



Setting Up Assisted Insights

- [Overview](#)
- [Enabling Assisted Insights at the view level](#)
 - [New views](#)
 - [Pre-existing views](#)
- [Enabling Assisted Insights for users](#)
 - [Changing user permissions for 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](#).

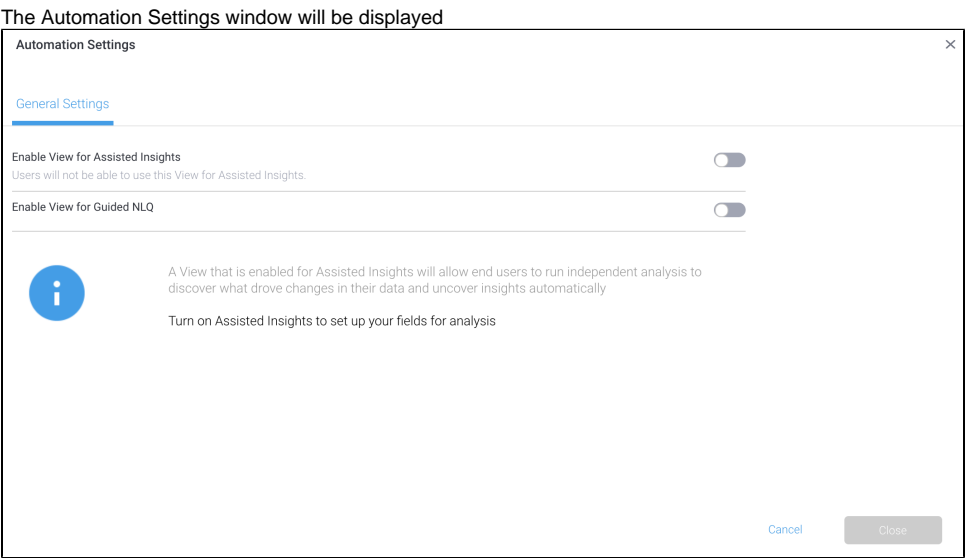
[top](#)

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



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

Automation Settings

General Settings

Key Variables

Enable View for Assisted Insights

This View can be used for Assisted Insights. Make sure you click on the Key Variables tab to set up your variables.

Enable View for Guided NLQ

Row Unique Identifier

Which field uniquely identifies a row in this data set. If more than one leave blank

... None ...

Primary Date Field

Select the date field to use to plot time series data.

... None ...

Cancel

Continue

The **Key Variables** tab will be displayed

Automation Settings

General Settings

Key Variables

Metrics	Assisted Insights	Guided NLQ	Description	Higher value is	Format	Non-Additive	Custom Chart Color	Field Usage Restrictions
<div><div></div><div>Σ</div><div>AGEATCAMP</div></div>	<input type="checkbox"/>		AGEATCAMP		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>AGENCYID</div></div>	<input type="checkbox"/>		AGENCYID		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>CAMPAIGNID</div></div>	<input type="checkbox"/>		CAMPAIGNID		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>CAMPID</div></div>	<input type="checkbox"/>		CAMPID		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>CAMPLENGTH</div></div>	<input type="checkbox"/>		CAMPLENGTH		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>CAMPIDRATING</div></div>	<input type="checkbox"/>		CAMPIDRATING		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>

Cancel

Submit

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

Automation Settings

General Settings

Key Variables

Metrics	Assisted Insights	Guided NLQ	Description	Higher value is	Format	Non-Additive	Custom Chart Color	Field Usage Restrictions
<div><div></div><div>Σ</div><div>CANCELLATIONFEE</div></div>	<input type="checkbox"/>		CANCELLATIONFEE		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>COST</div></div>	<input type="checkbox"/>		COST		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>INVOICEDAMOUNT</div></div>	<input checked="" type="checkbox"/>		INVOICEDAMOUNT	Good	Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>INVOICEESTIMATE</div></div>	<input type="checkbox"/>		INVOICEESTIMATE		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Σ</div><div>PERSONID</div></div>	<input type="checkbox"/>		PERSONID		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>

Dimensions

Assisted Insights

Guided NLQ

Plural Title

Description

Filter Value Case

Mandatory Filter

Field Usage Restrictions

Cancel

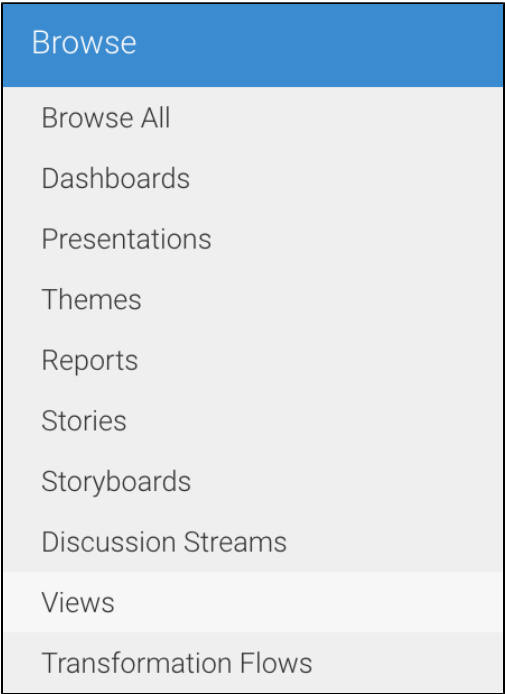
Submit


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

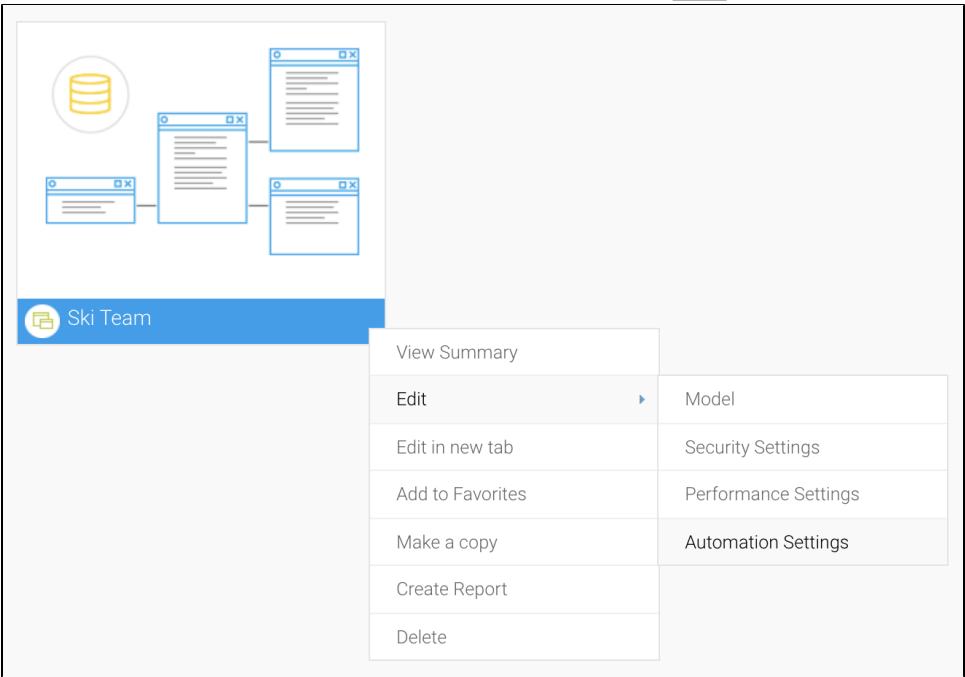
Pre-existing views

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

1. From the burger button , 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

Automation Settings

General Settings

Key Variables

Enable View for Assisted Insights

Users will not be able to use this View for Assisted Insights.

Enable View for Guided NLQ

Use this view for Guided NLQ. Make sure you click on the Key Variables tab to set up your variables.

Row Unique Identifier

Which field uniquely identifies a row in this data set. If more than one leave blank

--- None ---

Primary Date Field

Select the date field to use to plot time series data.

Invoiced Date

Custom Help Text - Guided NLQ

Enter your own introductory help text for Guided NLQ if you wish to replace the default message.

The Ski Team data is just for practice! When you're ready, click on the Start Again button to select something else.

Cancel

Continue

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

Automation Settings

General Settings

Key Variables

Enable View for Assisted Insights

This View can be used for Assisted Insights. Make sure you click on the Key Variables tab to set up your variables.

Enable View for Guided NLQ

Use this view for Guided NLQ. Make sure you click on the Key Variables tab to set up your variables.

Row Unique Identifier

Which field uniquely identifies a row in this data set. If more than one leave blank.

--- None ---

Primary Date Field

Select the date field to use to plot time series data.

Invoiced Date

Scope of Analysis - Date Period

Select a time interval that will provide the best sample for analysis.

--- None ---

Maximum Data Range - Assisted Insights

1

--- None ---

Cancel

Continue

The **Key Variables** tab will be displayed

Automation Settings

General Settings

Key Variables

Metrics	Assisted Insights	Guided NLQ	Description	Higher value is	Format	Non-Additive	Custom Chart Color	Field Usage Restrictions
% Age at Camp	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Age of the athlete w...	Good	Custom	<input type="checkbox"/>		
Σ Athlete Counter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	A formula to enable ...	Good	Custom	<input type="checkbox"/>		
Athlete Latitude	<input type="checkbox"/>	<input type="checkbox"/>	The latitude of the at...		Custom	<input type="checkbox"/>		
Athlete Longitude	<input type="checkbox"/>	<input type="checkbox"/>	The longitude of the ...		Custom	<input type="checkbox"/>		
% Camp Days	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Total length of the c...	Good	Custom	<input type="checkbox"/>		
% Camp Rating	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Camp rating selecte...	Good	Numeric	<input type="checkbox"/>		

Cancel

Submit

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.

Automation Settings

General Settings

Key Variables

Metrics	Assisted Insights	Guided NLQ	Description	Higher value is	Format	Non-Additive	Custom Chart Color	Field Usage Restrictions
<div><div></div><div>Exchange Rate</div></div>	<input type="checkbox"/>	<input type="checkbox"/>	The exchange rate u...		Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Invoice Estimate</div></div>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Estimated invoiced a...	Good	Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Invoiced (Pref Currency)</div></div>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Formula Builder Met...	Good	Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Invoiced Amount</div></div>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invoiced amount (in ...	Good	Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>
<div><div></div><div>Profit Margin</div></div>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Profit made from ath...	Good	Custom	<input type="checkbox"/>	<div><div></div></div>	<div><div></div></div>

Assisted

Mandatory

Field Usage

Cancel

Submit

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.

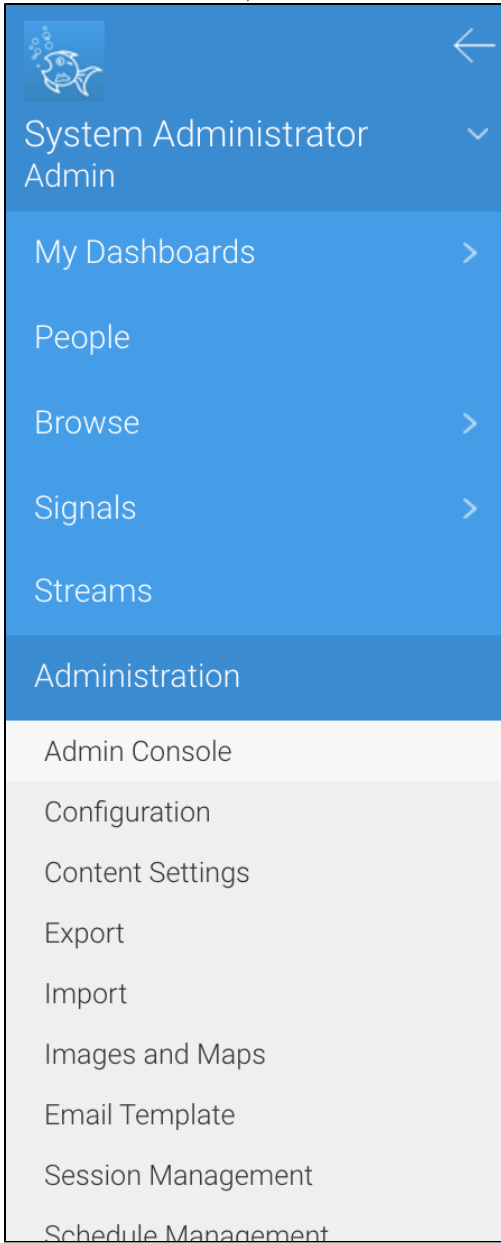
Security Access Function	Description
Assisted Discovery	Provides access to the Assisted Discovery feature available in the report builder.
Instant Insight	Provides access to the Instant Insights feature available on charts.
Configure Assisted Insights	Provides access to the Insights Settings feature 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



- 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	

- 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		
<input checked="" type="checkbox"/>	Enable Assisted Discovery	i
<input checked="" type="checkbox"/>	Enable Instant Insights	i
<input checked="" type="checkbox"/>	Configure Assisted Insights	i

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