

# Streamlining Decision-Making with Proactive Insights

A Comprehensive Guide to Creating, Managing, and  
Running Proactive Insights for Data-Driven Success.

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# 1. Introduction

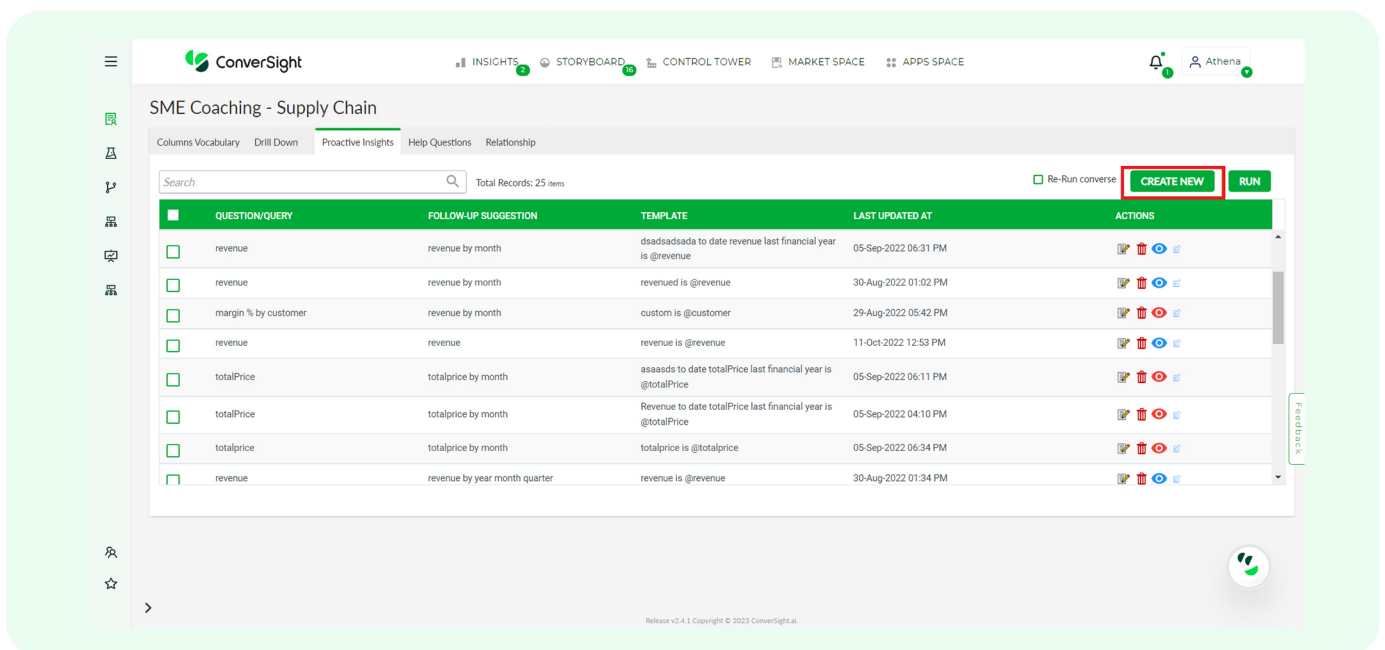
Proactive Insights is a feature that allows users to generate valuable insights and display them in a visually appealing format. These insights are derived from proactive efforts, such as asking questions and setting thresholds for triggering alerts. Proactive Insights makes it easy to incorporate fresh insights into your project and to personalize the conditions for triggering alerts. With Proactive Insights, you can gain deeper understanding and knowledge about your data and make informed decisions based on the insights presented.

In this datasheet, we will provide an overview of the key features of Proactive Insights, as well as detailed instructions on how to create, manage, and run insights. We will also cover some best practices and tips for using Proactive Insights effectively. Whether you're a data analyst, business user, or decision maker, Proactive Insights can help you extract maximum value from your data and drive better outcomes for your organization.

## 2. Creating new Proactive Insights

### 2.1 Accessing the 'Create New' Tab

To create a new Proactive Insight, start by clicking on the 'Create New' button on the Proactive Insights page. This will open the 'Proactive Insight' page, where you can enter the details of your new insight.

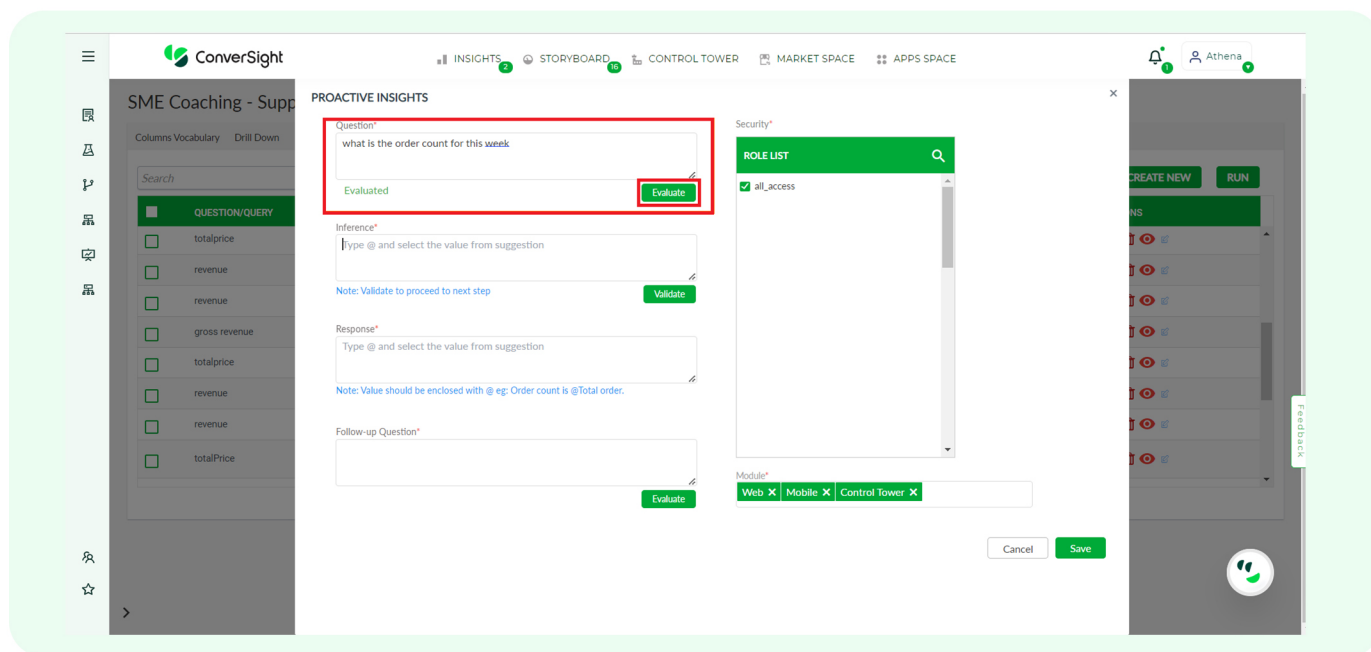


The screenshot displays the ConverSight Proactive Insights interface. The top navigation bar includes 'INSIGHTS', 'STORYBOARD', 'CONTROL TOWER', 'MARKET SPACE', and 'APPS SPACE'. The user is logged in as 'Athena'. The main content area is titled 'SME Coaching - Supply Chain' and features a search bar and a 'Total Records: 25 items' indicator. A table lists existing insights with columns for 'QUESTION/QUERY', 'FOLLOW-UP SUGGESTION', 'TEMPLATE', 'LAST UPDATED AT', and 'ACTIONS'. A red box highlights the 'CREATE NEW' button in the top right corner of the table area. A 'Feedback' button is visible on the right side of the interface.

| QUESTION/QUERY       | FOLLOW-UP SUGGESTION          | TEMPLATE   | LAST UPDATED AT      | ACTIONS |
|----------------------|-------------------------------|--|----------------------|---------|
| revenue              | revenue by month              | dsadsadsada to date revenue last financial year is @revenue    | 05-Sep-2022 06:31 PM | [Icons] |
| revenue              | revenue by month              | revenue is @revenue  | 30-Aug-2022 01:02 PM | [Icons] |
| margin % by customer | revenue by month              | custom is @customer  | 29-Aug-2022 05:42 PM | [Icons] |
| revenue              | revenue                       | revenue is @revenue  | 11-Oct-2022 12:53 PM | [Icons] |
| totalPrice           | totalprice by month           | asaasads to date totalPrice last financial year is @totalPrice | 05-Sep-2022 06:11 PM | [Icons] |
| totalPrice           | totalprice by month           | Revenue to date totalPrice last financial year is @totalPrice  | 05-Sep-2022 04:10 PM | [Icons] |
| totalprice           | totalprice by month           | totalprice is @totalprice                                      | 05-Sep-2022 06:34 PM | [Icons] |
| revenue              | revenue by year month quarter | revenue is @revenue  | 30-Aug-2022 01:34 PM | [Icons] |

## 2.2 Entering the Question

To create a new Proactive Insight, the initial step is to enter a question related to the data. This question will be assessed to determine its output and can be any relevant question such as "What are the top-selling products by region?" or "What is the total revenue generated by our top 10 customers?". Once entered, the question can be evaluated by clicking on the **'Evaluate'** button.

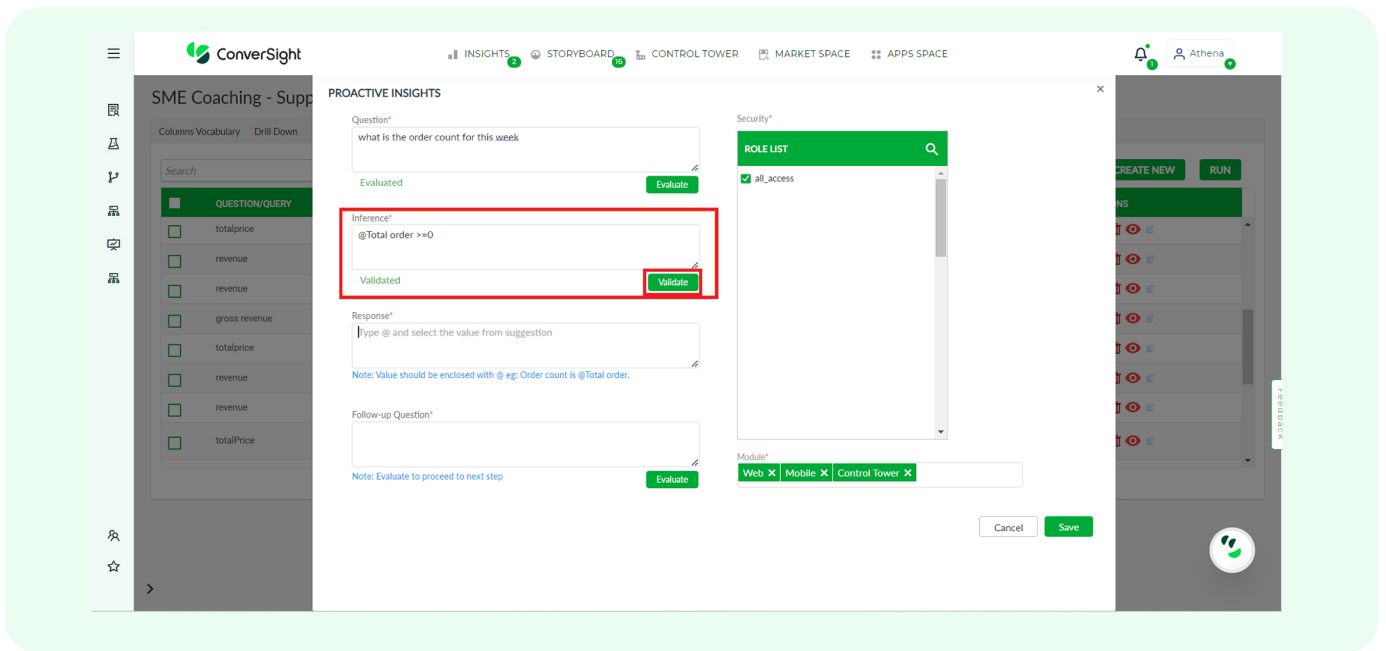


## 2.3 Setting the Inference Criteria

Once you have evaluated your question, you can specify the inference criteria that will activate the alert function within insight sets. This can include setting a threshold value or monitoring changes in trends. You can customize these criteria to meet your specific needs and preferences.

To set the inference criteria, you can use the **'Inference'** textbox. This allows you to input the criteria that will trigger the alert function. If you need to reference any column names in your criteria, you can simply use the '@' symbol to retrieve a list of relevant column names. To ensure that your criteria are accurate, you can click on the **'Validate'** button. This will provide you with a quick and easy way to confirm the validity of your input.

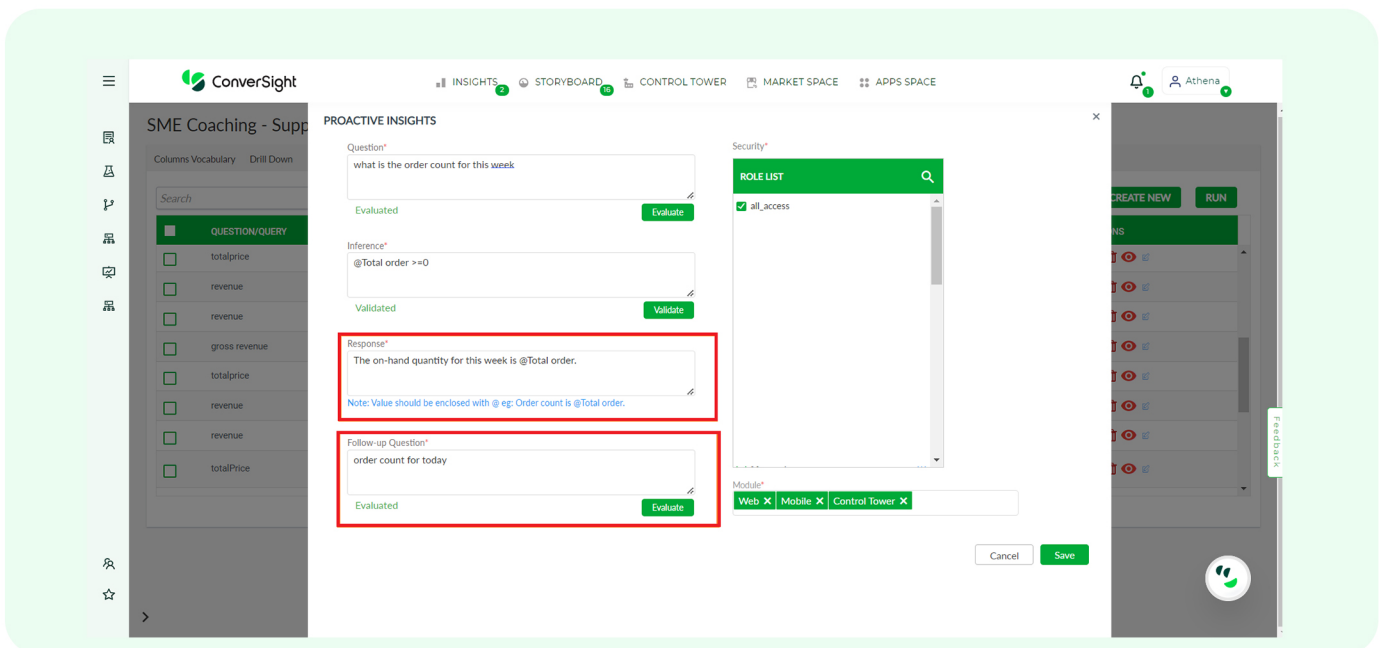




## 2.4 Adding Response and Follow-up Questions

To enhance the context and knowledge provided by an insight, you can add a response sentence into the **'Response'** textbox that will appear alongside the charts. This sentence may include values generated by columns, which are represented by '@' followed by the respective column name.

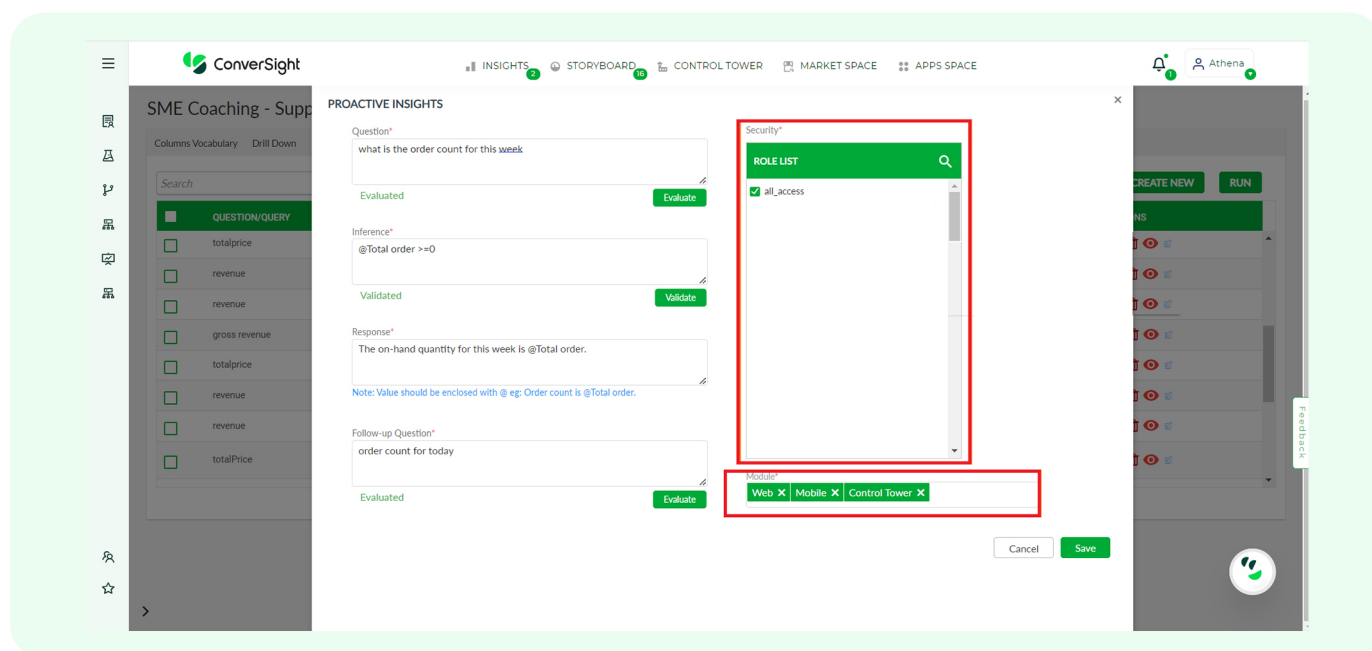
Moreover, the **'Follow-up Question'** textbox allows users to input additional questions that may arise after viewing the insight's output. By doing so, users can evaluate the accuracy of their inquiries and ensure the relevance and reliability of their insights.



## 2.5 Setting Security and Module Access

By configuring the Security settings, you can determine which roles or groups have access to the insights. This can be done by selecting the appropriate roles from the list displayed in the **'Security'** checkbox.

Additionally, users can assign their insights to specific modules to organize and categorize them according to their preference. The **'Module'** textbox allows users to select the module they want to assign the insight to. This feature helps users to easily manage their insights and improve their workflow efficiency.



## 2.6 Saving a New Insight

Once you have entered all the details of your new insight, click on the **'Save'** button to create it. Your new insight will now be added to the list of Proactive Insights, where you can manage and run it as needed.

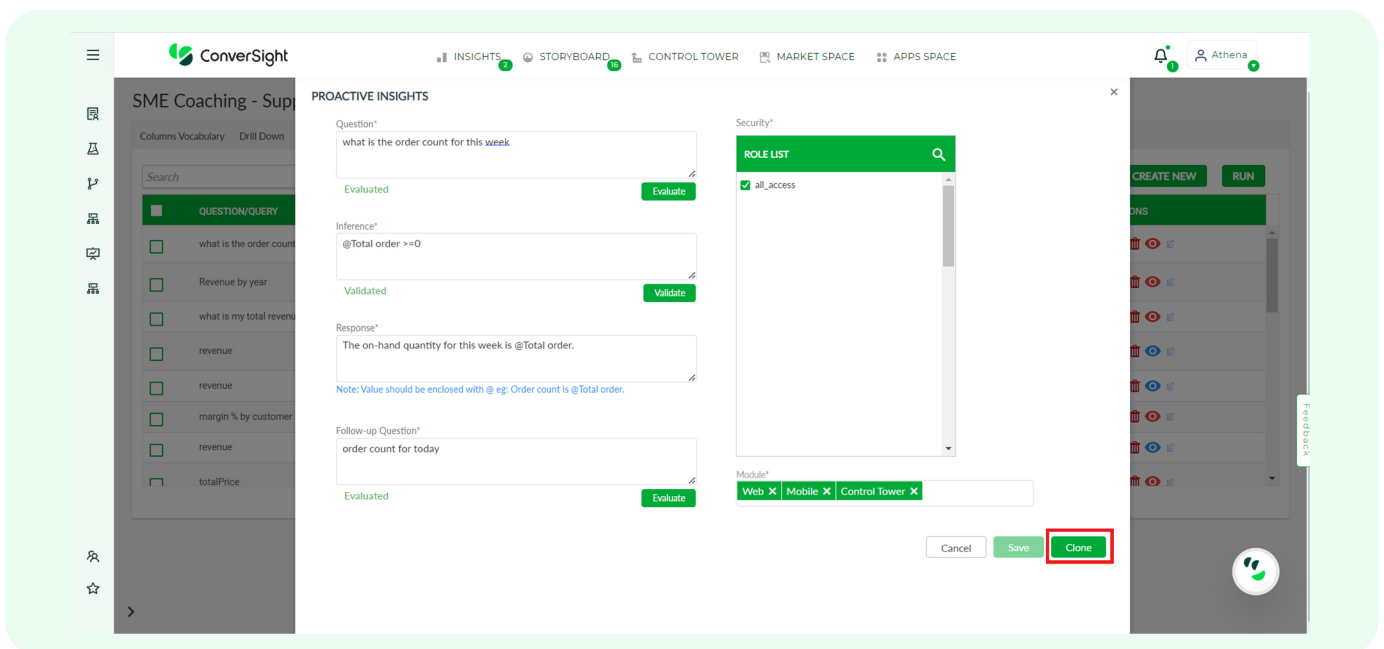
## 3. Managing Proactive Insights

Once you've created Proactive Insights, you can manage them by editing, deleting, publishing, and tagging them. Here are the steps for each:

### 3.1 Editing Proactive Insights

To make changes to an existing Proactive Insight, follow these steps:

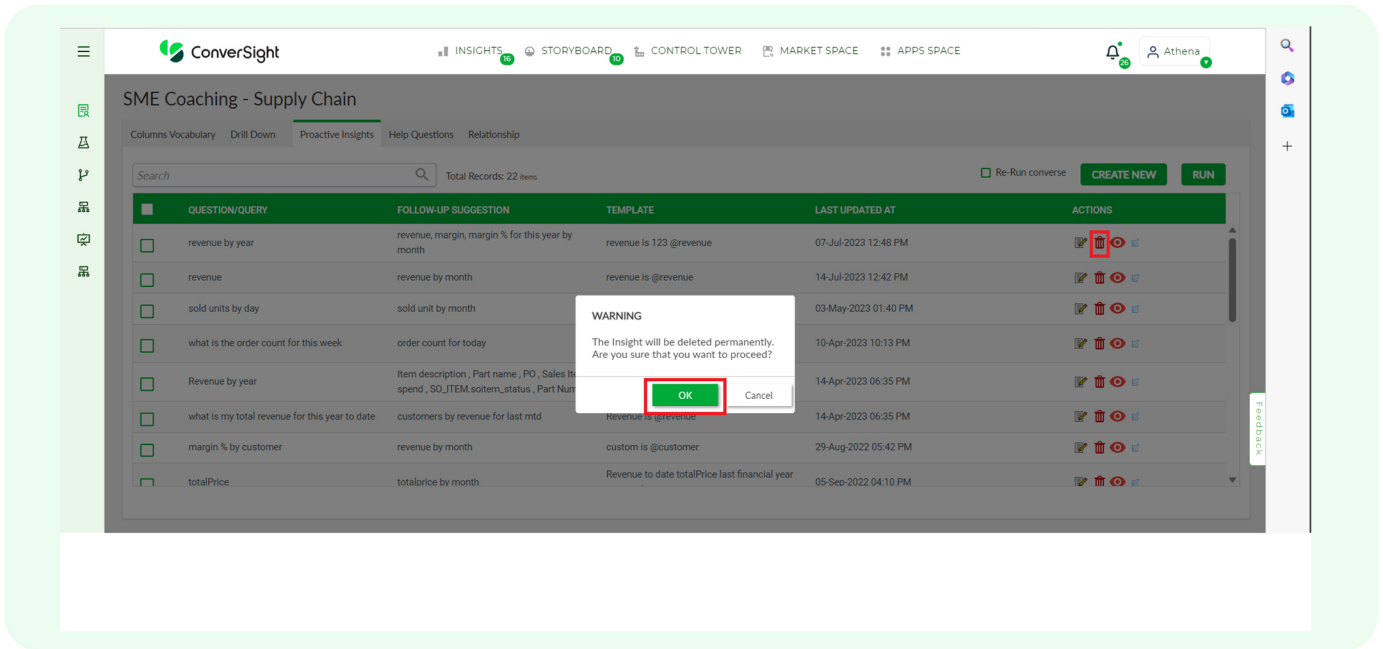
1. Click on the **'Edit'** icon for the insight you wish to modify.
2. This will direct you to the Proactive Insights Page where you can edit the existing query.
3. Once you have made the desired changes, you can choose to either **'Save'** the edited insight or create a copy of the insight by clicking on the **'Clone'** button.



### 3.2 Deleting Proactive Insights

To delete a Proactive Insight, follow these steps:

1. Locate the insight you want to delete in the list of Proactive Insights.
2. Click on the **'Delete'** icon located under the **'Actions'** column for the selected insight.
3. Confirm the deletion by clicking on the **'OK'** button in the pop-up window that appears.

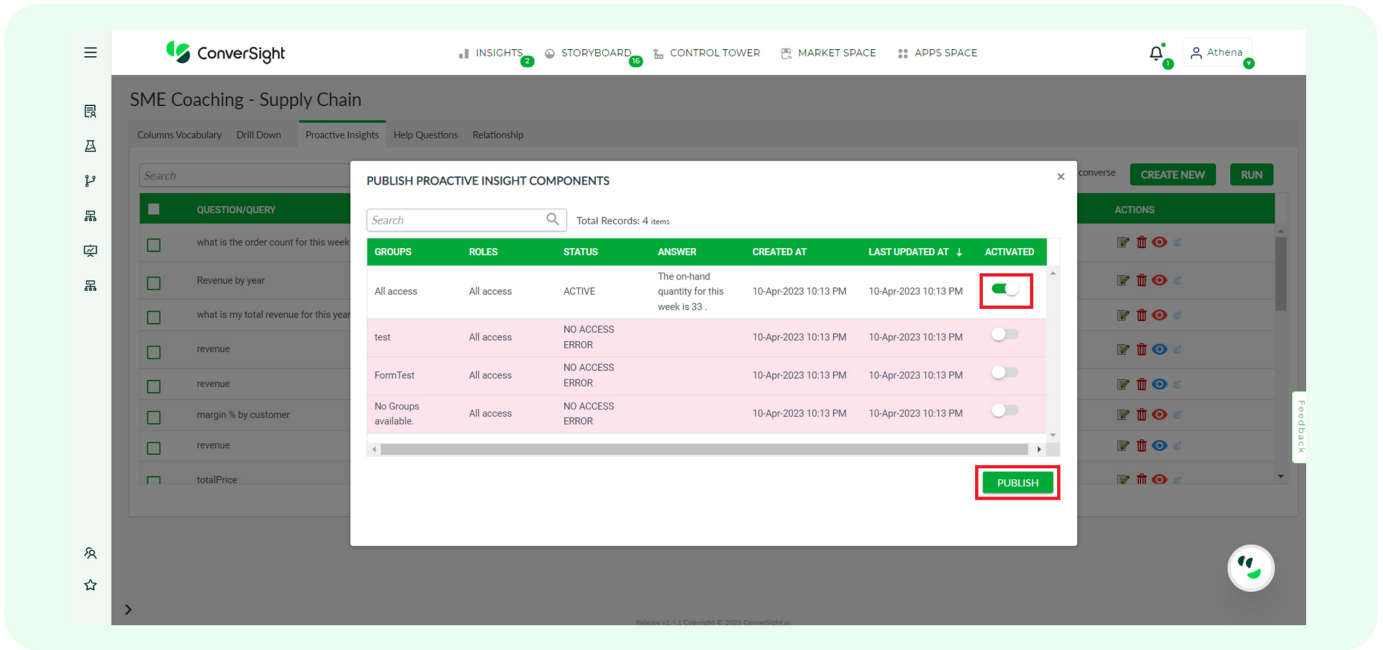


### 3.3 Publishing Proactive Insights

To run a Proactive Insight with a specific role and group and access the latest data, the Publish feature is utilized. To publish an insight, follow these steps:

1. Click on the **'Eye'** icon to access the published Proactive Insights components.
2. Check the status displayed, which is independent of the access granted to the respective roles and groups. If the status is listed as **'Success'**, you can proceed to the next step.
3. Activate the insight by toggling the activation button and then selecting **'Publish'**.

Keep in mind that once published, the insight is available to all users who have access to the dataset.

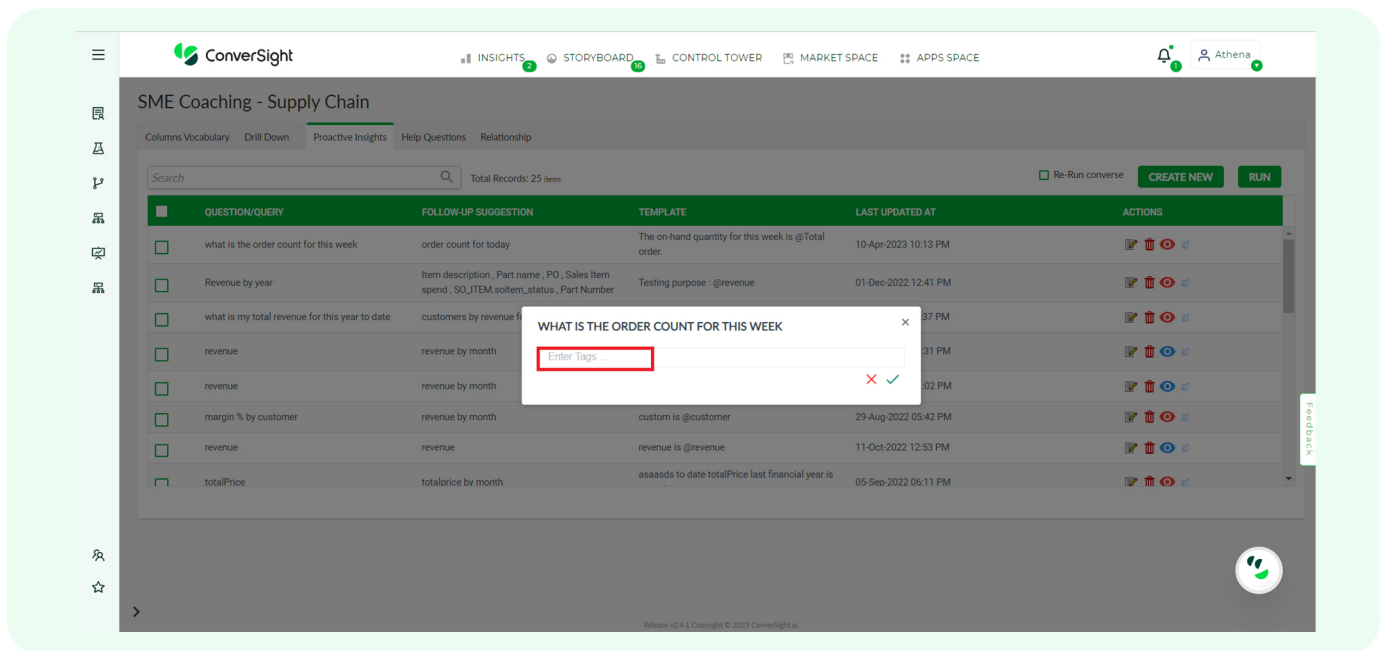


### 3.4 Tagging Proactive Insights

To help organize and categorize Proactive Insights, you can tag them with relevant keywords. To add a tag to an insight, follow these steps:

1. Click on the **'Tag'** icon located at the end of the insight you want to tag.
2. In the displayed text box, type the tag you want to assign to the insight.
3. Press **'Enter'** to add the tag, and the insight will now be associated with that tag.

You can add multiple tags to an insight by repeating the process.

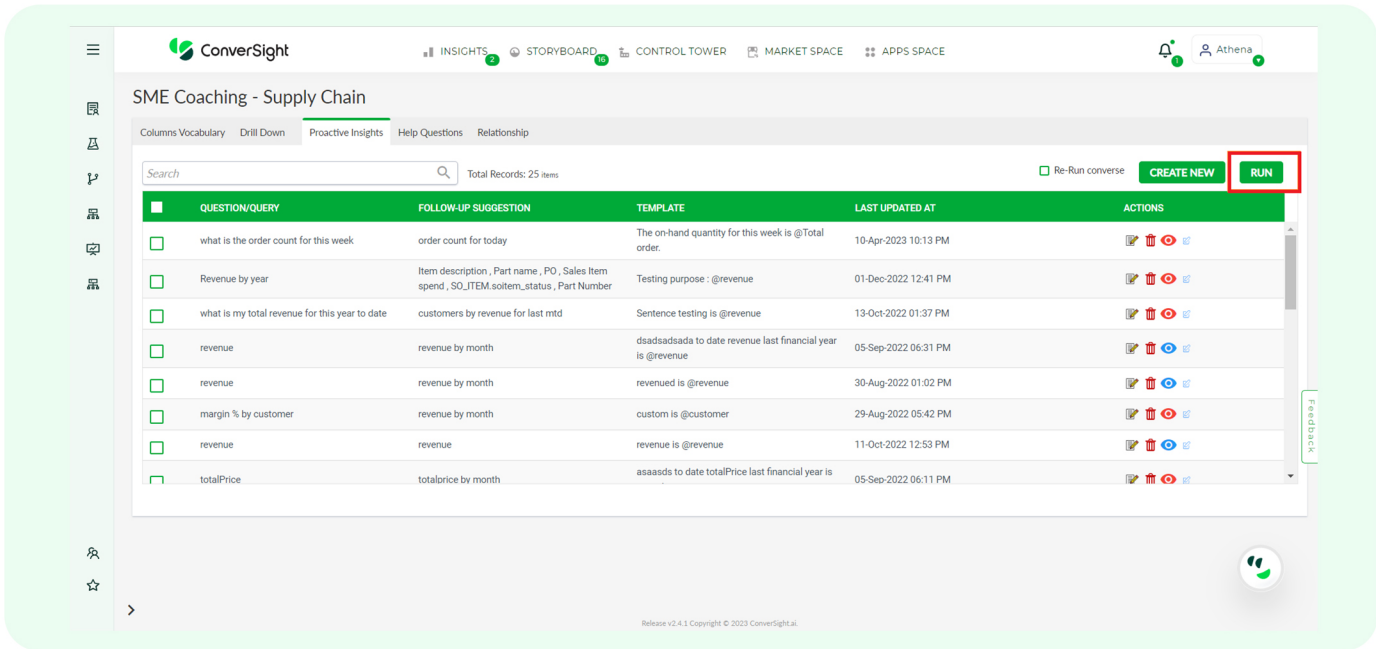


## 4. Running Proactive Insights

### 4.1 Selecting and Running an Insight

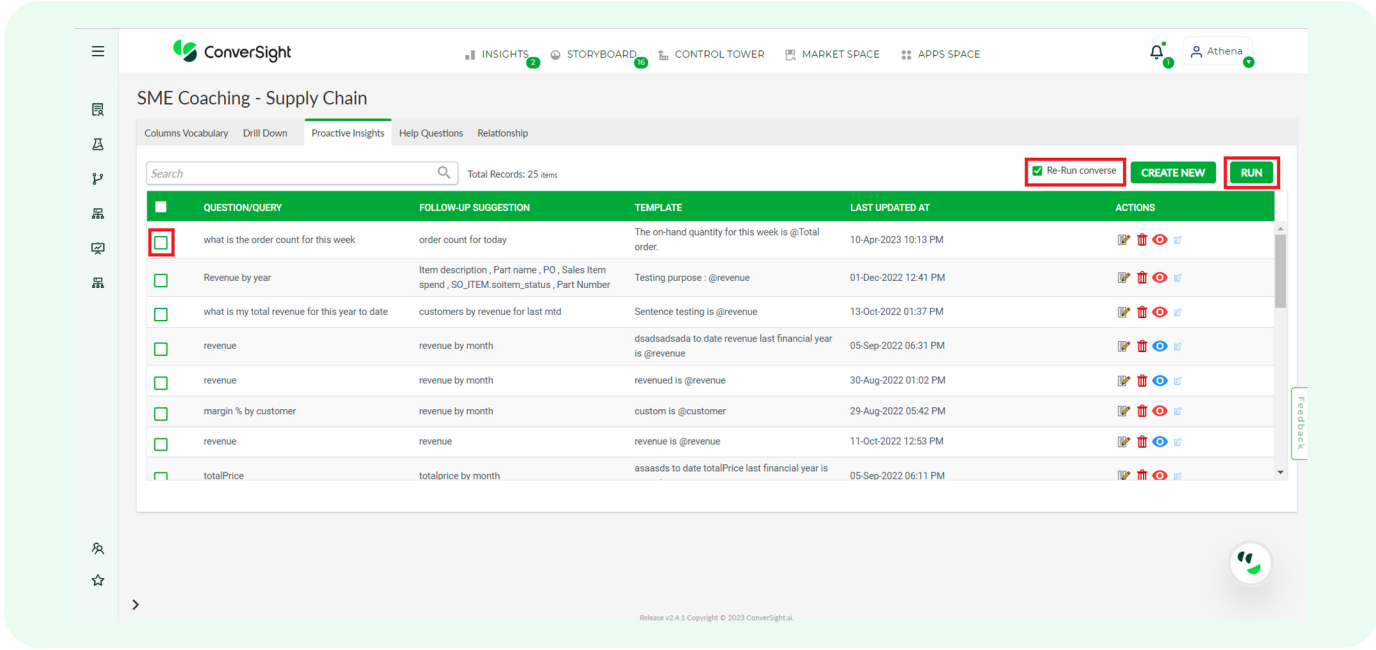
To run a Proactive Insight, select the desired insight from the Proactive Insights table and click on the **'Run'** button. This will generate insights based on the status of the dataset.





### 4.2 Re-Running an Insight

If you want to re-run a Proactive Insight from the initial status, select the insight and check the box labelled 'Re-Run Converse'. Then, click the 'Run' button to generate new insights based on the initial status of the dataset.



## 5. Conclusion

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ConverSight's Proactive Insights feature empowers you to derive valuable insights from your data with ease. With a user-friendly interface and a wide range of customizable options, you can easily create, manage, and run proactive insights that meet your specific needs. Whether you want to track key performance indicators, identify trends, or monitor critical data points, Proactive Insights provides the tools you need to make informed decisions and stay ahead of the competition.

By setting up proactive insights, you automatically receive notifications about trends, anomalies, and other important developments in the data, without having to manually analyze it themselves. With features such as editing, deleting, publishing, and tagging proactive insights, you easily manage the insights and share them with others as needed. Additionally, running proactive insights is a straightforward process that allows you to quickly generate insights based on the data. Overall, Proactive Insights feature is a powerful tool that can help users stay on top of their data and make informed decisions with confidence.

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Request a demo

### About ConverSight

ConverSight's Adaptive Analytics platform uses conversational AI, Natural Language Processing and machine learning to converge the distance between humans and data through data stories, presenting the meaning of data in the most effective, personalized and efficient form possible. ConverSight's patented AI business assistant, Athena, connects distributed databases to answer questions and Augment the consumers through 4 key functions: Information on demand, Automated Story Telling, Proactive Insights, and Recommended Actions.

For more information, visit [www.conversight.ai](http://www.conversight.ai)

