

Setting Up Instant Insights

Overview

Use this guide to learn how to configure the Instant Insights settings through the view builder, in order to provide users access to the Instant Insights functionality.



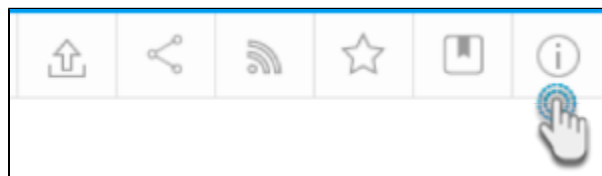
- For existing dashboards and views, you will need to manually enable this functionality. This is done through the view's setting page, since the chart data is based on views. However, for new views, this will be included as part of the view creation process.
- Ensure that the user configuring these settings has the security access to do so. Click [here](#) to learn about the related security functions.



Instant Insight discovery is only available for pre-selected fields. But you can change these fields through the view settings screen.

Set Up Procedure

1. First, determine which view your chart is based on.
 - a. You can do this by accessing a chart, and then clicking on the information button.








- b. Click on it to view all types of details on the report, including the view name.

Performance by Region

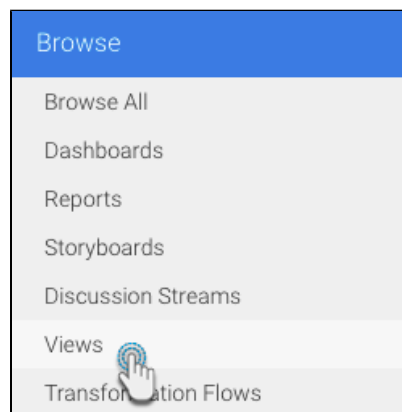
Report DetailsColumnsSQL Statement

Performance by Region

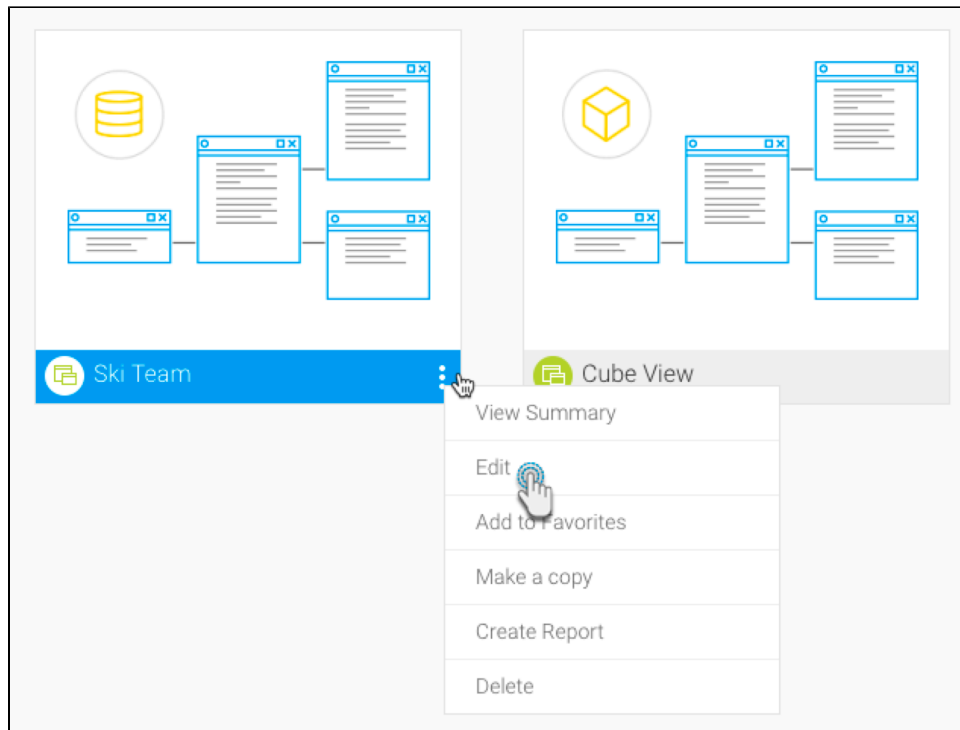
Examine invoicing figures by Camp Location hierarchy.

Last Modified  System Administrat... 26-6-2017 13:15	Run Times Avg 0 seconds Last 0 seconds Max 10000 rows	34 runs Activity Last 30 Days  5
Folder & Sub Folder:	 Tutorial	 Athletes
Source & View	Ski Team	 Ski Team
Report Access	User Must Login	
Report URL	<input data-bbox="738 819 1177 861" type="text" value="http://localhost/RunReport.i4?reportUUID=8("/>	

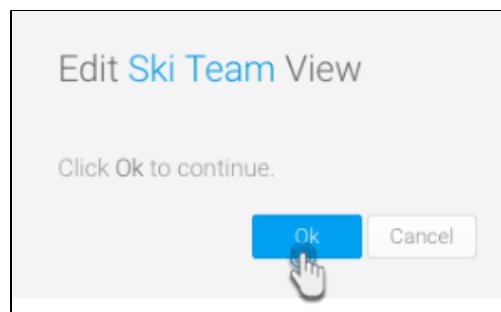
2. Then navigate to the views screen. (Main menu>Browse>Views)



3. Find the view you want, click on it's menu button and then choose Edit.

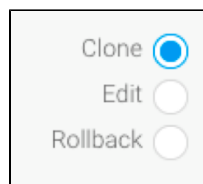


4. Click Ok when the confirmation popup appears.



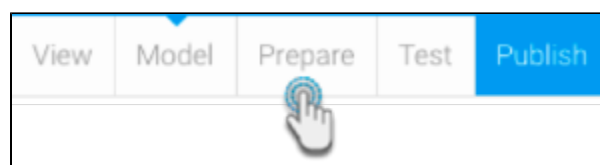
5. Choose either Clone or Edit to edit the view.

If you edit the existing view then no users will be able to run reports against that view until you have activated it. Any changes you make to the view may impact existing reports and corruption may occur. You will also not be given the option to rollback the view to its previous state. If you clone a view then the changes are made independently of report users. On activation, the view will replace the previous version.



6. Then click on the button at the bottom.

7. Next, navigate to the Prepare section from the view's model screen.



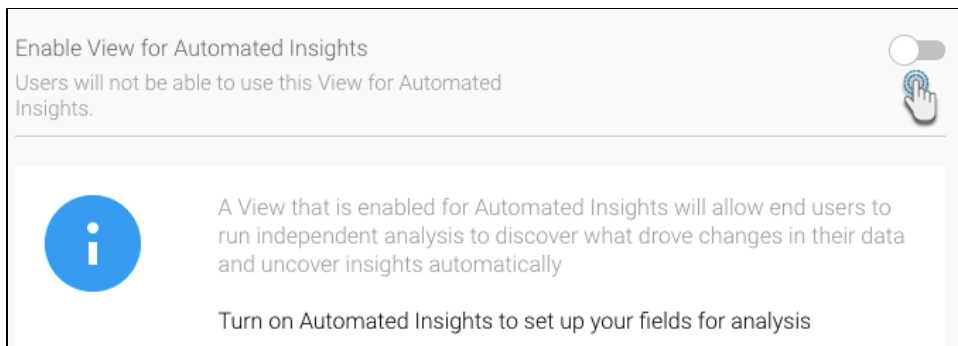
8. Click on the Instant Insights set up button, from the header menu options.



This button will only appear if you have the role function for Instant Insights Setup. Click [here](#) to learn more about this.



9. Now, click on the button to enable your selected view for automated insights. (This should be enabled by default.)



10. Click on the Key Variables tab or the Continue button to proceed.
11. In the Key Variables section, select checkboxes of metric and dimension fields that you want the automated analysis feature enabled for.



Only data fields selected here will have the Auto Analyze option appear in the tooltips.

Automated Insights Setup

General Settings **Key Variables**

Variables

Select fields that will help to explain changes in your data. Key variables are those that are important for your users to understand

6 of 12 Variables used

Include	Metrics	Higher value is
<input type="checkbox"/>	Invoice Estimate	
<input type="checkbox"/>	Invoiced (Pref Currency)	
<input checked="" type="checkbox"/>	Invoiced Amount	Good
<input checked="" type="checkbox"/>	Profit Margin	Good

Include Dimensions Plural

<input type="checkbox"/>	Age Group at Camp
<input type="checkbox"/>	Agency Country
<input type="checkbox"/>	Agency Demographic
<input type="checkbox"/>	Agency Geo ISOCode

Submit

12. Once done, click on Submit.

13. Back on the Prepare page, save these view changes by clicking on the Publish button, choosing the folders and clicking on the Save and Publish button.
14. You will now be able to use the Instant Insights feature on your charts.

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