Setting Up Assisted Insights

Overview

This guide shows you how to configure Assisted Insights settings through the view builder, and to provide users with security access to Instant Insights and Assisted Discovery.

> ✅ Only admins can create and modify views. Ensure you have the appropriate access before attempting to create or edit a view.

> ✅ Assisted Insights is only available for pre-selected fields. You can change these fields through the Automation settings dialog box within the view builder.
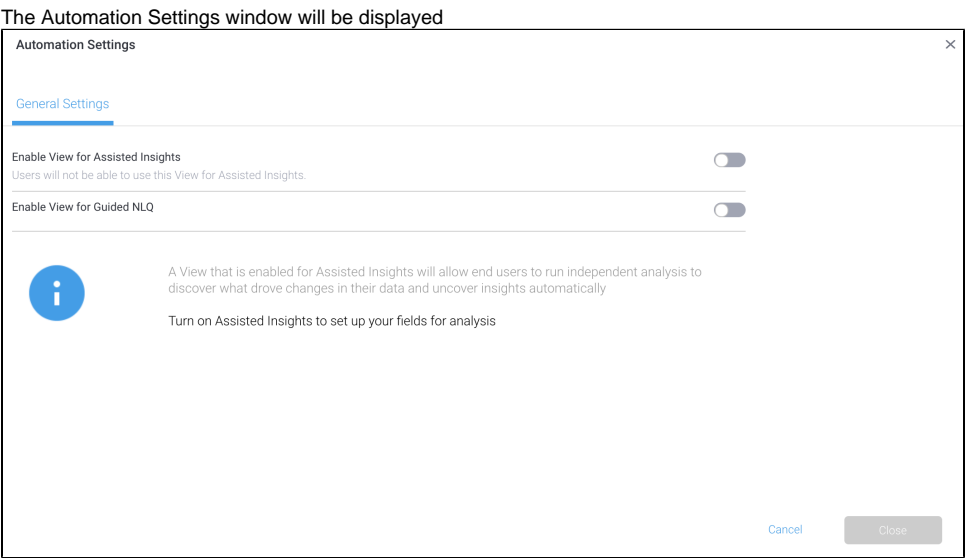

Enabling Assisted Insights at the view level

New views

The following steps outline the process for enabling Assisted Insights on a new view. For more information on how to create views, click here.

1. From the view builder, click the **Automation Settings** 🤖 tool on the view builder toolbar

The Automation Settings window will be displayed

2. Toggle on the **Enable View for Assisted Insights** toggle, and click the **Continue** button

The **Key Variables** tab will be displayed

3. Check the **checkboxes** of the dimensions or metrics you would like Assisted Insights enabled for, and click the **Submit** button
The Automation Settings window will close and the view builder will be displayed
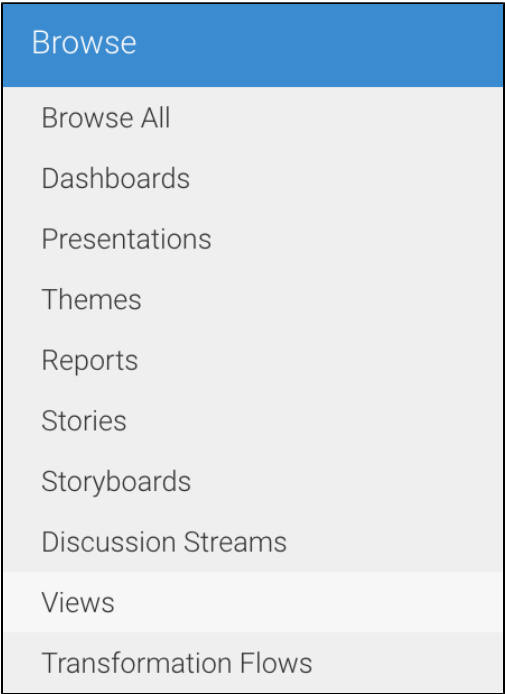

Assisted Insights is now enabled for the selected fields in your view.

Pre-existing views

The following steps outline the process for enabling Assisted Insights on a pre-existing view.

1. From the. burger bun [☰] , click the **Browse** menu, then click the **Views** option

2. Hover your mouse cursor over your selected view, click on the menu button [⋮]

3. Hover your mouse over **Edit**, then click **Automation Settings**
   The Automation Settings window will be displayed

4. Toggle on the **Enable View for Assisted Insights** toggle, and click the **Continue** button

The **Key Variables** tab will be displayed

5. Check the **checkboxes** of the dimensions or metrics you would like Assisted Insights enabled for, and click the **Submit** button
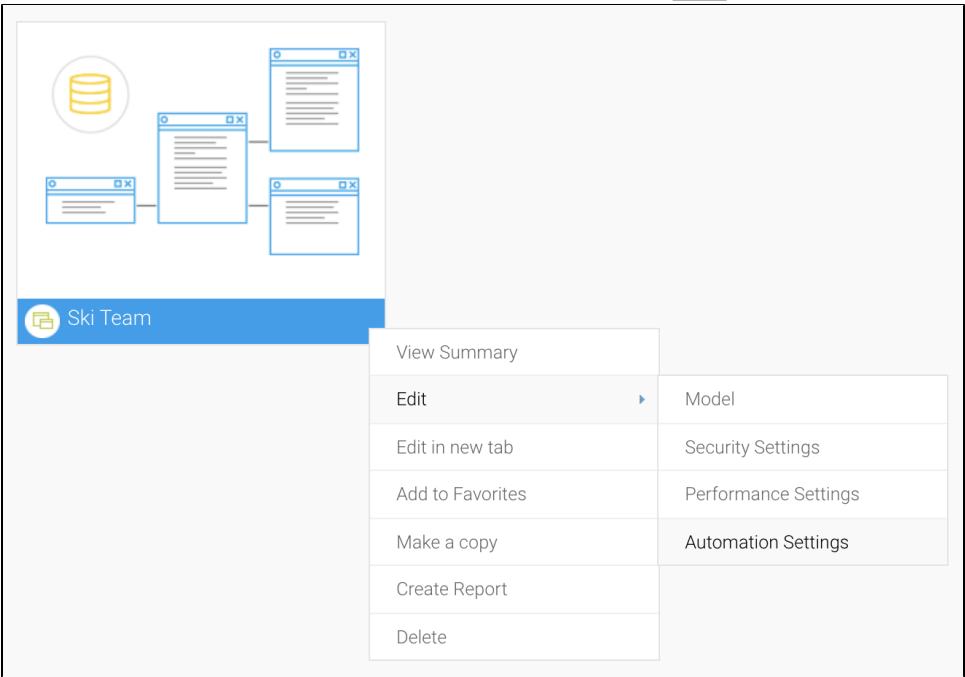The Automation Settings window will close and the view browse page will be displayed

Assisted Insights is now enabled for the selected fields in your view.

Enabling Assisted Insights for users

Once Assisted Insights are enabled at the view level, admins can grant Assisted Insights access for different user types. There are three security access functions, and they can be configured from the Assisted Insights section on the Role Management page.

Security Access Function	Description
Assisted Discovery	Provides access to the Assisted Discovery feature available in the report builder.
Instant Insight	Provides access to the Instant Insights feature available on charts.
Configure Assisted Insights	Provides access to the Insights Settings feature available in the view builder. This security access function is enabled by default for admins, and is a required function for configuring Assisted Insights settings.

top

Changing user permissions for Assisted Insights

The following steps outline how to enable or disable Assisted Insights for different user types:

1. From the burger bun [≡], click on the **Administration** menu, then click the **Admin Console** option

System Administrator
Admin

My Dashboards >

People

Browse >

Signals >

Streams

Administration

Admin Console

Configuration

Content Settings

Export

Import

Images and Maps

Email Template

Session Management

Schedule Management
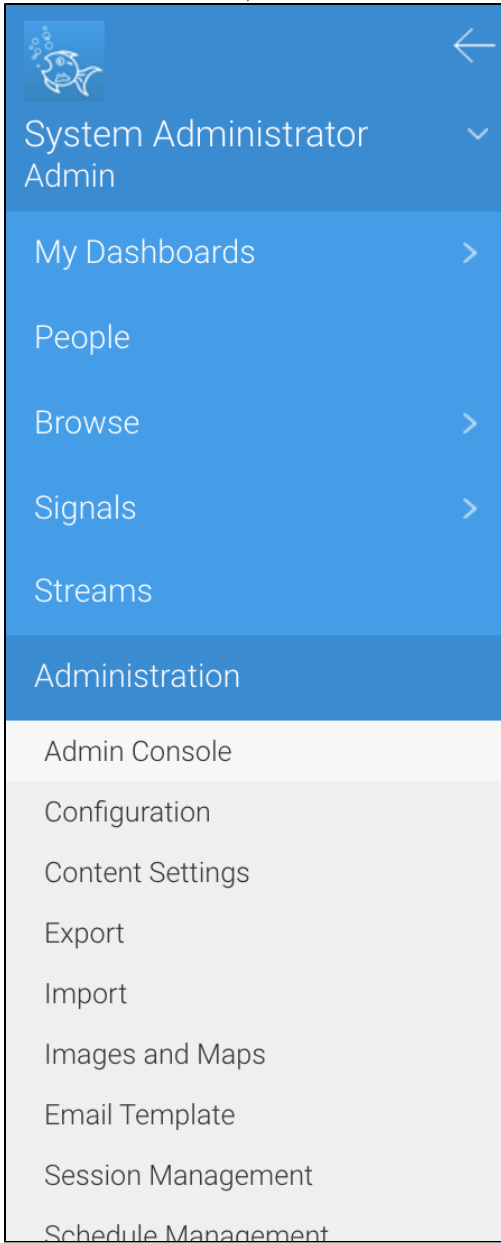
2. Expand the **Roles** section, and click on a user role to display the Role Management page

Roles		Members
Consumer & Collaborator	Default	0 ▼
Personal Content Writer & Collaborator		0 ▼
Public Content Writer & Collaborator		2 ▼
Public Content Writer & Collaborator - Advanced		1 ▼
System Administrator		1 ▼

Add

3. Expand the Assisted Insights section, and check the checkboxes to enable the security access functions for the selected role
   To disable a function, uncheck the checkbox

∧ Assisted Insights
☑ Enable Assisted Discovery ⓘ
☑ Enable Instant Insights ⓘ
☑ Configure Assisted Insights ⓘ

4. Click on the **Save** button
5. Log out of the system and log in again for these settings to take effect

top