ConverSight

Data Workbench

Unleashing the Power of AI and ML with a Collaborative and Flexible Platform

Whitepaper

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1. Introduction to ConverSight's Data Workbench

1.1. Need for Data Workbench in Modern Data Analytics

In today's data-driven world, organizations face immense challenges in managing and analyzing vast amounts of data. Traditional methods of data analytics often fall short in addressing the complexities of modern data environments, resulting in challenges in managing, integrating and analyzing data effectively. This is where ConverSight's Data Workbench comes in, providing a unified platform that simplifies data analytics and enables organizations to make informed decisions based on insights extracted from their data.

ConverSight is a unified decision intelligence platform that empowers organizations to harness the full potential of their data. With various modules, including Data Connector, Data Management, Train Athena, Data Governance and Forms, Data Workbench offers a comprehensive solution for data analytics and insights.

ConverSight's Data Workbench addresses the need for modern data analytics by providing a comprehensive platform that simplifies data management, enhances data governance, enables advanced analytics and facilitates data-driven decision-making. It empowers organizations to unlock valuable insights from their data, gain a competitive edge and drive business success in today's data-centric landscape.

1.2 Enhance Your Decision-Making with Data Workbench

ConverSight's Data Workbench provides a comprehensive set of features that enable organizations to make informed decisions based on data-driven insights. These features empower users with the tools and capabilities needed to extract valuable insights from their data, uncover hidden patterns and derive meaningful conclusions to support strategic decision-making.

ConverSight's Data Workbench provides a unified platform for organizations to easily connect and integrate data from diverse sources through the Data Connector module, ensuring decision-makers have a holistic view of their data for better decision-making.

The Data Management module ensures data quality and consistency, reducing the risk of decisions based on inaccurate or incomplete data. The Train Athena module empowers decision-makers with advanced machine learning capabilities to build predictive models and generate insights from data. The Data Governance module ensures compliant and secure data management, maintaining data integrity, security and privacy. The Forms module enables organizations to collect and analyze data from various stakeholders, facilitating data-driven decision making based on real-time data. These features highlight the importance of ConverSight's Data Workbench in empowering organizations with robust data analytics capabilities for informed decision-making and ultimately helps organizations to gain a competitive edge, optimize business processes and achieve better outcomes in today's data-centric business landscape.

2. Data Governance

2.1 User Roles

Data Governance plays a crucial role in the management and protection of data in ConverSight. It encompasses best practices that focus on maintaining data privacy, security and quality, while also establishing clear roles and responsibilities for those involved in data-related activities. The role of the Data Administrator is very important in driving effective Data Governance practices.

The ConverSight Platform offers three roles: User, Data Administrator (Data Admin) and Organization Administrator (Org Admin), each providing different levels of access to the platform's features and capabilities.

Org Admin

Has full access to all features and capabilities, manages users and their access and ensures secure access control within the platform.

Data Admin

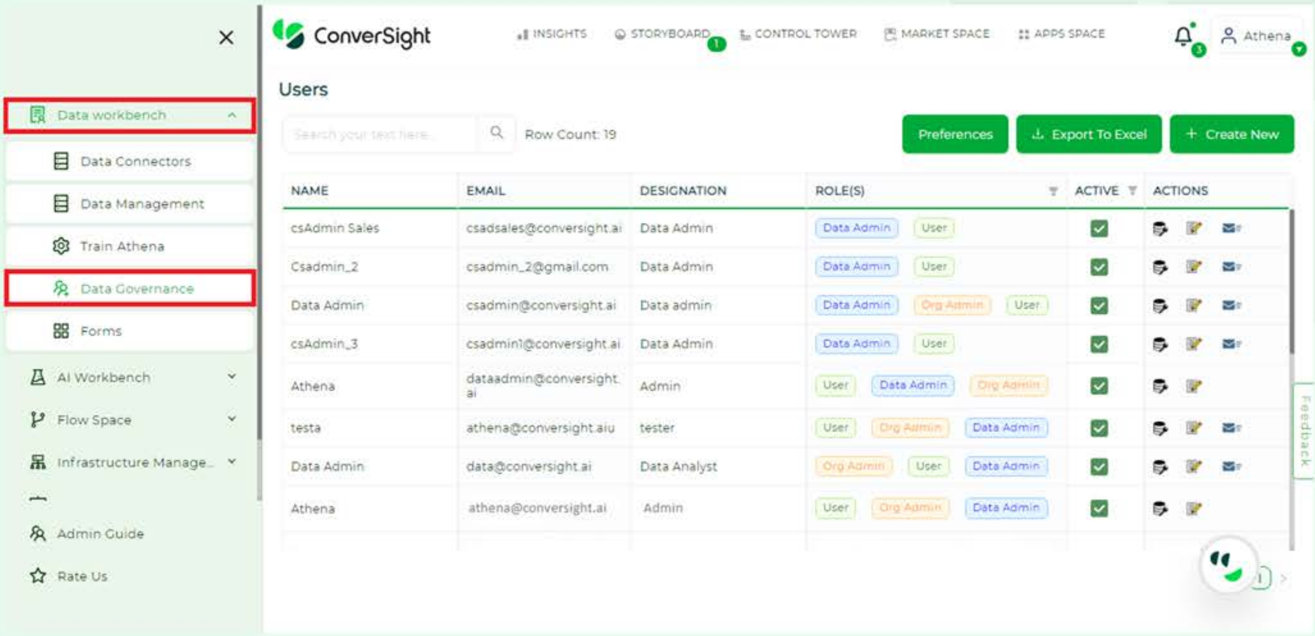
Responsible for linking an organization's data to the platform for data integration and management.

User

Ability to access ConverSight's insights, utilize Athena for data analysis and access specific datasets, reports and visulizations.

To access Data Governance from the ConverSight platform, navigate to the Configurations section and select **'Data Governance'** from the **'Data Workbench'** menu.

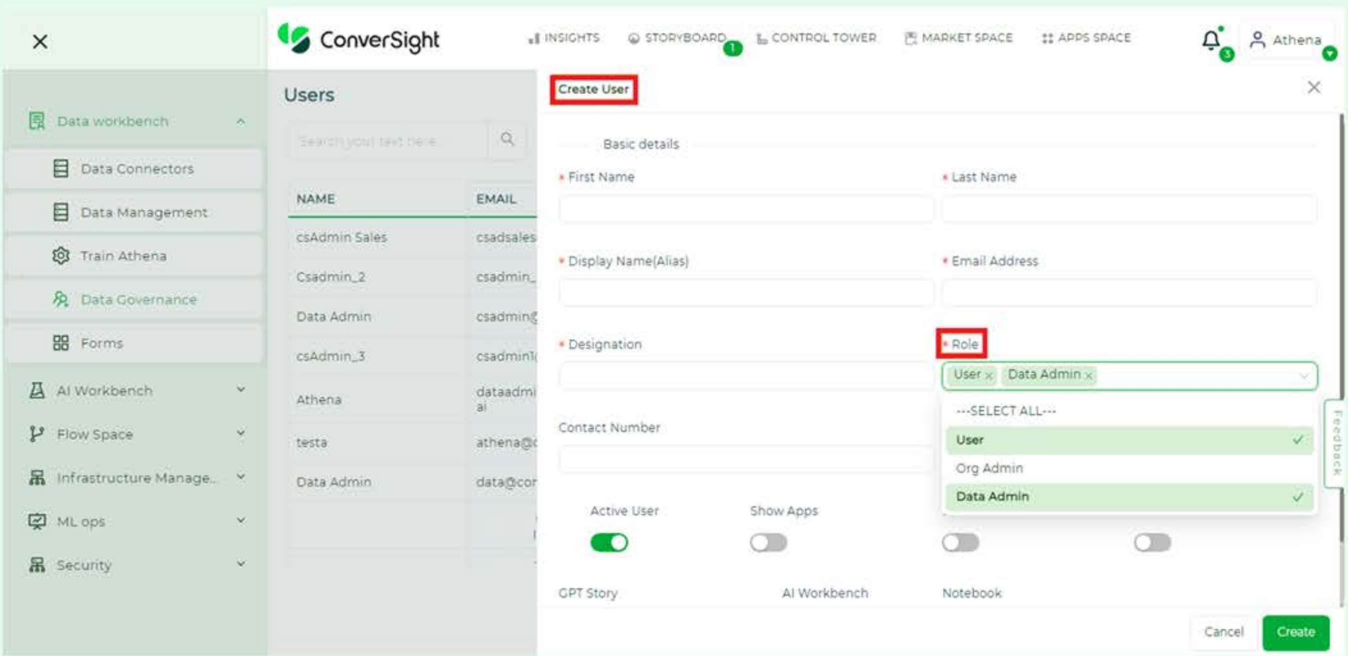
Here, you can view a list of individuals who currently have access to the platform.



2.2 Creating New Users

To create a new user on the ConverSight platform, you must first access the platform as an Org Admin. Upon successful login, you will be directed to the platform's storyboard, where you will have access to the Org Admin privileges for your subdomain.

Click on the **'Create New'** button in the **'Data Governance'** page to access the user creation form. Here, you will need to provide details like name, email address, designation and assign user role, which can be User, Data Admin or Org Admin.



It's worth noting that one user can have multiple roles assigned to them, depending on the access requirements.

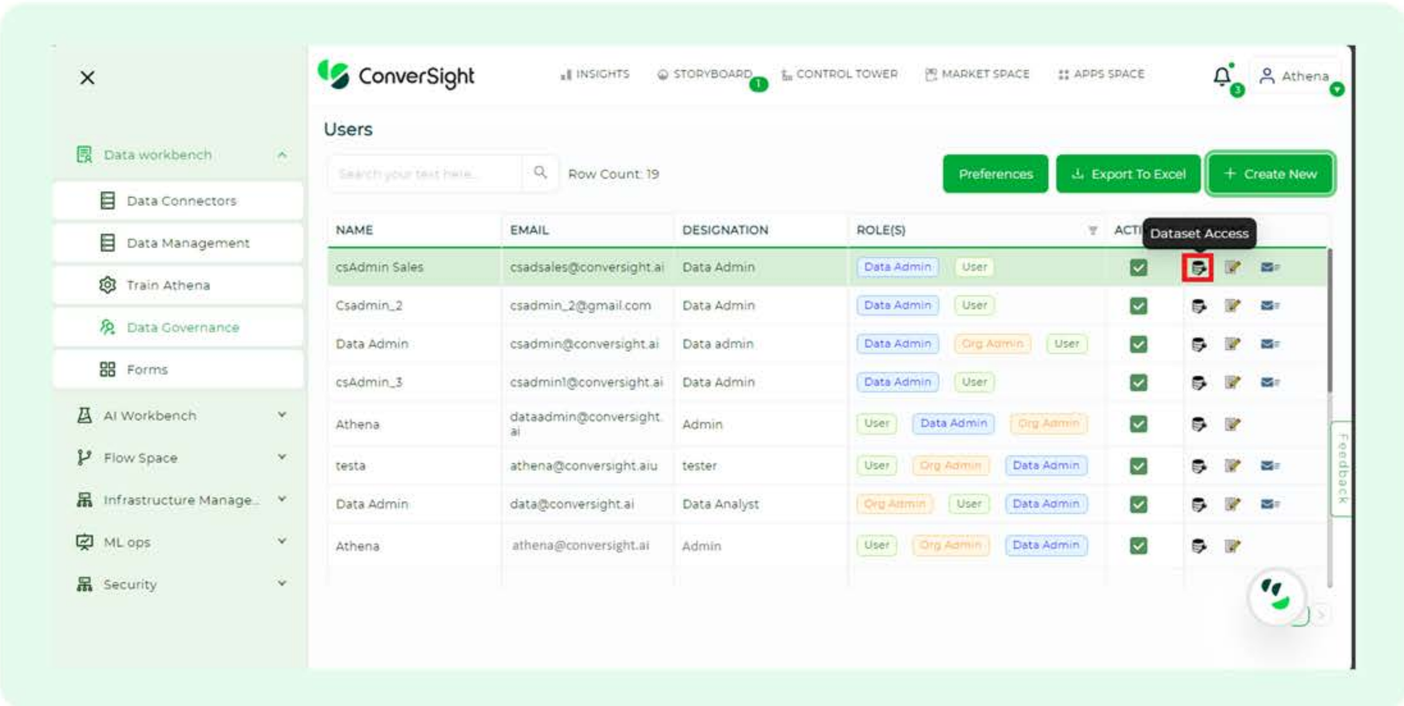
Below the user details, there are several options that can be enabled or disabled, including Active user, GPT Story, Show Apps, Show Tower, AI Workbench and Notebook. The access granted to newly created roles may vary based on the assigned role of the user and it is up to the Org Admin to provide the appropriate access.

Finally, click on **'Create'** button to create the new user with their assigned role(s).

2.3 Configuring Dataset Access

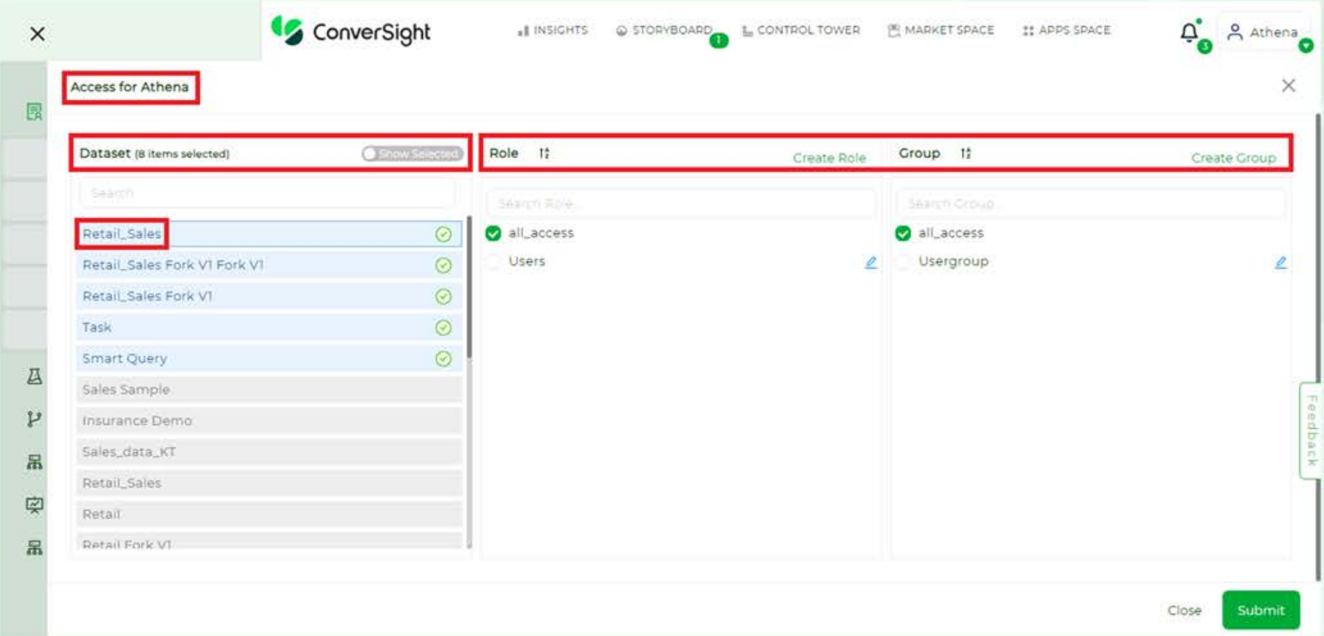
Configuring dataset access is an important aspect of data governance, which involves ensuring that only authorized personnel have access to data. In the ConverSight platform, dataset access can be configured using the Role and Group features.

To configure a dataset access, choose a user from the list and then click on the **'Dataset Access'** icon under the **'Action'** column.



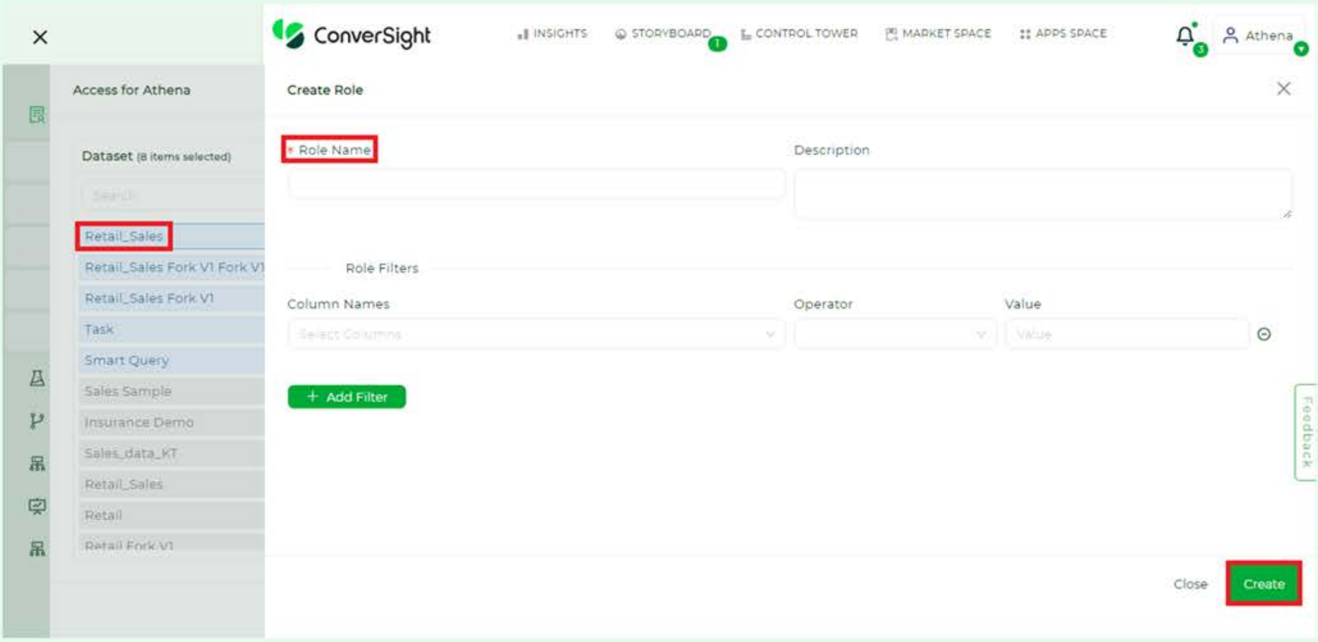
Upon clicking the **'Dataset Access'** icon, you will be directed to a page as shown in the image below.

Here, you can select the dataset for which you wish to grant access.



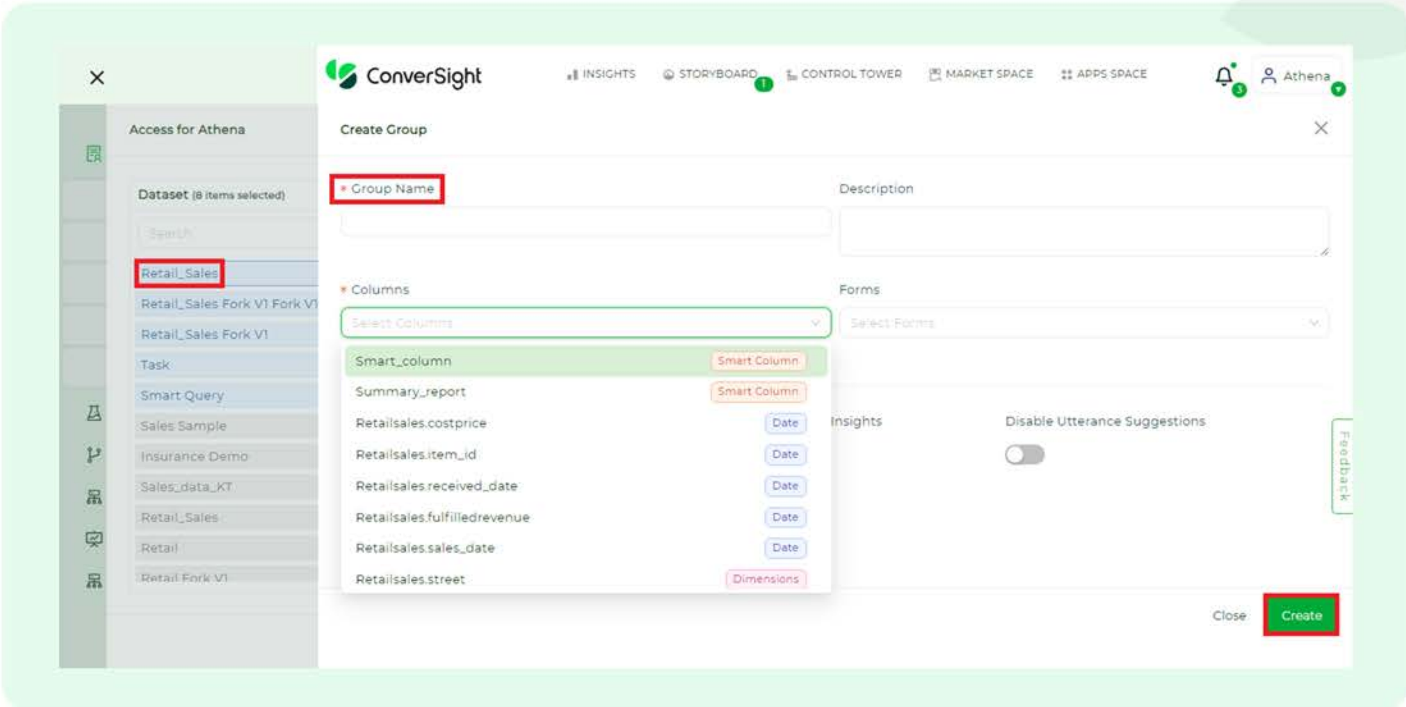
The **'Role'** feature allows the assignment of specific data access privileges to a user based on their role or responsibilities. For instance, a user might have limited access to data, while a data admin might have full access. An Org Admin could have access to all data in the organization.

To restrict access to specific data, click on the **'Create Role'** option and set the desired parameters. For example, you can limit access to data related to specific columns. Once you have set the parameters, click on **'Create'** as shown in the image below.



The **'Group'** feature allows granting access to specific columns within a dataset. By using this feature, users can be given access to a subset of available data columns instead of the entire dataset. For example, a user might have access to only the sales data columns and not the employee information columns.

To establish a **'Group'**, navigate to the **'Create Group'** option. This feature allows granting data access to multiple users at once.

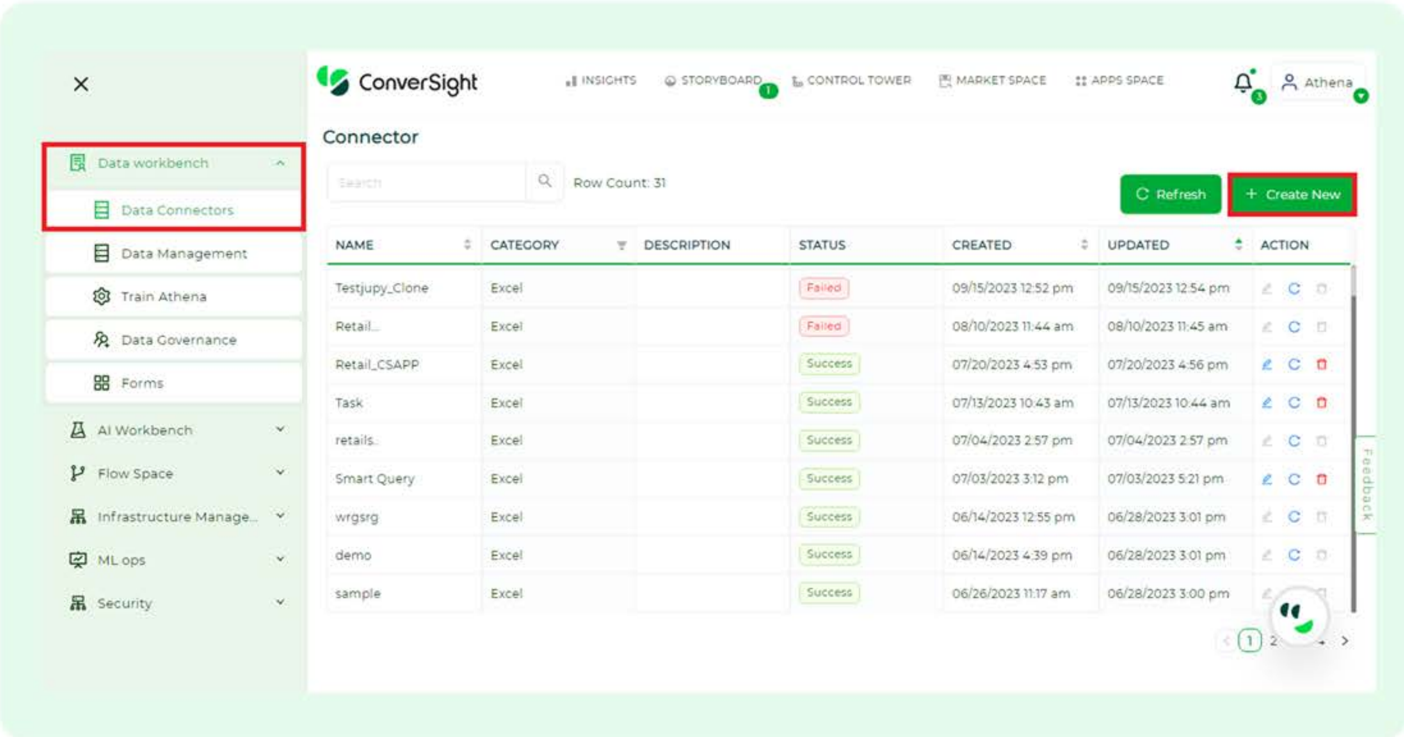


After creating the appropriate **'Role'** and **'Group'**, proceed to finalize the changes by clicking on the **'Submit'** button.

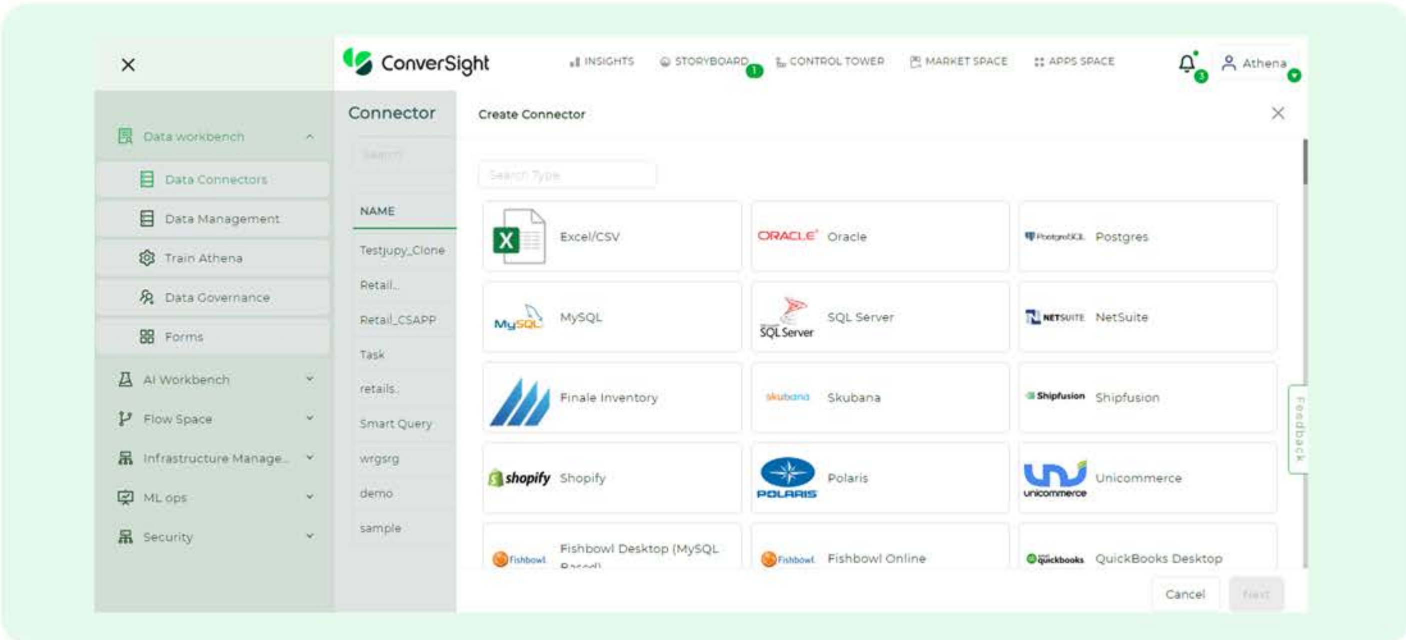
3. Data Connector

3.1 Loading Datasets into ConverSight Platform

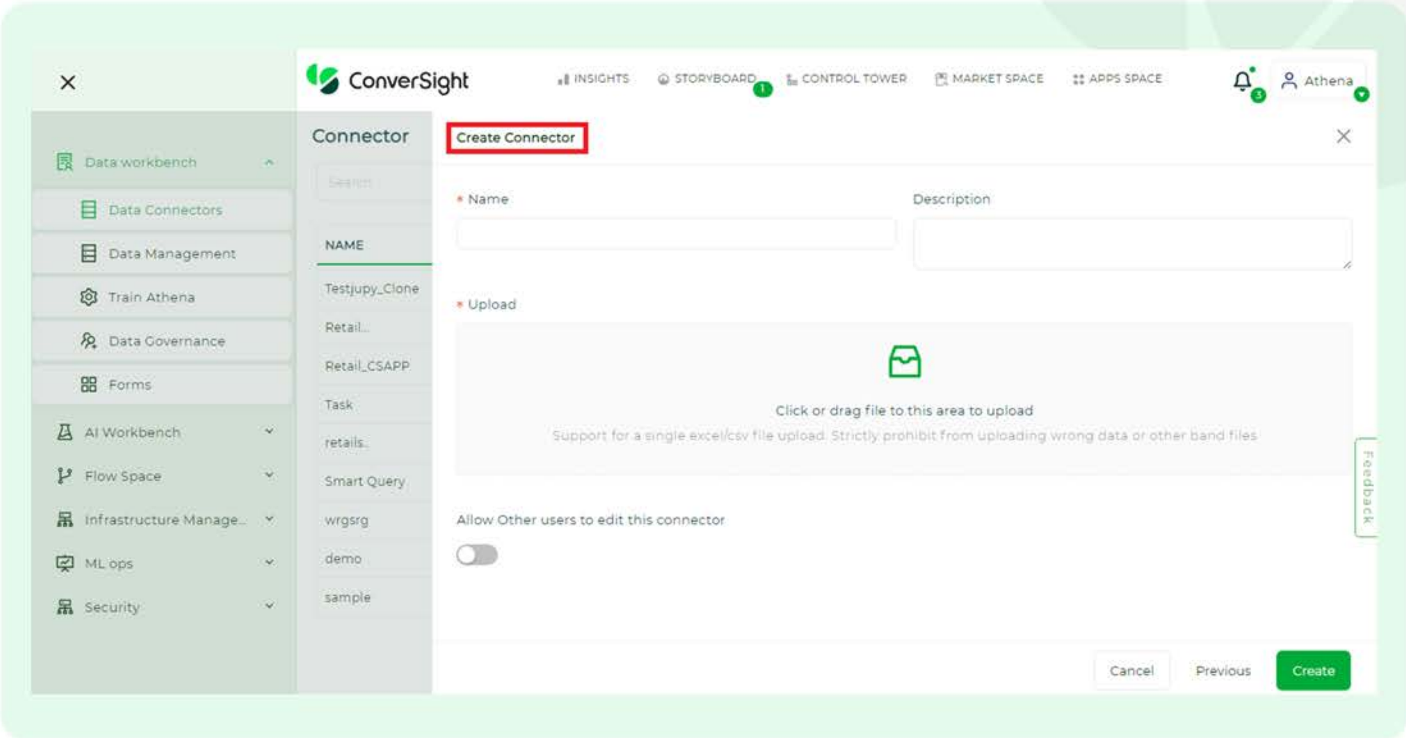
ConverSight provides a seamless and efficient way to leverage data for informed decision-making, making it an asset in any data-driven workflow. ConverSight empowers users to effortlessly create and load new datasets through its intuitive **'Data Connector'** feature, conveniently located under the **'Data Workbench'** menu in the Configuration pane. Users can create new datasets in ConverSight using the **'Create New'** option in the Data Connector feature, as shown in the image below.



After selecting the **'Create New'** option, users will be directed to the screen mentioned below, where they can choose their preferred file format for creating a new dataset.

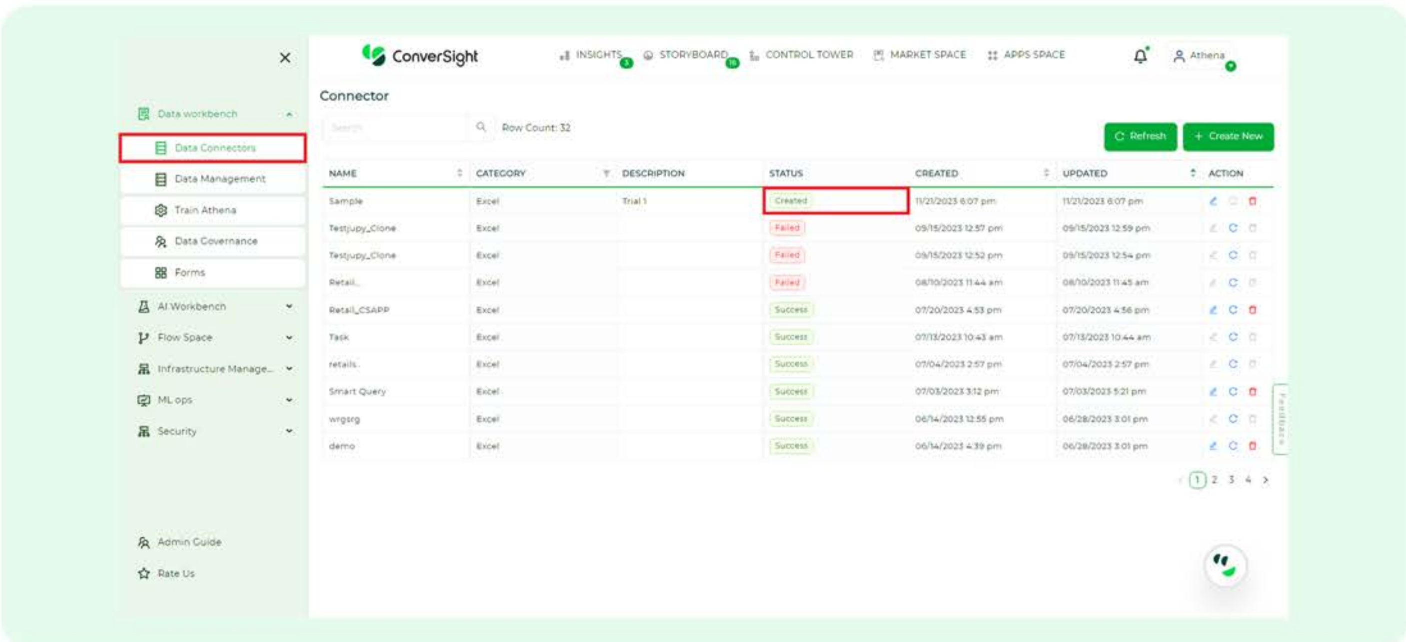


Users need to input the name, description and other required fields based on the Data Connector that is selected, followed by uploading the desired file either by clicking or dragging the file to the designated area shown below. Finally, they can click on the **'Create'** button to generate the dataset.



After the data is loaded onto the ConverSight platform, the dataset initially appears on the Data Management page with a **'Created'** status. Subsequently, the status changes to **'Accepted'** and **'Success'**. When the status displays **'Success'**, it indicates that the dataset has been fully loaded onto the ConverSight platform.

Upon importing a dataset into ConverSight, users are directed to a screen displaying its name, category, description, status and other details. This creatively designed layout allows for easy reference and quick access to information, enhancing the user experience and facilitating efficient data management and analysis.



4. Data Management

The Data Management feature in ConverSight can be accessed through the Configuration pane, providing users with a comprehensive view of all the datasets that have been created and are available within ConverSight. This intuitive feature offers a centralized location where users can efficiently manage and organize their datasets, enabling them to easily track and work with the datasets they have created or have access to.

4.1 Creating Datasets

Creating datasets is an important step in making the data available for efficient data analysis and visualization within the ConverSight platform. After the Data Connector module creates the connector information with the necessary details and validates the information, it needs to be organized into datasets to simplify data organization and enable easy execution of complex queries. By streamlining decision-making processes and extracting valuable insights, creating datasets is critical for gaining insights and making informed decisions within the platform.

The following are the steps involved for crating dataset:

1. Navigate to the Configurations section, select **'Data Management'** under the **'Data Workbench'** menu, and click **'Create New'**.

2. Input the necessary **'Dataset Information'** and **'Locale Settings'**.

3. Choose a connected data source and click **'Next'**.

4. Choose tables to include in your dataset and click **'Next'**.

5. Select the relevant columns and click **'Next'**.

6. Click **'Load'** to initiate the loading process.

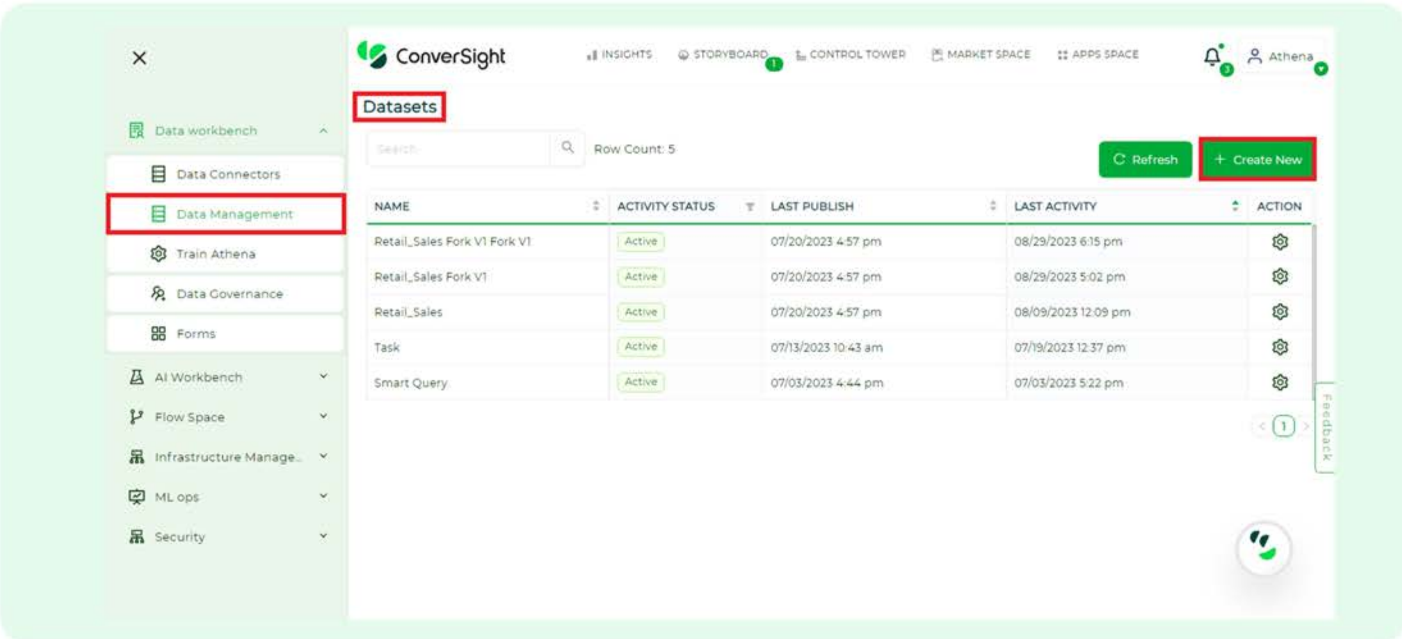
7. Check email for loading process status update.

8. Click **'Configure SME'** to train and provide knowledge for Athena and AI.

9. Save the changes made and publish the dataset by clicking on the **'Save'** and **'Publish'** buttons respectively.

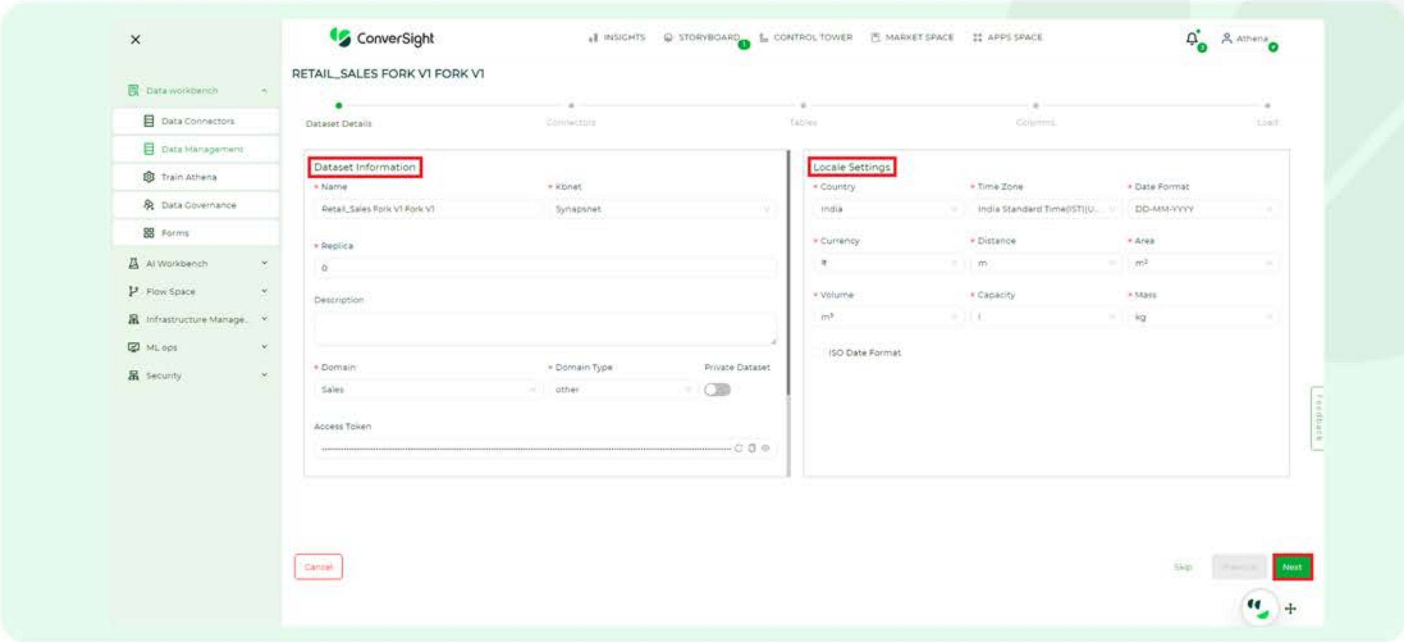
10. Once published, the dataset status will change to **'Active'**, indicating it's ready to be used for querying, analyzing and visualizing data.

Please note that no email notifications will be sent upon successful loading of the dataset.



Dataset Details

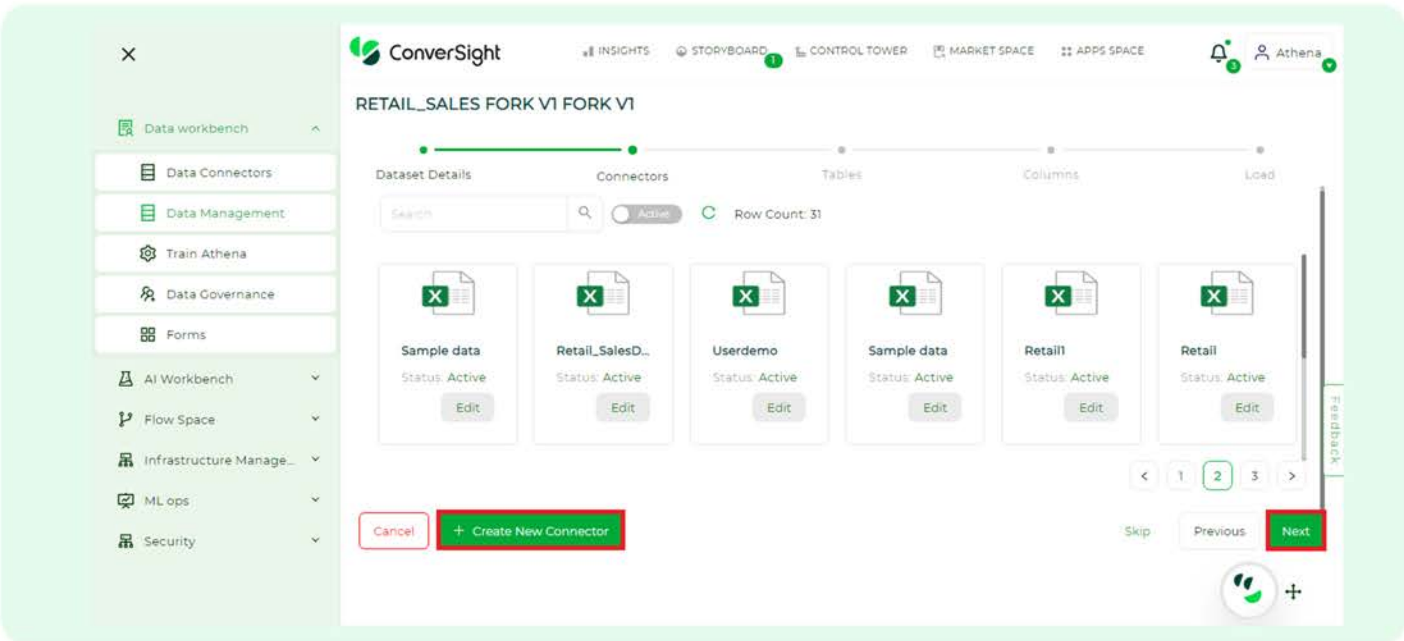
Upon clicking **'Create New'**, you will be directed to the **'Dataset Details'** page where you can provide the Dataset Information such as dataset name, description, template and Locale Settings, based on your geographic location.



Connectors

When creating a dataset, it's important to note that only currently **'Active'** connectors can be selected. On the **'Connectors'** page, you will see a list of all the available connectors that were loaded into ConverSight. You can select one or more connectors of your choice from this list. These data sources are loaded previously using the Data Connector module in ConverSight.

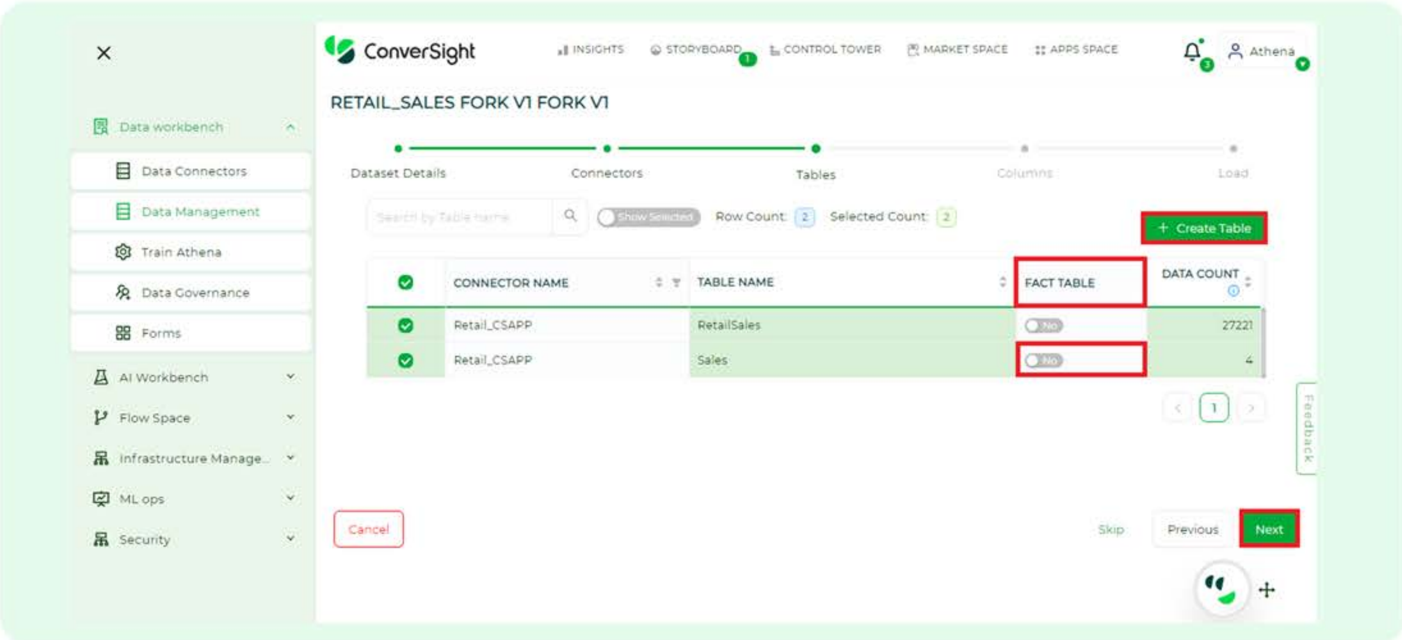
To connect a new data source to ConverSight, click on the **'Create New Connector'** button and follow the prompts to create and load the data. This is helpful if you need to connect a data source that hasn't been loaded previously and you can then select it from the list of available connectors during dataset creation.



Tables

After the connector is selected, the **‘Tables’** section will be populated with all the tables that are available in the connected data source, allowing you to select the relevant tables you want to access.

This section enables you to view and manage the tables associated with each connected data source, including fact tables. A Fact Table is a table in a data warehouse that holds quantitative information for analysis and reporting. It's often denormalized to improve performance and can be easily enabled using the Fact Table toggle button during dataset creation. To analyze the data in a Fact Table, you'll need Dimension Tables that store information on how the data can be analyzed. Joining the Fact Table's foreign key column with a Dimension Table enables in-depth analysis. Fact Tables are crucial for data analytics and accurate reporting in ConverSight.

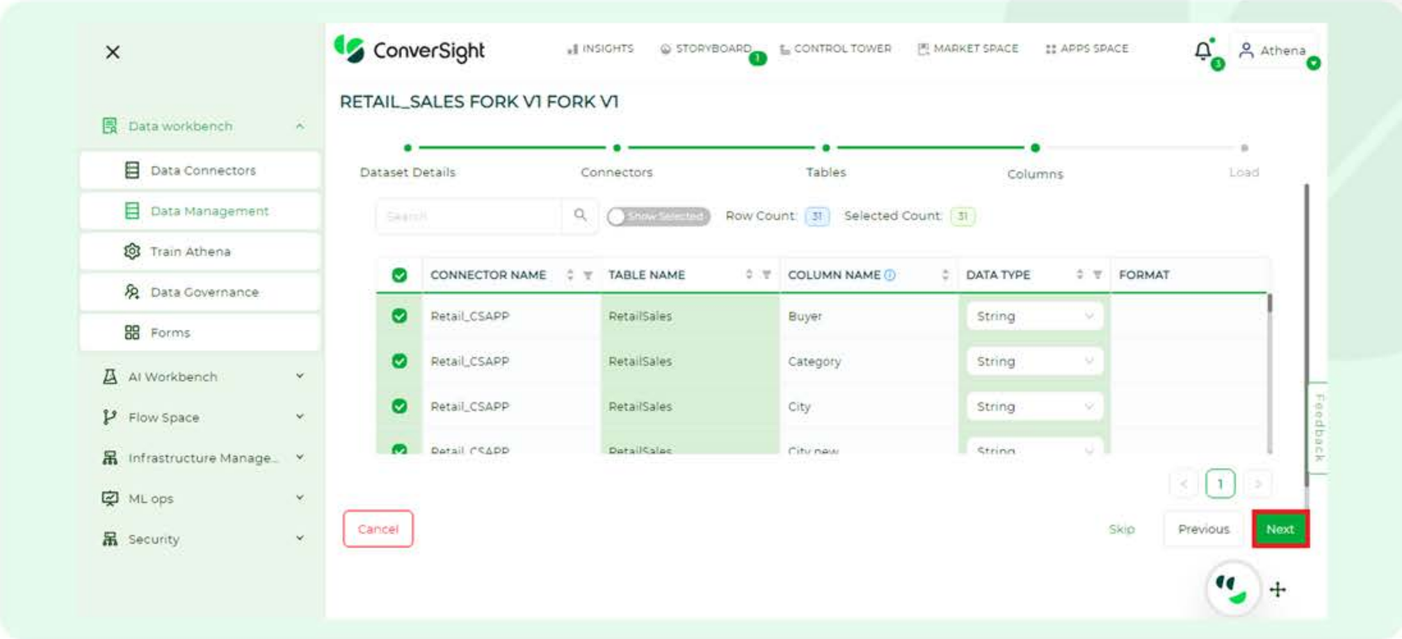


In addition to fact tables, ConverSight also allows you to create custom tables using SQL queries. Custom tables are tables that you create in ConverSight to meet your specific data needs. To create a custom table, you can select the **‘Create Table’** option in the Tables section and write SQL queries to extract data from the connected data source. With custom tables, users can perform all operations just like they would with a normal table that is imported. However, columns will not be listed for custom tables, but you can perform data analysis and transformations on the data as you would with a regular table.

Columns

In the **‘Columns’** section, you will be able to view a list of all the columns available in the selected tables, and you can select specific columns that you want to include in your dataset. You can also modify the data type of each column by selecting from the available options in the **‘Data Type’** drop-down menu next to each column name. This is helpful if you want to customize the data types to match the requirements of your data analysis tasks.

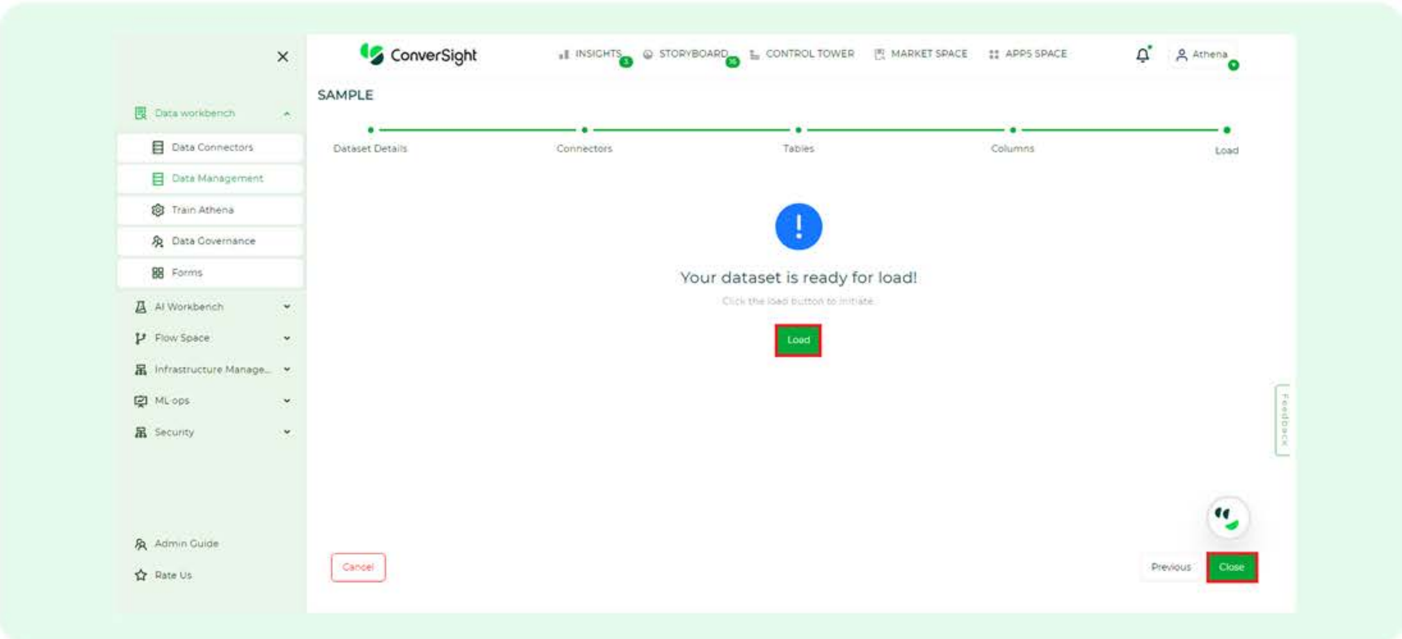
After selecting the columns and modifying their data types (if necessary), you can click on the **‘Next’** button to proceed with the dataset creation process.



Load

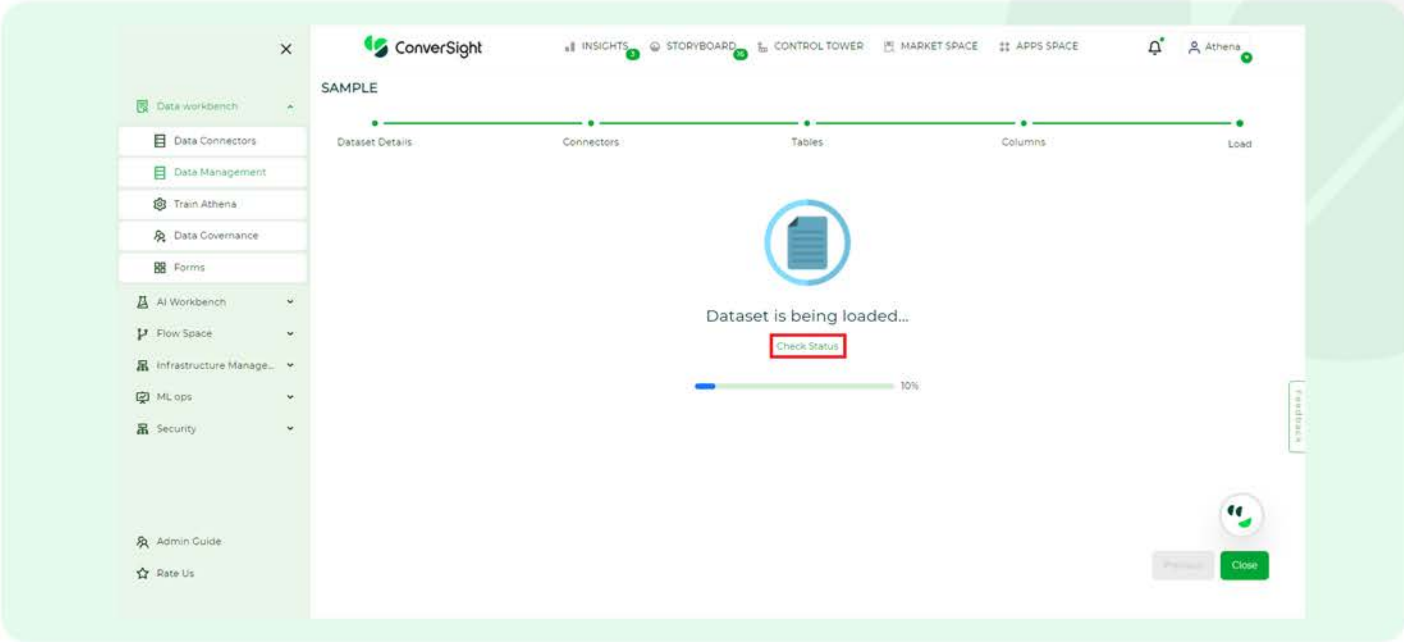
After you have selected the tables and columns you want to include in your dataset, you can initiate the loading process for your dataset.

To load your dataset, click on the **'Load'** button, which will start the loading process. This process may take some time depending on the size and complexity of your dataset.



Check Load Status

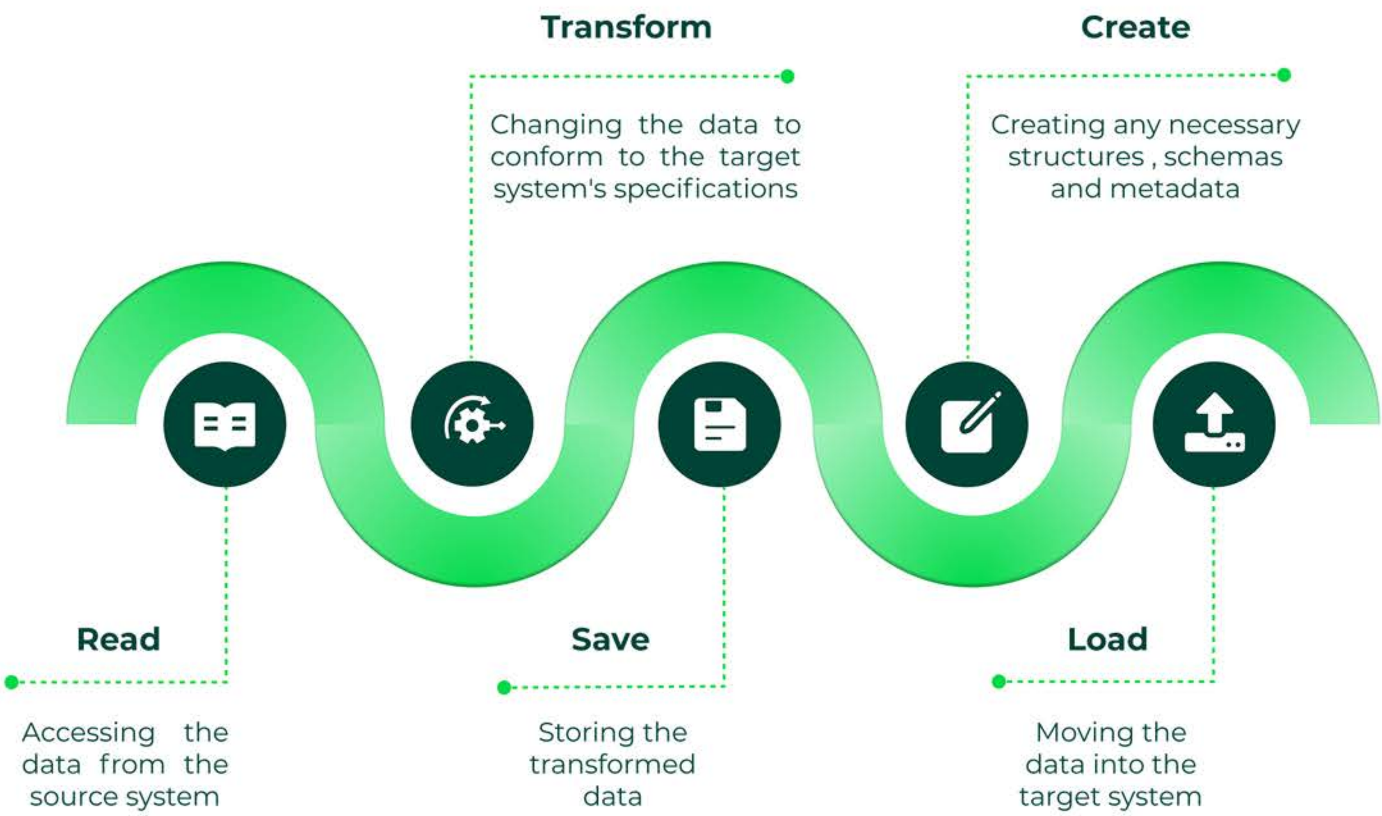
During the loading process, the selected dataset goes through various stages and you can monitor the progress by clicking **'Check Status'**. The load status includes details such as the table name, status, level, runtime and any errors encountered during the process.

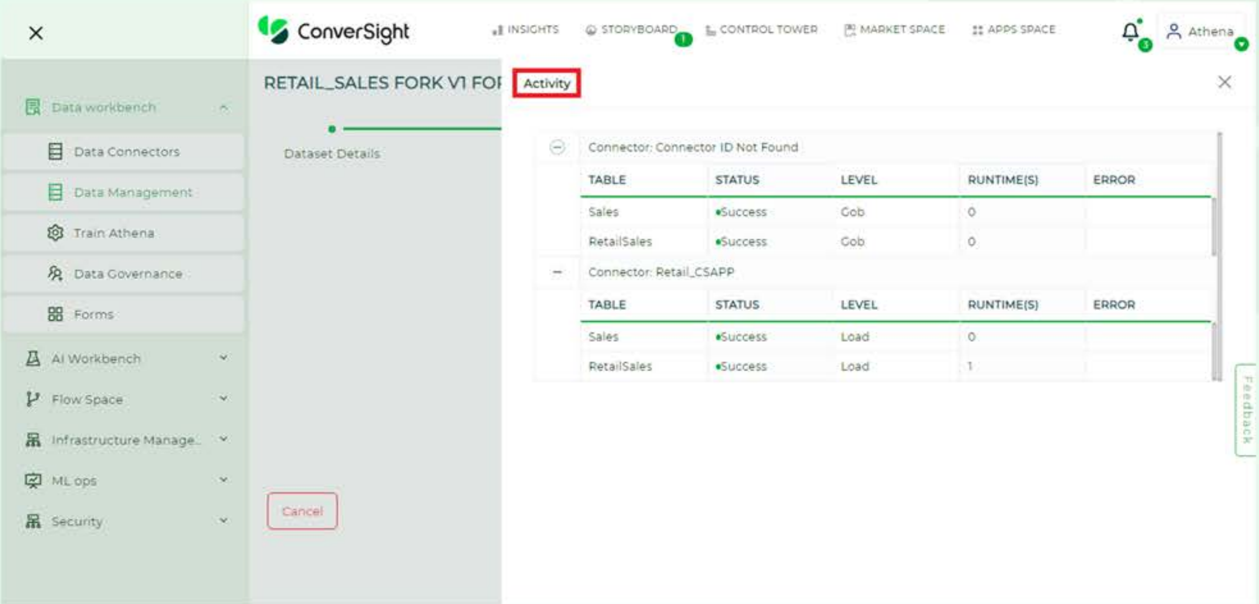


After initiating the loading process of a selected dataset, the status of the load can be viewed on the ConverSight platform. There are two possible statuses:

1. **Processing** indicates that the load is still ongoing.
2. **Success** indicates that the load has been completed successfully.

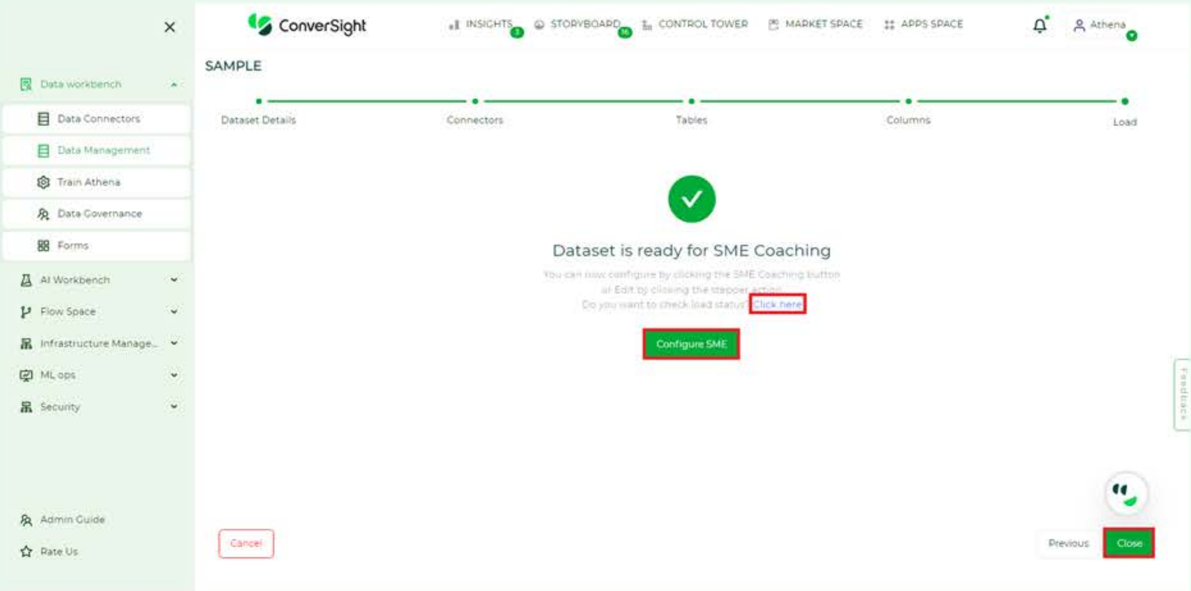
Additionally, the status of the load process is broken down into several levels that indicate the various stages of the loading process, including:



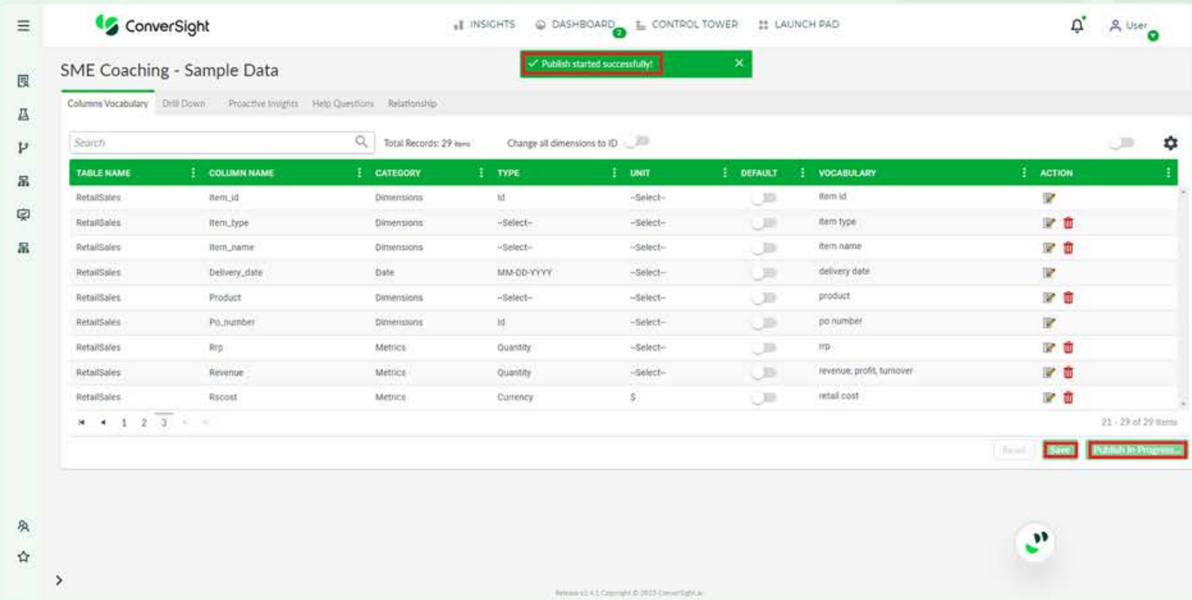


Configure SME

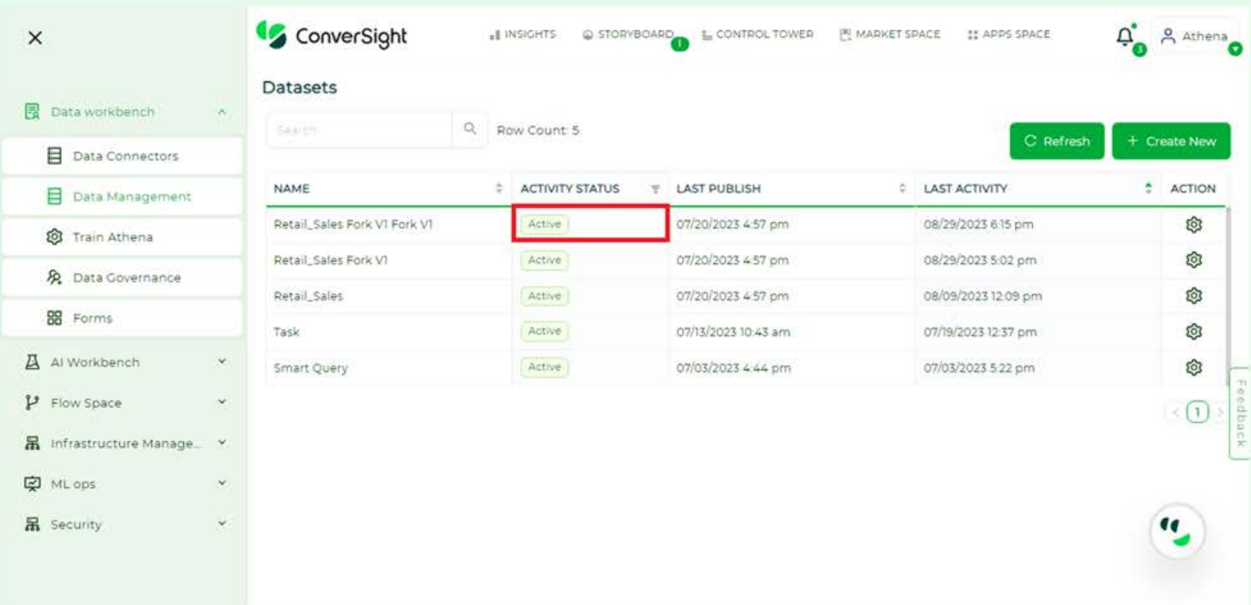
After the successful loading of a dataset into the ConverSight platform, the next step is to provide knowledge and training for Athena and AI/ML models by proceeding to SME Coaching. To do this, click on the **'Configure SME'** button, which will redirect you to the Configure SME page.



Here, you can update the vocabulary of the columns to make it more meaningful and improve query efficiency. By optimizing the vocabulary, you make it easier for Athena and AI/ML models to access the data and extract insights. Once you have made the necessary changes, click on the **'Save'** button to save the changes made and then click **'Publish'** to publish the dataset.



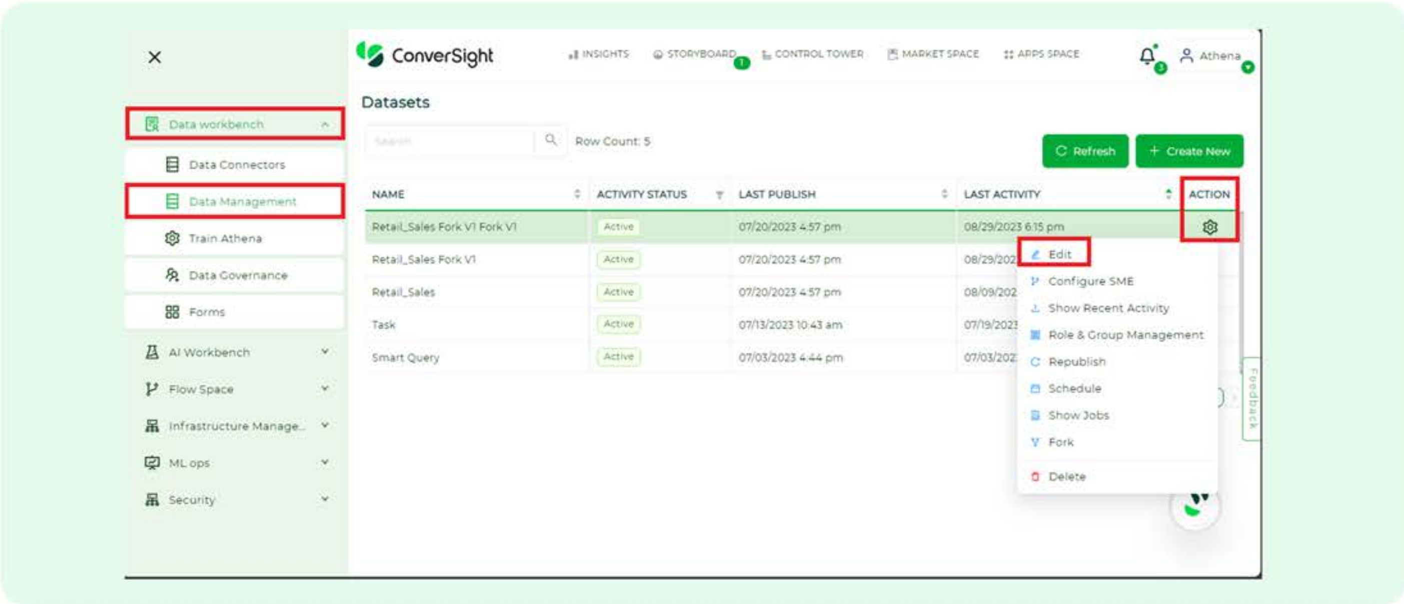
After successfully publishing the dataset on the ConverSight platform, the status of the dataset will be marked as **'Active'**, indicating that the dataset is now available for use. This status ensures that all necessary processes have been completed successfully and users can start querying, analyzing and visualizing the data. The **'Active'** status provides users with accurate, up-to-date and reliable data, allowing them to create reports, generate insights and perform various actions on the dataset.



4.2 Data Editing and Configuration

4.2.1 Edit Data

Within the ConverSight platform, users have the ability to make updates and modifications to their datasets using the **'Edit'** option, which is conveniently accessible from the Settings icon under the **'Action'** column. This feature allows users to input and modify various dataset details, including data connectors, tables, columns and load settings, as required. By leveraging the **'Edit'** option, users can fine-tune their datasets to meet specific business needs and optimize data management and analysis workflows.

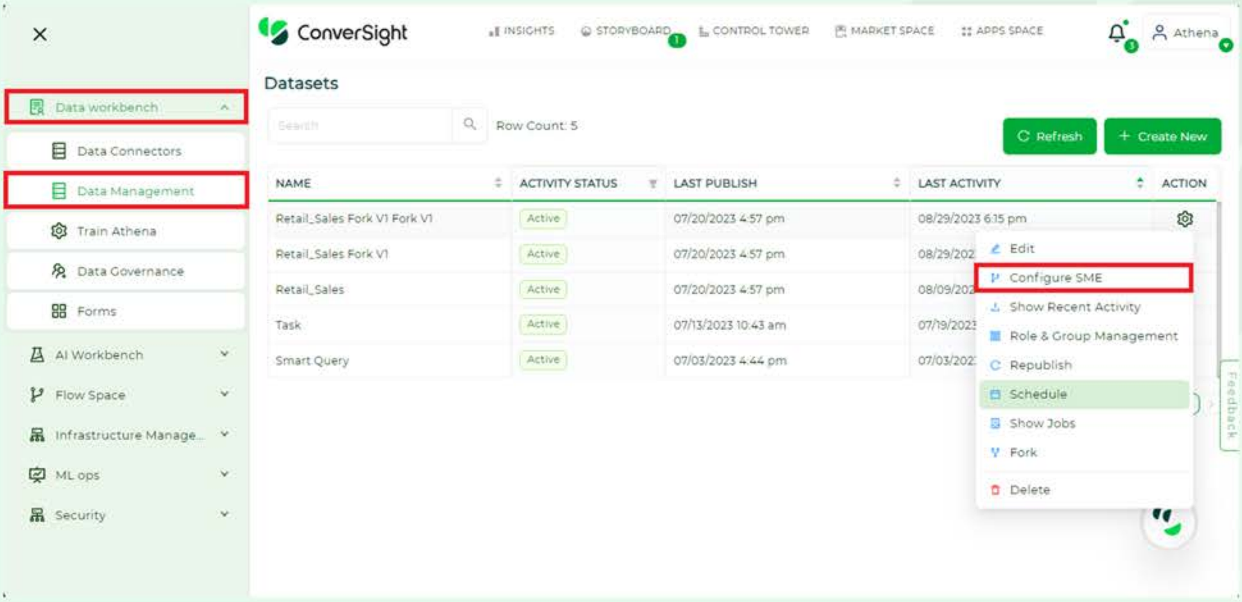


4.2.2 Configure SME

Subject Matter Expert (SME) configuration is the process of making data accessible within ConverSight. SME configuration provides knowledge to Athena.

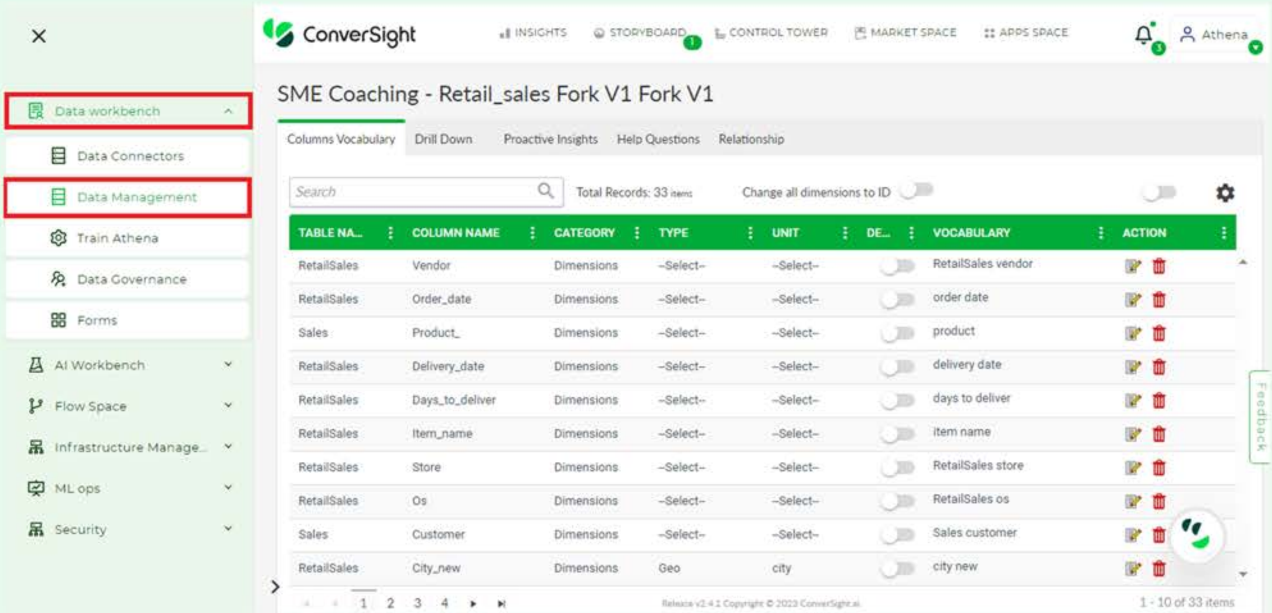
After creating a dataset, select **'Data Management'** from the **'Data Workbench'** menu. If the dataset was successfully created, Activity status will display **'Active'** and you can further proceed with **'Configure SME'** from the Action menu.

To perform SME Coaching, go to the Settings icon in the **'Action'** column of the Data Management section from the Data Workbench and select **'Configure SME'**.



The feature to incorporate business-specific terms into the data is accessible in the vocabulary column, which can enhance the precision of AI and ML models when responding to queries. Additionally, you have the capability to customize the category and type of columns to align with your specific requirements.

To make comparisons and generate insights with more precision, access the **'Drill Down'** tab and select a column for drill down analysis. After making any necessary changes, click **'Save'** to save your progress.



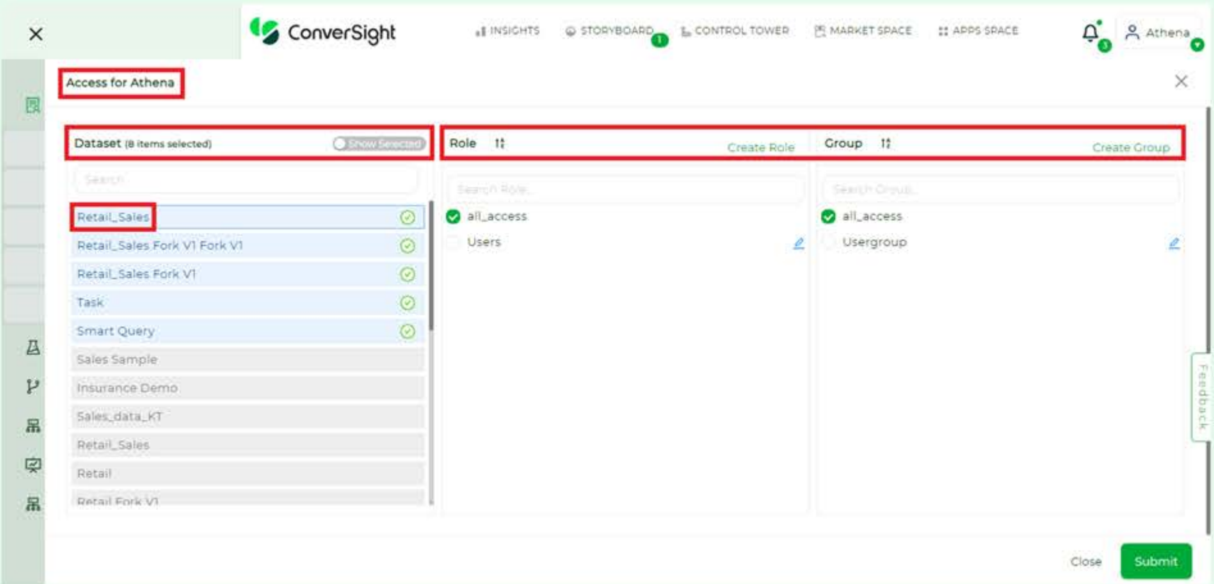
4.3 Access Control and Dataset Actions

4.3.1 Role and Group Management

To configure the **'Role and Group'** for a loaded dataset, you need to click on the **'Settings'** icon located under the **'Action'** column of the respective dataset. This option will allow you to create the role and group according to your specific requirements.

1. The **'Role'** feature enables users to assign specific data access privileges based on their role or responsibilities, restricting access to specific data based on parameters set by the user.

2. The **'Group'** feature allows granting access to specific columns within a dataset, allowing users to be given access to a subset of available data columns instead of the entire dataset and granting data access to multiple users at once.



4.3.2 Republish and Schedule

Republishing a dataset is the process of updating the data in an existing dataset in the database by reloading data from the source database and updating the dictionary that contains metadata information about the dataset, such as column types, encoding and indexing. Republishing ensures that the data in database is up-to-date and accurate, which is crucial for generating accurate insights and analytics.

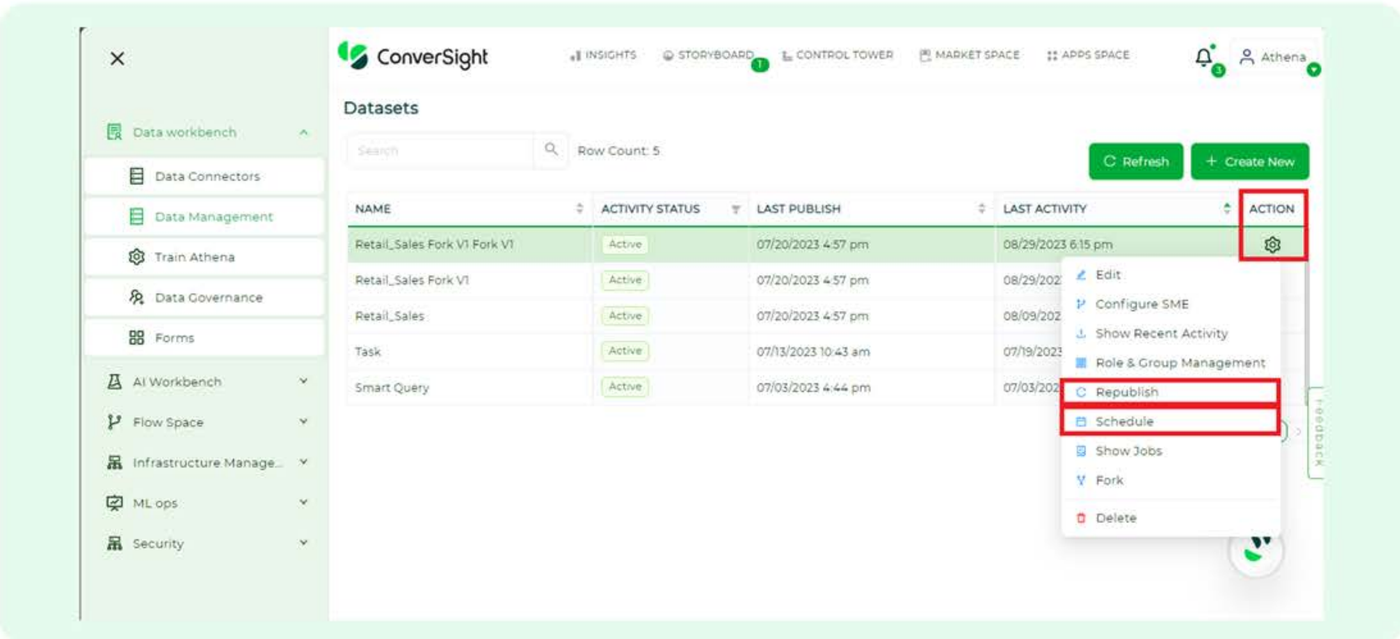
Usually, there are two ways to republish a dataset:

Republish
Allows you to reload data from the source database and update the dataset's metadata information manually.

Schedule
Allows you to set up a regular refresh time for the dataset and have it updated automatically according to your desired frequency.

The following are the steps to Republish the dataset in the ConverSight platform:

1. Select the dataset that you want to republish.
2. Click on the **'Settings'** icon under the **'Action'** column.
3. Click **'Republish'** from the dropdown menu to republish the dataset manually.
4. Click **'Schedule'** from the dropdown menu to republish the dataset automatically.



Following are the stages involved when republishing the datasets:

LoadRequested - The process of getting new data from the source database to the database is initiated.

DictionaryRequested - The metadata dictionary that contains information about the dataset is requested for update.

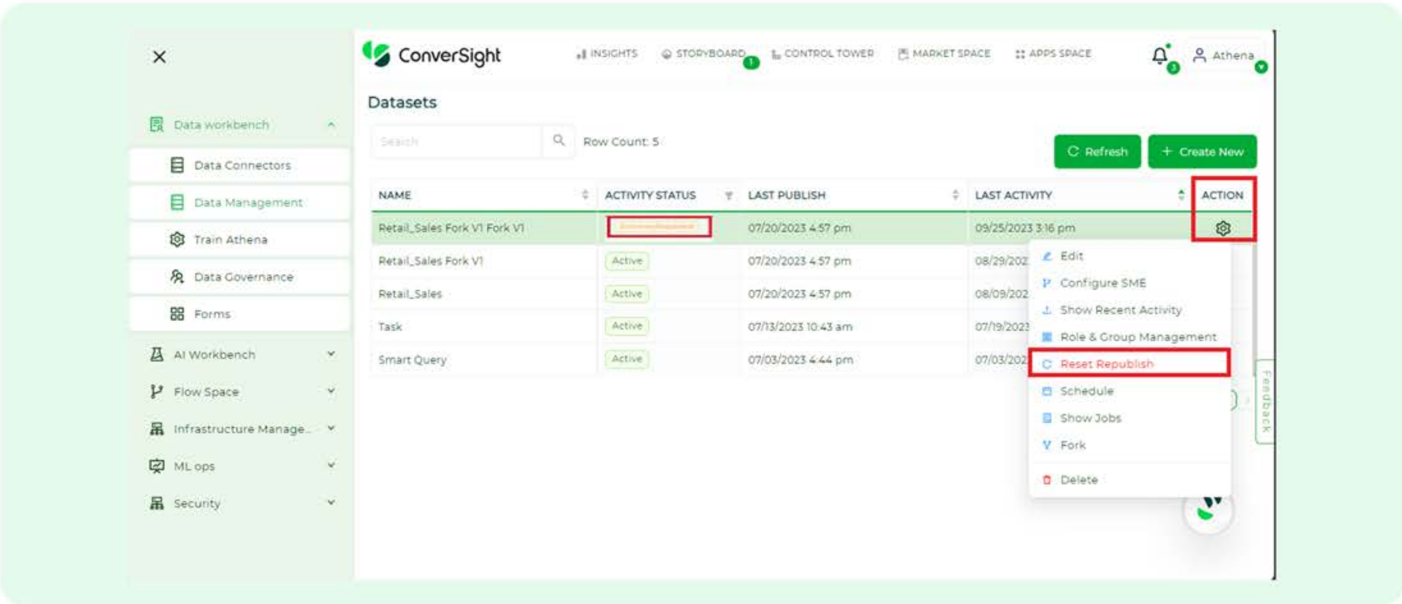
DictionaryUpdated - The metadata dictionary is updated with the latest information about the dataset.

ViewPublishRequested - Indicates that only views are being refreshed. This status is triggered when there are changes made to smart queries and the dataset is published.

Active - The dataset is active with the latest data and metadata.

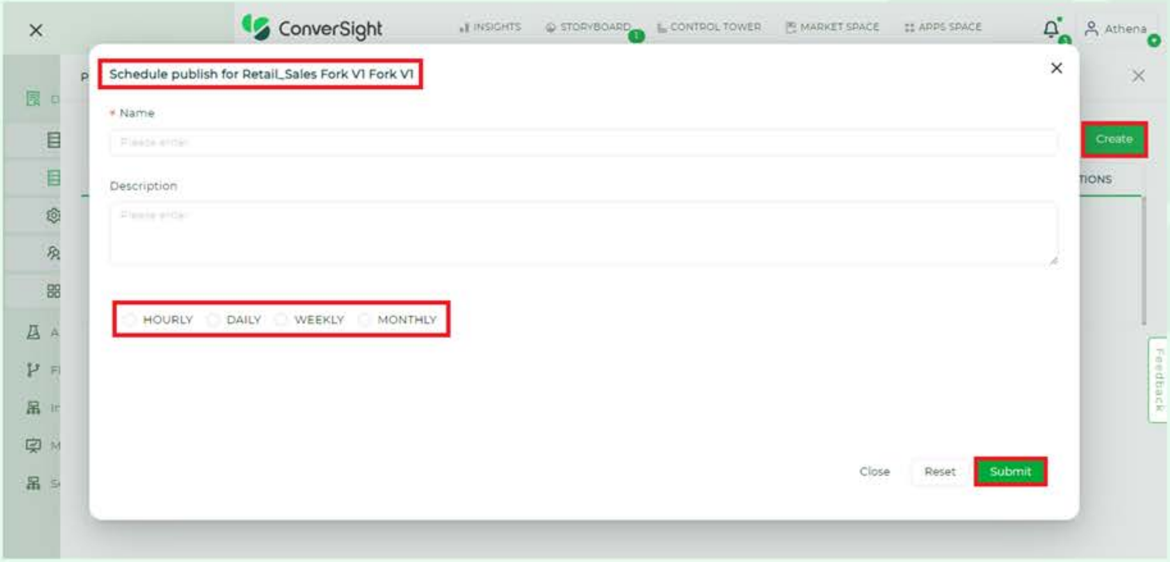
Once the Republish has started, you can also stop the process using **'Reset Republish'** option that is available only while the data republish process is in progress.

'Reset Republish' is a function that allows the user to end the current refresh process and make the previously refreshed data the active version. This option is helpful in case the data refresh encounters an error or is taking an unusually long time to complete. The user can use the **'Reset Republish'** function to revert to the previously refreshed data without losing any data or metadata information.



To automate republishing for the desired datasets, click on the **'Schedule'** option from the dropdown menu, which will then open the **'Publish Scheduler'** page.

From there, click on **'Create'** to access the **'Schedule Publish'** page, which allows users to customize the frequency and details of the dataset's republishing. Users can choose to schedule automatic republishing on hourly, daily, weekly or monthly intervals based on their preferences.

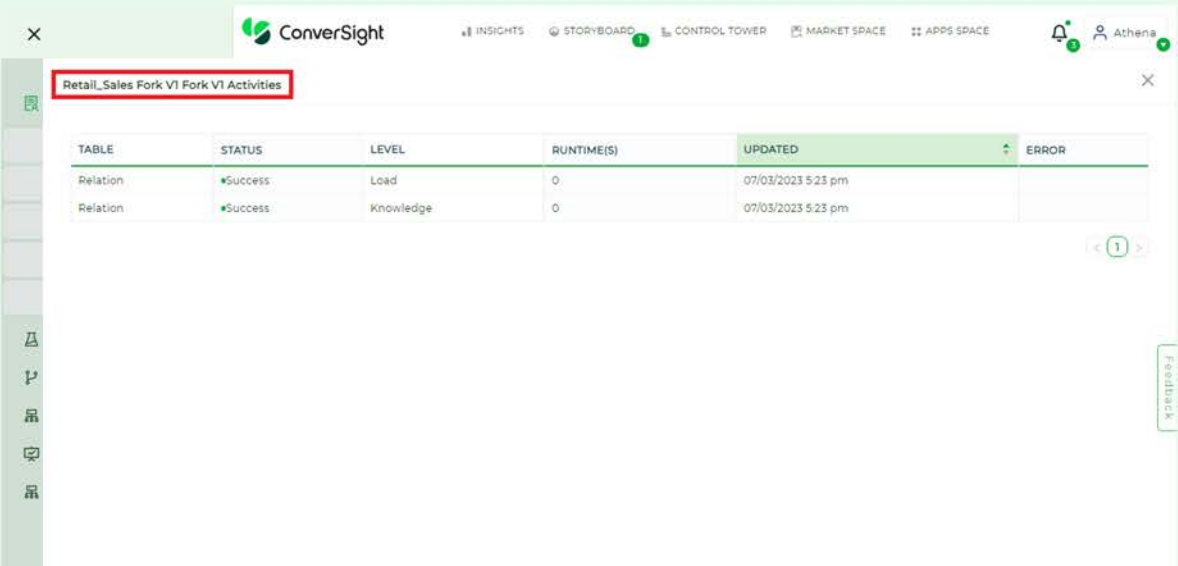


Scheduling a dataset refresh provides several benefits, such as reducing manual effort and increasing data accuracy. It ensures that the data in the database is always up to date, which is crucial for generating accurate insights and analytics. Additionally, it helps to reduce the risk of data inconsistencies and errors that can occur when data is manually refreshed.

4.4 Activity Monitoring and Job Management

4.4.1 Show Recent Activity

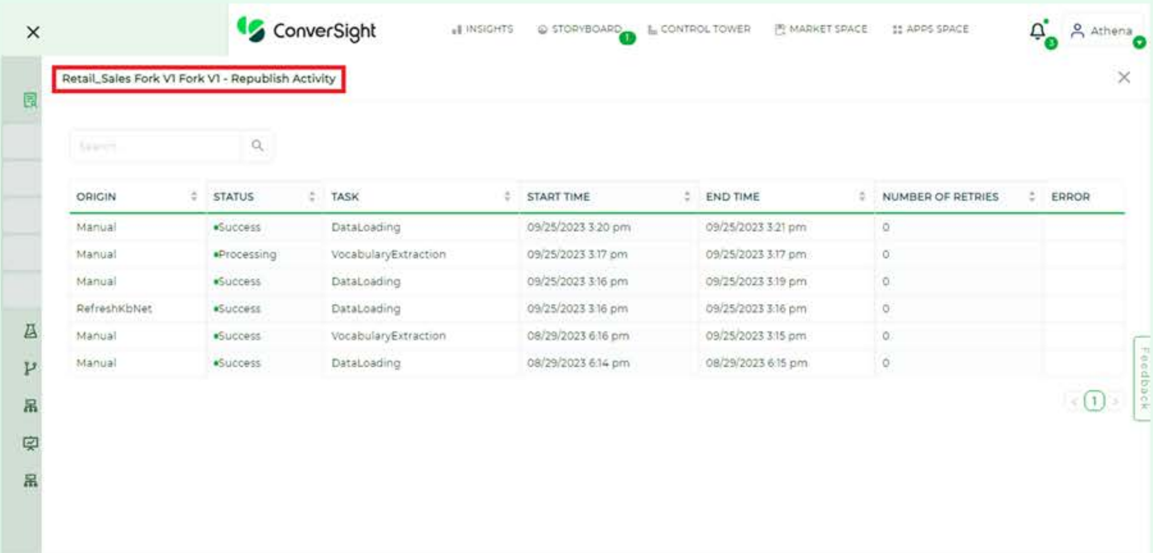
The **'Show Recent Activity'** option in ConverSight provides users with detailed information about their datasets, including the dataset schema, status, level, runtime, updated date and any errors occurred. This feature allows users to easily monitor and track the performance and status of their datasets, ensuring data accuracy and integrity. This formal and professional functionality within ConverSight empowers users with valuable dataset activity and performance information.



Troubleshooting in a data management system typically involves identifying the root cause of a problem and fixing it. This may involve reviewing logs and error messages, running diagnostic tests and collaborating with other teams to resolve issues. Effective monitoring and troubleshooting are crucial for ensuring the reliability and performance of data management systems and for minimizing downtime and data loss.

4.4.2 Show Jobs

The **'Show Jobs'** feature will display the tables involved in the processing, along with the task types such as loading, scheduling or republishing activities. **'Show Jobs'** provides a list of all the tasks being monitored from the start, allowing users to easily track and review the status of their jobs.



4.5 Dataset Operations and Clean-up

4.5.1 Forking a Dataset

In ConverSight, forking a dataset involves creating a separate copy of the original dataset that can be modified independently without affecting the original. Forking can be useful in the following scenarios:

1 Collaborating with a team without interfering with each other's work.

2 Experimenting with modifications to a dataset without risking the original.

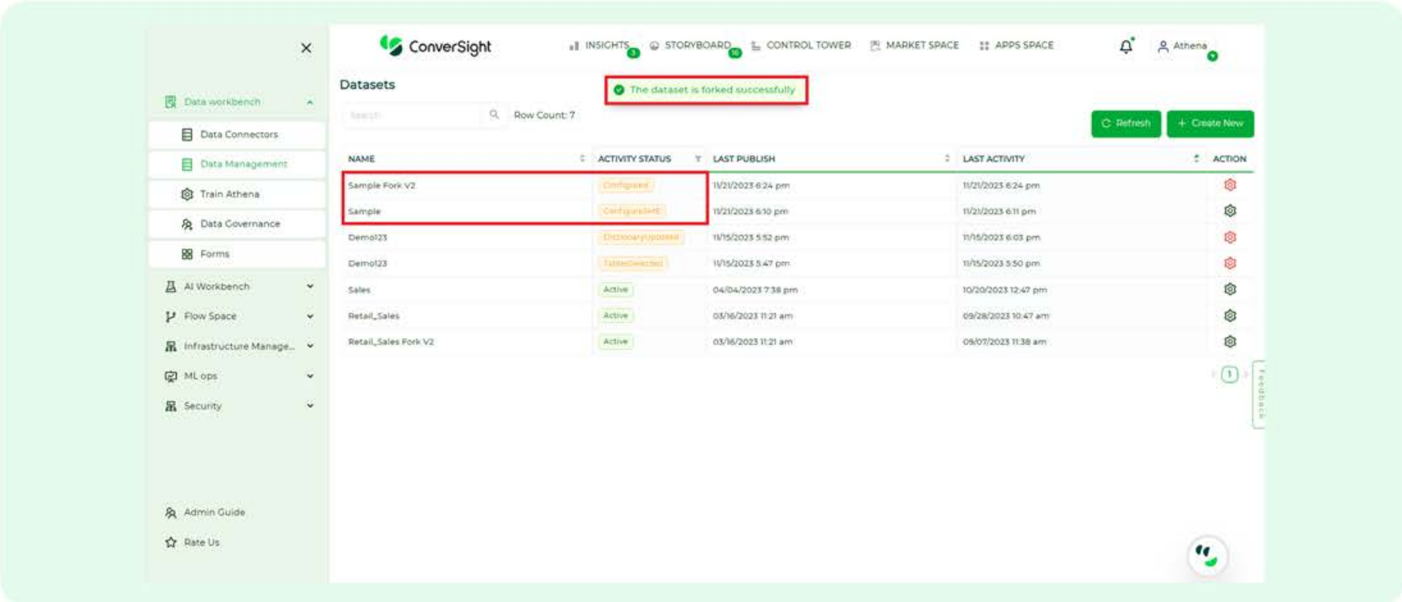
3 Creating a backup copy of an important dataset in a separate location.

To create a copy of a dataset in ConverSight, click on the **'Fork'** option available in the **'Settings'** icon under the **'Action'** column. This creates a copy of the original dataset with the following naming convention:

Forked Dataset - [Dataset Name] Fork [Version Number]
For example - Retail_Sales Fork V1

The version number of a dataset is updated according to the number of times it has been forked.

Upon forking a dataset, its **'Activity Status'** is set to **'Configured'** initially. After going through the following sequence of steps – **'LoadRequested'** , **'DataLoaded'** , **'DictionaryRequested'** and **'DictionaryUpdated'** – finally, the status of the forked dataset changes to **'Active'** , indicating that it is available for use.



4.5.2 Deleting a Dataset

To delete a dataset, click on **'Delete'** from the **'Settings'** icon under **'Action'** column. This will delete the dataset. A message will be displayed upon successful deletion of the dataset.

5. Train Athena – SME Coaching

The Train Athena is a crucial component in the process of training a dataset to provide data-driven insights and facilitate informed decision-making. Following the successful loading of the dataset, accessing the Train Athena involves navigating to the Configurations section and selecting the **'Train Athena'** option under the **'Data Workbench'** menu. Conducting SME Coaching is necessary to enable Athena to accurately respond to queries and provide valuable business insights.

5.1 Columns Vocabulary

The **'Columns Vocabulary'** is essential for training Athena on data. The tab displays data in a tabular format, which includes table names, column names, categories, types, units, vocabulary, default options and action fields.

Here is a concise overview of the information contained in the **'Columns Vocabulary'** tab.

Table Name

Shows a list of tables present in the dataset.

Column Name

Exhibits all the columns present in the dataset, including custom field columns.

Category

Assigns a category to each column based on its type, including metrics, dimensions, dates and flags. Custom fields created by users may be highlighted with categories like calculated metrics, dimensions and dates. Columns can either be metrics or dimensions depending on whether their values can be aggregated for calculations.

Type

Offers specific information about the data a column contains based on its category.

Unit

Displays the unit based on the selected type for the column.

Default

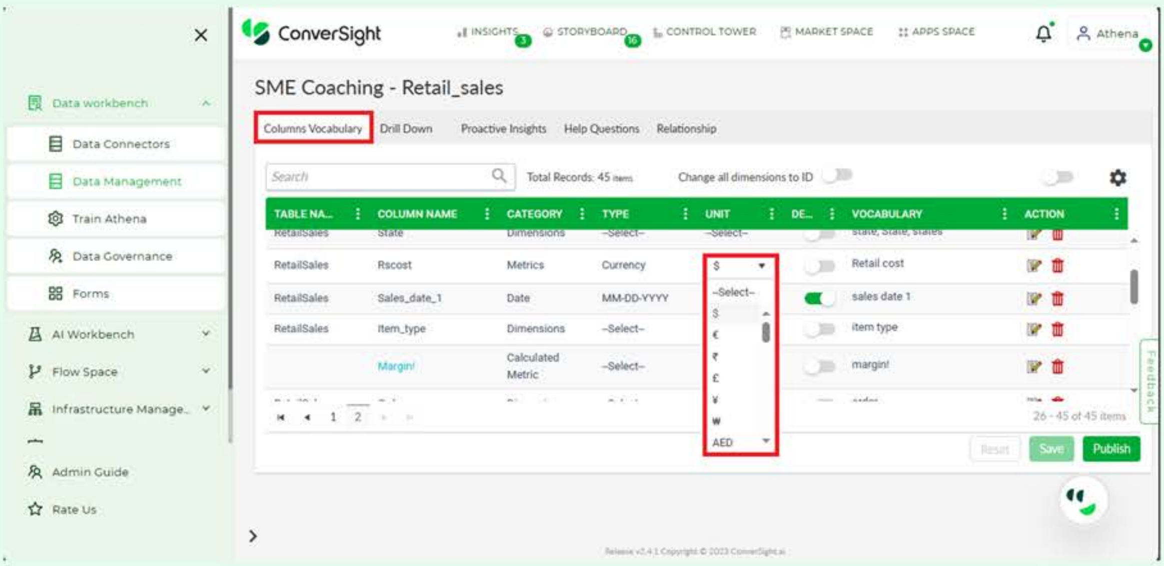
Specifies a default column to prevent confusion when requesting Athena to display data from multiple columns with the same data.

Vocabulary

Allows users to add synonyms to column names to train Athena to identify and respond to diverse questions that have equivalent meanings.

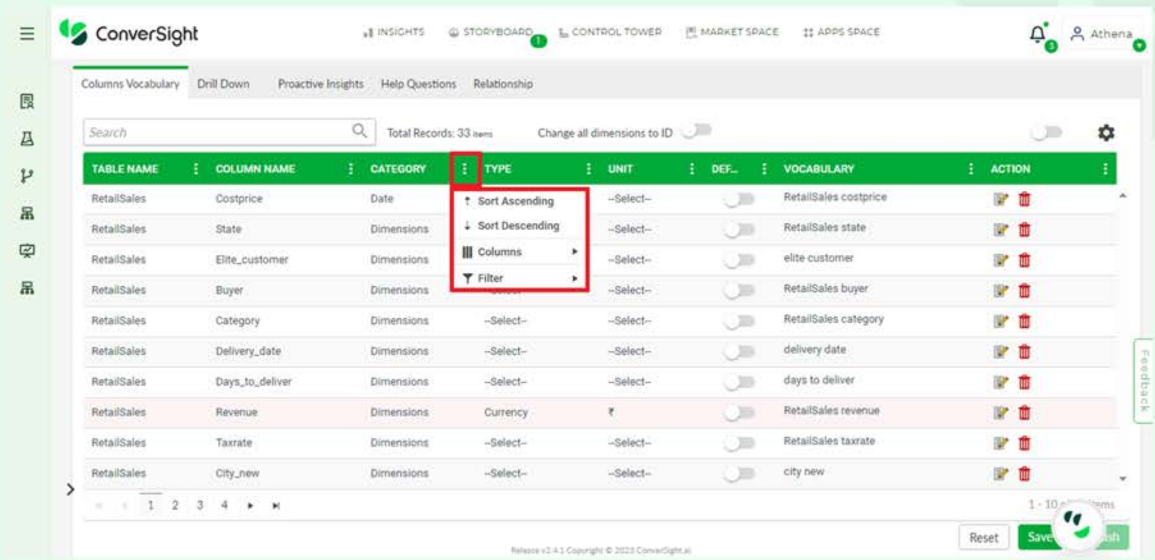
Action

Provides options for editing and deleting columns and setting up any supplementary metadata information required for the user interface.



The Fields option provides users with a range of tools to sort, filter and add columns to their tables. Users can sort columns in either ascending or descending order and select columns from the list of available options.

Available columns include columns for ranking, critical columns for analysis, and columns for data type, mode, category, type, unit, default and vocabulary. The filter option also allows users to focus on a specific subset of data by applying specific criteria, temporarily hiding rows that do not meet the chosen criteria.



5.2 Create Custom Field

This feature allows users to generate their own column from existing data, including an applied condition column that can be utilized in future analyses. Users can create Calculated Fields, Summary Fields and Smart Query to analyze and view business data easily.

5.2.1 Calculated Fields

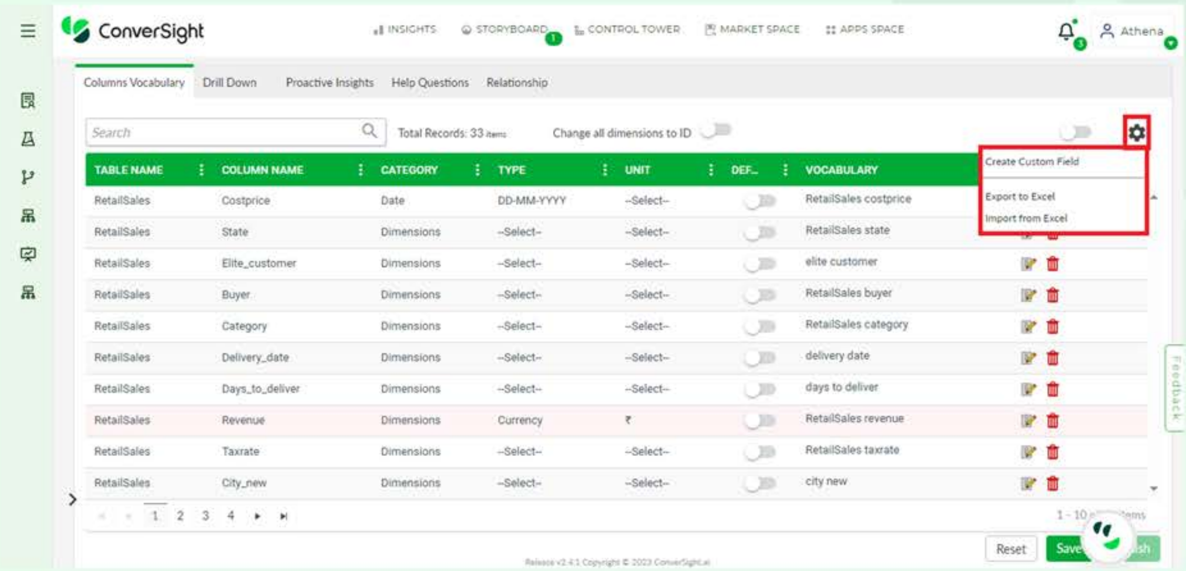
Calculated Fields allow users to create custom fields based on existing data that can be used for future analyses. Users can create complex calculations and metrics with Calculated Fields, such as ratios, percentages and aggregations.

5.2.2 Summary Fields

Summary Fields enable users to consolidate columns from different tables into one place for report creation or verification. With Summary Fields, users can name the query, save it for future use and retrieve the group of columns using only the Summary Fields name in Athena, saving significant time and effort. Additionally, users can add filters to Summary Fields to further refine their results.

5.2.3 Smart Query

Smart Query is a user-friendly feature that simplifies the process of retrieving data from a database through an intuitive interface. With Smart Query, users can construct customized queries that return a table by choosing tables, fields and filters and can enhance its efficiency with its customizable features.



5.2.4 Export and Import

Users can export the the metadata information dataset to an Excel file and import data from Excel by utilizing the export and import options.

5.2.5 Save and Publish

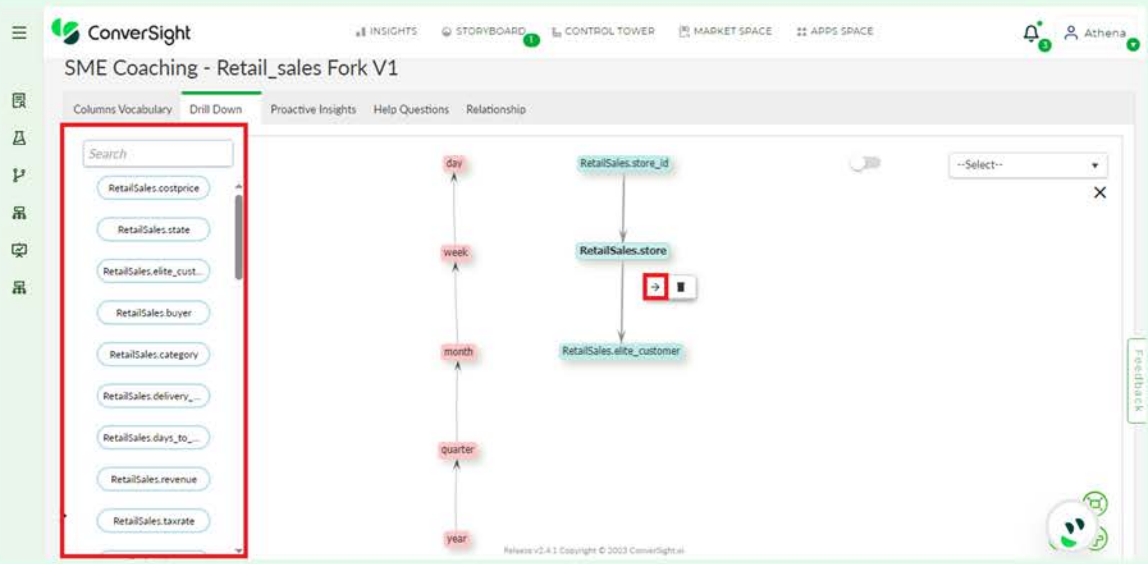
Once the configuration of the SME coaching settings is completed, users can save changes by clicking on Save and then click the Publish button in the Columns Vocabulary tab to make the changes live. This ensures that the customized settings and configurations are applied to the dataset.

5.3 Drill Down

The **'Drill Down'** report refers to a type of report that empowers users to seamlessly navigate to a different layer of data granularity by clicking on specific data elements within a web page or application. This functionality enables users to explore multidimensional data by transitioning from high-level information to a more detailed view, facilitating in-depth data analysis.

To create a Drill Down, click on the pencil icon as shown the image.

The dataset's available columns are displayed on the left-hand side, from which you can drag and drop the desired columns to form a hierarchy. To link two columns and establish a relationship, simply click on the desired column, which will display an arrow symbol and then click on the **'Arrow'** symbol to connect it to the other column.



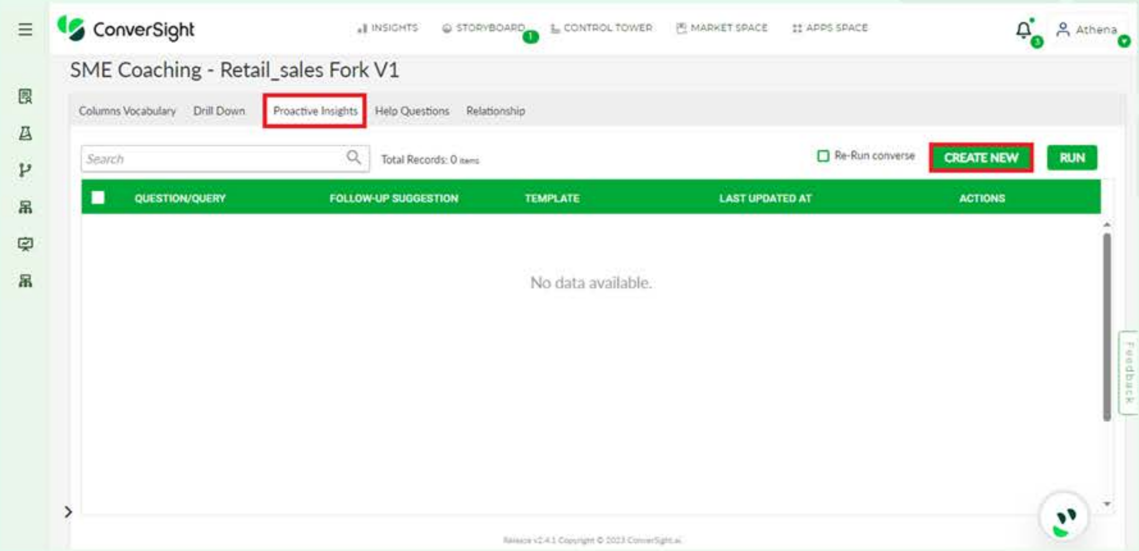
Additionally, if you want to delete a relationship between two columns, simply select a column and click on the delete button.

5.4 Proactive Insights

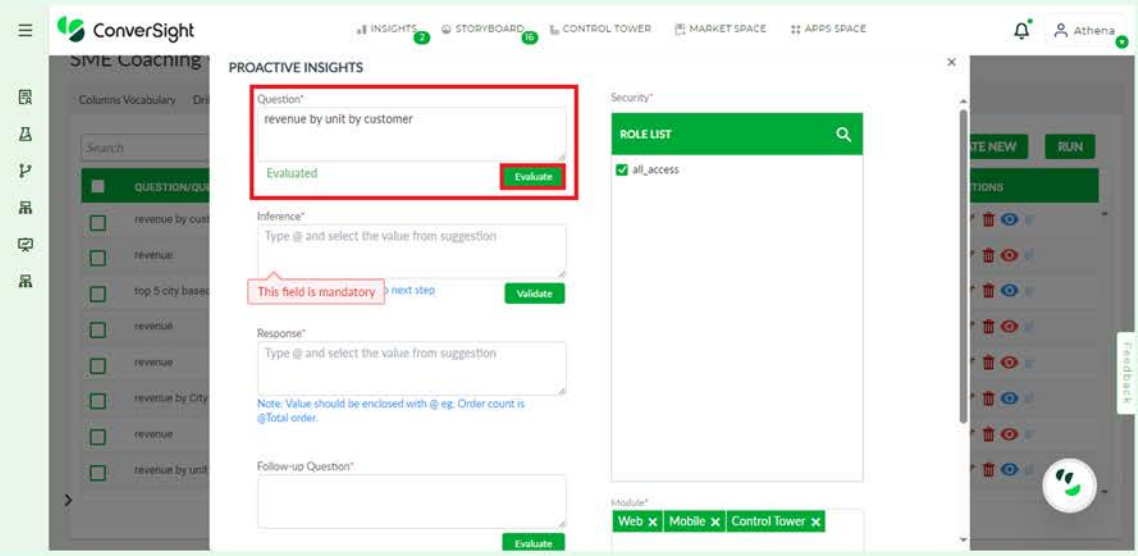
The Proactive Insights feature encompasses proactive efforts that result in the generation of valuable insights, which are then presented in a visually appealing tabular format. These insights, derived from Proactive Insights are prominently showcased on the insights screen. Proactive Insights also includes the ability to alert the user with data explanations if certain thresholds are reached.

Creating new Proactive Insights

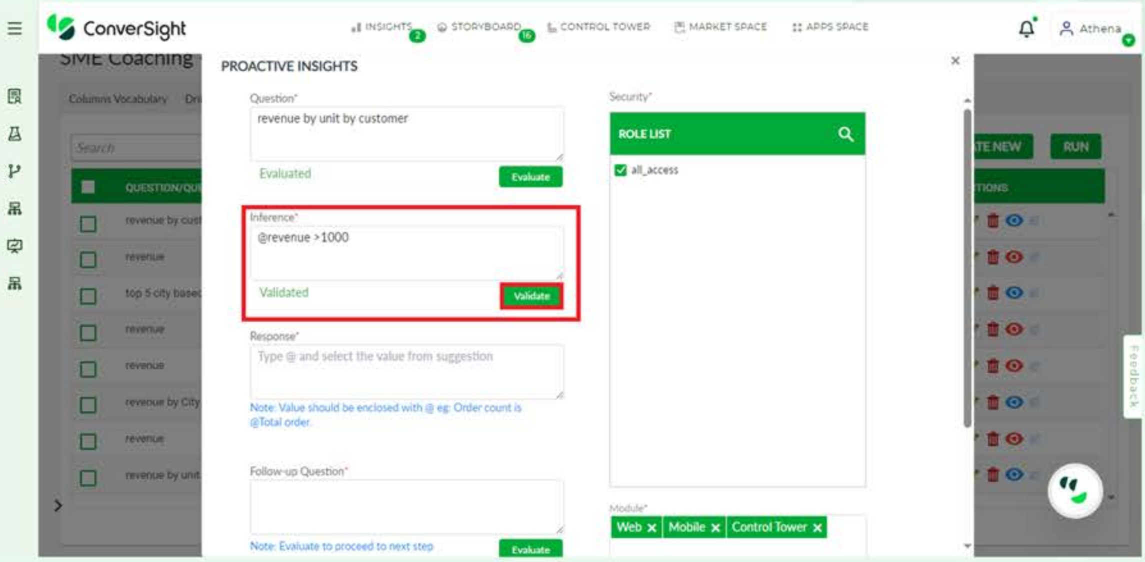
To create an Insight, click on **'Create New'**.



The **'Create New'** tab allows users to incorporate fresh insights into their project. To do so, you must supply a **'Question'** which is then assessed to determine its output. Once the question has been entered, you can evaluate it by clicking on the **'Evaluate'** button.

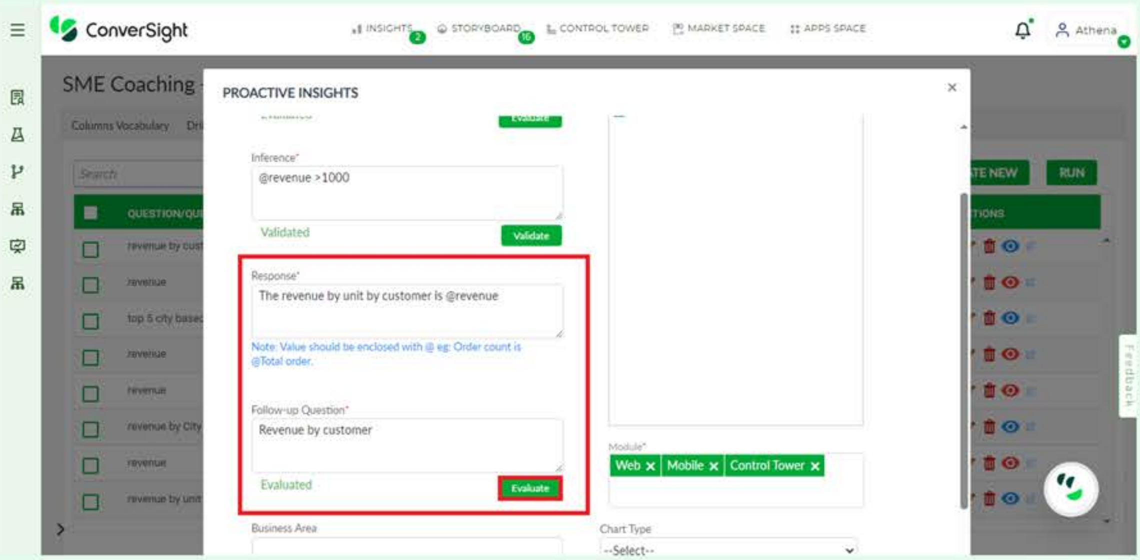


The **'Inference'** textbox serves as the threshold criteria for triggering the alert function within insight sets. Users enjoy the flexibility to personalize and customize the conditions to suit their preferences and requirements. By utilizing the **'@'** symbol, users can effortlessly retrieve a list of column names that align with their question or query. Additionally, the **'Validate'** button provides a convenient way for users to confirm the accuracy of their input.

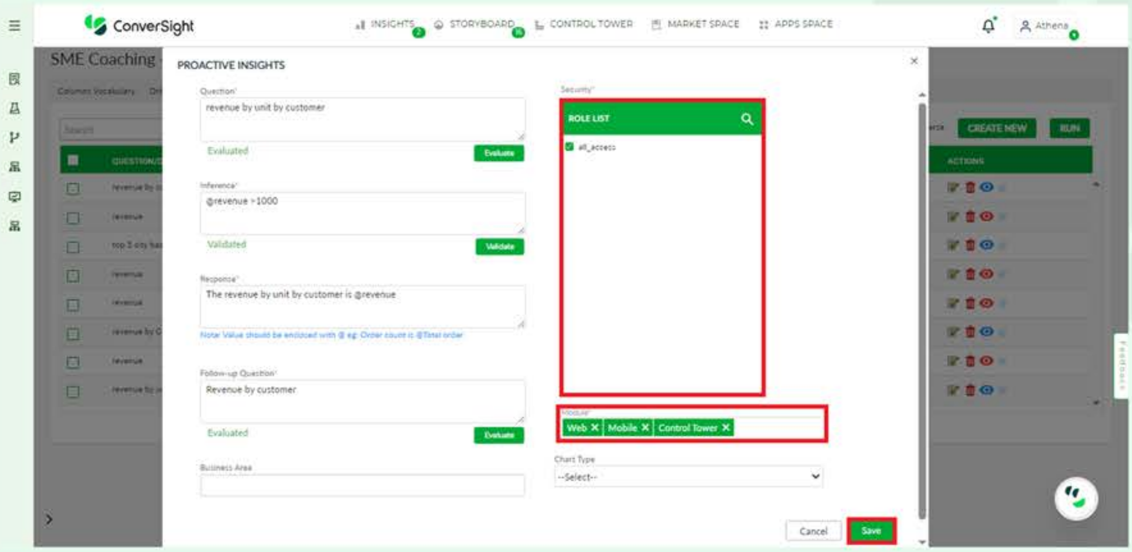


The **'Response'** textbox allows users to input a sentence that will be displayed alongside the Insight charts, providing additional context and knowledge. This information may include column-generated values denoted by **'@'** followed by the respective column name, further enriching the insights.

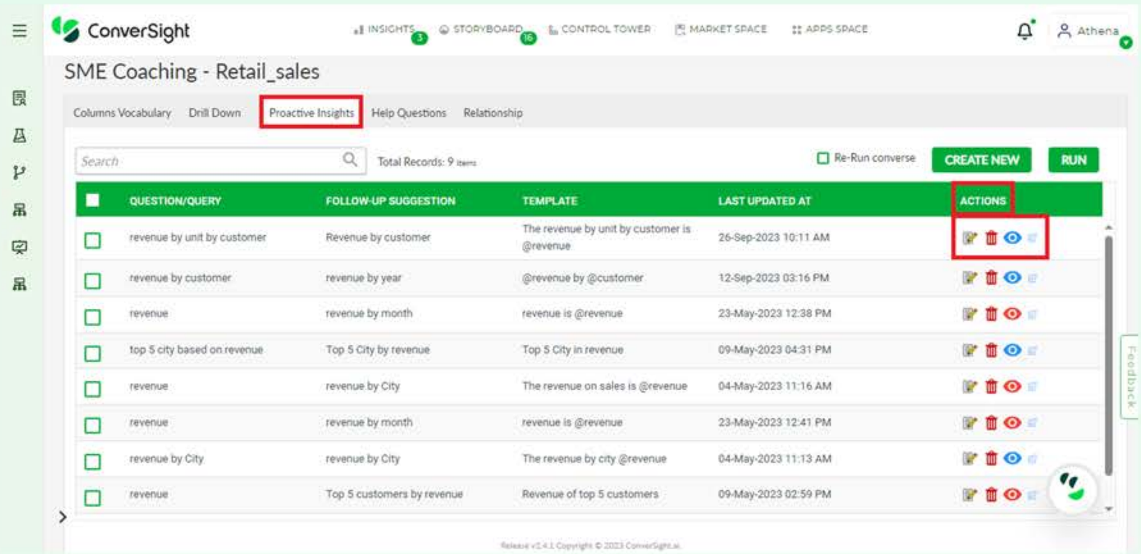
The **'Follow-up Question'** textbox is specifically designed for users to enter any questions that may arise after viewing the output of an insight. Users have the freedom to create their own follow-up questions, which can be evaluated for accuracy to ensure the relevance and reliability of their inquiries.



The Security checkbox displays all available roles associated with the dataset, allowing users to grant permission to view insights by selecting the appropriate role. Users have the option to assign the created insights to specific modules of their choice in the Module textbox. Finally, click **'Save'** to create a new Insight.

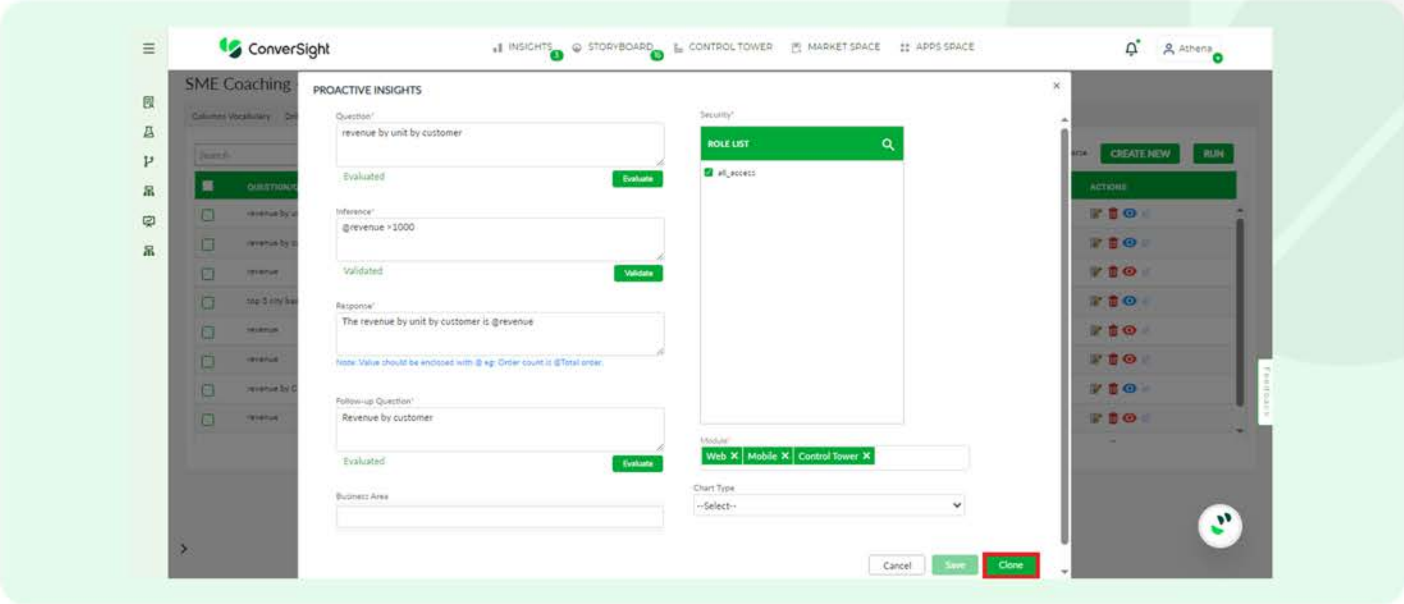


Upon creating a Proactive Insight, the **'Actions'** column displays several options that can be performed from the main page of the Proactive Insights, including editing, deleting, publishing and tagging the insight.



Editing Proactive Insights

To modify an existing insight, click on the **'Edit'** icon. This will open the Proactive Insights Page where the existing query can be edited. The user can then choose to either **'Save'** the edited insight or create a copy of the insight by clicking on the **'Clone'** button.

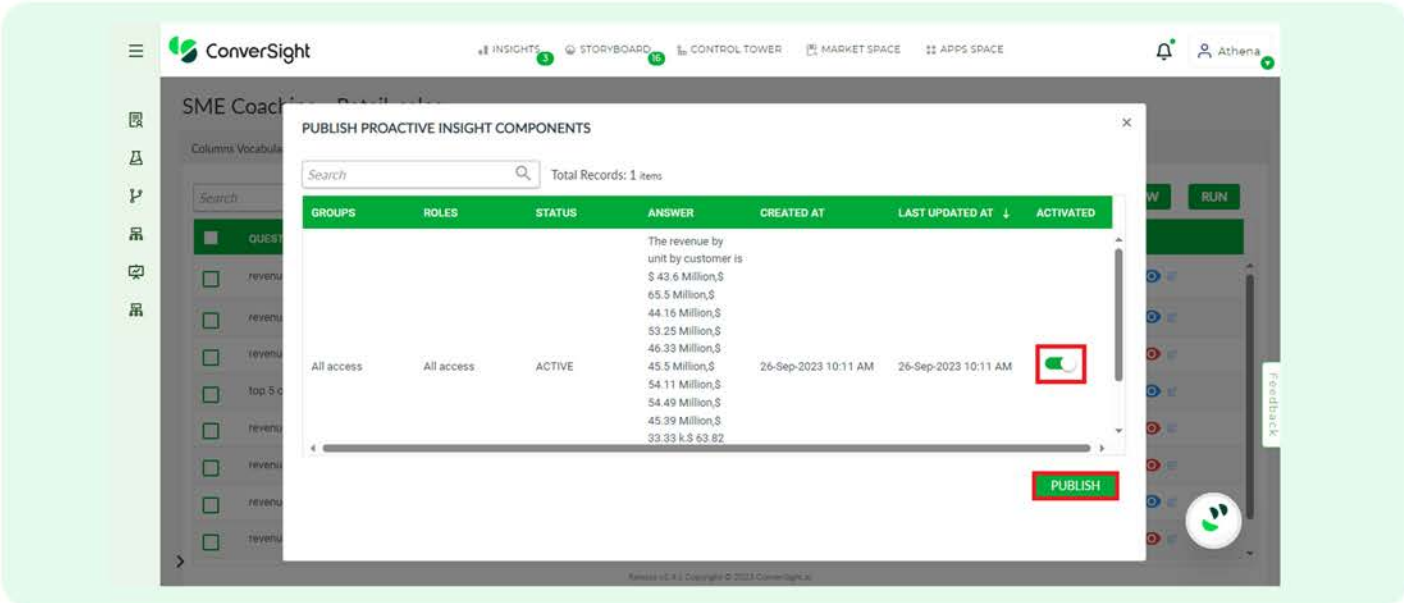


Deleting Proactive Insights

To delete a Proactive Insight, simply click on the **'Delete'** icon under the **'Actions'** Column.

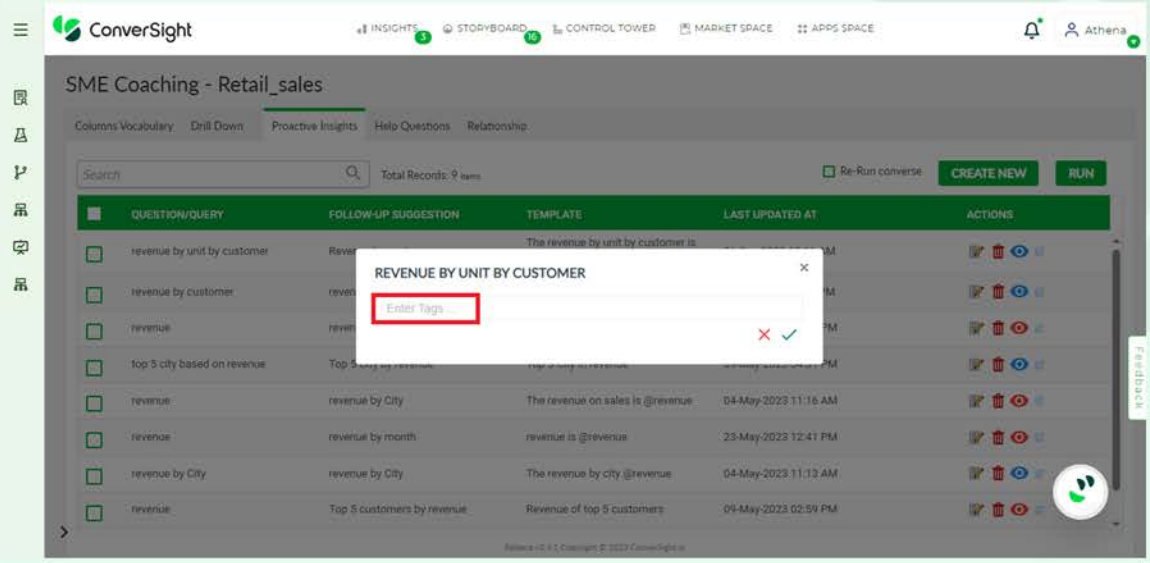
Publishing Proactive Insights

To access the published Proactive Insights components, click on the **'Eye'** icon, which will direct you to the **'Publish'** window. The status displayed is independent of the access granted to the respective roles and groups. If the status is listed as **'Success'**, you can activate the insight by toggling the activation button and then selecting **'Publish'**.



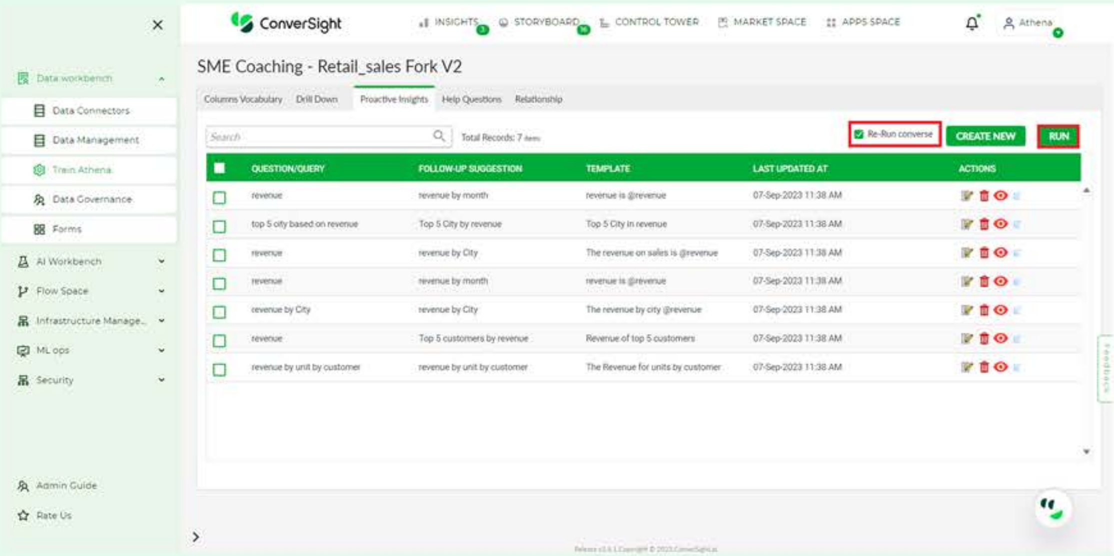
Tagging Proactive Insights

To classify insights and determine their appropriate category or business area for display, tags are used. You can add tags to your insight by clicking on the **'Tag'** icon located at the end.



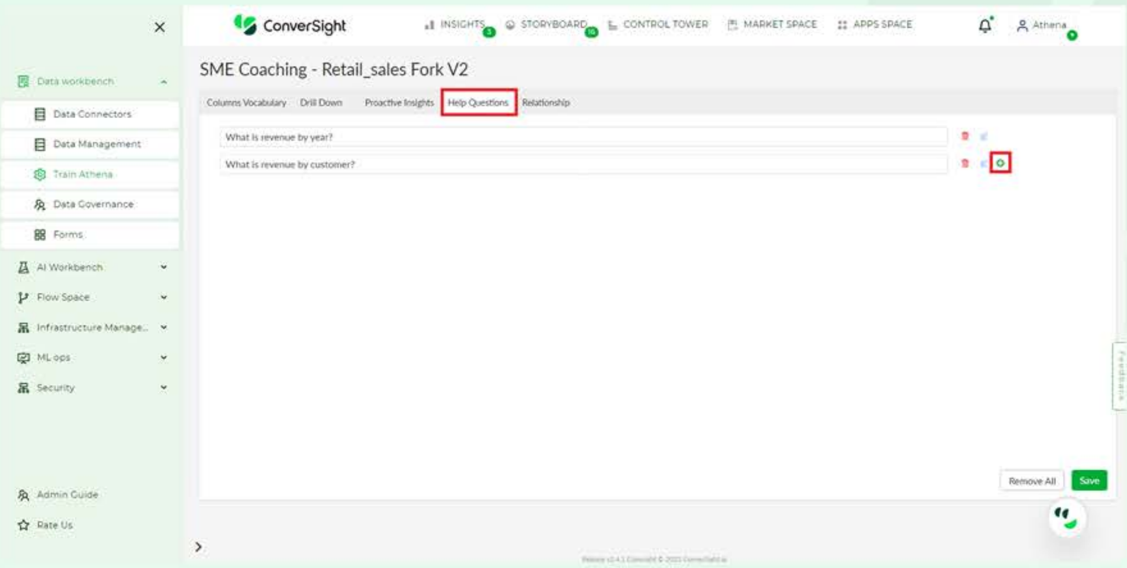
Running Proactive Insights

To generate proactive insights based on the status, simply select the desired insight from the table and click on **'Run'**. Alternatively, if you want to re-run the insight from the initial status, you can select the insight and check the box labelled **'Re-Run Converse'**, then click **'Run'**.

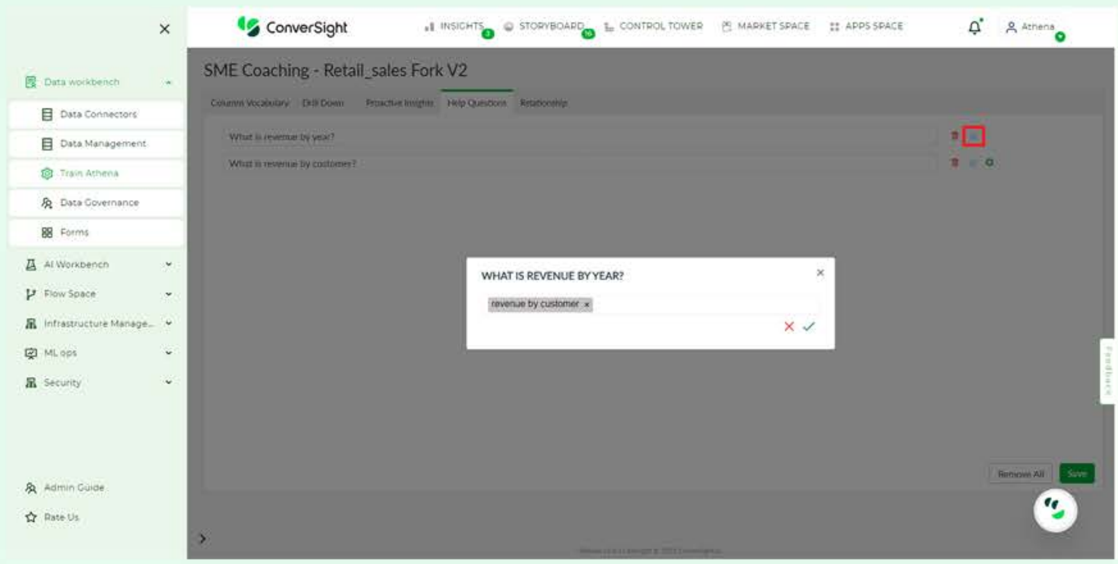


5.5 Help Questions

The Help Question tab provides users with valuable guidance on the different types of questions that can be directed to Athena. Moreover, you can easily expand the list of questions by adding their own inquiries with a simple click on the plus icon.



Furthermore, you have the option to enhance the questions by adding Tags. By selecting the tag icon and assigning relevant tags, you can categorize the questions for better organization and clarity. The tagged questions will then be displayed under the respective tags, allowing you to effortlessly identify the category to which the question belongs.



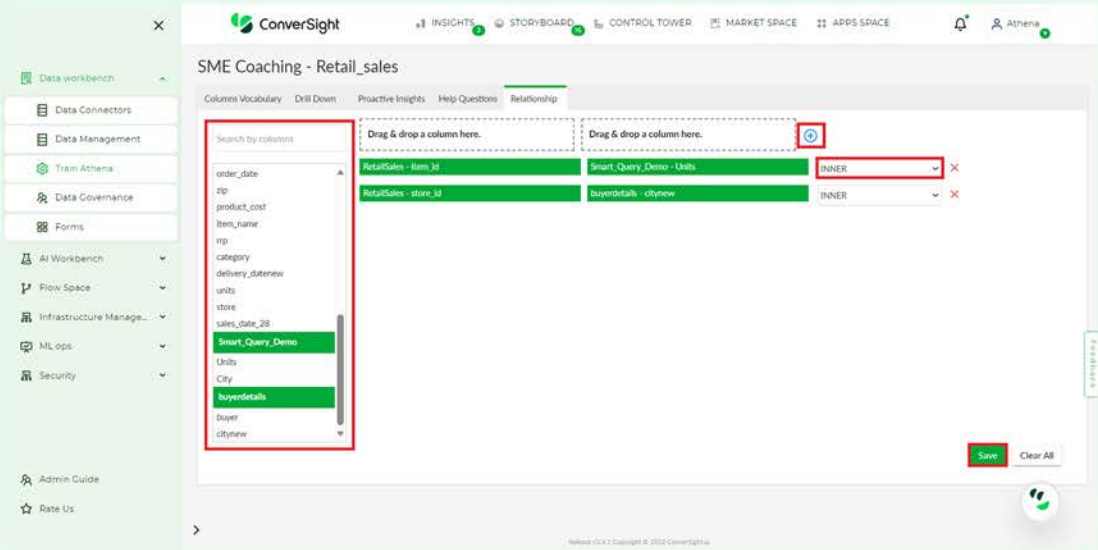
To remove a particular question, select the delete icon that appears next to the question. Additionally, you can delete all questions by clicking on **'Remove All'**.

After you have added the questions and made the required modifications, click **'Save'** to save your changes.

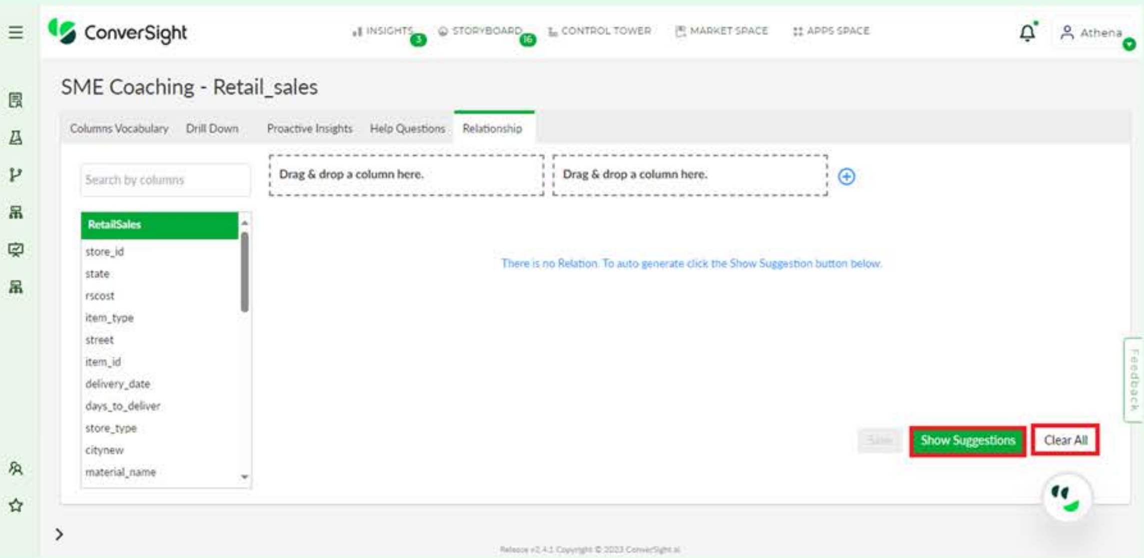
5.6 Relationship

The Relationship tab enables efficient mapping and retrieval of data based on the established relationships between different tables.

Upon navigating to the **'Relationship'** tab, a list of tables and the columns is displayed on the left-hand side, with two drag and drop areas available for forming relationships between two tables. To provide flexibility and control over the relationship being created, you can select which join operation should be performed on the common columns between the two tables. By default, the inner join operation is used.



In addition to the above, the ConverSight platform has a **'Show Suggestions'** feature that recommends columns sharing common attributes for establishing relationships. To remove all attempted relationships, you can simply click the **'Clear All'** button.



Once the desired relationships are established, the changes can be saved by clicking the **'Save'** button.

6. Forms

ConverSight platform offers a powerful feature called **'Forms'** that facilitates efficient business management. With Forms, businesses can easily collect accurate sales and inventory data from users and generate purchase orders to replenish their inventory.

Forms are highly versatile and can include various types of input fields, such as text fields, drop-down menus or checkboxes, allowing businesses to gather specific information such as product types, customer locations or transaction dates. The data collected through Forms serve as valuable input for machine learning algorithms, which can analyze the data, identify patterns and make predictions for future events. Forms provide a flexible user-friendly way to collect information and can be used in diverse applications, ranging from customer relationship management to provide maintenance.

Improved Accuracy

Automated ordering systems can ensure that orders are placed accurately and that the correct product and quantity are ordered, reducing the risk of errors, and improving customer satisfaction.

Better Inventory Management

Automated ordering systems can be integrated with inventory management systems, making it easier to track inventory levels and automate the reordering process when inventory levels are low.

Increased Customer Satisfaction

Automated ordering systems can provide customers with a convenient and easy-to-use ordering process, thereby improving customer satisfaction and increasing the likelihood of repeat

Increased Sales

Automating the ordering process can help businesses process more orders in less time, resulting in increased sales and revenue.

Increased Efficiency

Automating the ordering process can significantly speed up the time it takes to process an order, reduce the need for manual data entry, and lower the risk of errors.

7. Conclusion

7.1 Embrace Data Workbench for Improved Data-driven Decisions

Organizations today rely heavily on data-driven decisions to gain a competitive edge and drive business success. ConverSight's Data Workbench provides a powerful solution for organizations to effectively manage, analyze and derive insights from their data. By embracing Data Workbench, organizations can unlock the full potential of their data, making informed decisions based on accurate and reliable insights.

In today's information-driven business environment, organizations need to capitalize on the power of data to stay ahead in the competitive landscape. By recognizing the value of Data Workbench and integrating it into your organization's data analytics workflow, organizations can gain a competitive edge by leveraging data-driven insights to optimize business processes, identify hidden patterns and make strategic decisions. With reliable and accurate data, advanced analytics capabilities and adherence to data protection regulations, Data Workbench empowers decision-makers to make sound and informed decisions that drive positive outcomes.

7.2 Final Thoughts on Data Workbench: Your Next Step in Data Analytics

In the digital age where data plays a crucial role in decision-making, organizations need advanced tools and capabilities to effectively analyze and derive insights from their data. ConverSight's Data Workbench offers a comprehensive and integrated solution for data analytics, providing organizations with the ability to connect and integrate data, manage data quality and consistency, leverage machine learning for predictive insights, ensure data governance and compliance and collect data from stakeholders. With ConverSight's Data Workbench, organizations can take their next step in data analytics and gain a competitive advantage by making informed decisions based on accurate and reliable insights.

Embracing Data Workbench is a key step towards unlocking the true value of data and leveraging it for improved data-driven decisions. By integrating Data Workbench into their data analytics strategy, organizations can unlock valuable insights, drive innovation and achieve better outcomes in today's dynamic business environment.

Join our customers who have accelerated growth with ConverSight

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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 infomation, visit www.conversight.ai