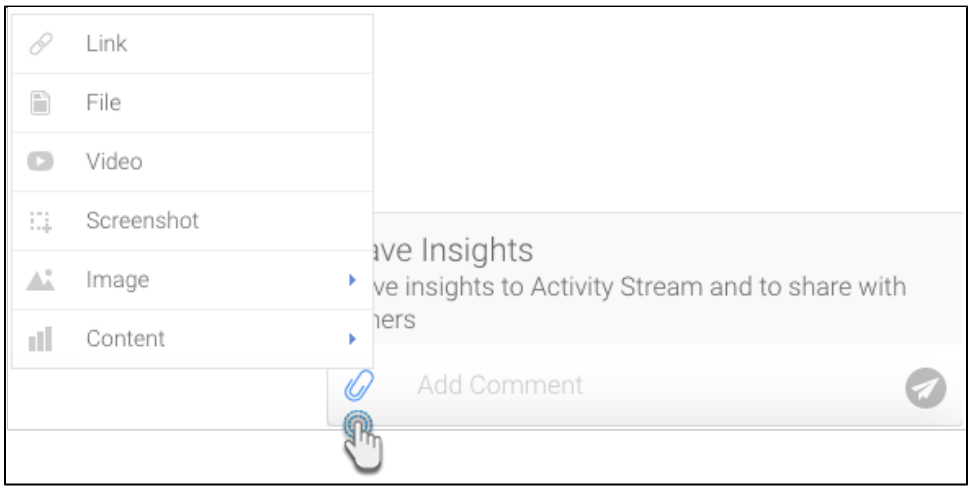
Sharing Insights

Once insights appear in the Auto Analysis panel, you can save these to the activity stream to be used later, or to share them with other users.

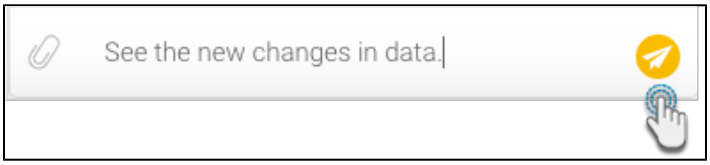
1. Choose the insights that you wish to save.
2. Insights can be saved or shared using the Save Insights section at the bottom of the Auto Analysis panel.



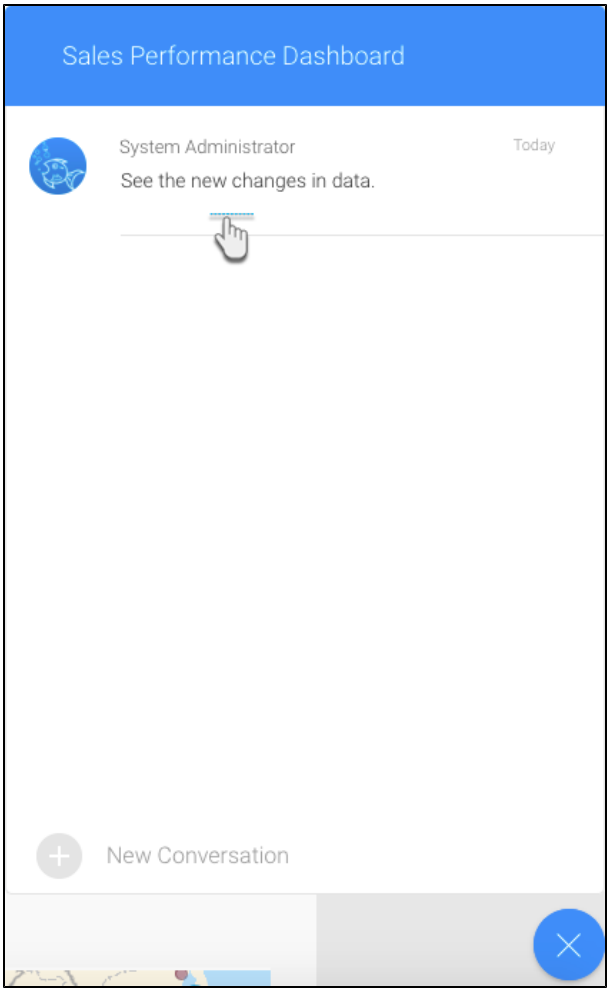
3. Enter a comment.
4. You can also attach a file by using the attachment icon.



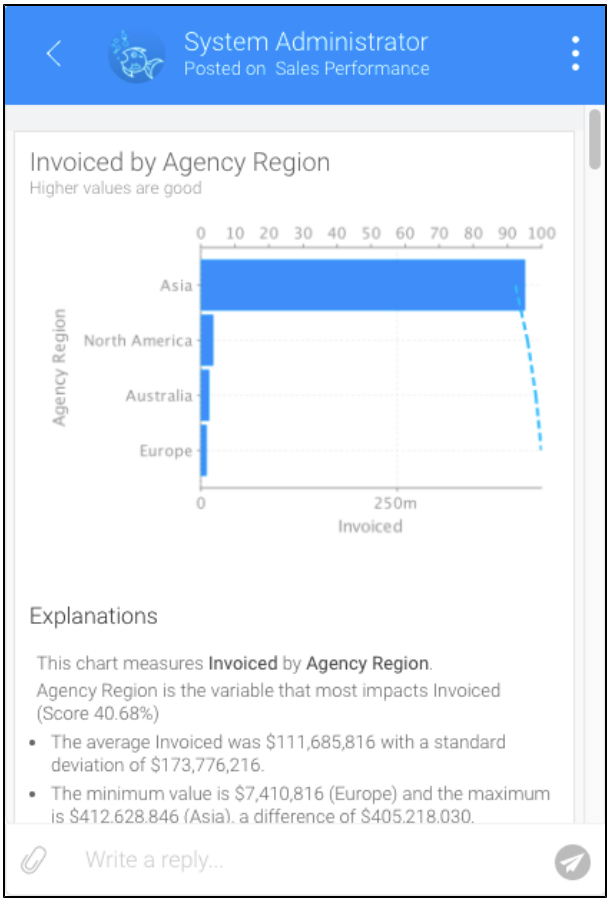
5. Then click on the send icon.



6. This will be added to the activity stream of the chart or dashboard. (For more information on the activity stream, click here.)



7. Click on this comment to view the saved insights in the activity stream.



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Limitations

This functionality is currently unsupported for the following chart types.

- Cross tab charts.
- Auto charts with more than one dimensions in the X or Y axis.
- The following analytical charts: Scatter, Treemap, Histogram, Box & Whisker, Heat grid. Trellis charts that contain more than one dimensions in either of the axes will not be supported either.
- Area charts: Stacked area charts.
- Bar charts: Stacked Horizontal Bar, and Layered Bar.
- Column charts: Stacked Vertical Column, 3D Stacked Column, and Layered.
- Line chart types: Z-charts.
- All types of financial charts.
- All types of map charts.
- All types of meter charts.
- Special purpose charts: Funnel, Proportional Infographic, Comparative Infographic, Radar, Event, Week Density, and Digital Numeric Display.

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