

Ignite Insights with Dynamic Storyboards

Unleashing the Power of Data Visualization.





Table of Contents

1. Introduction	02
2. Understanding Storyboards	02
○ 2.1 The Essence of Storyboard Tags	06
○ 2.2 Components of Storyboards	07
○ 2.3 Enhancing Interactivity thorough Storyboard Navigation	20
3. Effortlessly Distributing Storyboards	23
4. Conclusion	24



I. Introduction

A Storyboard offers a centralized platform for visualizing and managing data, consolidating diverse visual elements such as charts, tables and graphs into a unified view. Acting as a control center for data insights, it enables users to track and analyze key metrics, trends and performance indicators seamlessly, eliminating the need to navigate between different datasets or tools.

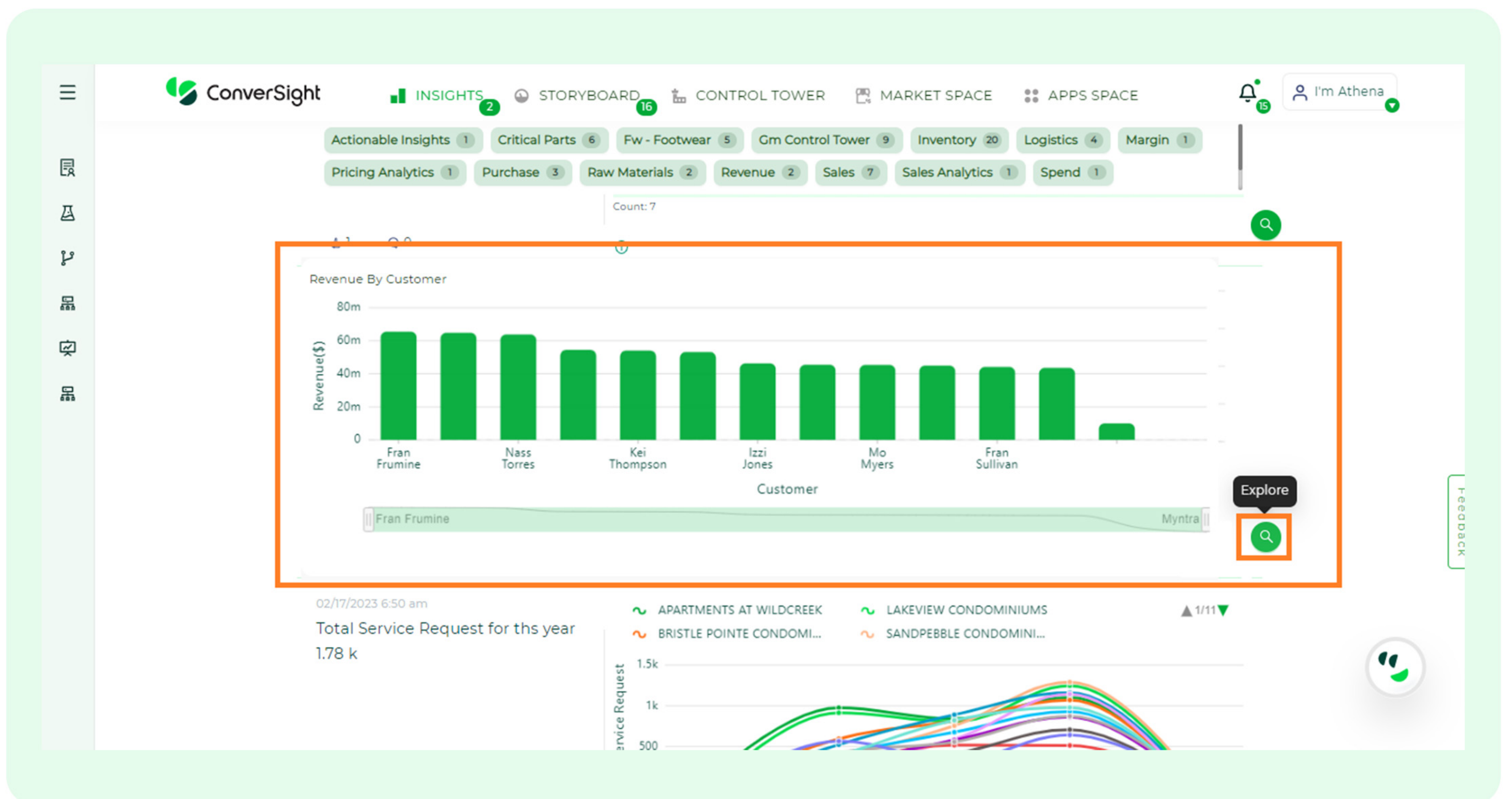
In ConverSight, Storyboards are highly adaptable, allowing users to tailor them to their specific requirements by pinning the most pertinent visualizations. This customization ensures immediate access to crucial data, whether it involves monitoring sales trends, tracking marketing campaigns or analyzing other business metrics. Designed to be dynamic and insightful, ConverSight's Storyboards facilitate organizations in revolutionizing their data interaction, fostering an environment that is more intuitive, engaging and actionable.

2. Exploring the CS App

2. Understanding Storyboards

The Storyboard feature is designed to enhance the user experience and facilitate effective collaboration in data analysis. It offers a range of useful functionalities that empower users to communicate their insights, share information and make data-driven decisions together. It provides a customized display of your data by pinning and saving visualizations. Efficient data management involves seamlessly integrating query reports into a centralized platform. With the capability to add query reports to Storyboards, you can consolidate and analyze data effectively. The following will explain how to create a Storyboard:

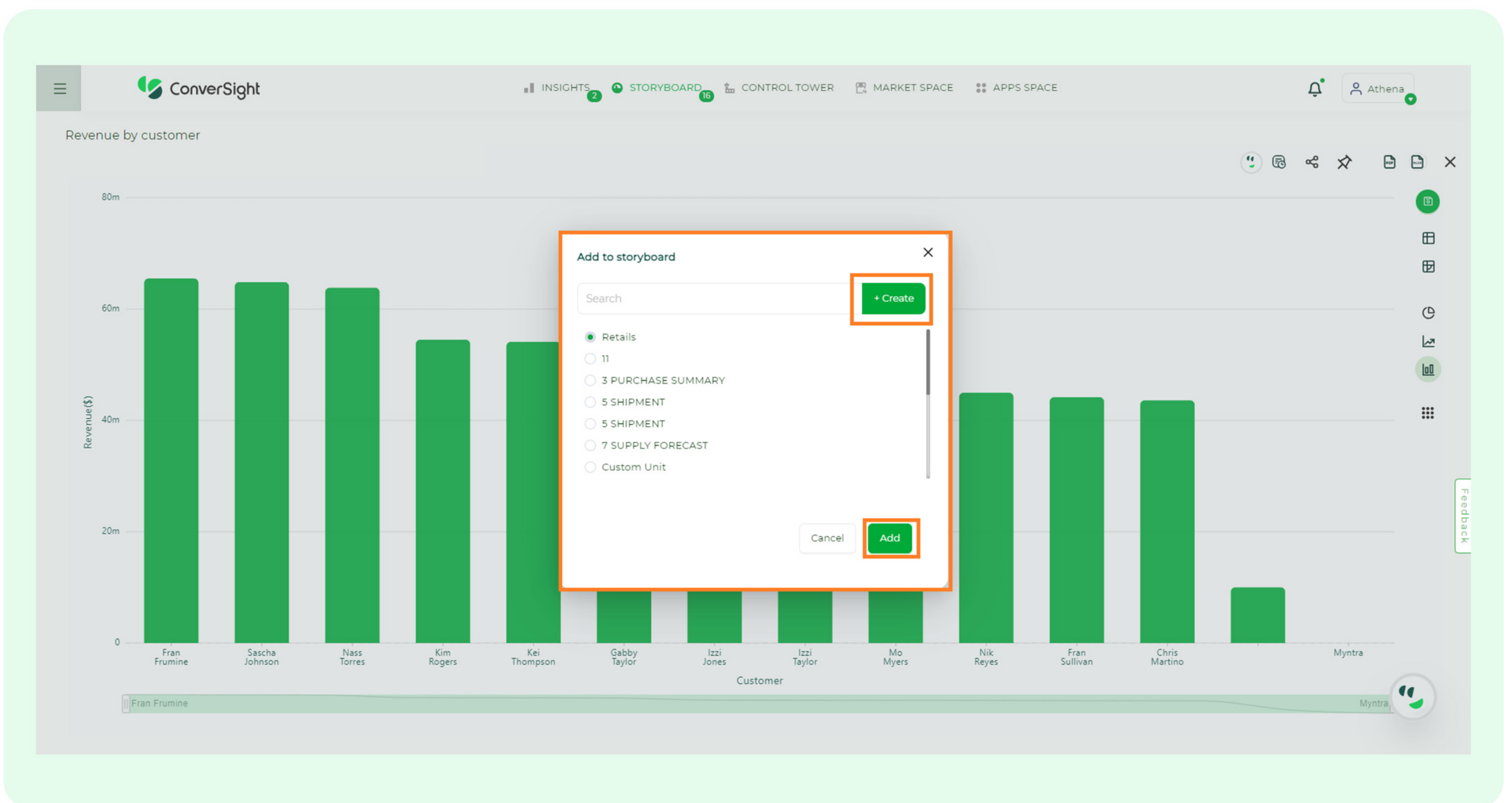
Step 1: To begin, navigate to the **Insights** page and click on the **Explore** icon or locate the query report you wish to add to a Storyboard from Athena's response.



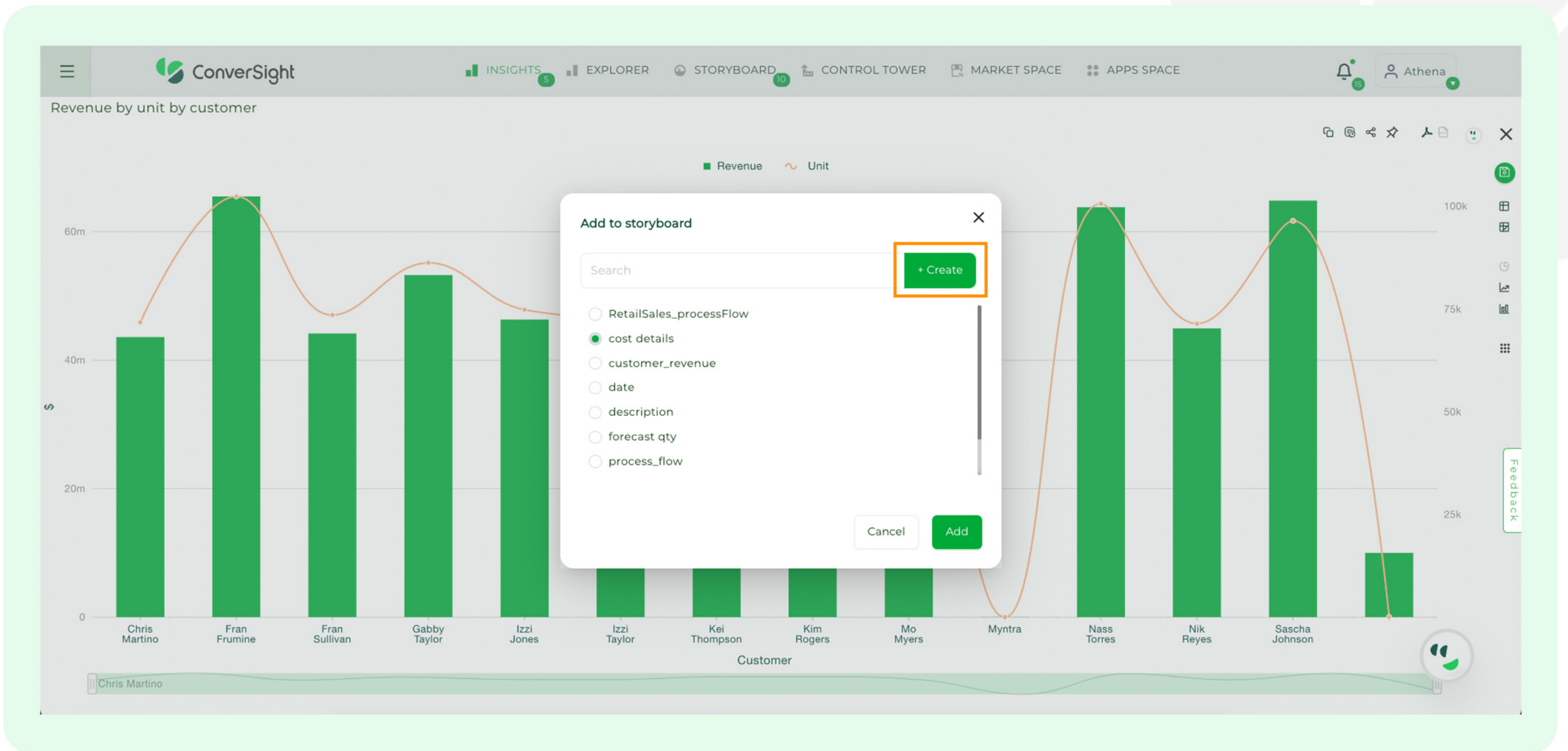
Step 2: Click on the **Pin** icon to add to the Storyboard.



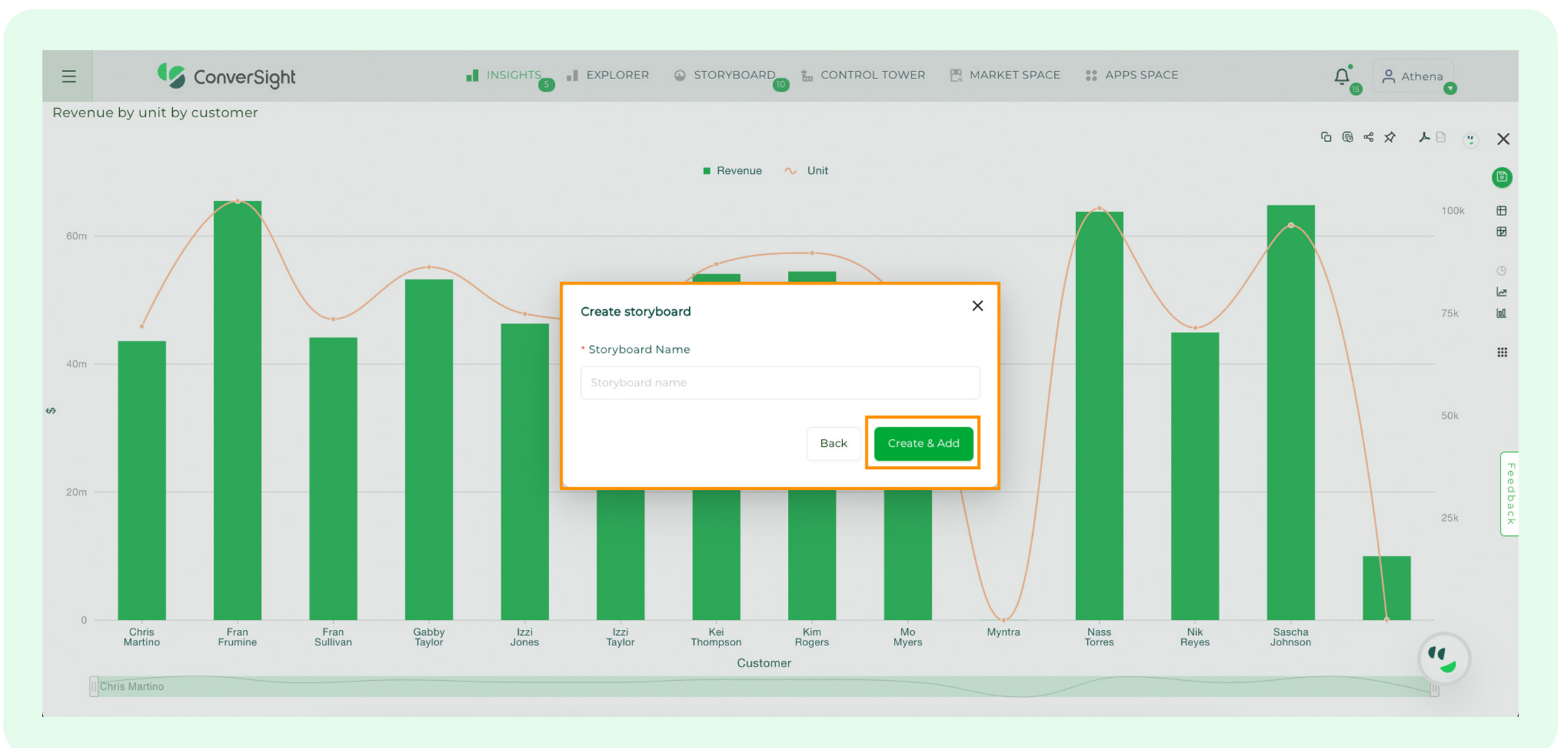
Step 3: A dialog box appears, offering you two options: Creating a new Storyboard or Adding the query report to an existing one.



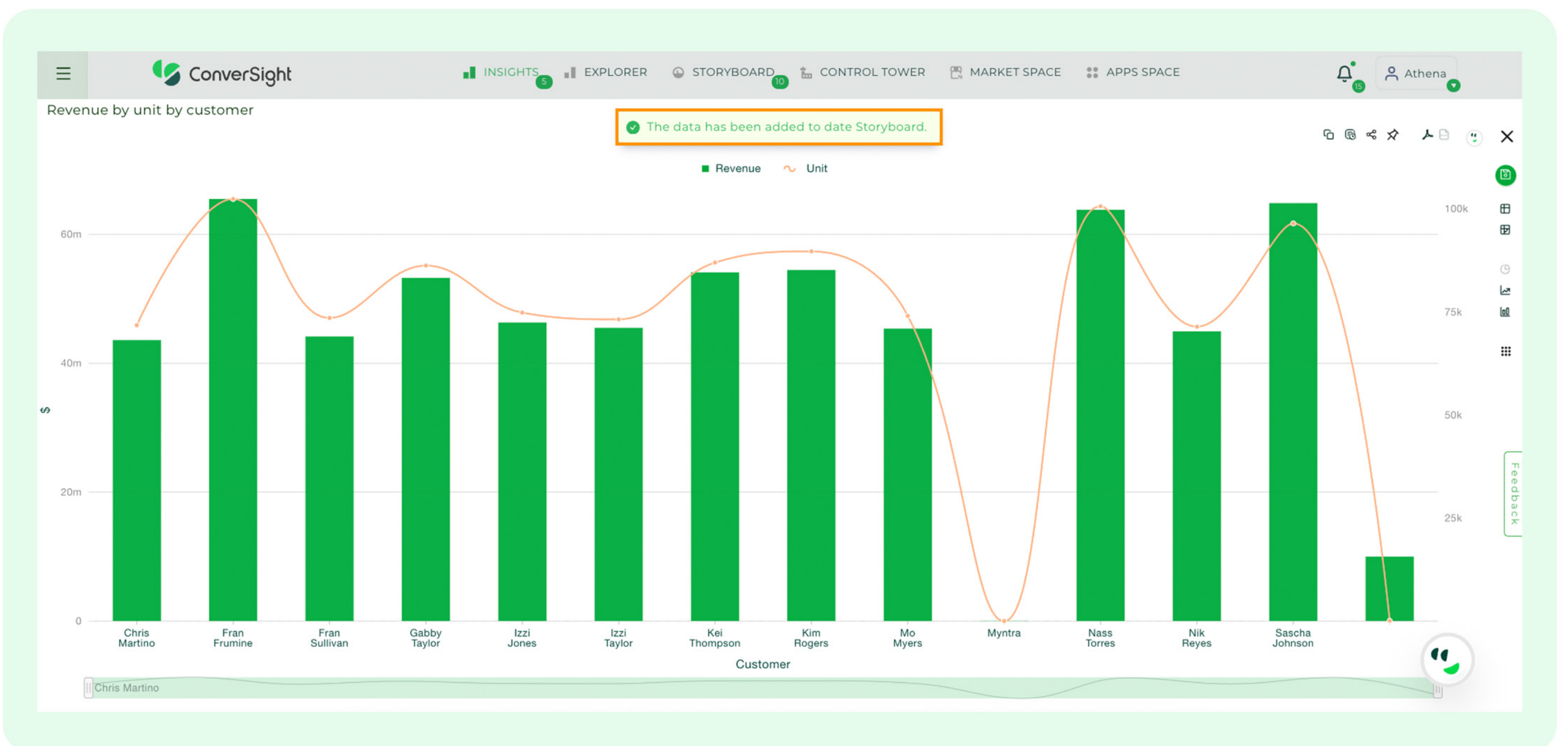
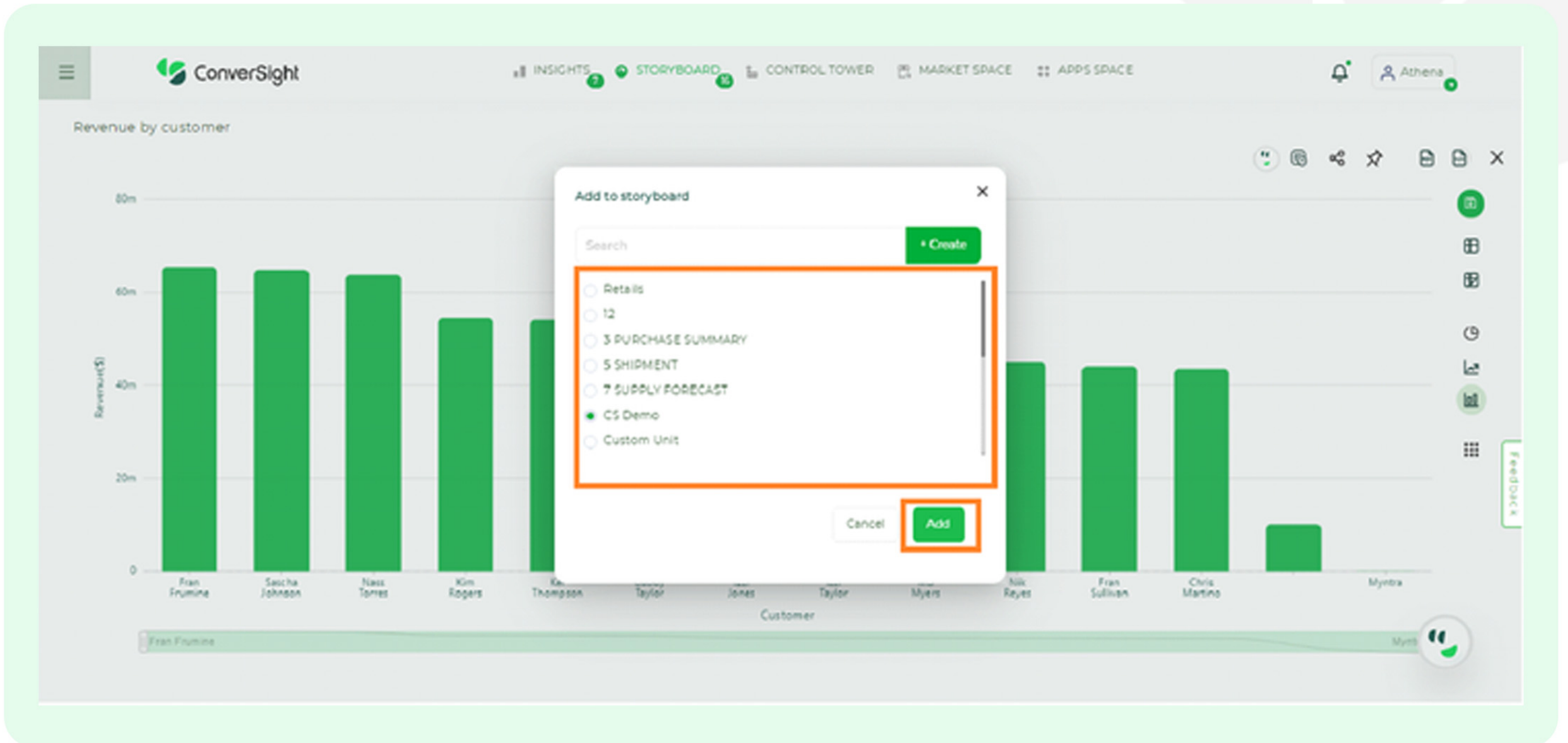
Step 4: Look for the + **Create** icon, which serves as the gateway to create a new Storyboard.



Step 5: Enter a name for your new Storyboard and click **Create and Add** to save the Storyboard and add your query report to it.



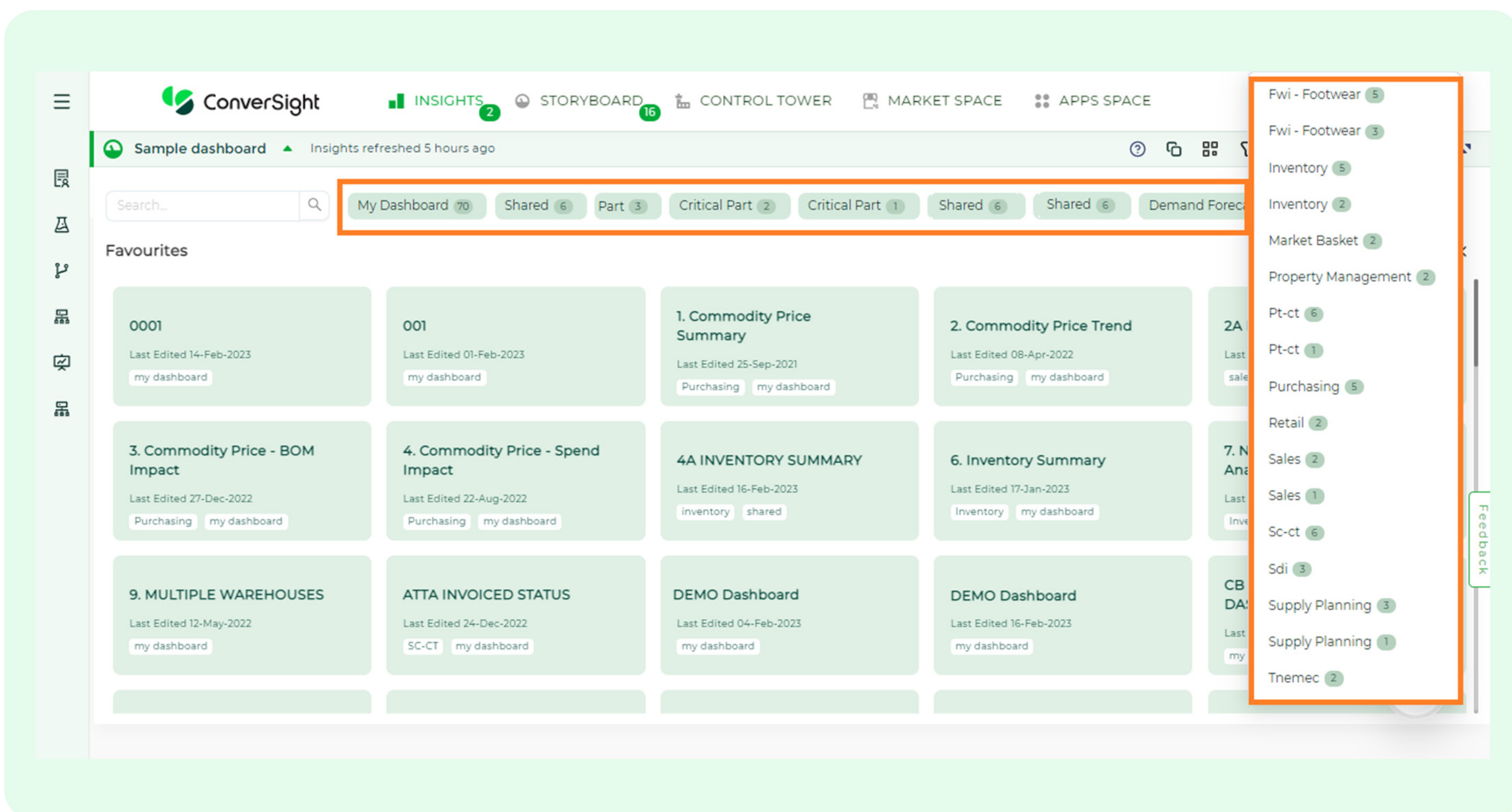
Step 6: Alternatively, if you prefer, you can integrate the query report into an existing Storyboard by selecting the appropriate one from the displayed list in the dialog box and clicking the **Add** button, seamlessly merging the report with your current data visualizations.





2.1 The Essence of Storyboard Tags

Organizing and sharing insights efficiently is crucial. This is where the Storyboard tag becomes valuable. It acts as a centralized hub for your pinned items, enabling you to categorize and store your insights in a structured manner. By utilizing Storyboard tags, you can easily locate and retrieve your insights whenever required, whether they are graphical representations, columns or tables. This functionality empowers you to curate a personalized collection of insights that align with your specific needs, facilitating the extraction of valuable information.



By pinning items such as graphical representations, columns and tables, you can efficiently organize your data visualization assets. This ensures that the most important and relevant insights are readily accessible, saving you time and effort in navigating through vast amounts of data.

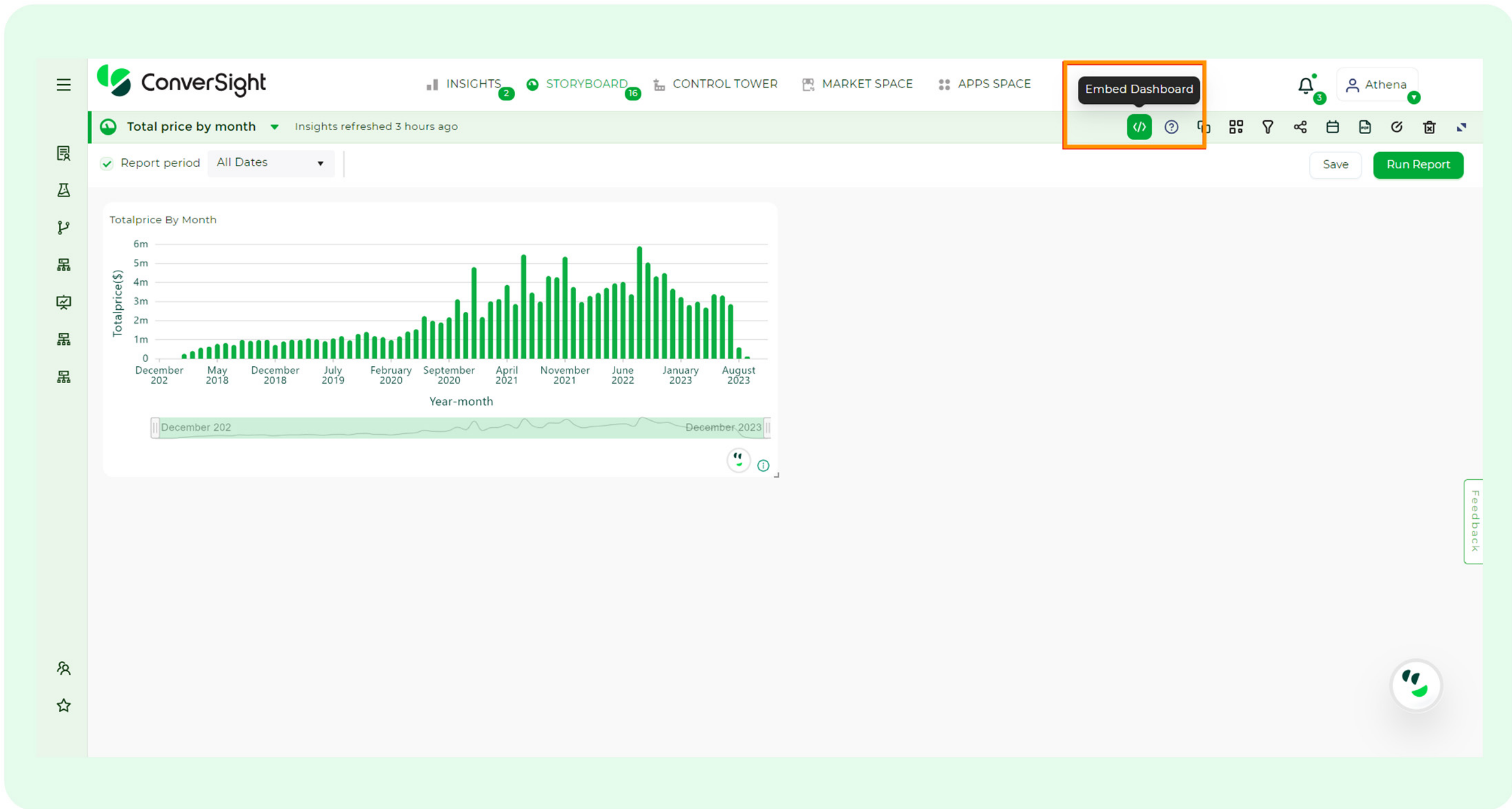


2.2 Components of Storyboard

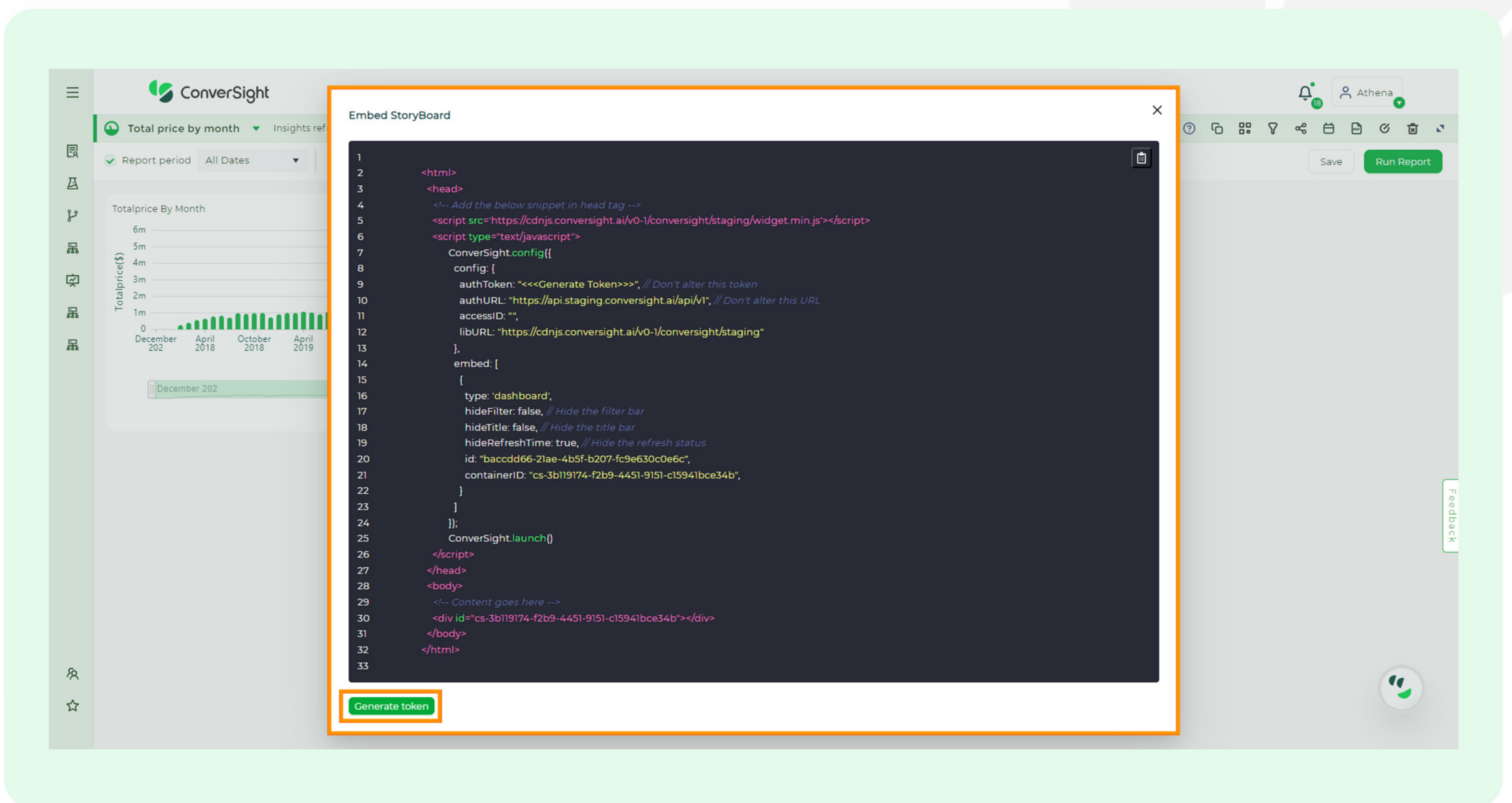
Let's dive into the world of Storyboard help and empower effective Storyboard usage.

Embed Storyboard

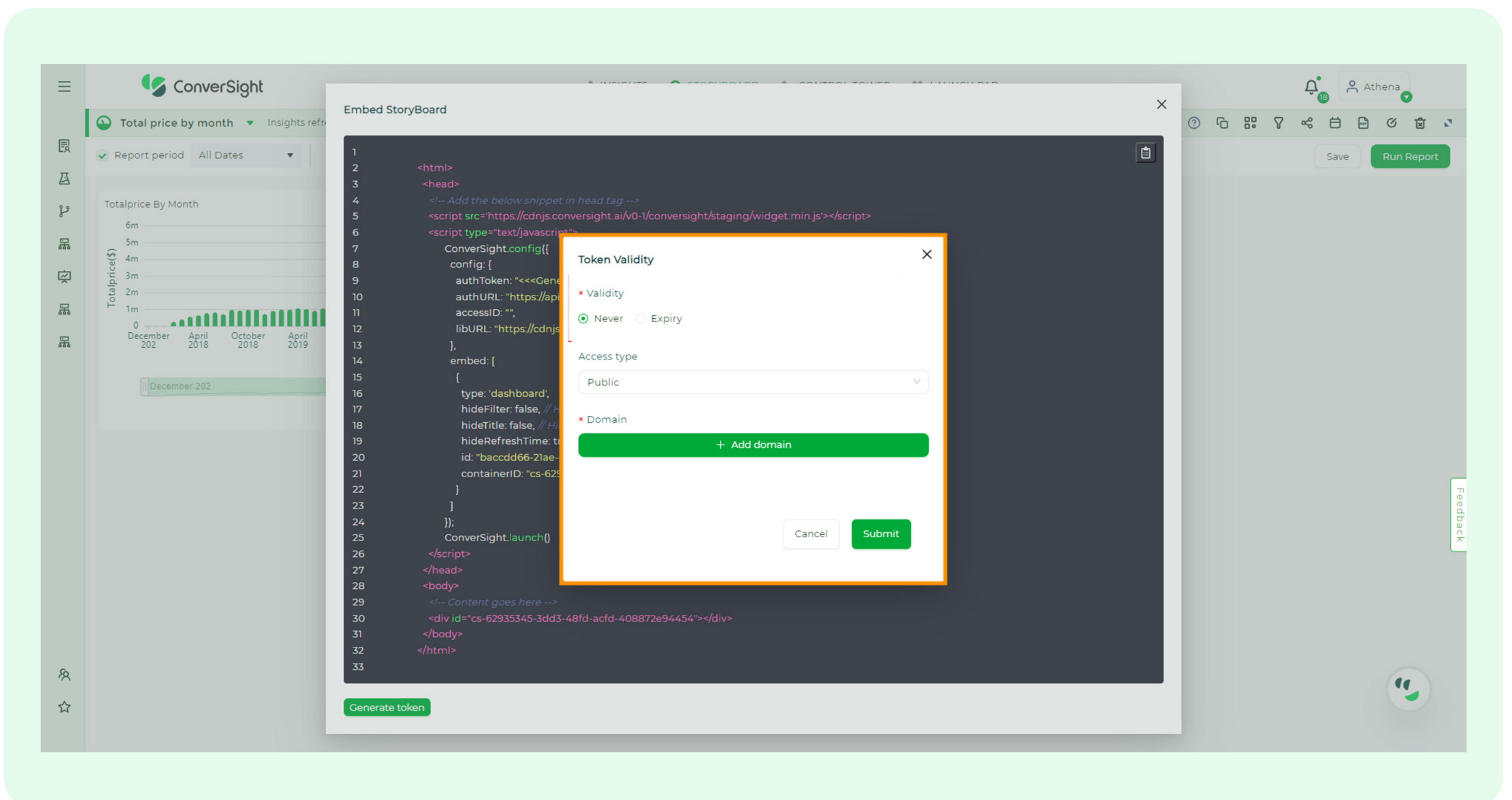
The Embed Storyboard feature in Athena proves beneficial for organizations whose members prefer integrating it into their applications rather than accessing ConverSight directly. This feature enables users to apply filters, controlling access and tailoring it to specific users for convenient data retrieval from any location. Users can seamlessly integrate a chosen Storyboard into any application, ensuring accessibility and convenience within their preferred tools or systems. This flexibility empowers users to access and interact with their Storyboard on the move, facilitating informed decisions based on real-time data.



Click on the **Embed Storyboard** icon to access the snippet of the Storyboard.

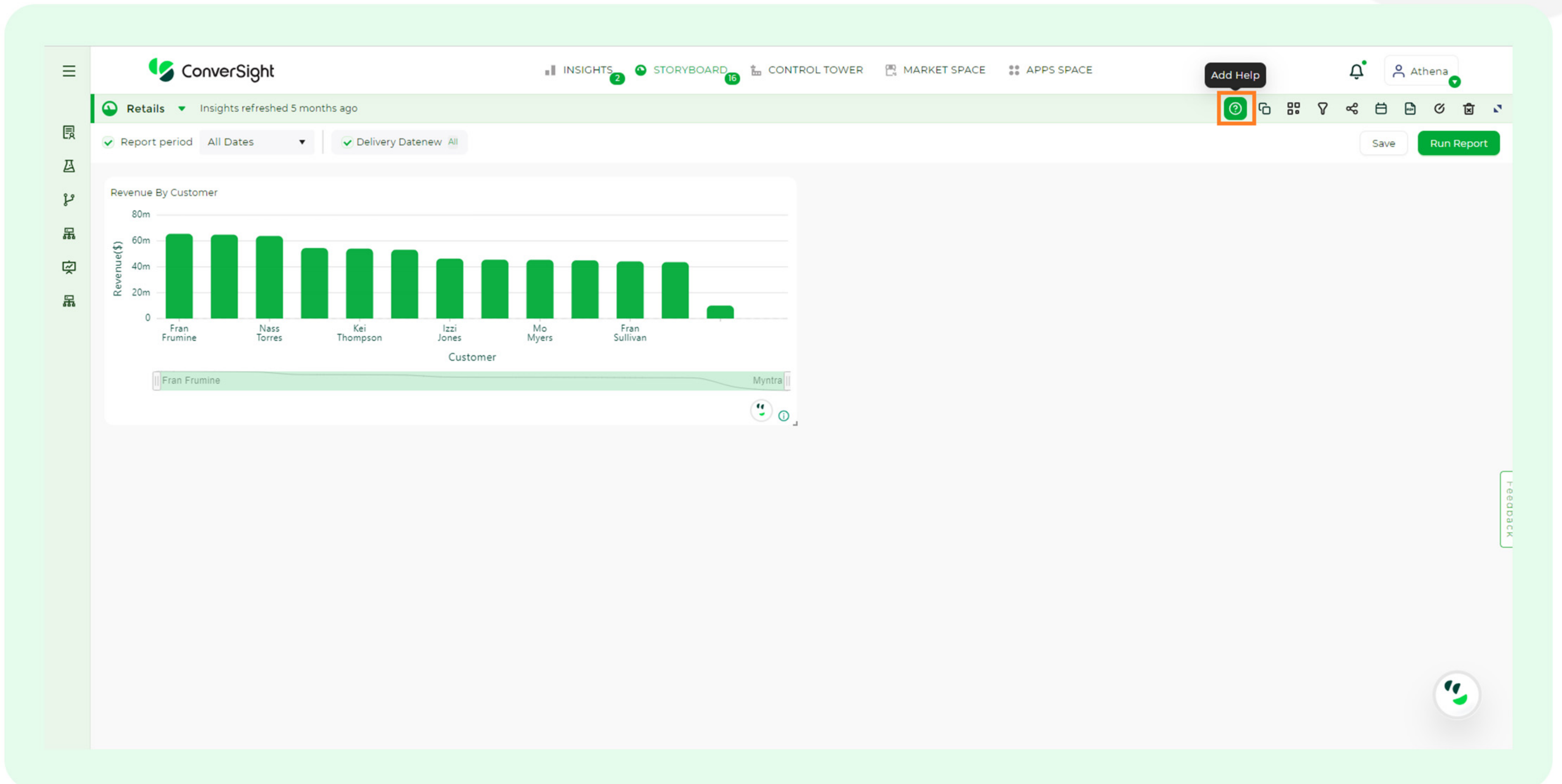


Upon clicking the Generate Token page allows you to set the Storyboard's validity period as **Never** for indefinite access or **Expiry** for a specific duration. You can implement role-based access, choosing between broad access for collaboration or controlled user-level entry through the User Token, prioritizing data privacy and security.

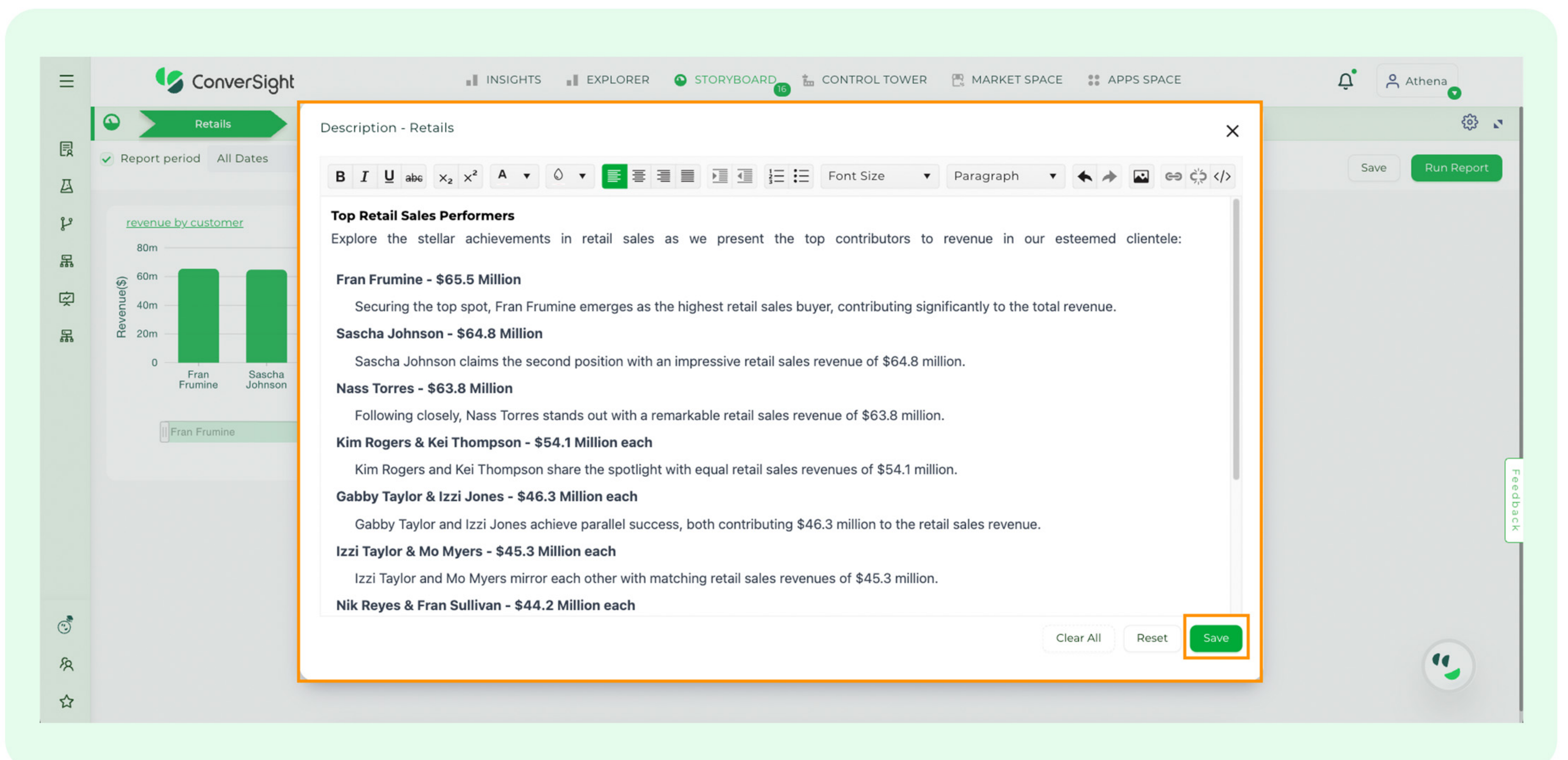


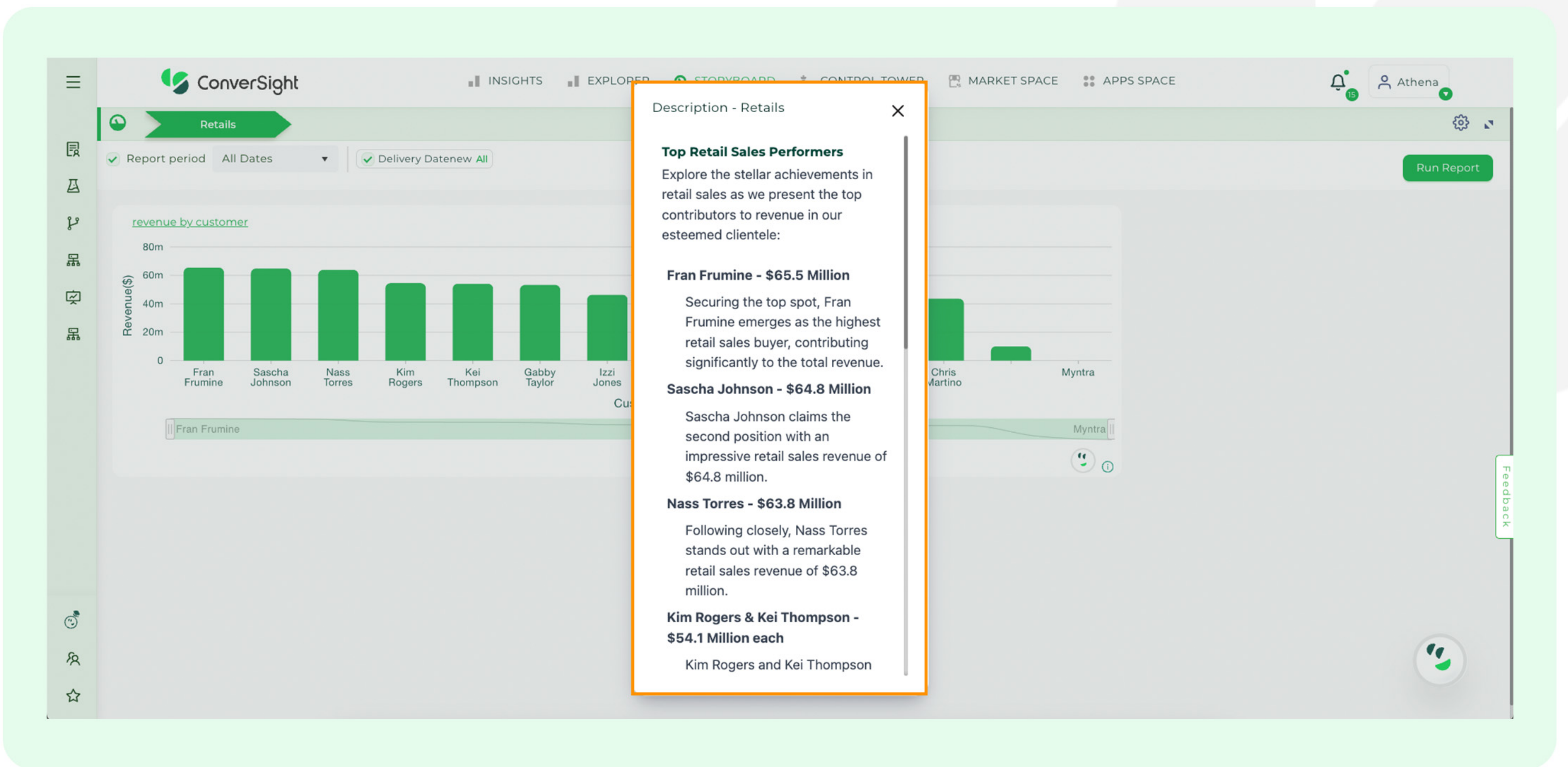
Add Help

The Add Help provides access to the functionality that allows you to add descriptions and attach images to the Storyboard. To begin, navigate to the Storyboard page where you want to provide additional information. Look for the **Help** icon, often represented by a question mark. By clicking, a dialog box appears. Within the help dialog box, you will find a section to add a description of the Storyboard. Take advantage of this feature to provide context, purpose and any relevant information about the data being displayed.



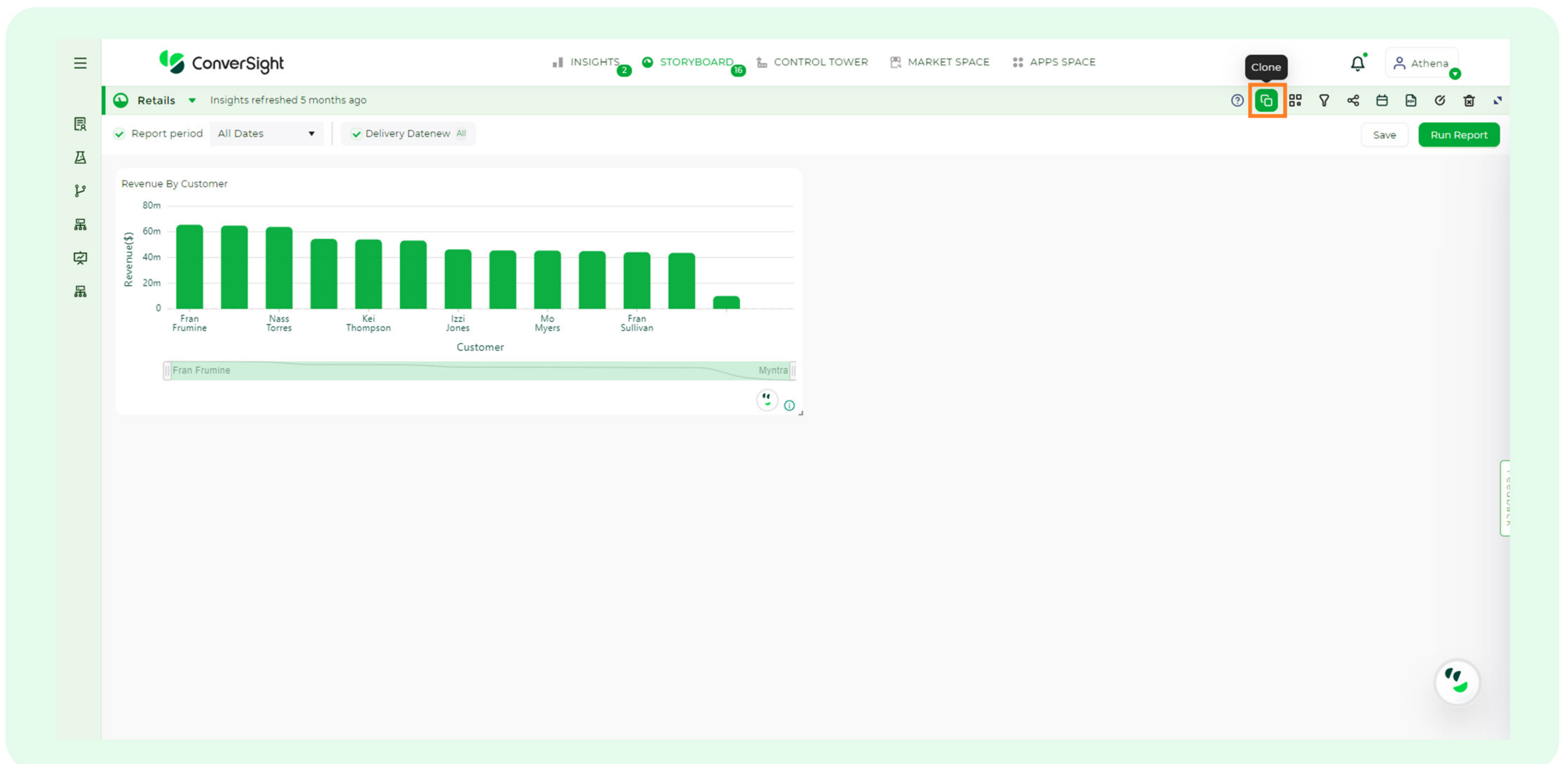
Once you have added descriptions and attached images, click on the **Save** button. Now, when you share the Storyboard with others, they can view descriptions and attached images by selecting the **Add Help** option.



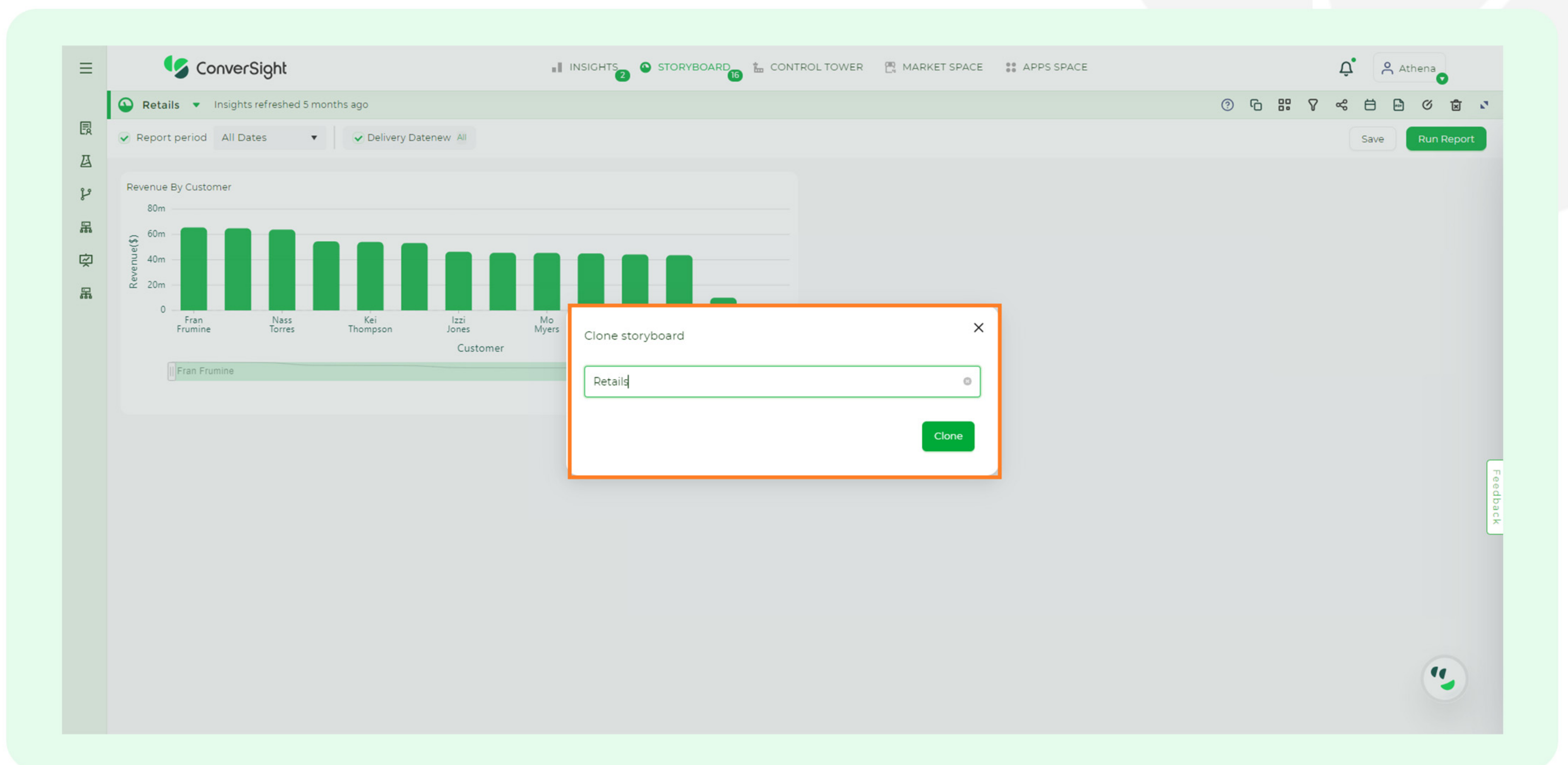


Clone

Creating a Storyboard from scratch can be a time-consuming process, especially when you need to replicate an existing Storyboard with minor modifications. However, with the clone feature, you can swiftly generate copies of your Storyboard and make the necessary edits to create new and customized versions. To begin the cloning process, navigate to the Storyboard page and locate the **Clone** icon, typically depicted by a symbol like two overlapping rectangles. By clicking on this icon, you can access the functionality to create a duplicate of the Storyboard.



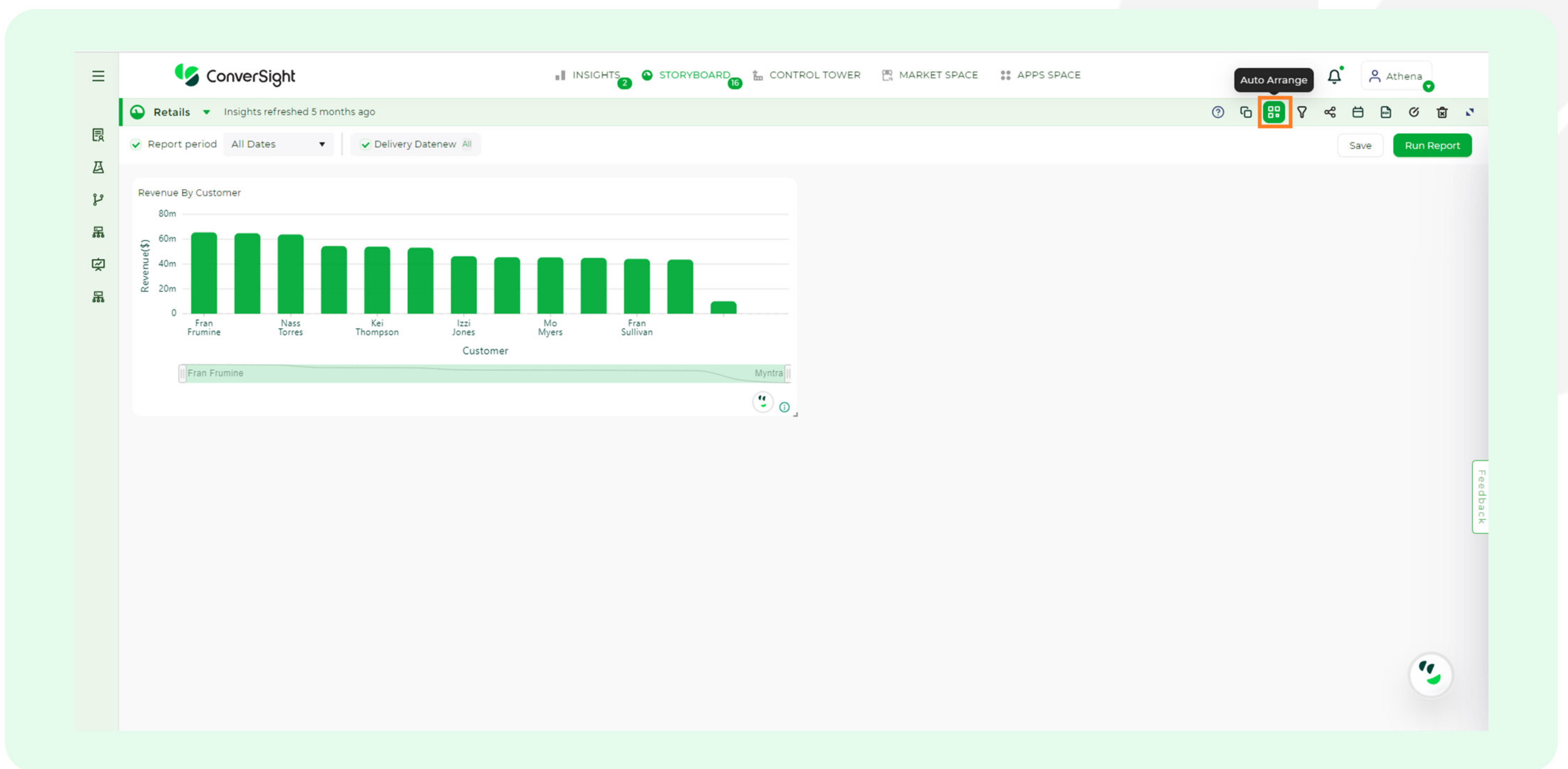
Enter a name for your cloned Storyboard and click on the **Clone** button. A new Storyboard will be generated as an exact copy of the original. This cloned Storyboard will inherit all the visualizations, configurations and settings from the original.



Auto Arrange

Manually arranging and optimizing the layout of components can be time-consuming and challenging. With the auto-arrange feature, you can streamline the process and achieve an optimized view of your data by automatically arranging components and reducing free spaces. The auto-arrange rule "card-chart-table" offers a convenient way to automatically organize content within a Storyboard.

By grouping information into cards, arranging charts for data visualization, and structuring tables for tabular data, it ensures a well-organized and visually appealing layout. To begin, navigate to the Storyboard page where you want to optimize the layout. Look for the **Auto-arrange** icon, typically represented by a symbol of grids. By clicking on this icon, you gain access to the functionality that automatically re-arranges your data components for an optimized view.

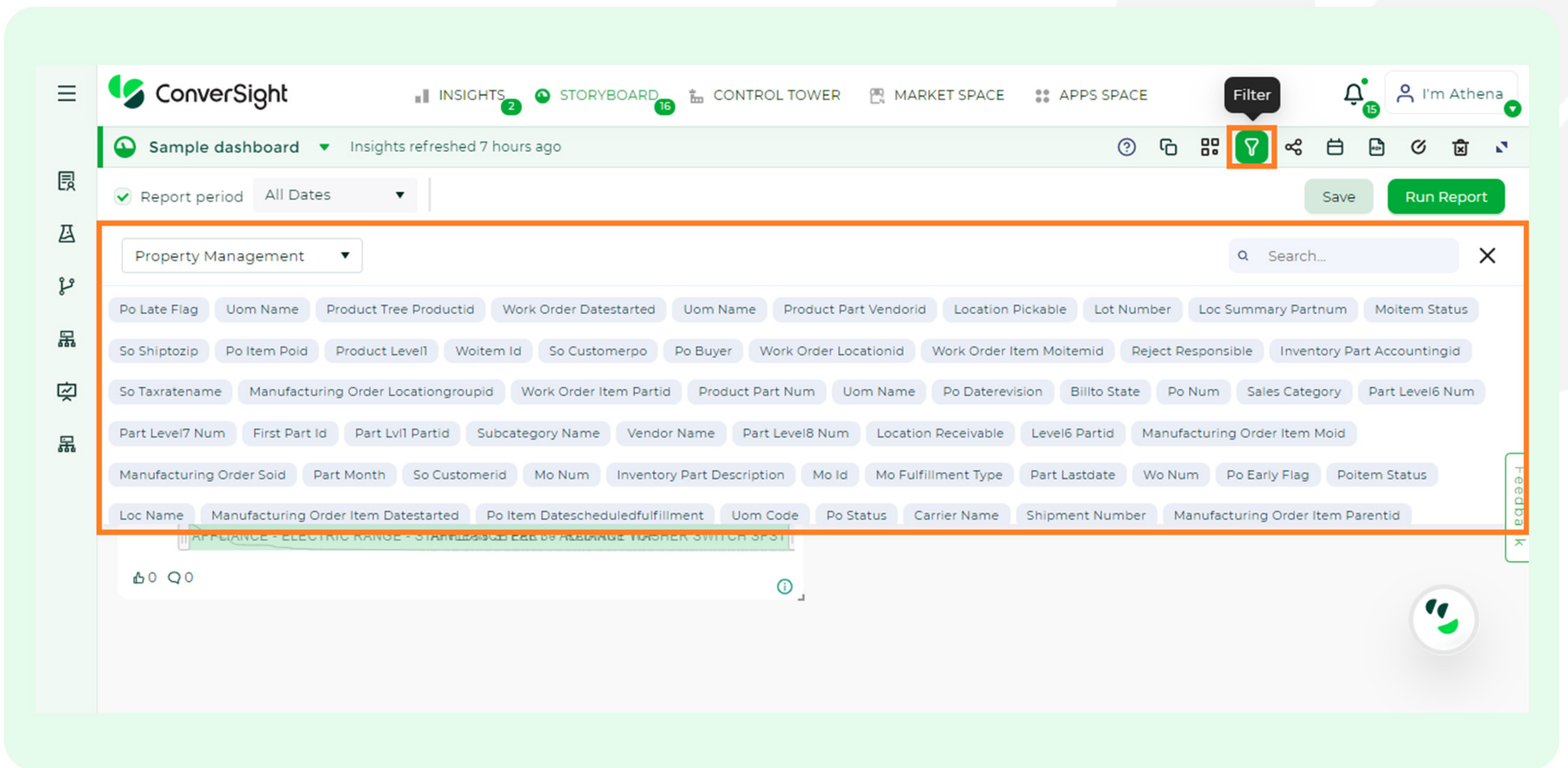


Once you activate the auto-arrange feature, your Storyboard components will be automatically adjusted and repositioned to reduce free spaces and create a visually pleasing layout. As your data evolves or new visualizations are added, you can leverage the auto-arrange feature iteratively to maintain an organized and optimized layout. Whenever you make changes to the Storyboard, simply click the **Auto-Arrange** feature again to ensure that the components are repositioned for the best view.

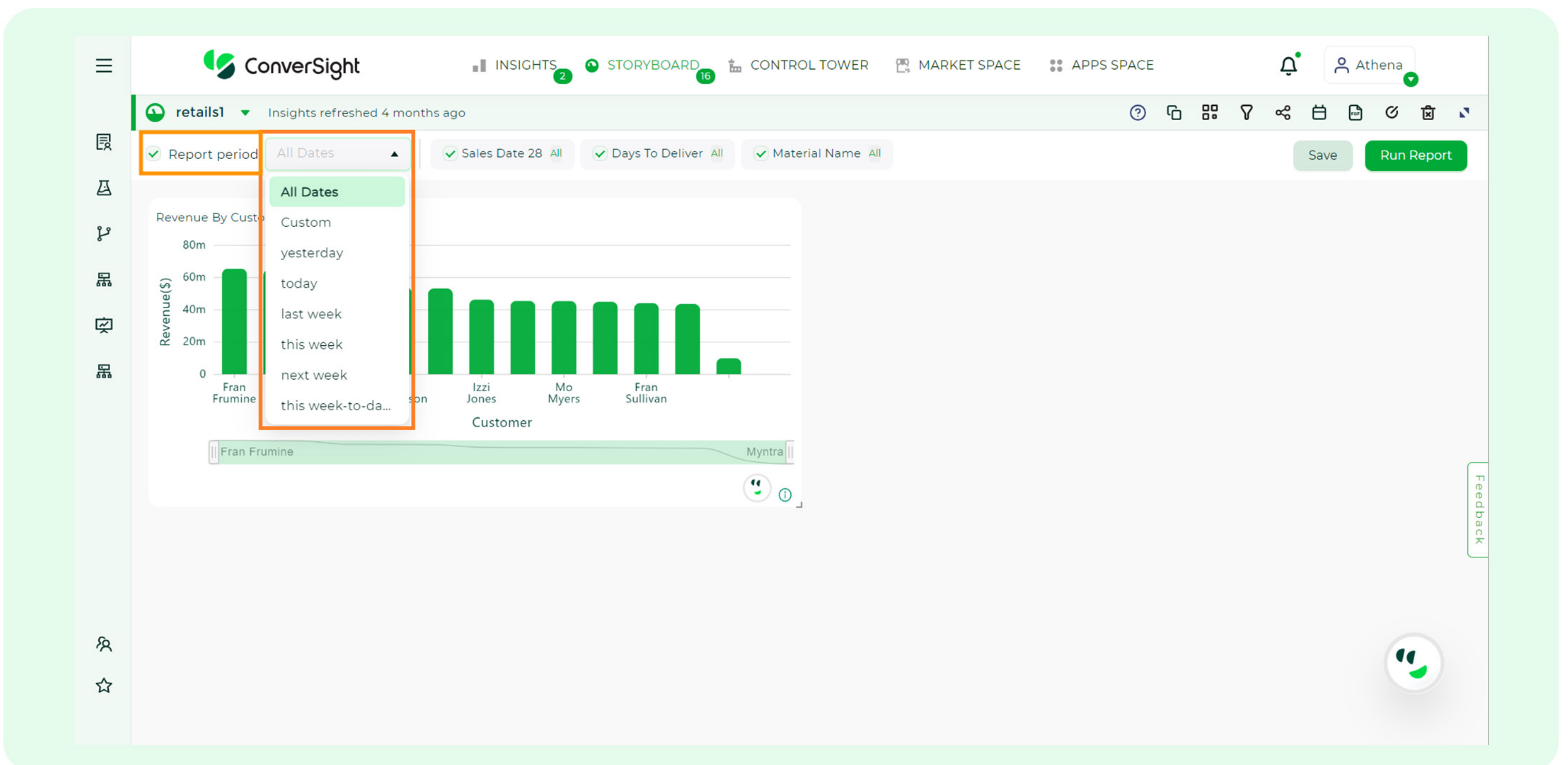
Filter

The filter function is a potent tool that allows users to fine-tune and concentrate the data exhibited in Storyboards. It becomes useful when dealing with numerous categories and aiming to showcase specifically. Applying these types of filters to an entire Storyboard simplifies the process of focusing solely on the data of interest across the tables and charts contained within the Storyboard. The filter categories are generated automatically during dataset loading, based on the columns present in the dataset.

To apply a filter, click on the **Filter** icon typically represented as a funnel. This action will display a list of columns from which you can select the specific column to which you wish to apply the filter. By selecting **Run Report**, a visualization output is generated. If you wish to preserve this output, you have the option to save it for future use. By saving it, the visualization becomes permanently available for reference and utilization.

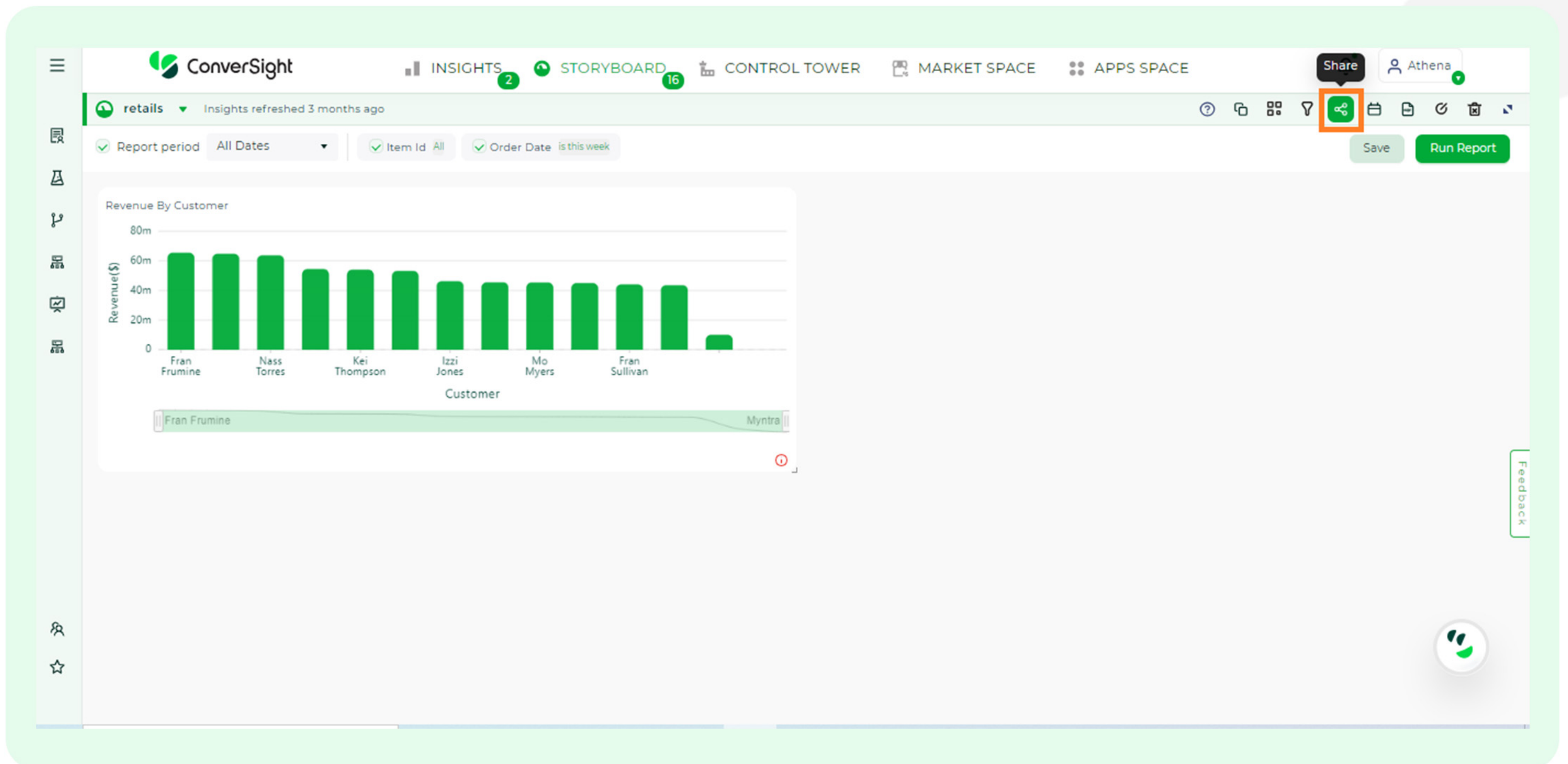


The Report period feature allows for convenient filtering based on specific dates. Once you have applied the desired filters to the Storyboard, you can run the report to generate an output visualization based on the filtered data. If you want to preserve the filtered visualization for future reference or sharing, it's important to save it. Saving the filtered Storyboard ensures that your customized view is available permanently, allowing you to revisit it whenever needed.

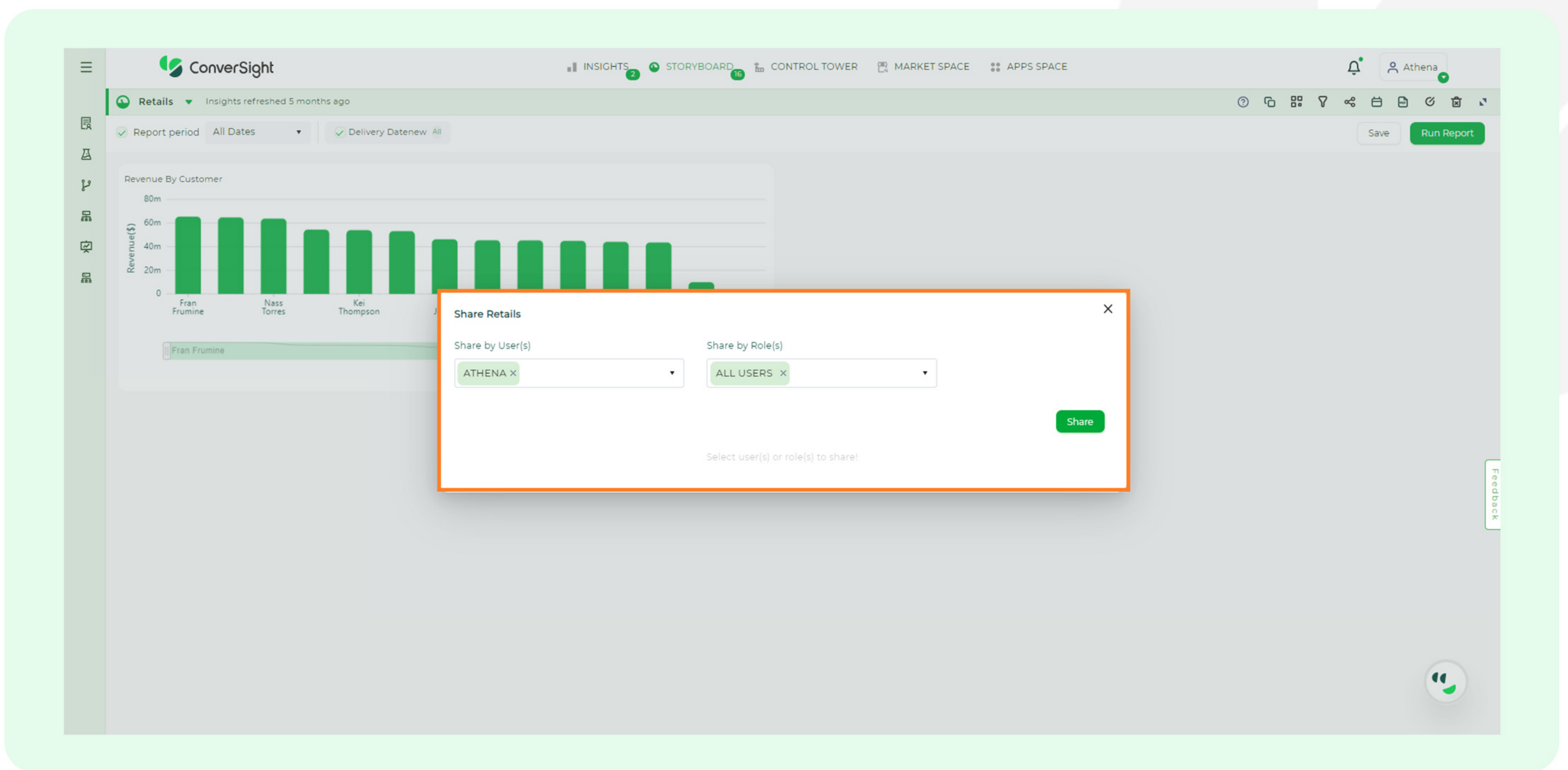


Share

With the shared feature in Storyboards, you can easily distribute your selected Storyboard to colleagues or team members. By sharing the Storyboard, you empower others to access and benefit from the valuable insights you have gathered. To initiate the sharing process, navigate to the Storyboard page you wish to distribute.

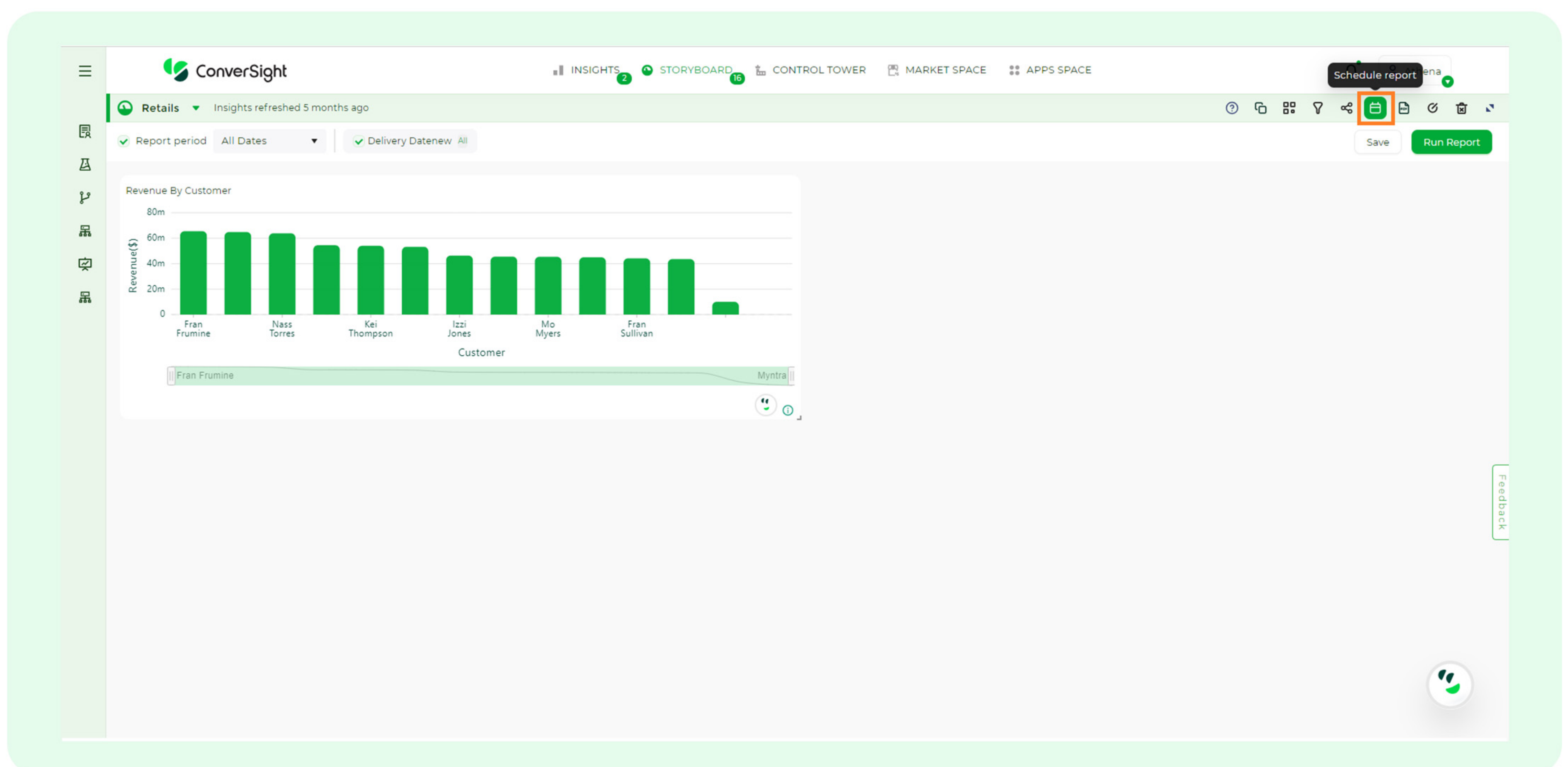


Simply click on the **Share** icon, which will prompt a dialog box to appear. In this box, you can specify the recipients of the Storyboard by entering their email addresses. By selecting users and roles, you can tailor the sharing process to ensure that the individuals have access to the relevant information within the Storyboard, facilitating effective collaboration and communication. You have the flexibility to select multiple recipients and make edits during the sharing process. After specifying the recipients and configuring the sharing permissions, click the **Share** button to distribute the Storyboard. This enables easy access for others to explore and utilize the valuable insights presented within the shared Storyboard.



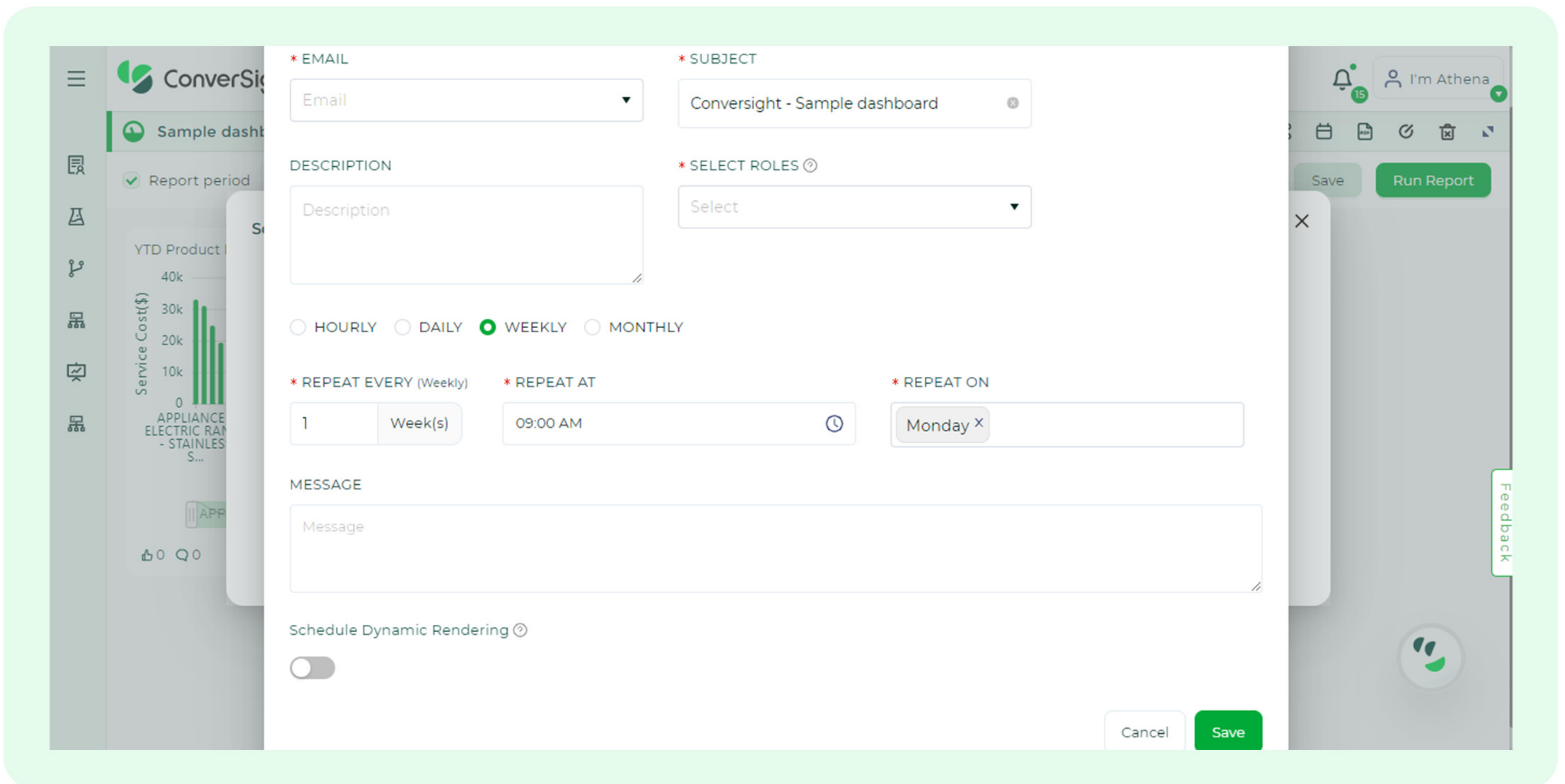
Schedule Report

Timely delivery of data insights is crucial for effective decision-making and staying informed. With the scheduling feature in Storyboards, you can automate the process of sharing your selected Storyboard with recipients at specified intervals. To initiate the scheduling process, navigate to the Storyboard page you wish to schedule. Look for the **Calendar** icon, usually located in the top right corner of the Storyboard interface.



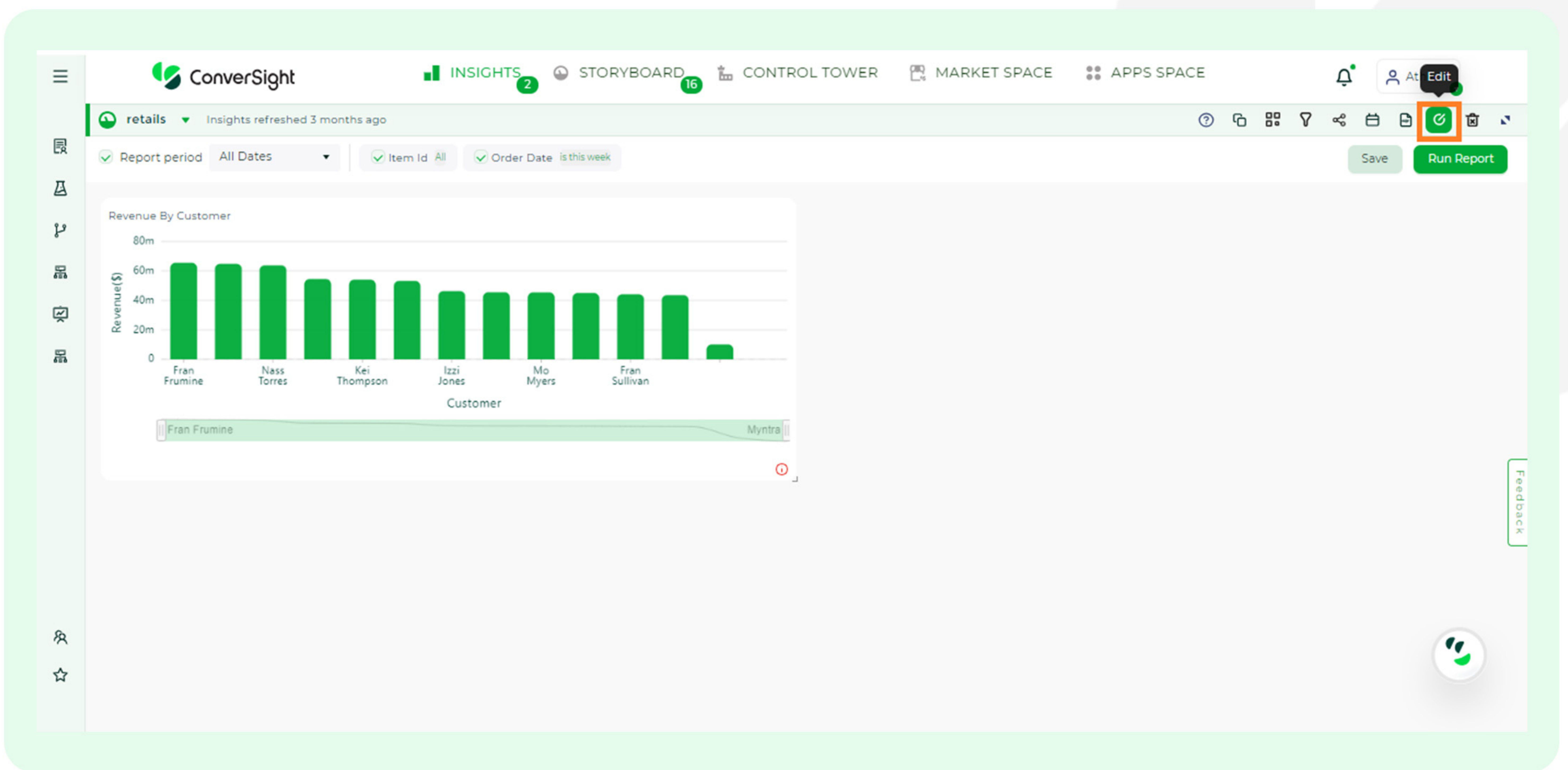
Upon clicking the calendar icon, a Scheduled Storyboard dialog box will appear. In this dialog box, you can specify your email address as the primary recipient. In the Scheduled Storyboard dialog box, you can define the frequency of the Storyboard delivery. You can schedule the Storyboard to be sent hourly, daily, weekly or monthly. Choose the frequency that best suits your requirements and ensures timely access to the insights presented. Users can include a personalized message when sharing.

By enabling Schedule dynamic Rendering, the shared mail can be presented as unique data. Otherwise, it will be shared as an Excel sheet. Once you have configured the email recipients, schedule frequency and delivery timings, click the **Save** button to activate the scheduled Storyboard.

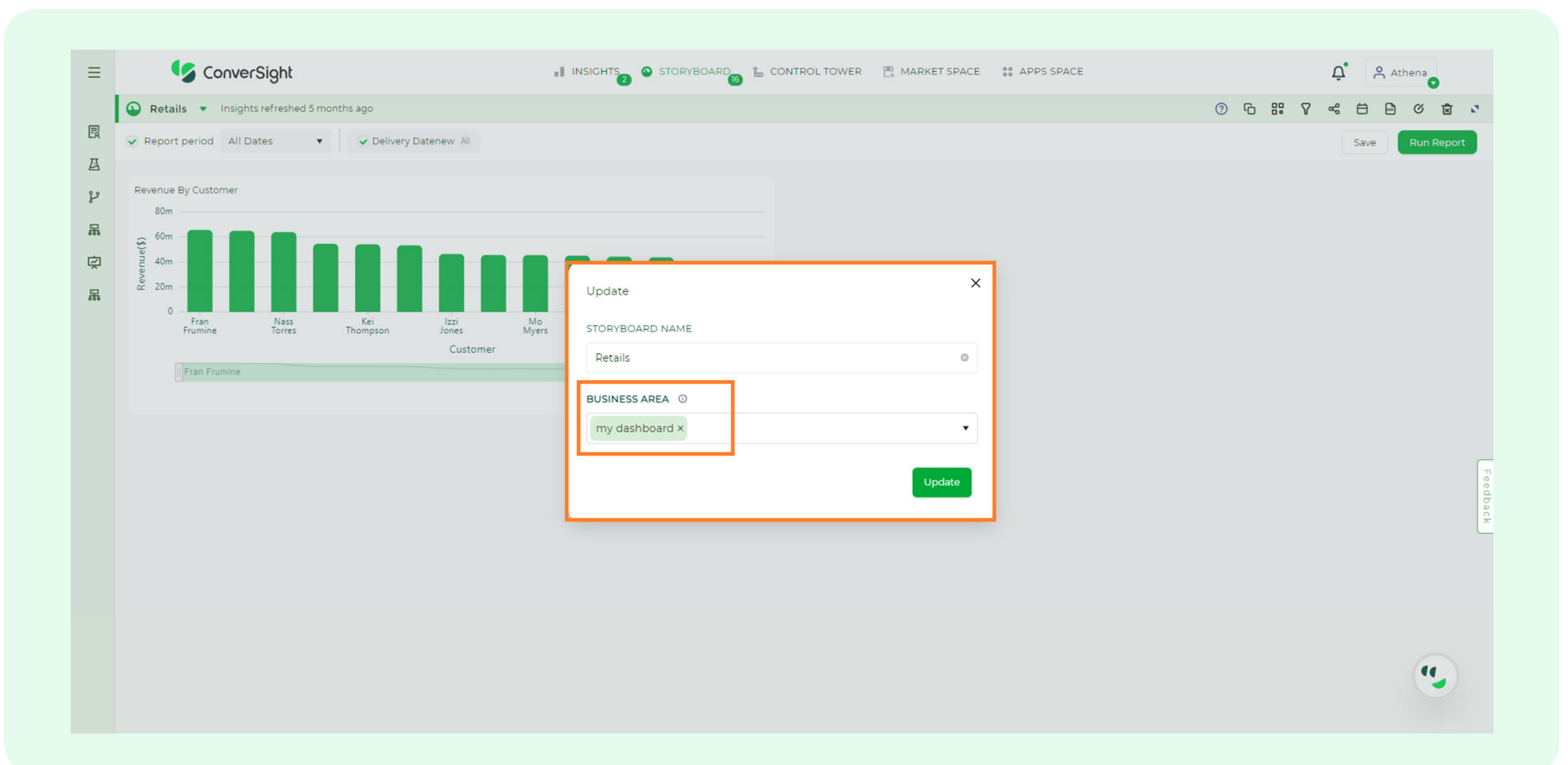


Edit

Occasionally, you may need to edit a Storyboard to update its contents or customize it according to your specific needs. To begin editing the Storyboard, navigate to the Storyboard section. Click on the **Edit** icon next to the Storyboard you wish to modify. This action will open the Storyboard in edit mode, enabling you to make changes.

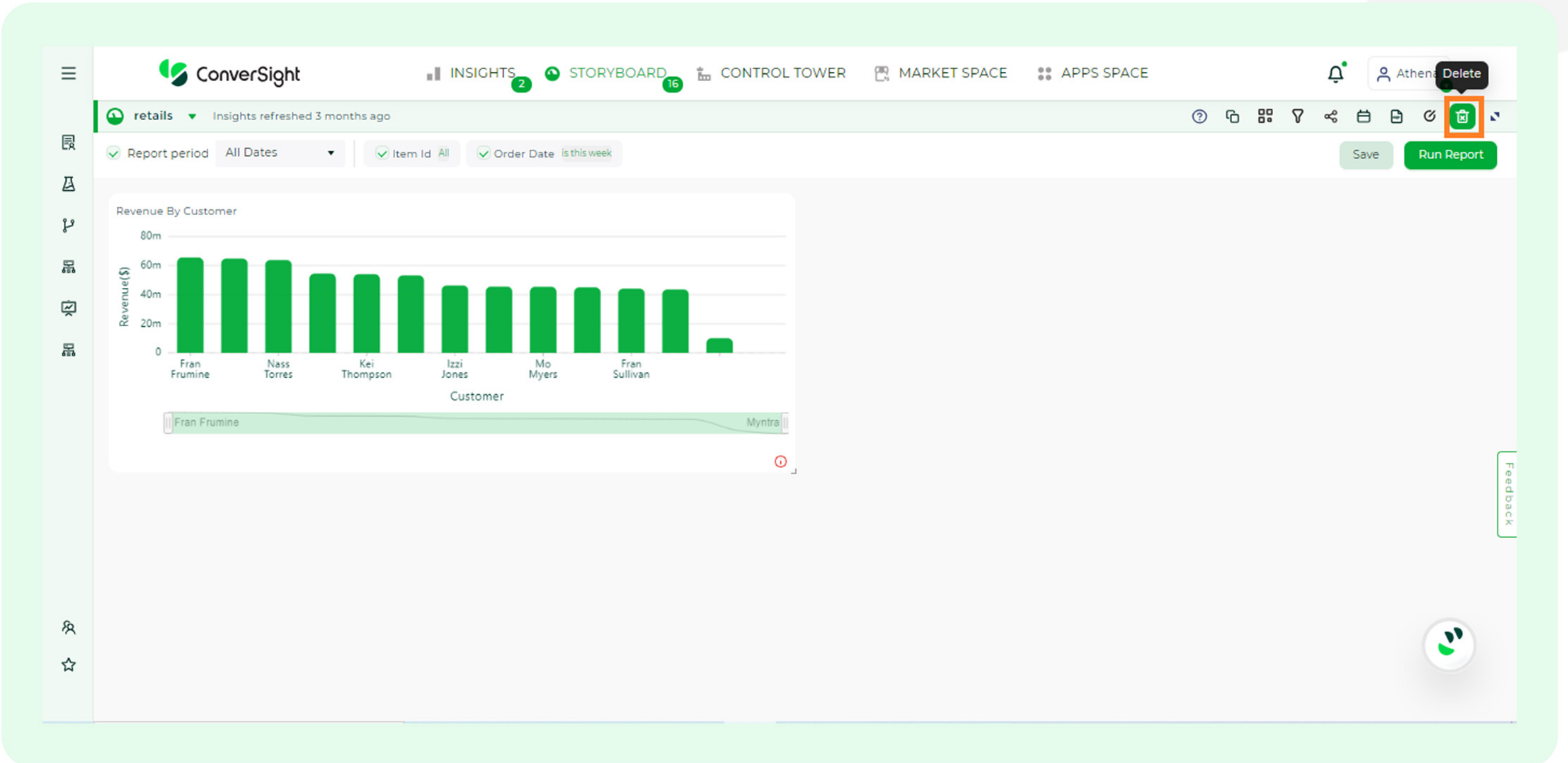


Once you're in edit mode, you'll notice a section where you can modify the Storyboard's name. Locate the field displaying the current name of the Storyboard and click on it. Enter the new desired name for the Storyboard and save the changes. Renaming the Storyboard can help provide better context and make it more identifiable. In the Business Area, individuals can filter the Storyboard based on their specific business requirements, enabling them to display the content they desire. Editing a Storyboard provides the flexibility to adapt and refine your data visualization to better suit your business needs.

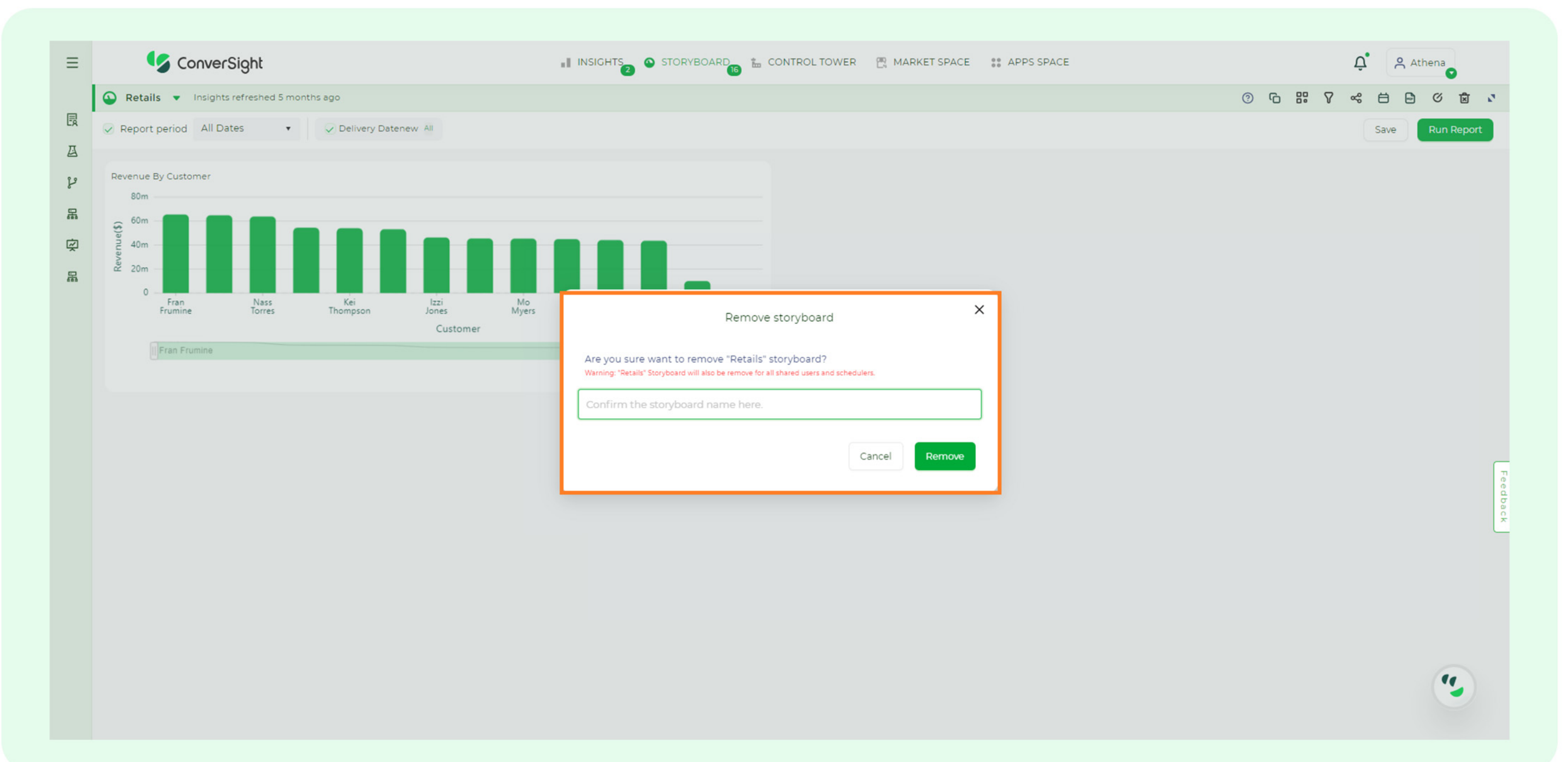


Delete

Storyboards are valuable tools for visualizing and analyzing data. However, there may come a time when you need to remove a Storyboard that is no longer relevant or necessary. Start by navigating to the Storyboard section. The **Delete** icon is typically represented by a symbol such as a trash can. Look for the list of available Storyboards and locate the one you want to delete. Within the Storyboard list, you should find a delete icon associated with each Storyboard.

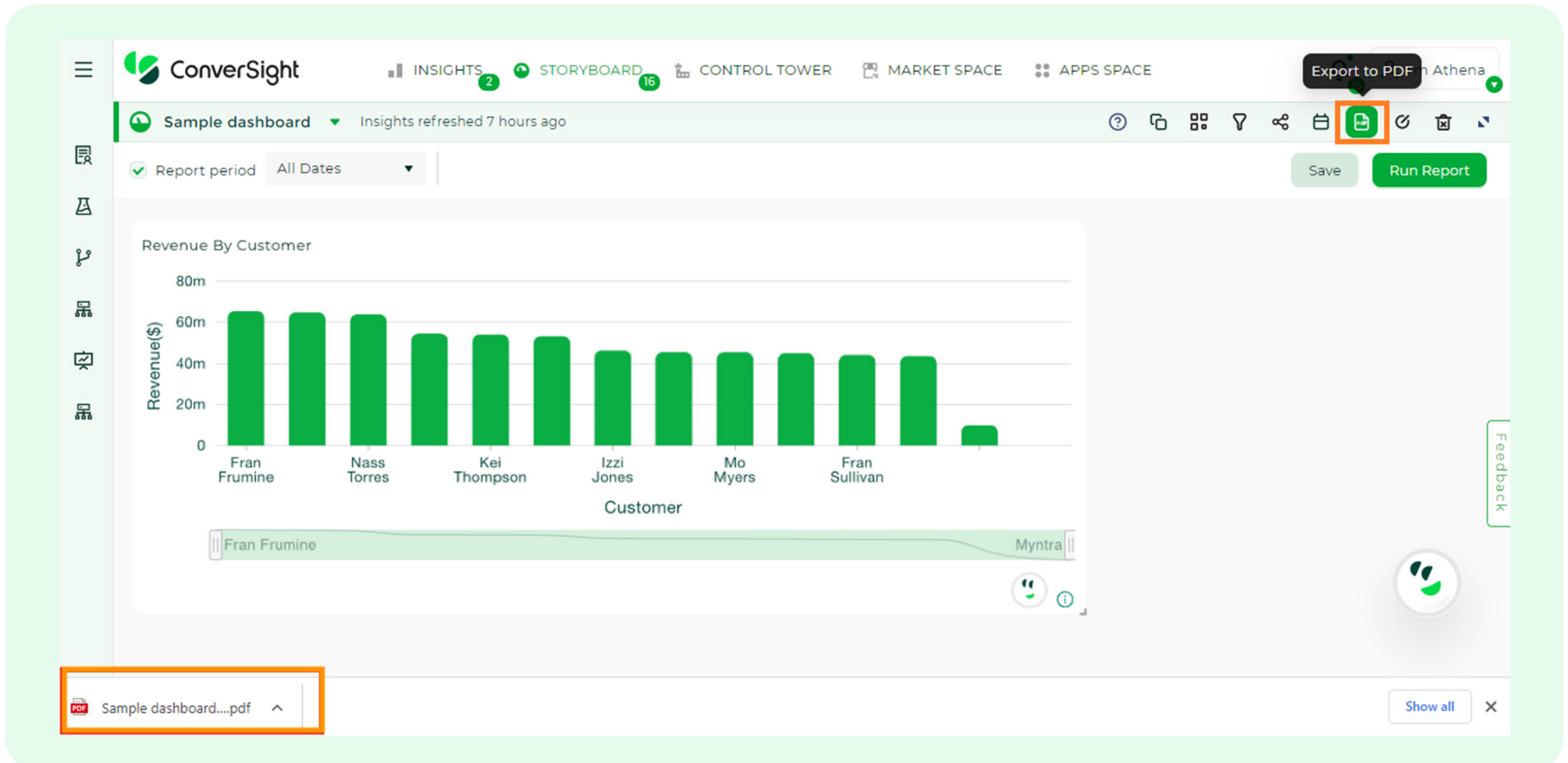


Locate the delete icon next to the Storyboard you wish to remove. Within the Storyboard list, you should find a delete icon associated with each Storyboard. This action will prompt a confirmation dialog box or a pop-up message asking you to confirm the deletion. To proceed with the deletion, click on the **Remove** button. This action confirms your intention to delete the selected Storyboard.



Export to PDF

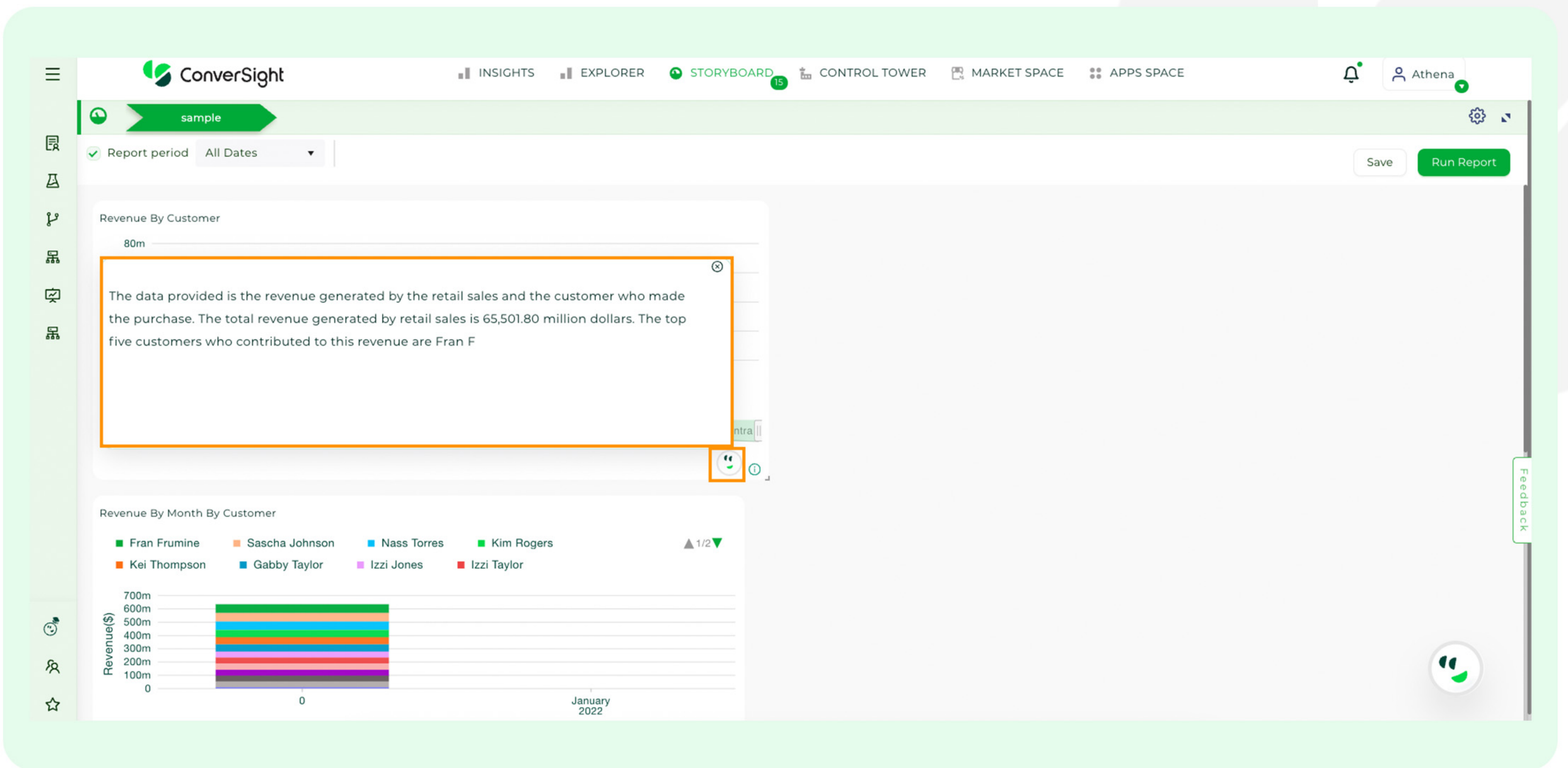
Sometimes, you may need to share a Storyboard with others inside or outside your organization in a portable and easily accessible format. Begin by logging into ConverseSight and navigating to the Storyboard you wish to export. Locate the **Export to PDF** icon, typically represented by an icon resembling a PDF document. Once you have identified the export to PDF icon, click on it. This action will initiate the export process and generate a PDF version of your Storyboard. Once the download is complete, open the PDF document to verify that the Storyboard has been successfully exported and that the layout and content are intact.



Attach the PDF file to an email, upload it to a document sharing platform or distribute it through any other preferred method to ensure that the intended recipients can access and view the Storyboard.

Generate AI Story

The Generate AI Story feature allows users to participate in natural language conversations, delivering responses in an engaging narrative format. It incorporates Natural Language Processing (NLP) and Large Language Model (LLM) technologies, elevating its capabilities in content generation, summarization and industry-specific language understanding. Trained on industrial public data and company-specific information, it delivers accurate insights by unveiling hidden patterns. Utilizing the generate AI story feature enhances conversations with a dialogue flow resembling human interaction, taking into account conversation history for contextually relevant responses.



2.3 Enhancing Interactivity through Storyboard Navigation

The Navigate to feature within the Storyboard functionality empowers users with seamless connectivity, allowing them to establish dynamic links to various elements such as applications, insights, other Storyboards or even user-specified URLs. To establish links between Storyboards and other elements, click on the **Title of the Storyboard** and select the destination where your Storyboard should redirect from the **Navigate to** the dropdown menu.

Custom Unit Insights refreshed 6 months ago

Report period: All Dates

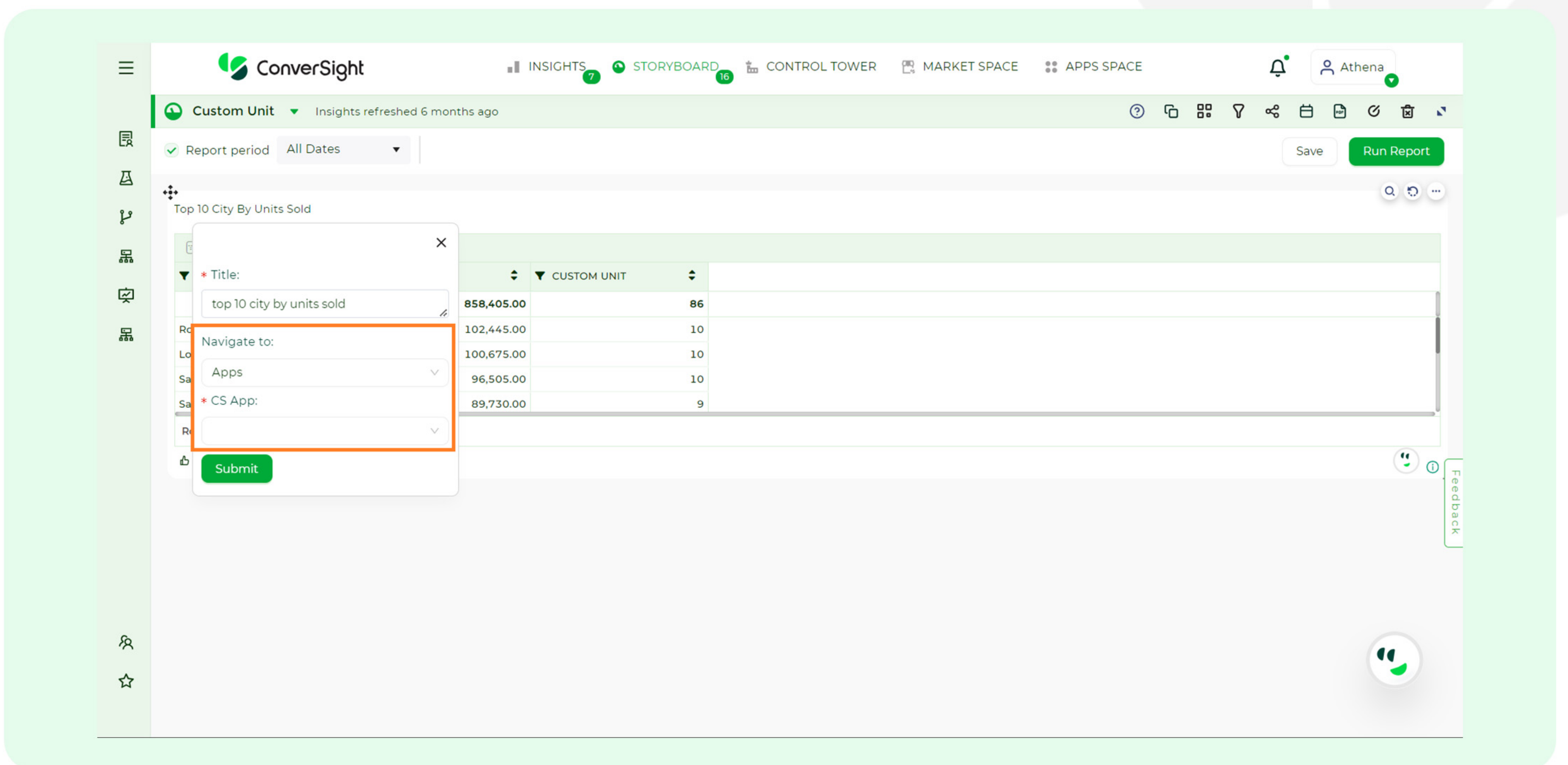
Save Run Report

Top 10 City By Units Sold

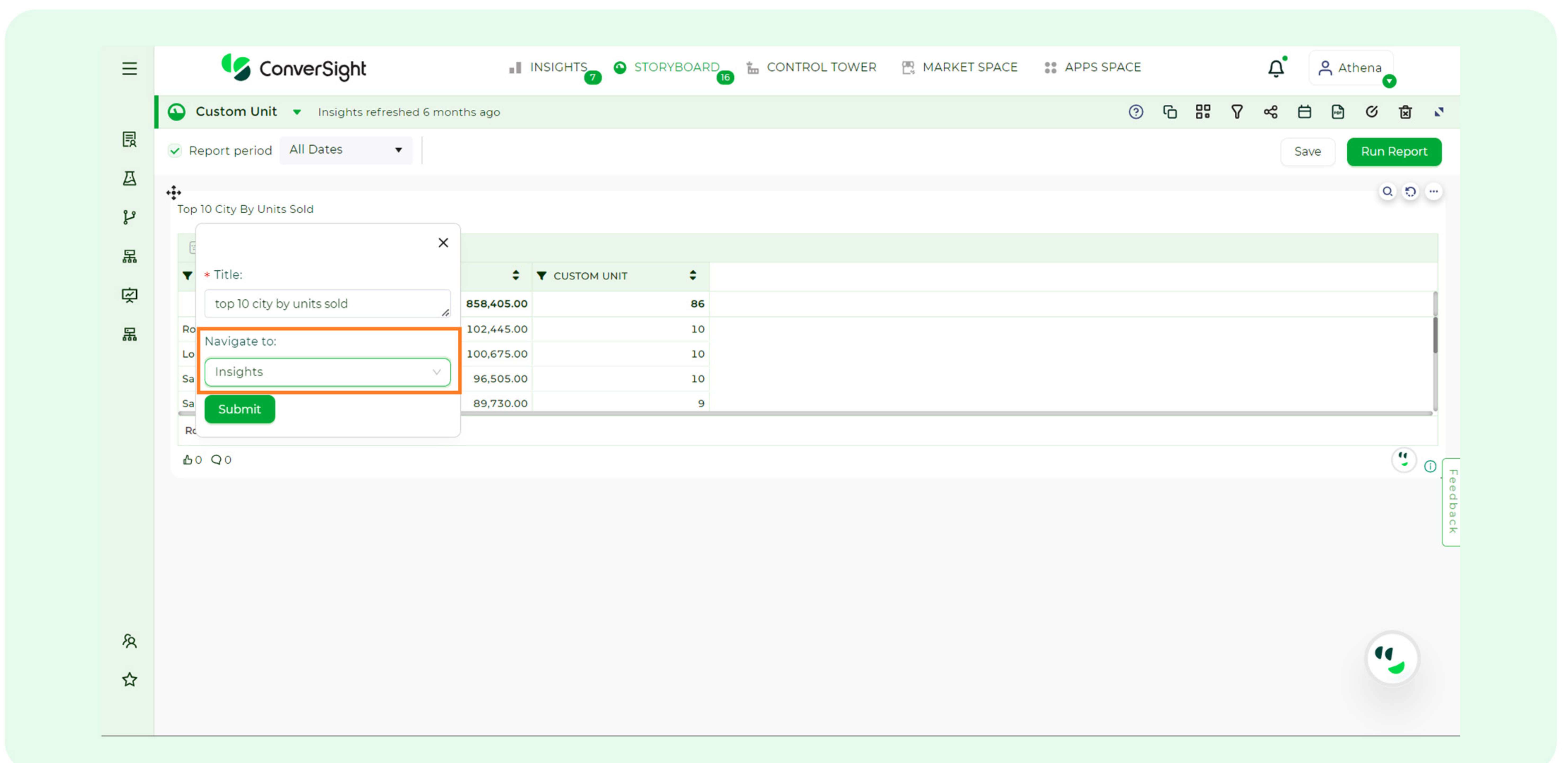
CITY	UNITS SOLD	CUSTOM UNIT
	858,405.00	86
Rochester	102,445.00	10
Long Beach	100,675.00	10
San Diego	96,505.00	10
San Francisco	89,730.00	9

Rows: 10

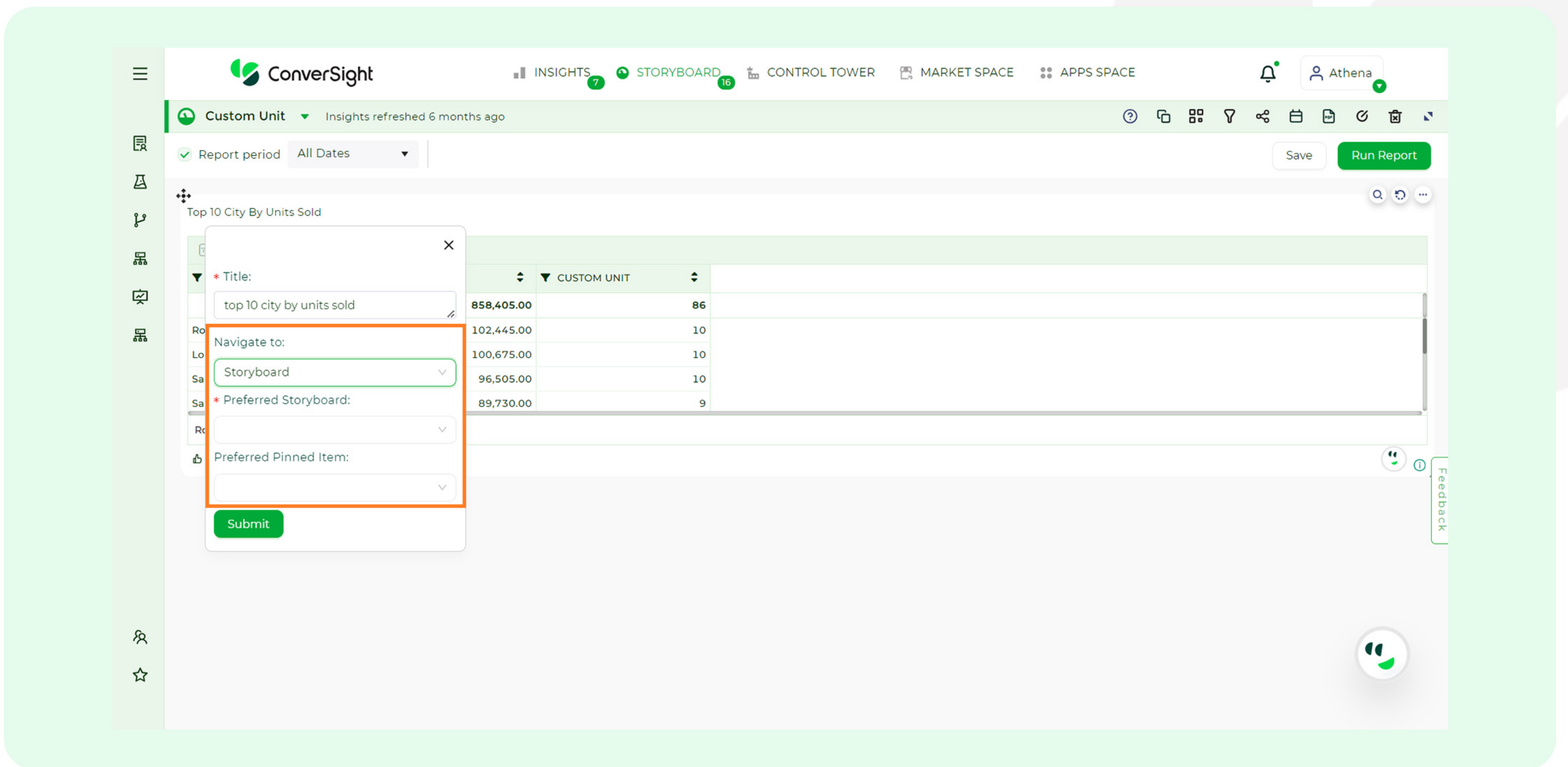
To establish a link from Storyboard to a CS App, select **Apps** from the Navigate to dropdown and then choose the desired CS App as a destination from the CS App dropdown menu.



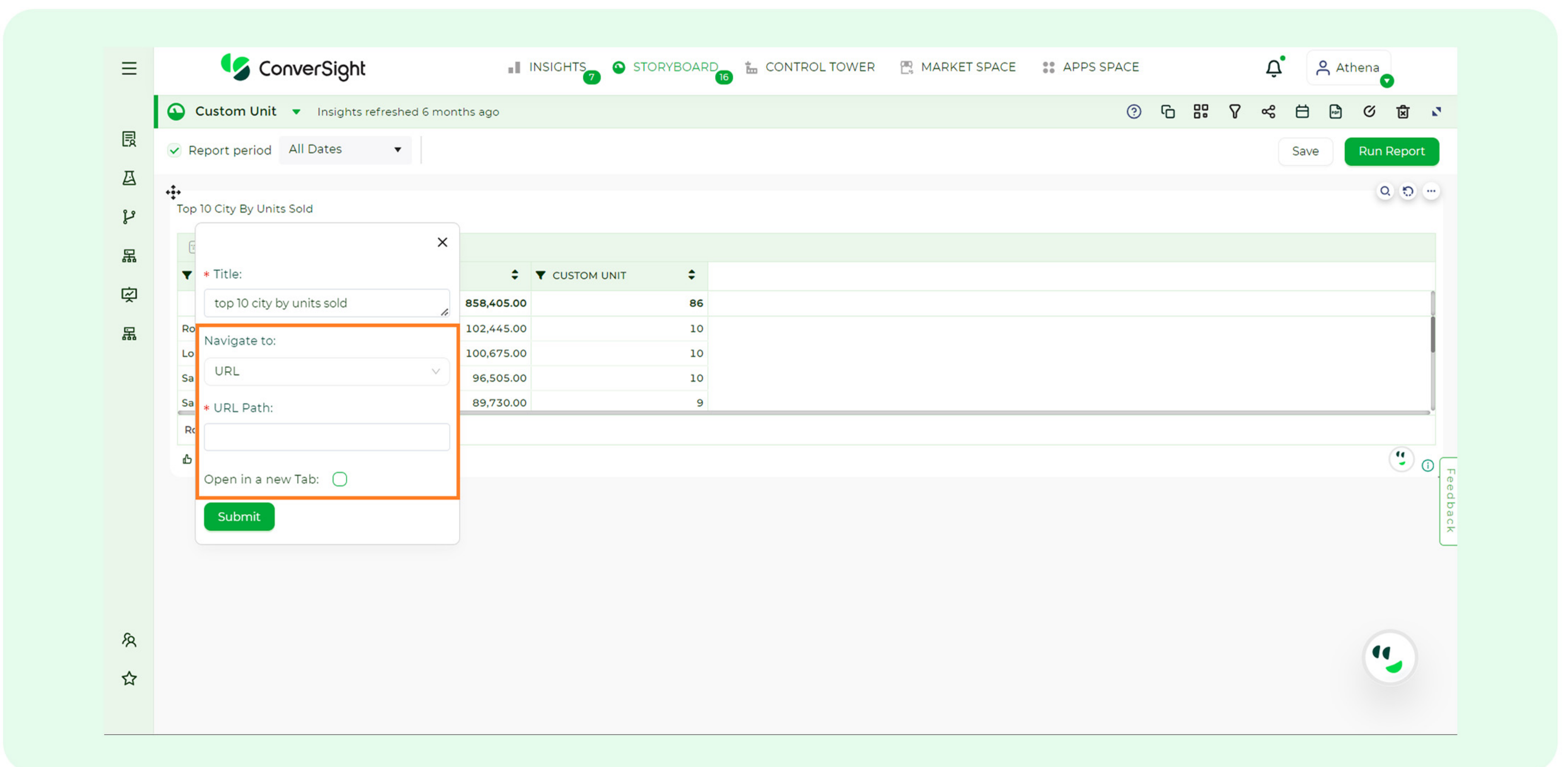
On selecting **Insights**, you can establish a connection between the Storyboard and the Insights page. Clicking the Storyboard's title will then direct you to the Insights page.



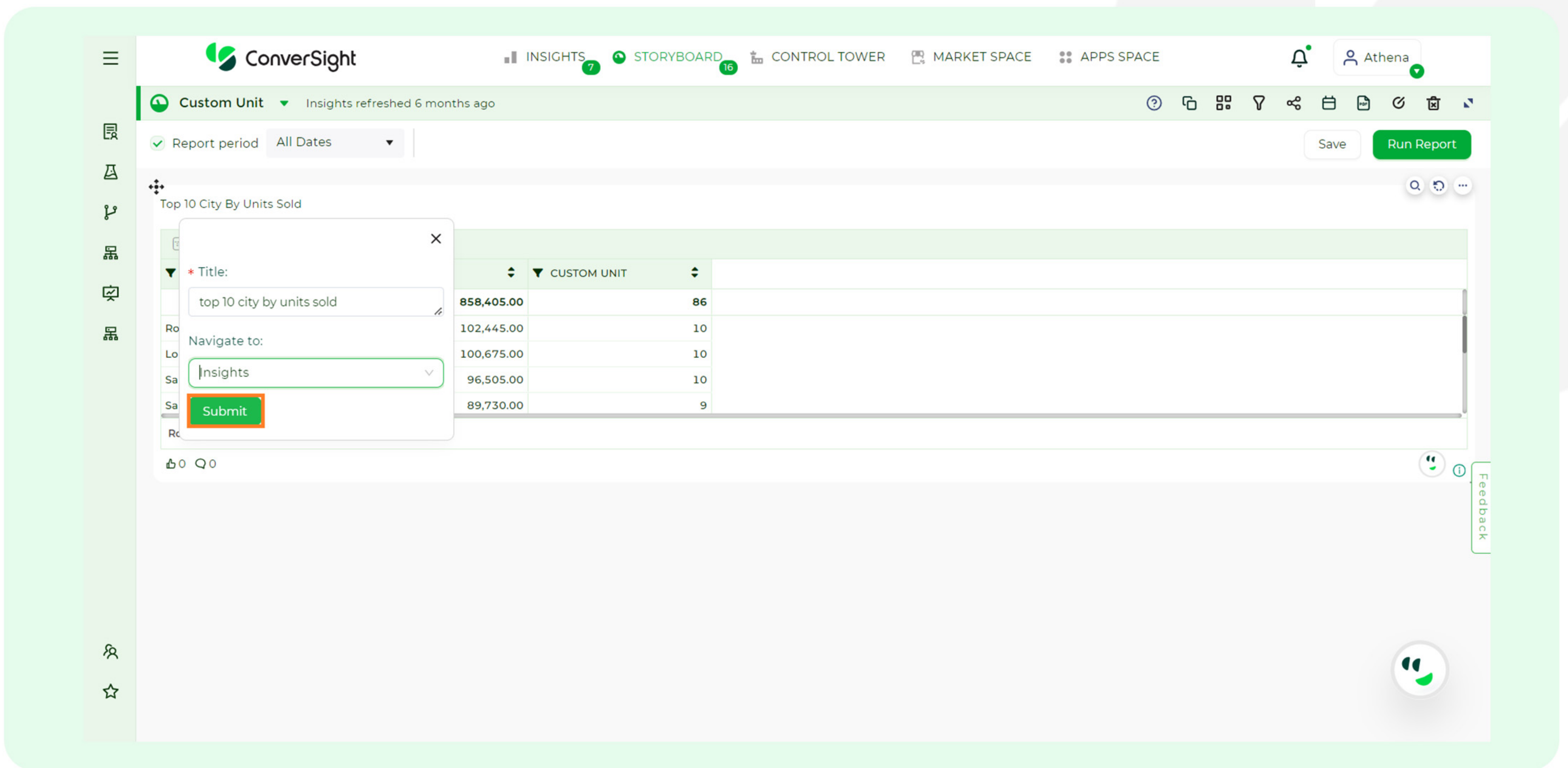
Choosing the Storyboard option enables the users to create a link to a specific pinned item within a chosen Storyboard. Clicking the Storyboard's title will then navigate you to the pinned Insight on the selected Storyboard's page.



On selecting the **URL**, the user can create a link connecting the Storyboard to an external website by entering the URL. Clicking on the Storyboard's title will then direct the user to the specified link. If the Open in a new tab checkbox is selected, the link will open in a new browser tab.

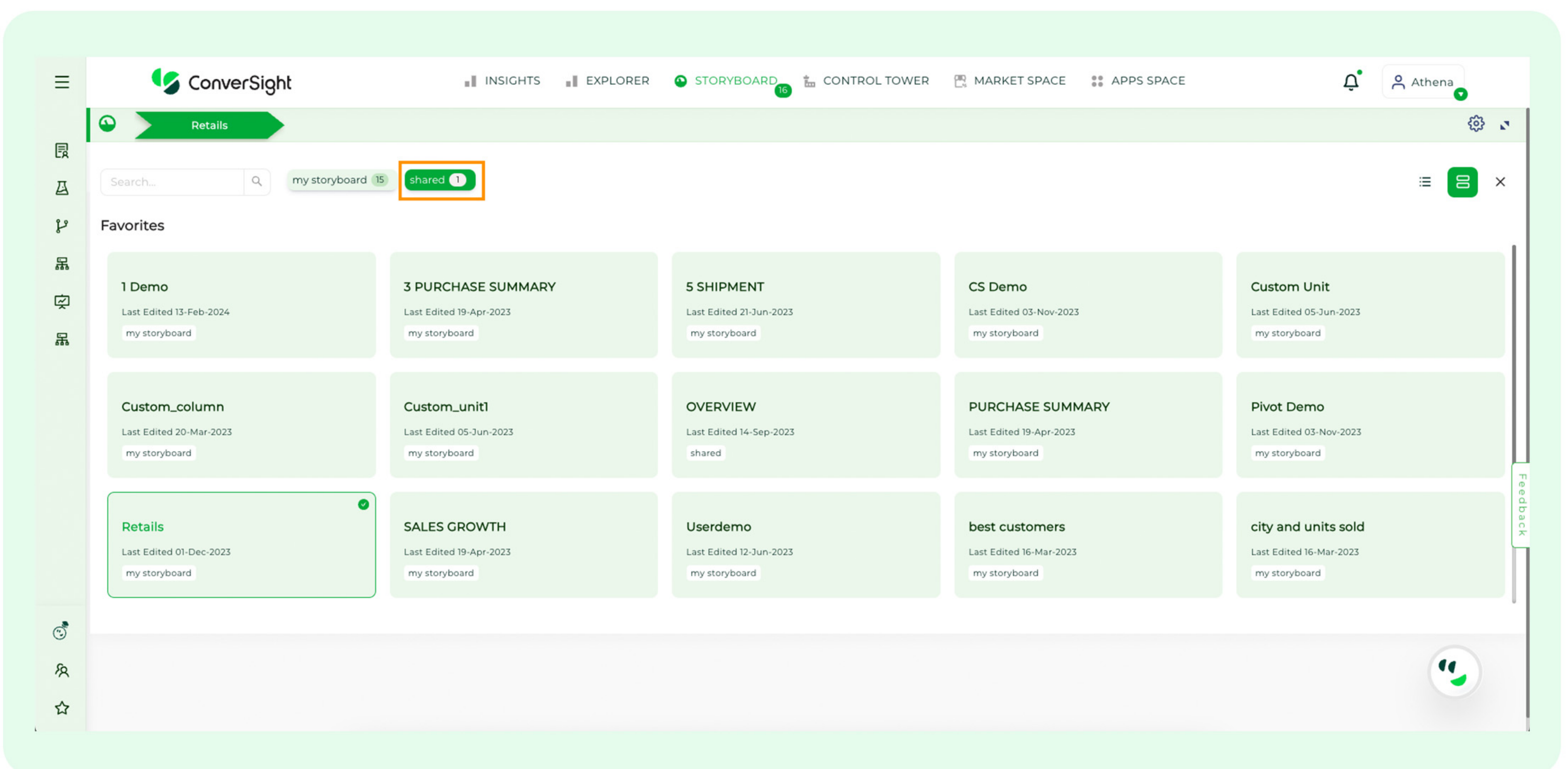


Upon selecting the preferred destination, proceed to click the **Submit** button. Subsequently, the Storyboard title transforms into a hyperlink, and clicking on it will redirect to the chosen destination.



3. Effortlessly Distributing Storyboards

Shared Storyboards play a crucial role in fostering collaboration and information sharing within an organization. They serve as a centralized hub where users can access and explore Storyboards that have been shared with them by others. Shared Storyboards can be likened to folders that contain Storyboards shared with you by other users. These shared Storyboards consolidate relevant visualizations and data reports, making it convenient for you to access and review the information. Once you have selected a shared Storyboard, you can interact with its content to gain insights and extract valuable information. The Storyboard may include various graphs, charts and data reports relevant to the shared information.



4. Conclusion

Storyboards are powerful tools that facilitate data visualization and analysis. By leveraging ConverSight's Storyboard solutions, businesses can enhance their competitive advantage by effectively interpreting and sharing data. These solutions offer customizable views, filters, and seamless transitions between visualizations, empowering users to gain actionable insights and a comprehensive understanding of their data landscape.

ConverSight's Storyboards provide extensive customization options, allowing users to tailor their visualizations to their specific needs. From selecting and organizing visualizations to adjusting color schemes and layouts, the platform offers a user-friendly environment for creating visually appealing and informative Storyboards. These versatile tools enable efficient exploration, analysis, and sharing of information, supporting business growth, informed decision-making, and deeper data comprehension.

Collaboration is made easy with ConverSight Storyboards, as teams can effortlessly share insights and make data-driven decisions together. Sharing Storyboards with colleagues, clients, and stakeholders ensures access to up-to-date information, fostering transparency and alignment. Embrace the potential of Storyboards, unlock the value of your data, and embark on an exciting journey of discovery with ConverSight's comprehensive visualization solutions.

Join our customers who have accelerated growth with ConverSight



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

