

Discovering Instant Insights

- [Overview](#)
- [Explain](#)
- [Compare](#)
- [Editing insights](#)
- [Sharing insights](#)
- [Limitations](#)

Overview

Instant Insights allow you to rapidly uncover insights in your data with minimal effort. Yellowfin can provide a deeper explanation of the data you're seeing, or compare two data points on a chart to understand differences.

Upon performing Instant Insights, a report is generated by Yellowfin in the background and saved in the configuration database, which forms the basis for the Instant Insights charts and narratives. If the insights are discarded by the user, these reports will be unused. The system will perform a check for these orphan reports every 48 hours, and delete the unused ones.

The Instant Insights feature is accessed via the **Auto Analyze** option in the chart tooltip dropdown menu on a dashboard. **Auto Analyze** offers two options: **Explain** and **Compare**. Refer to the procedures below to understand how both of these work.



Instant Insights must be [configured at the view level](#) by an admin before [making it available to users](#).



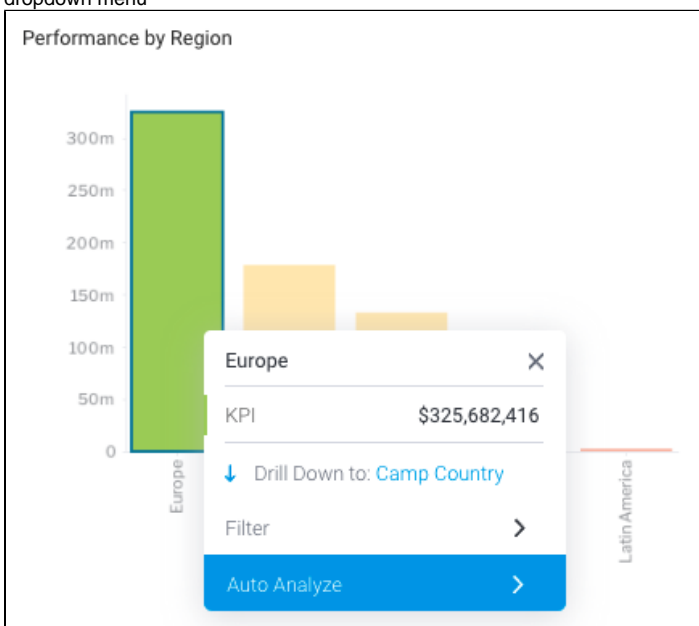
Instant Insights is not available for all chart types; see the list of limitations [below](#).

[top](#)

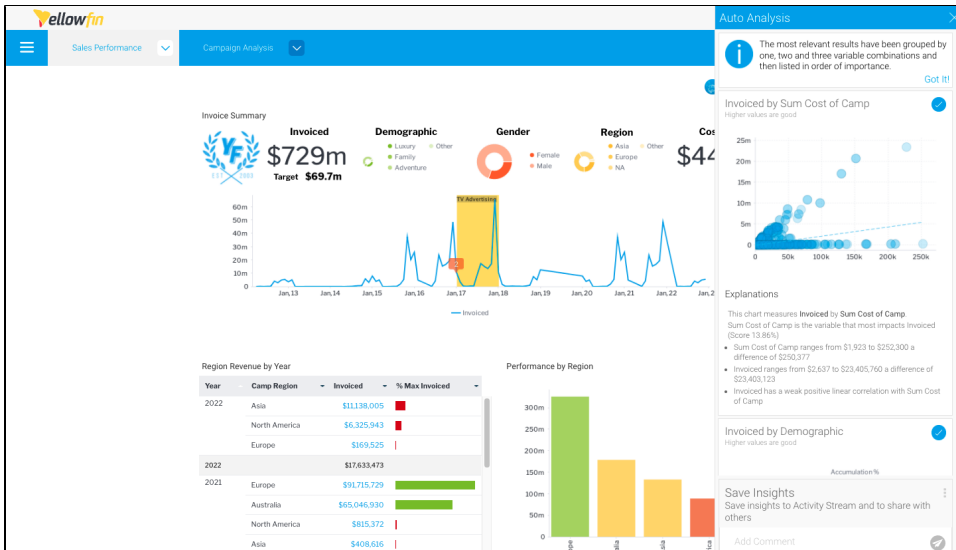
Explain

When selecting **Explain**, Yellowfin will detail the underlying data drivers that impact the particular metric you have chosen. In the example below, we've 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 run a series of algorithms to determine statistically relevant insights.

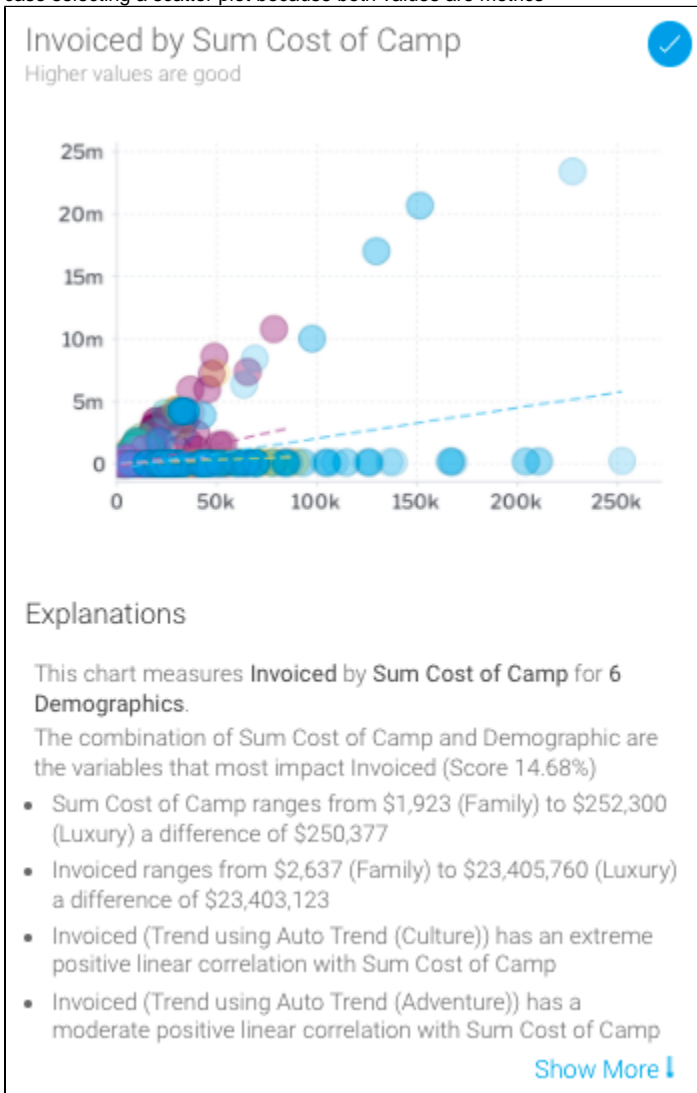
1. Navigate to a dashboard
2. Right-click on a chart element (a bar in a bar chart, or a data point), or hover your cursor over the element for 2 seconds to display the tooltip dropdown menu



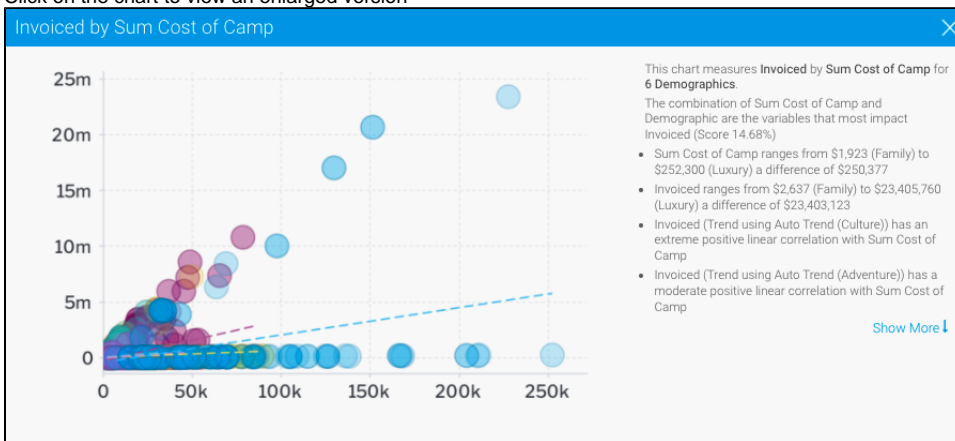
3. Click on **Auto Analyze**, then select **Explain**
The **Auto Analysis** panel will appear, displaying insight results in order of statistical relevance



Yellowfin will generate a natural language analysis, and also display the most appropriate charts for your insights (depending on the data), in this case selecting a scatter plot because both values are metrics



- Click on the chart to view an enlarged version



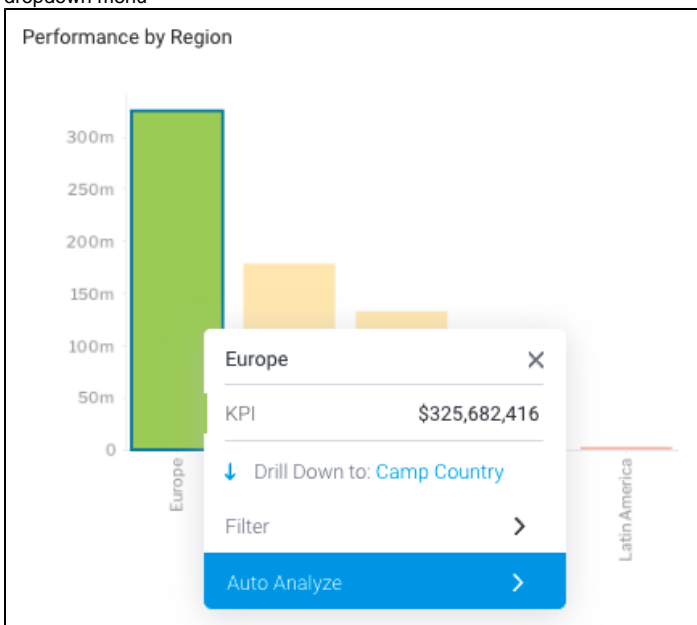
- Click on **Show More** at the end of the analysis to view the complete set of explanations provided with your insight

[top](#)

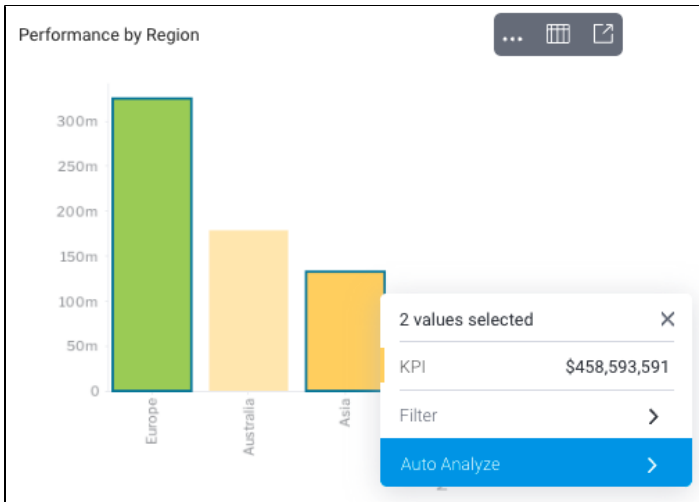
Compare

When selecting **Compare**, Yellowfin will analyze the data to explain the difference in values for a particular metric between two dimension or date values. In the example below, we've selected Sales for Asia, and then chosen the **Compare** option from the tooltip to select another region as a point of comparison. Yellowfin will access additional data elements from the underlying data view and run a series of algorithms to determine statistically relevant drivers of difference.

- Navigate to a dashboard
- Right-click on a chart element (a bar in a bar chart, or a data point), or hover your cursor over the element for 2 seconds to display the tooltip dropdown menu



Alternatively, you can click and drag over two chart elements, or hold the Shift key to select two elements you'd like to compare, then right-click to bring up the tooltip dropdown menu



- Click on **Auto Analyze**, then select **Compare**
The **Compare** popup will appear if only one element is selected, allowing you to choose a second data set for comparison
- Select the data you'd like to compare from the dropdown list, and click the **Compare** button

Compare

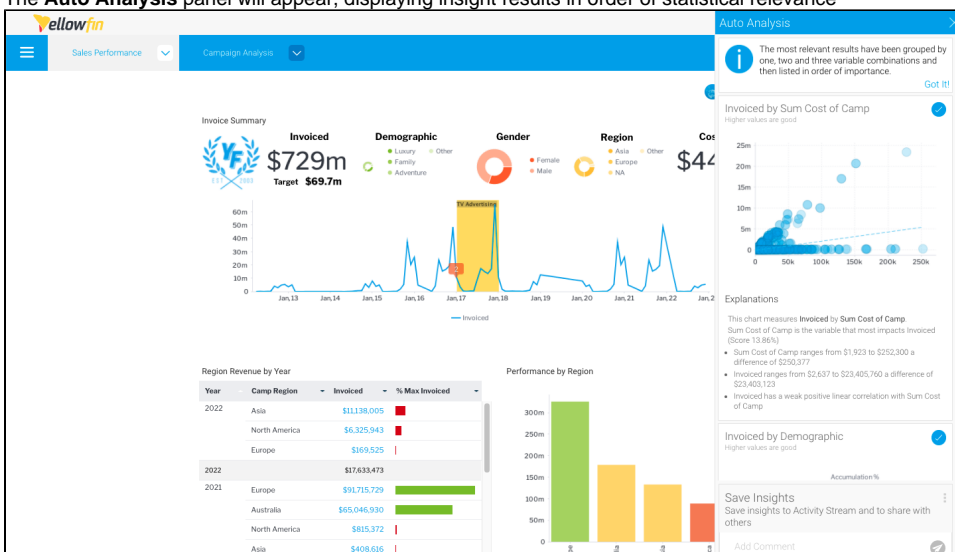
KPI in Europe compared with

Asia

Tip: You can choose 2 items on your chart to run auto-compare

Compare

- Click on the **Compare** button to perform the analysis
The **Auto Analysis** panel will appear, displaying insight results in order of statistical relevance




Yellowfin will generate a natural language analysis, and also display the most appropriate charts for your insights (depending on the data)

- Click on **Show More** at the end of the analysis to view the complete set of explanations provided with your insight

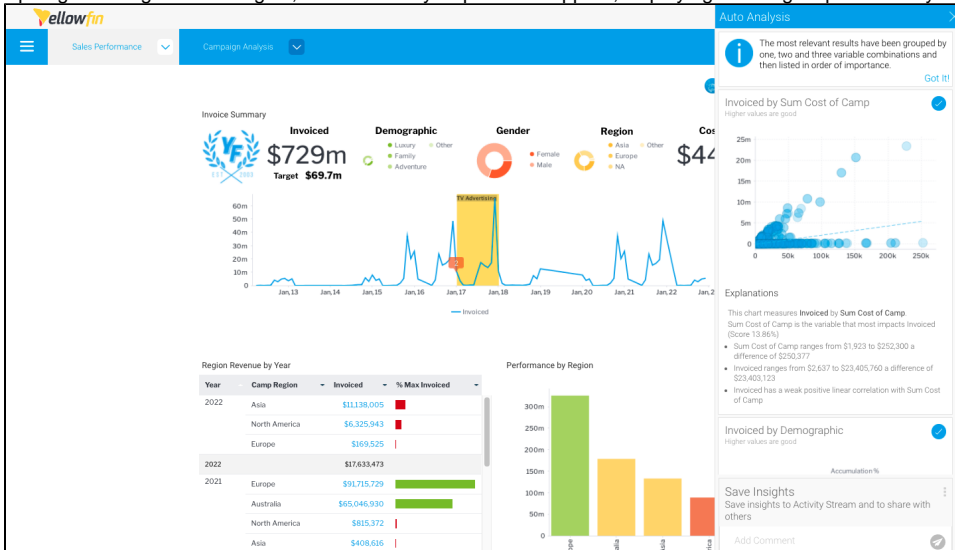
Editing insights


Instant Insights allows you to create a new report from the insights that were generated, including the charts that appear in the Auto Analysis panel. With this feature, you can turn interesting insights discovered by Yellowfin into reports that you can run regularly and add to your dashboards.


 This function is only available for users with report editing security access.

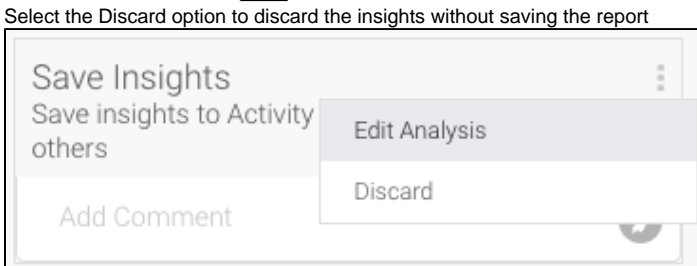
This tutorial will show you how to create a new report from your Instant Insights.

1. Upon generating Instant Insights, the Auto Analysis panel will appear, displaying the insights produced by Yellowfin

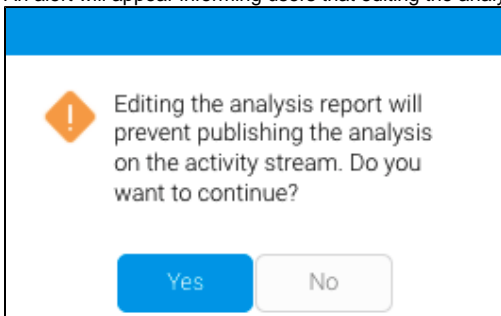


2. Click on the **round tick button**  in the top right-hand corner to select or deselect each insight you would like to view or edit in the report builder

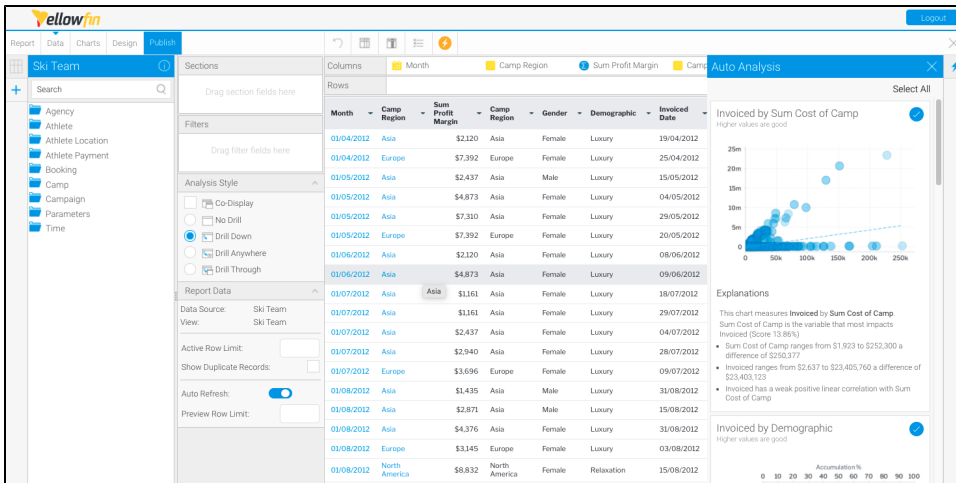
3. Click on the **menu button**  in the Save Insights box, and click **Edit Analysis**



An alert will appear informing users that editing the analysis will prevent them from publishing the results on the activity stream



4. Click the **Yes** button to continue
The report builder will be displayed, allowing you to view and edit the report produced by Yellowfin based on your selected insights

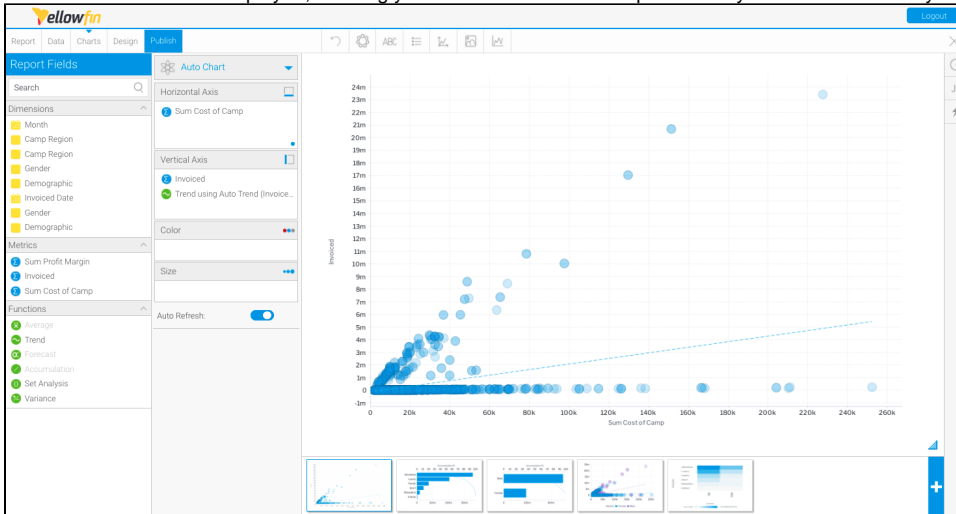


5. To close the Auto Analysis panel, click on the **Insights button**  on the right-hand side of the screen

You can click the Insights button to reopen the Auto Analysis panel at anytime on the report builder

6. Click on **Charts** in the toolbar to access the chart builder

The chart builder will be displayed, allowing you to view and edit charts produced by Yellowfin based on your selected insights



7. To save your insights report, click the Publish button

These reports and charts can now be used in the same way as other Yellowfin reports

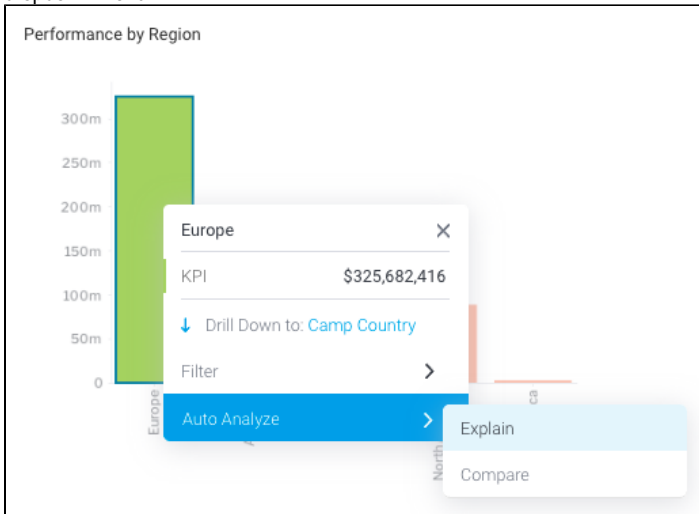
[top](#)

Sharing insights


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

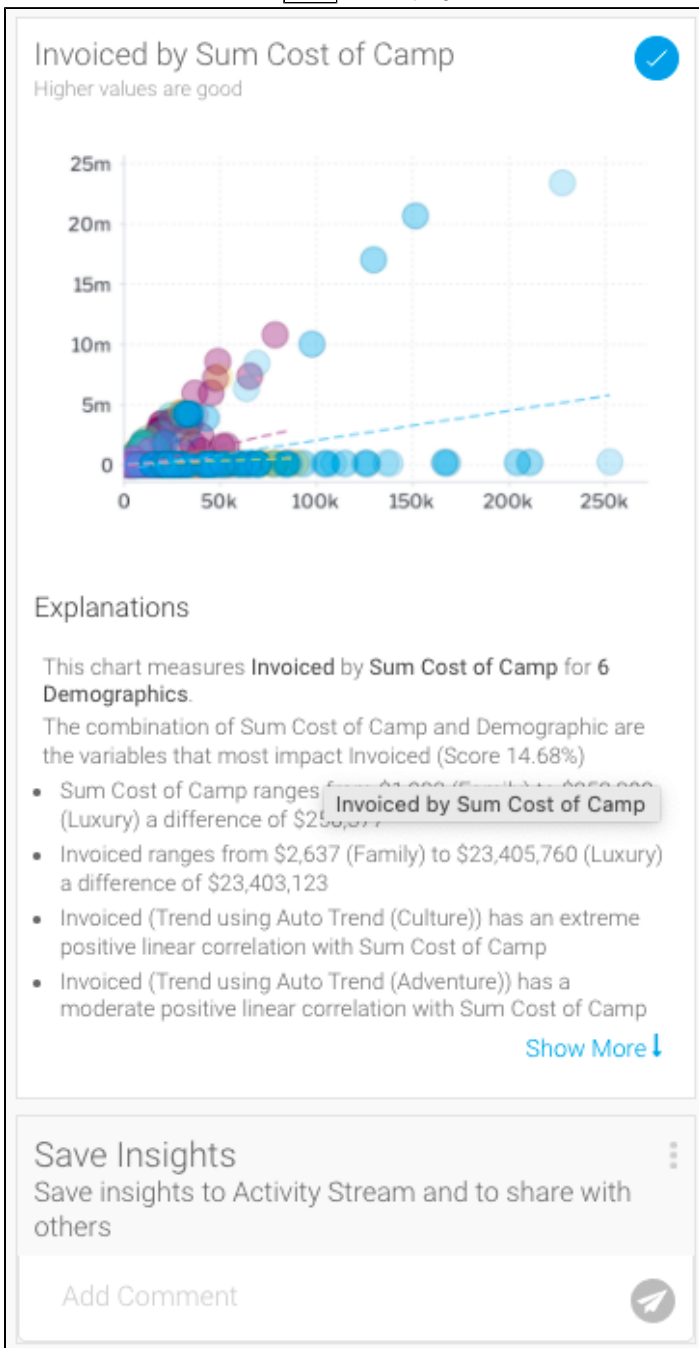
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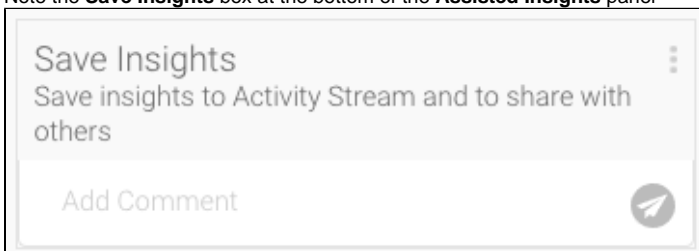


3. Click on **Auto Analyze**, then select **Explain** or **Compare**
The **Auto Analysis** panel will appear, displaying insight results in order of statistical relevance

4. Click on the **round tick button**  in the top right-hand corner to select or deselect each insight you would like to share



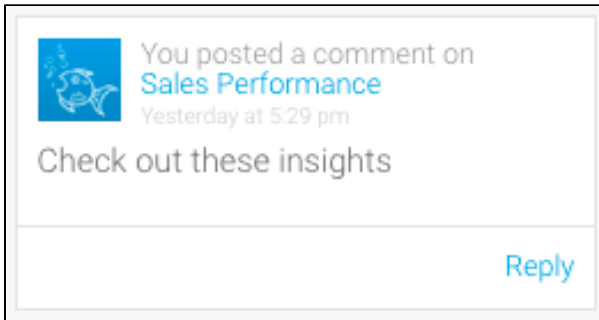
Note the **Save Insights** box at the bottom of the **Assisted Insights** panel



5. Add a comment and click the **Send**  button to post your insights to your timeline



Your insights will be displayed on your timeline



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

[top](#)

Limitations

Instant Insights is not supported for the following chart types.

Chart	Type
Auto	Any chart with more than one dimension in the X or Y axes.
Analytical	<ul style="list-style-type: none">Scatter.Treemap.Histogram.Box and Whisker.Trellis charts with more than one dimension in the X or Y axes.Heat Grid.
Area	Stacked Area.
Bar	<ul style="list-style-type: none">Stacked Horizontal Bar.Layered Bar.
Column	<ul style="list-style-type: none">Stacked Vertical Column.3D Stacked Column.Layered Column.
Financial	All types.
Line	Z-Chart.
Map	All types.
Meter	All types.

Special purpose	<ul style="list-style-type: none">• Funnel Chart.• Proportional Infographic.• Comparative Infographic.• Waterfall.• Event.• Week density.• Digital numeric display.• Numeric display.
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[top](#)
