

Summary Fields

Streamlining Data Analysis and Reporting Processes for Enhanced Insights.





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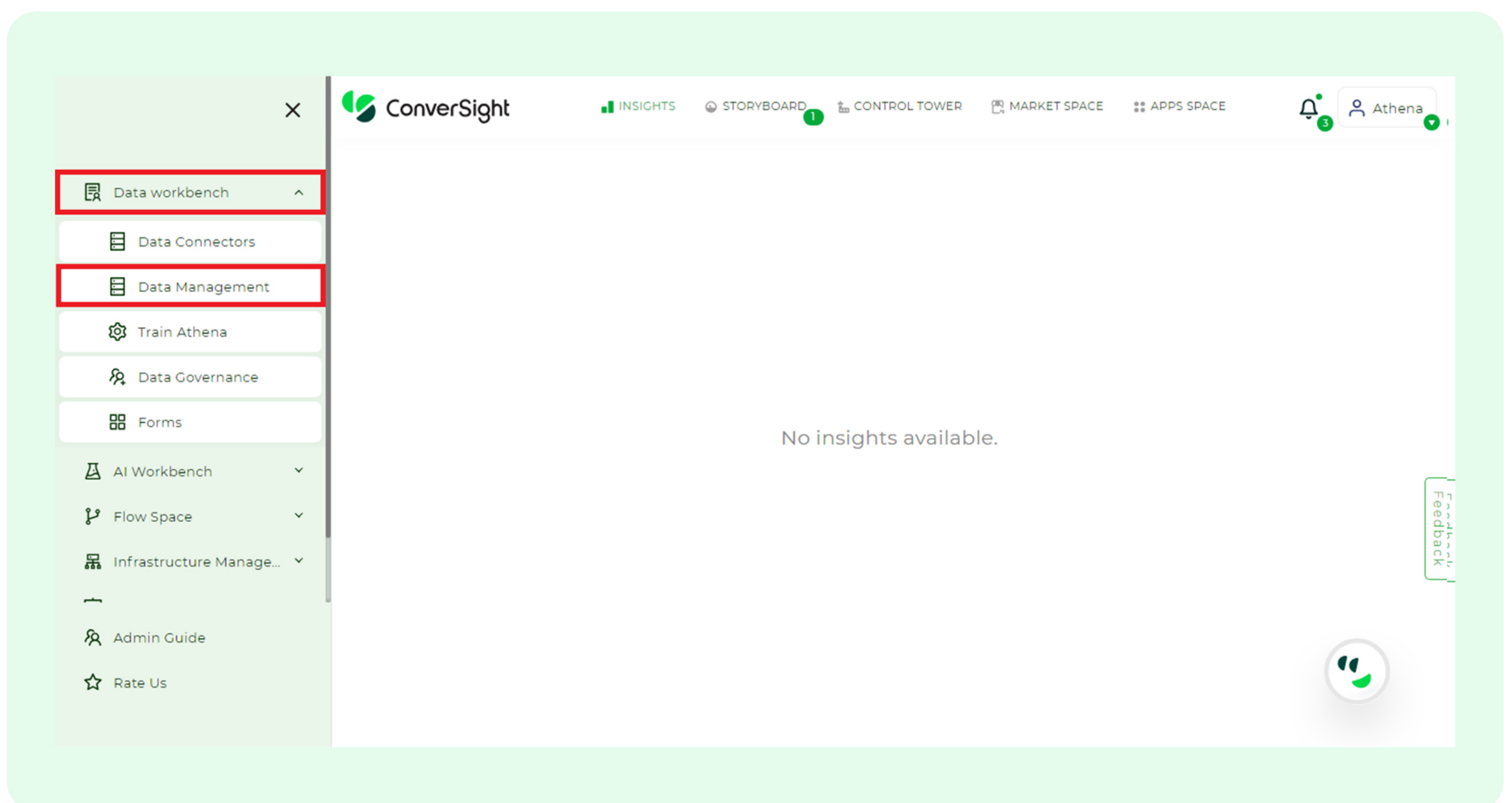
I. Introduction

In the fast-paced world of data analysis, where optimizing workflows and ensuring accuracy are paramount, ConverSight introduces a transformative feature known as Summary Fields. Summary Fields is a powerful feature designed to streamline and enhance your data analysis and reporting processes within a dataset. Beneficial for users engaged in regular report generation or those reviewing data across multiple columns and tables, Summary Fields provides an efficient way to gather, organize, access and retrieve data. In contrast to alternative methods like manual querying or guided search where selecting all columns is a repetitive task, Summary Fields notably enhances your experience with Athena. Summary Fields significantly improves your experience with Athena, offering a more intuitive and insightful data analysis journey.

2. Summary Fields

2.1 Accessing Summary Fields

To access the Summary Fields feature, you must first navigate to the **'Data Workbench'** under the configuration sidebar in the ConverSight platform and select **'Data Management'**.



Note

It is important to note that the custom field created using Summary Fields will exclusively exist within the ConverSight platform and won't be replicated in the actual database.



2.2 Creating Summary Fields Through SME

To create Summary Fields, select the dataset and go to the **'Settings'** icon located in the Action column of the Data Management and then choose **'Configure SME'**.

The screenshot shows the 'Datasets' page in the ConverSight interface. At the top, there are navigation tabs for INSIGHTS, STORYBOARD, CONTROL TOWER, MARKET SPACE, and APPS SPACE. The user is logged in as 'Athena'. Below the navigation is a search bar and a 'Row Count: 4' indicator. A table lists datasets with columns: NAME, ACTIVITY STATUS, LAST PUBLISH, LAST ACTIVITY, and ACTION. The 'Retail_Sales' dataset is selected, and a dropdown menu is open, showing options like Edit, Configure SME (highlighted in red), Show Recent Activity, Role & Group Management, Republish, Schedule, Show Jobs, Fork, and Delete.

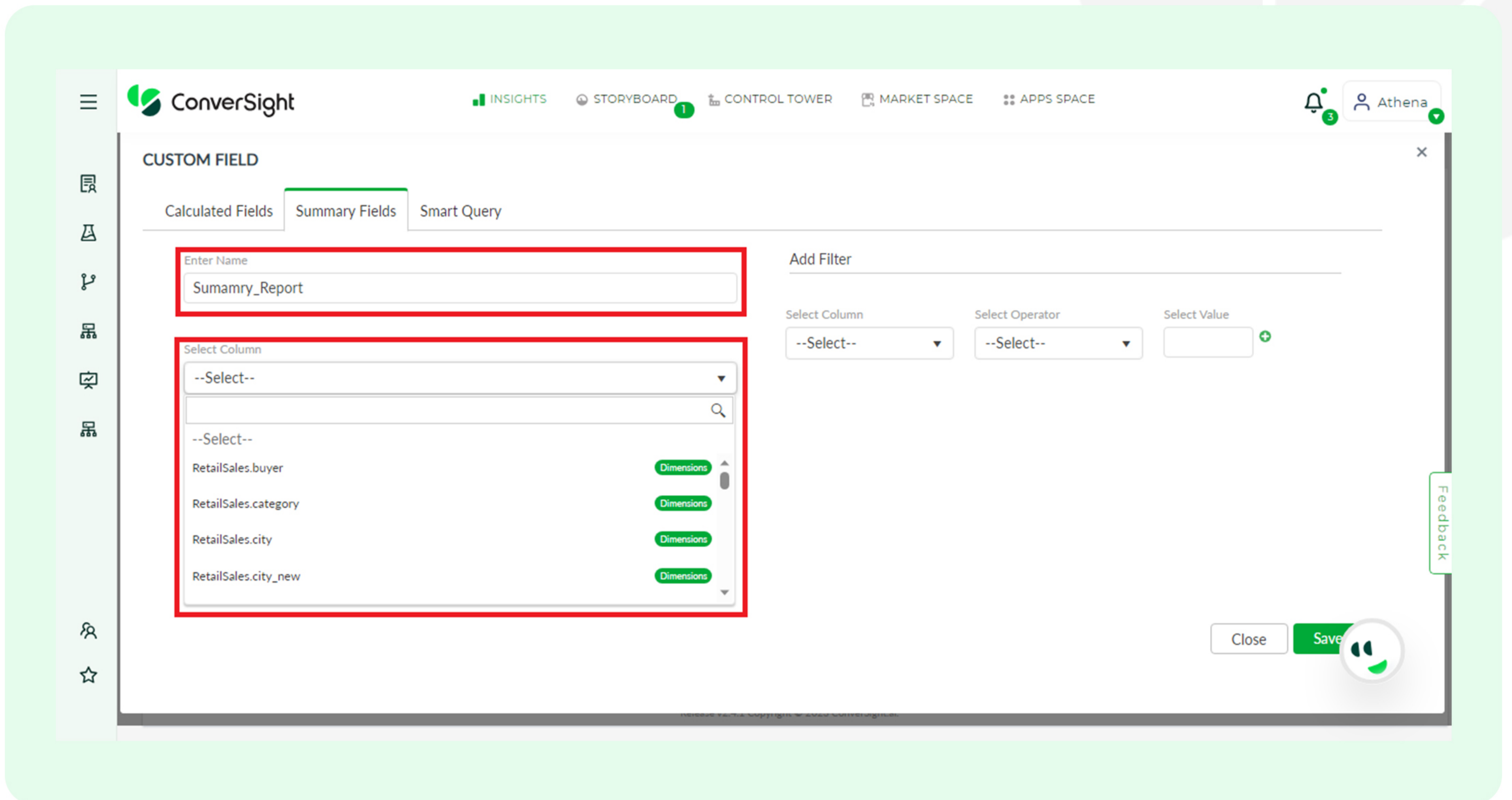
NAME	ACTIVITY STATUS	LAST PUBLISH	LAST ACTIVITY	ACTION
Retail_Sales	Active	07/20/2023 4:57 pm	08/09/2023 12:09 pm	[Settings Icon]
Task	Active	07/13/2023 10:43 am	07/19/2023 12:37 pm	[Settings Icon]
Smart Query	Active	07/03/2023 4:44 pm	07/03/2023 5:22 pm	[Settings Icon]
Trial Demo	Failed	07/03/2023 3:14 pm	07/03/2023 3:22 pm	[Settings Icon]

Click on the **'Summary Fields'** button.

The screenshot shows the 'SME Coaching - Retail_sales' page. It features a search bar, 'Total Records: 33 items', and a 'Generate Vocabulary' button. A table lists columns with columns: TABLE NAME, COLUMN NAME, CATEGORY, TYPE, UNIT, DEFAU..., VISIBI..., VOCABULARY, and ACT... The 'Summary Fields' button is highlighted in red. At the bottom, there are buttons for 'Calculated Fields', 'Summary Fields', 'Smart Query', 'Reset', 'Save', and 'Publish'.

TABLE NAME	COLUMN NAME	CATEGORY	TYPE	UNIT	DEFAU...	VISIBI...	VOCABULARY	ACT...
RetailSales	Newitem	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RetailSales newitem	[Edit] [Delete]
RetailSales	Order_date	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	order date	[Edit] [Delete]
RetailSales	Vendor	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RetailSales vendor	[Edit] [Delete]
RetailSales	State	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RetailSales state	[Edit] [Delete]
Sales	Totoalprice	Metrics	Currency	?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales totoalprice	[Edit] [Delete]
RetailSales	Store	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RetailSales store	[Edit] [Delete]
RetailSales	Zip	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RetailSales zip	[Edit] [Delete]
RetailSales	Item_type	Dimensions	--Select--	--Select--	<input type="checkbox"/>	<input checked="" type="checkbox"/>	item type	[Edit] [Delete]

- Give a name to your Summary Fields and proceed by selecting the essential columns you want to exhibit collectively from the provided dropdown menu.

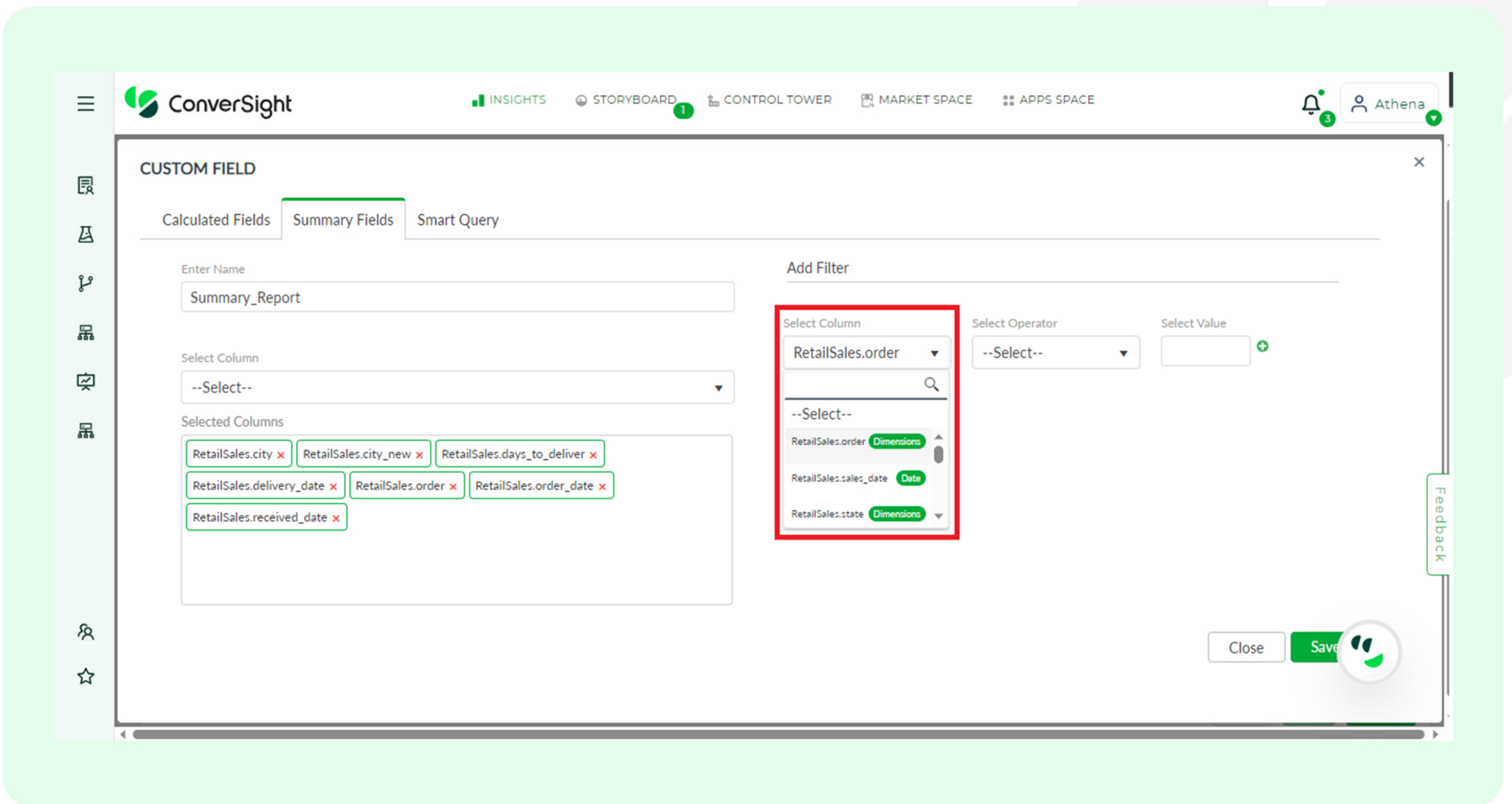


Note

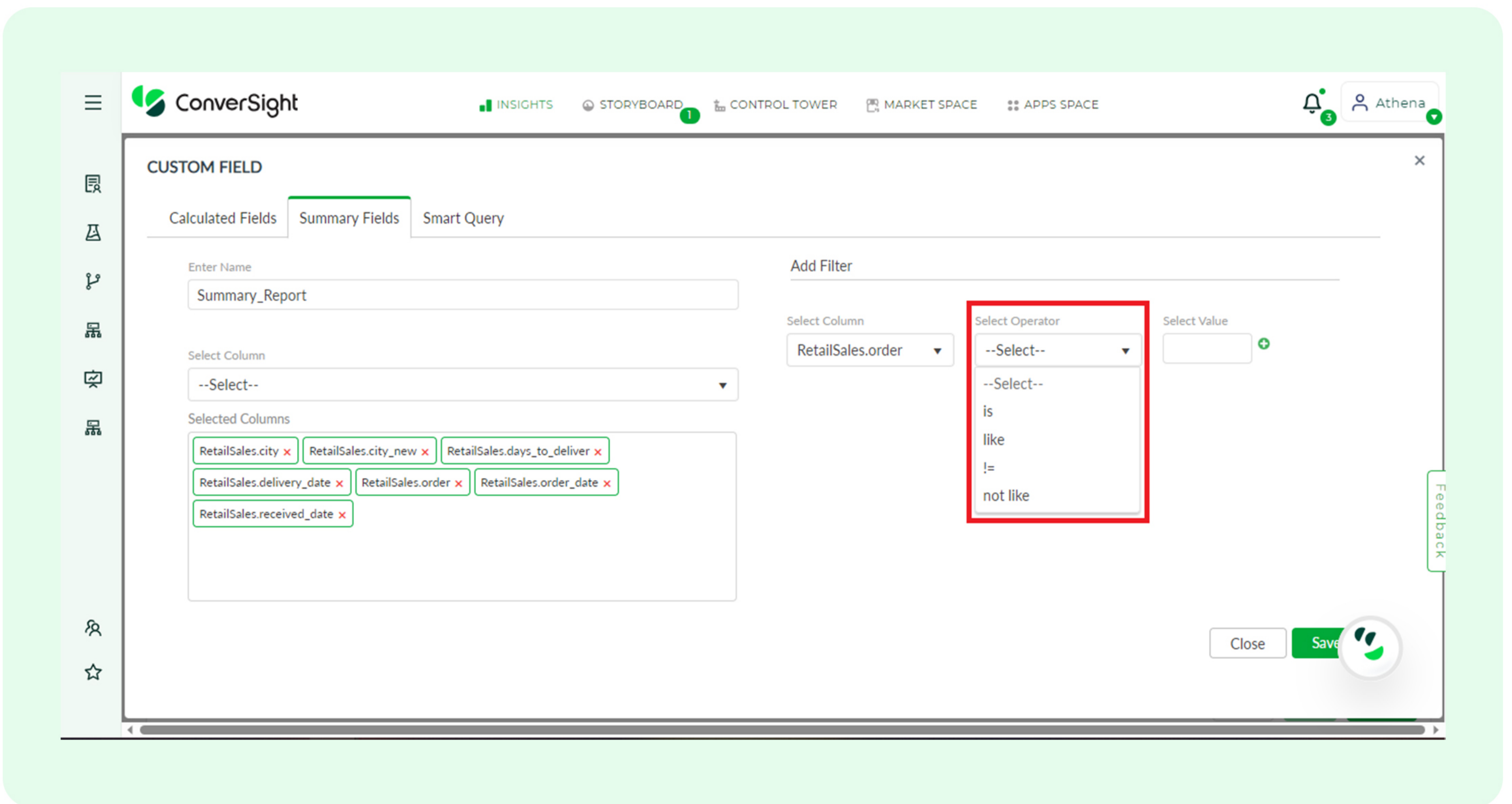
The selected columns need to exhibit a specific degree of interconnection or relationship for the query to be effective, if the columns originate from disparate tables.

The Summary Fields feature also enables users to customize columns by adding filters. The **'Add Filter'** option requires the column name, operator for that column and values. Columns can be categorized as metrics, dimensions, dates, flags, calculated metrics and calculated dimensions. Depending on the column category selected, relevant operators will be shown and values can be added.

- Choose the column that needs to be filtered.



Choose the necessary operator from the dropdown menu.

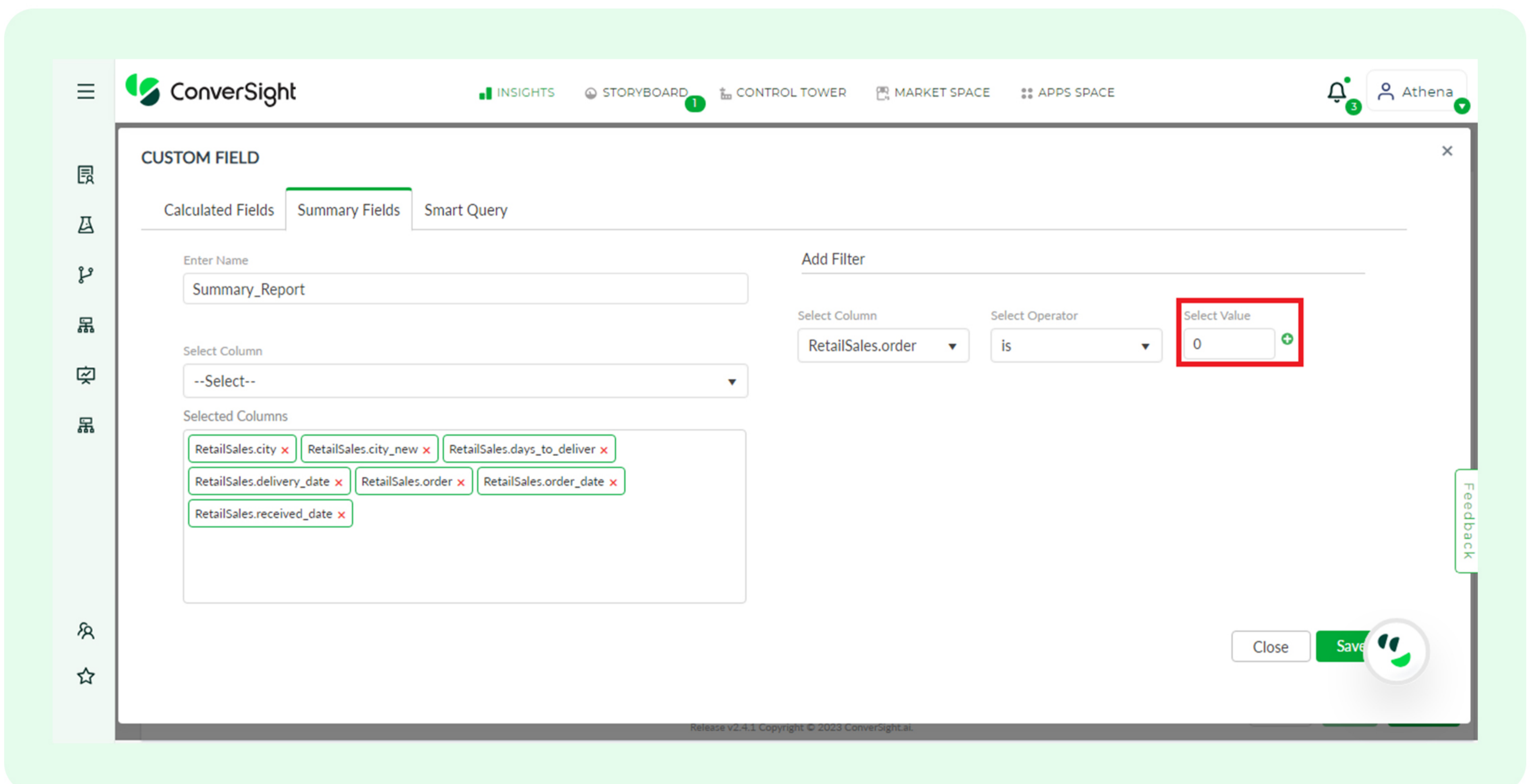


Note

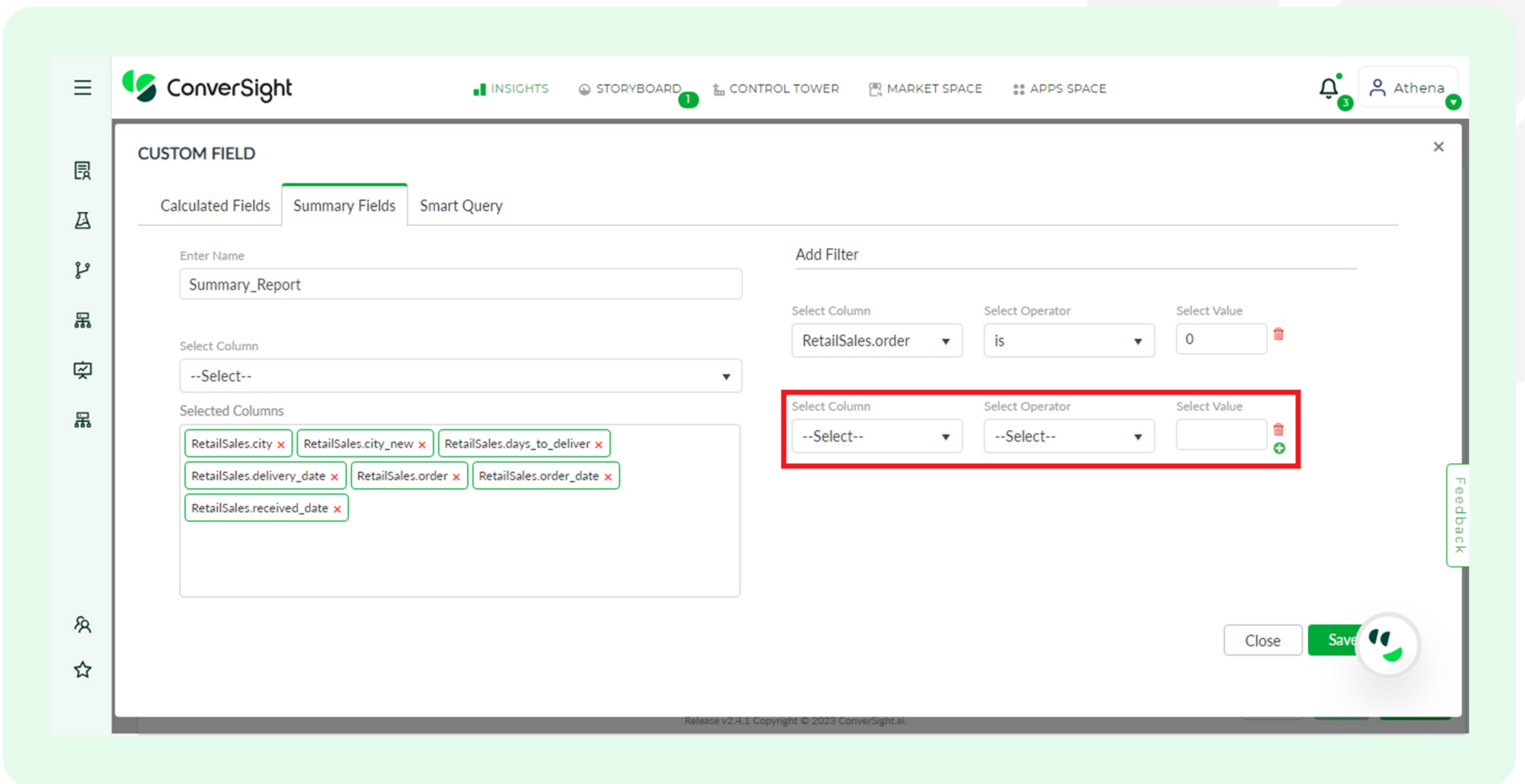
Depending on the column category selected, there are different operators available as shown below.

COLUMN TYPE	OPERATOR
Metrics and Calculated Metrics	== < <= > >= != between
Dimensions and Calculated Dimensions	is like != not like
Date	is between
Flag	= !=

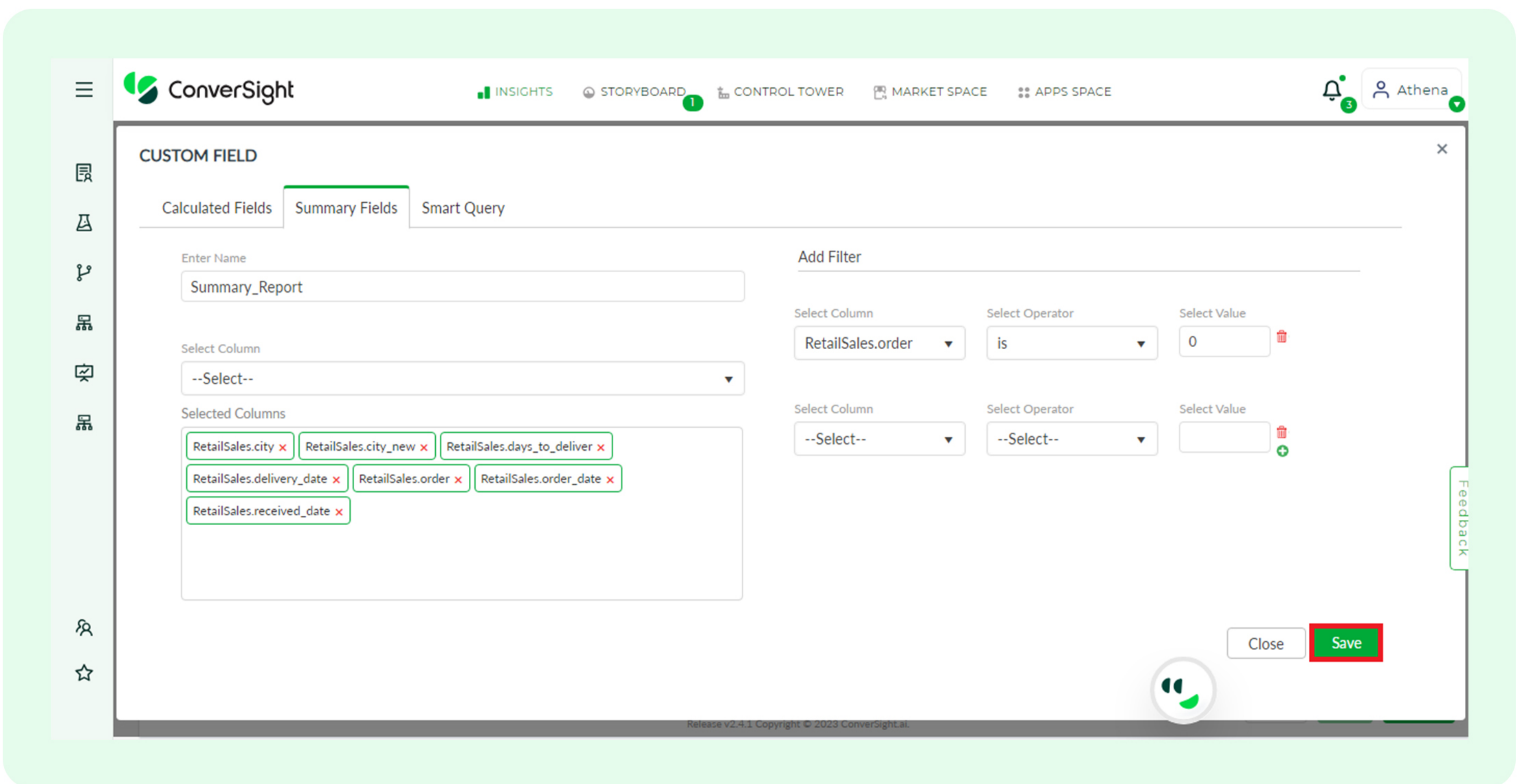
 Users must include a value in the filter.



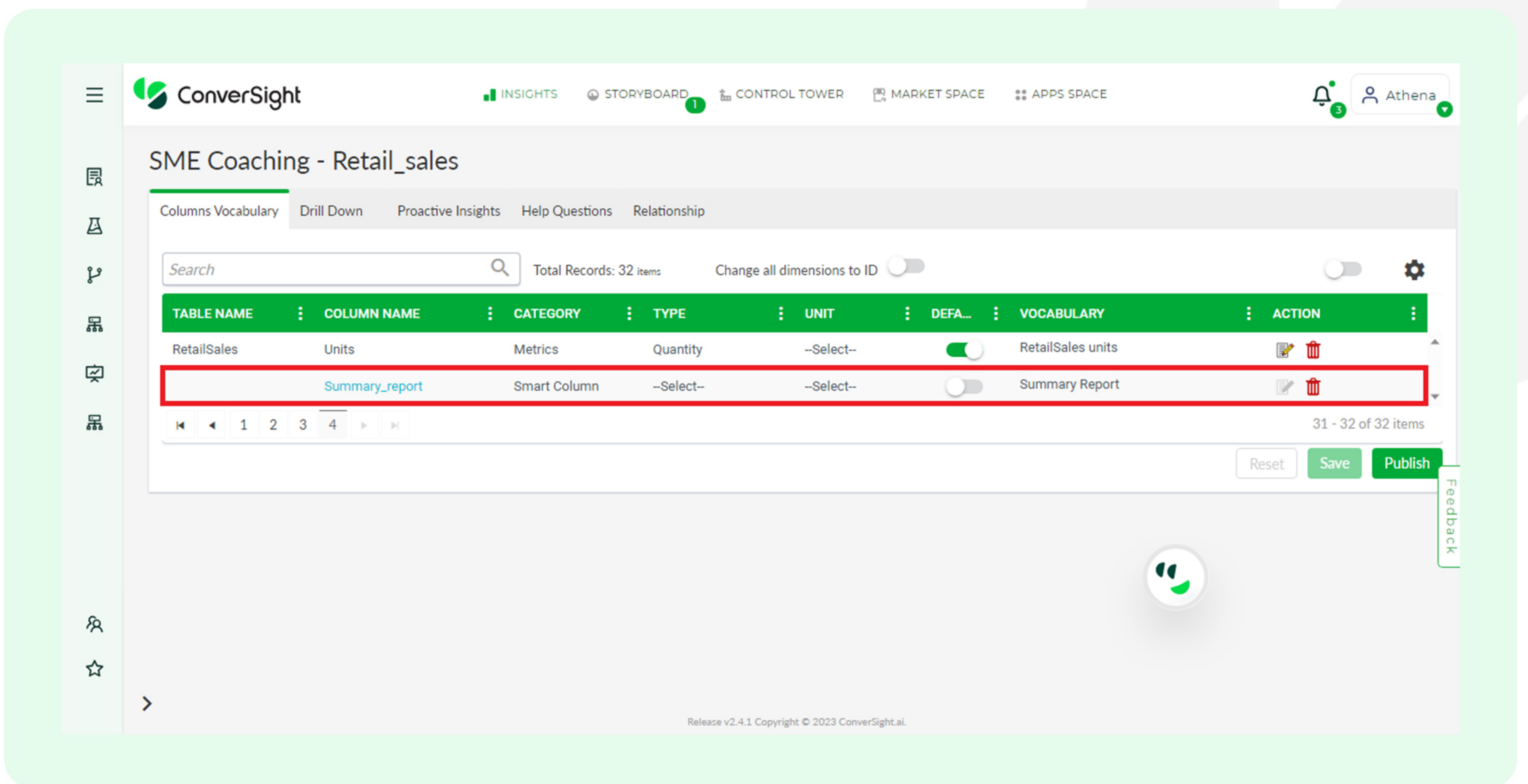
Users are empowered to enhance the precision of their search outcomes by adding multiple filters. This can be accomplished by simply clicking on the **'Plus'** icon. Similarly, the user can eliminate a specific filter by clicking on the **'Delete'** icon, represented as a removal symbol. This deletion icon is commonly positioned adjacent to each applied filter for convenient access.



- Upon completing any modifications, users can safeguard their changes by selecting the **'Save'** button. After the establishment of the Summary Fields, it seamlessly integrates into the dataset.

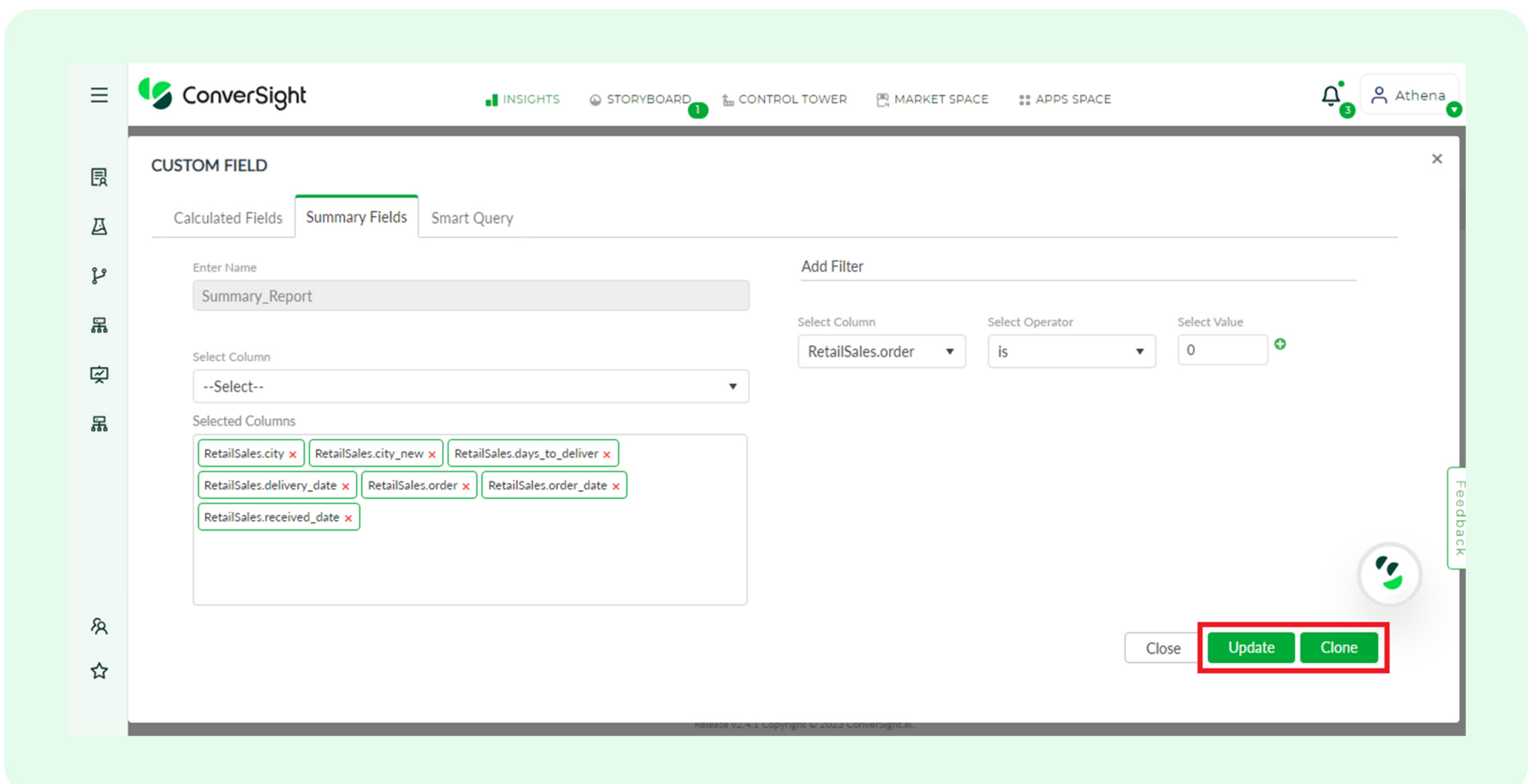


- If there arises a need to remove the Summary Fields, users can effortlessly do so by engaging with the provided **'Delete'** icon.

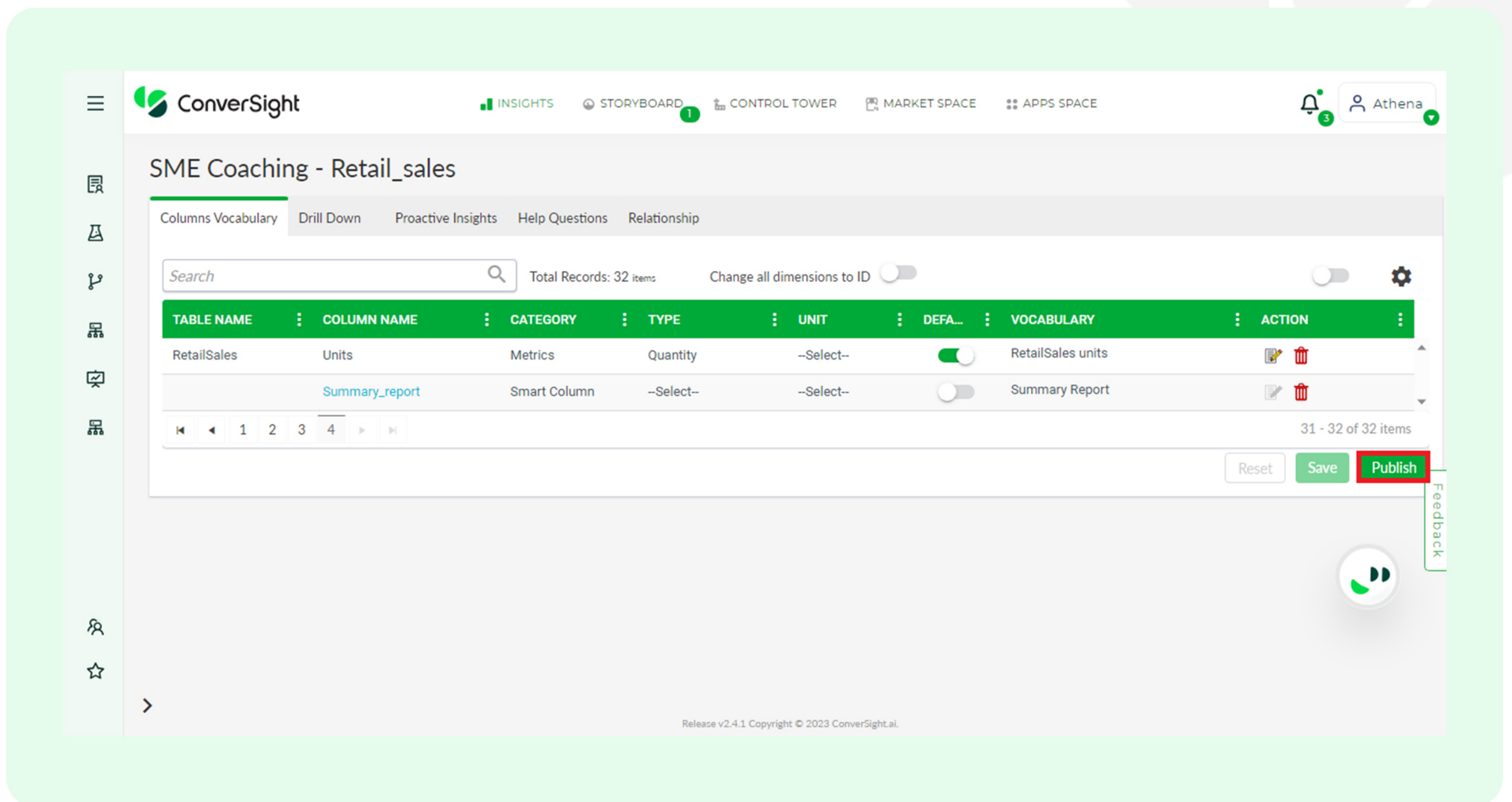


Modifications to Summary Fields may not always be compulsory, they are essential for optimizing data representation, accuracy and usability. Adapting these fields empowers users to extract relevant insights and information from the dataset, ensuring its continued relevance and value.

If a user wishes to change a Summary Field, they can do so by clicking on its name. This action quickly opens the relevant page where they can make necessary edits like adding or removing columns, changing the order of the selected columns and adding or removing filters. Once the changes are done, they can save them by clicking the **'Update'** button. Additionally, if the user needs a copy of an existing Summary Field, they can create one by using the **'Clone'** button. This process makes an exact copy that can be customized as needed.



In the beginning, the Summary Fields are generated as a preliminary step. To set them in motion and ensure their functionality, users should click the **'Publish'** button. This action applies the generated Summary Fields to the dataset, resulting in the reflection of any subsequent dataset modifications.



The screenshot displays the ConverSight interface for 'SME Coaching - Retail_sales'. 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 shows a table of columns with the following data:

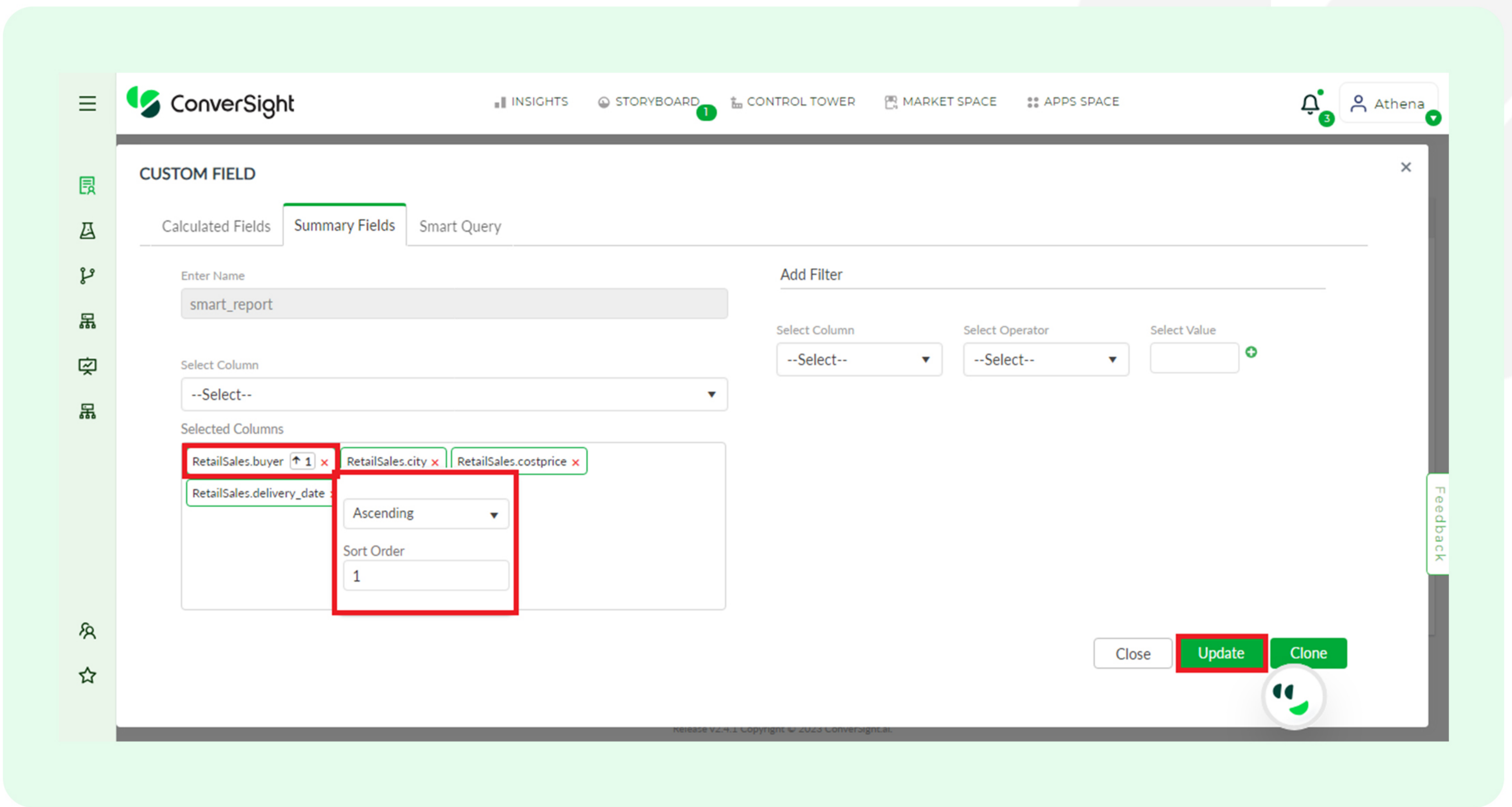
TABLE NAME	COLUMN NAME	CATEGORY	TYPE	UNIT	DEFA...	VOCABULARY	ACTION
RetailSales	Units	Metrics	Quantity	--Select--	<input checked="" type="checkbox"/>	RetailSales units	
	Summary_report	Smart Column	--Select--	--Select--	<input type="checkbox"/>	Summary Report	

At the bottom right of the table, there are 'Reset', 'Save', and 'Publish' buttons. The 'Publish' button is highlighted in red. A 'Feedback' button is also visible on the right side of the interface.

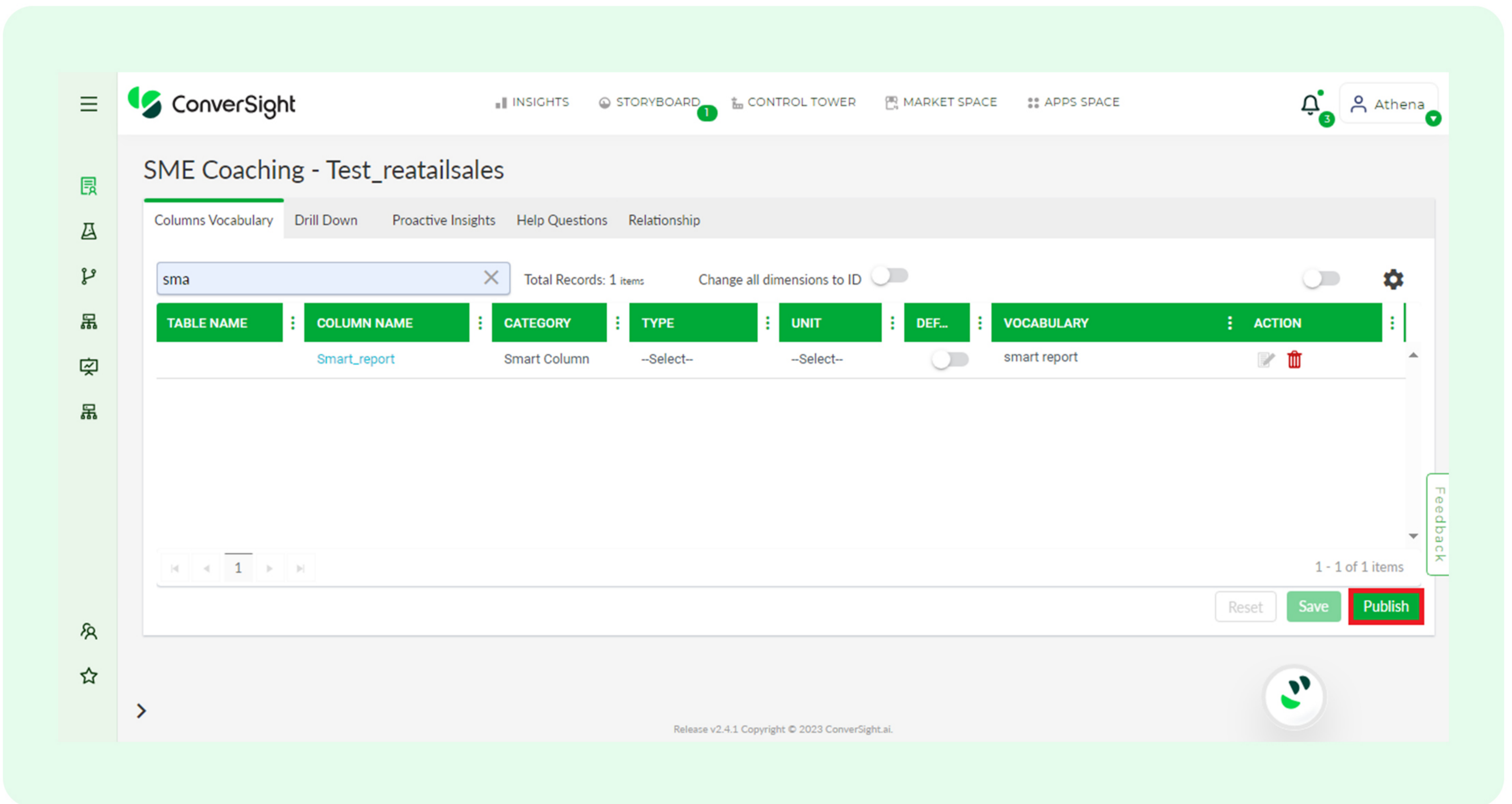
2.3 Sorting Columns

If a user desires to arrange columns within a Summary Field, they can achieve this by clicking on the field's name, prompting the opening of the pertinent page. Here, users can easily arrange columns in ascending or descending order as well as determine the sorting sequence of columns.

To sort a column from the Selected Columns box, perform a right-click on the desired column. A dropdown menu will appear; choose the sorting type and order. The sort order specifies the sequence in which data within a column or multiple columns are arranged. Once all fields are filled click on **'Update'** to save the changes.



Click **'Publish'** to publish the dataset.



Now, you can view the changes in Athena by querying using the Summary Field name. Click on the **'Explore'** icon to view the entire details if the outcome is large.

RETAILSALES BUYER	RETAILSALES CITY	RETAILSALES COSTPRICE	DELIVERY DATE
	chennaiNew		1/6/2023
	44		
1	50	08-01-2016	07302
1	40	08-01-2016	14604
1	58	09-01-2016	14202
1	40	10-01-2016	07505
1	68	10-01-2016	14202
1	18	11-01-2016	02114
1	12	12-01-2016	02114
1	67	12-01-2016	10036
1	23	13-01-2016	07302

2.4 Creating Summary Fields Through Athena

To generate a Summary Field via Athena in ConverSight, the initial step involves users posing a query to Athena.

Athena Conversation - Retail_sales
Updated 3 hours ago

Did you mean?
Click from the below item(s),
List sales.totoalprice by Sales customer | List sales.totoalprice by Sales totoalprice

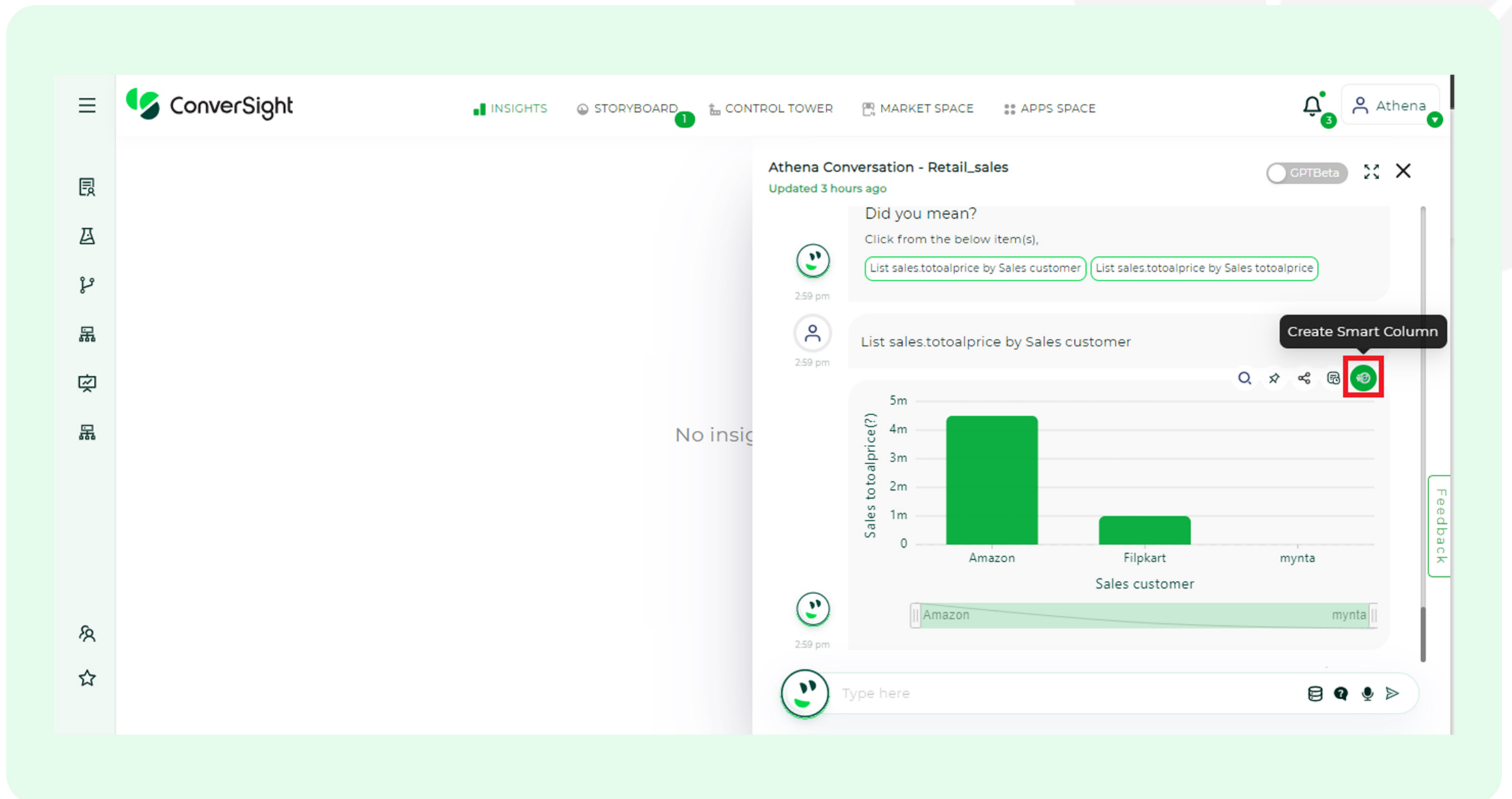
List sales.totoalprice by Sales customer

Sales to totalprice(?)

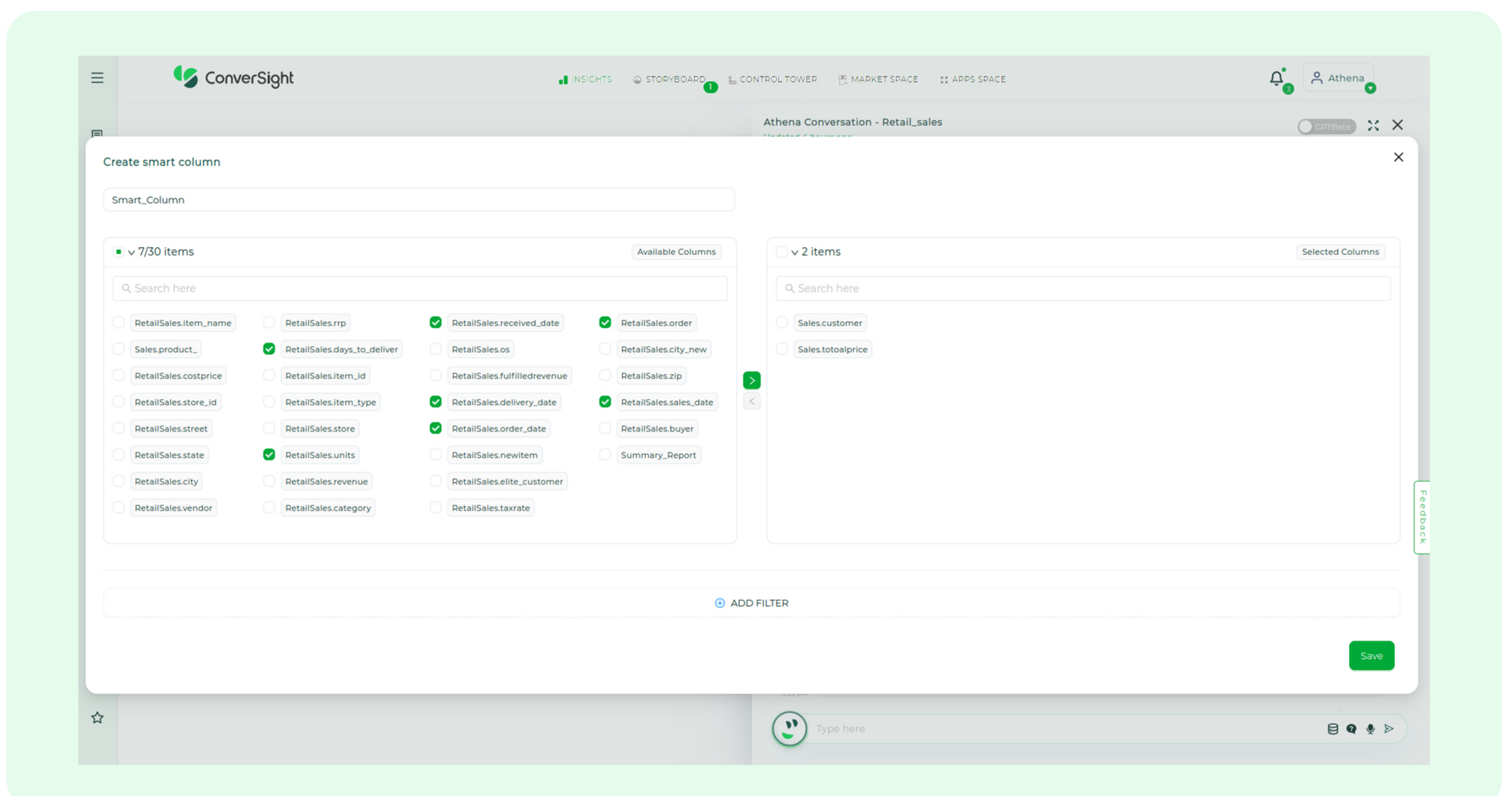
Sales customer	Sales to totalprice(?)
Amazon	~4.5m
Flipkart	~1m
mynta	~0.5m

Amazon | mynta

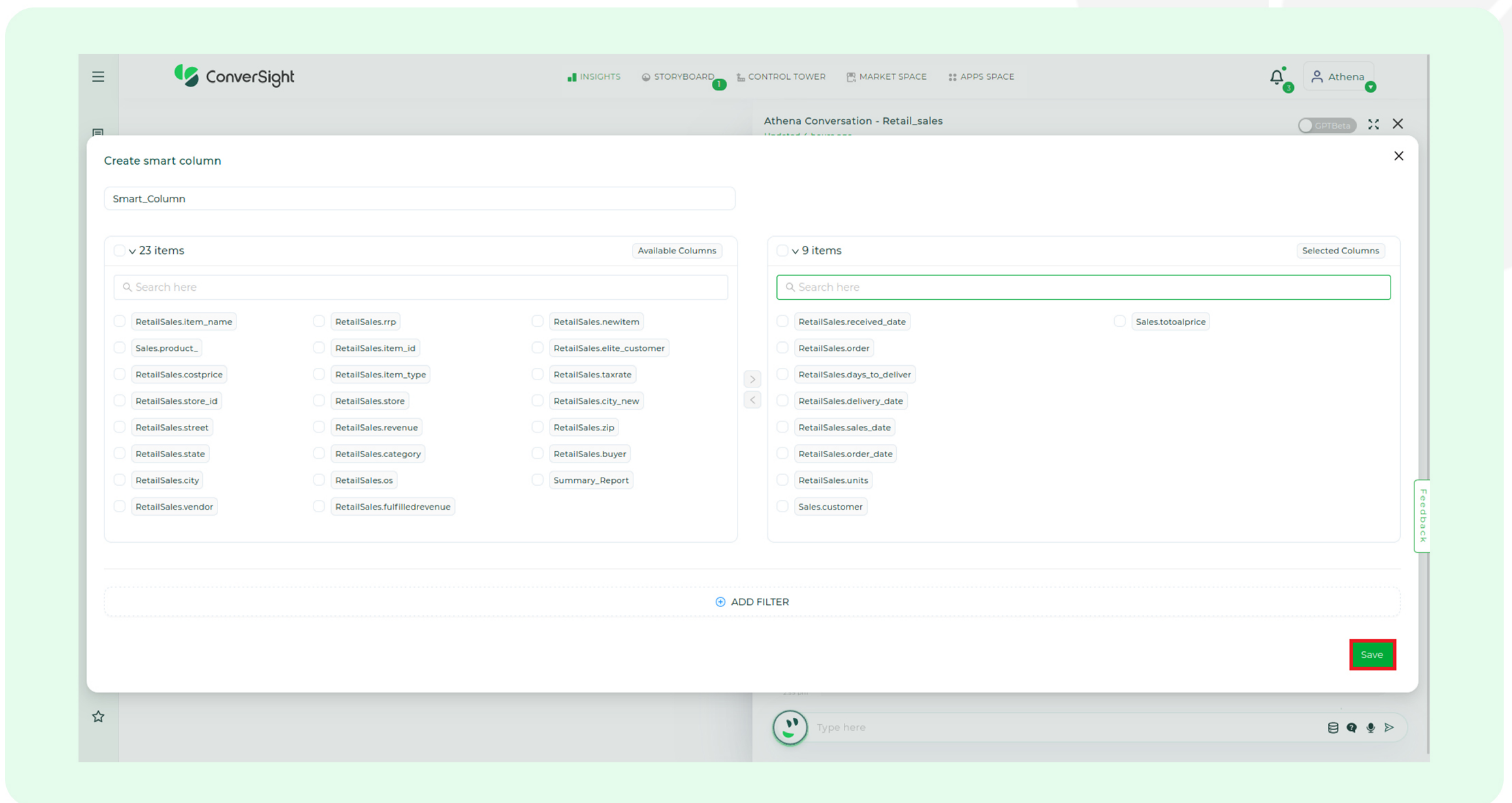
Upon the presentation of the query results, simply select the **'Create Smart Column'** icon to create a new Summary Field.



Upon clicking the **'Create Smart Column'** icon, the subsequent screen will appear. Here, users have the opportunity to input the Smart Column Name, choose the necessary columns from the left-hand partition, where the available columns in the dataset are displayed. Utilize the arrow keys to transfer selected columns from the available column section to the selected column section. By default, the selected column section on the right side holds the columns which are present already in the generated insights and if needed, incorporate filters to formulate the Smart Column.

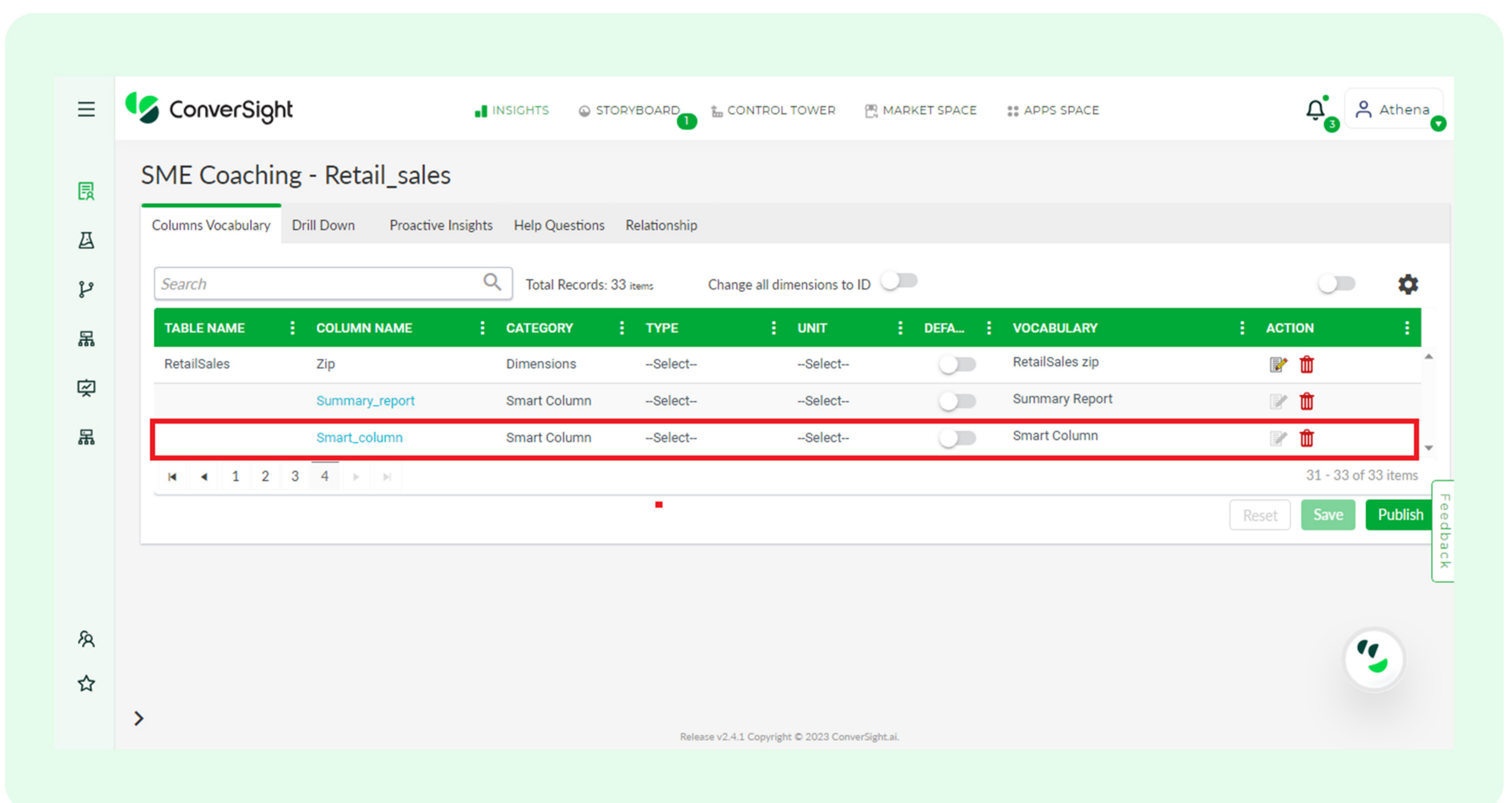


Once you've made your column selections, just press **'Save'** button to create the Smart Column.



Upon successful creation of the Smart Column, users can conveniently view it on the **'Configure SME Coaching'** page.

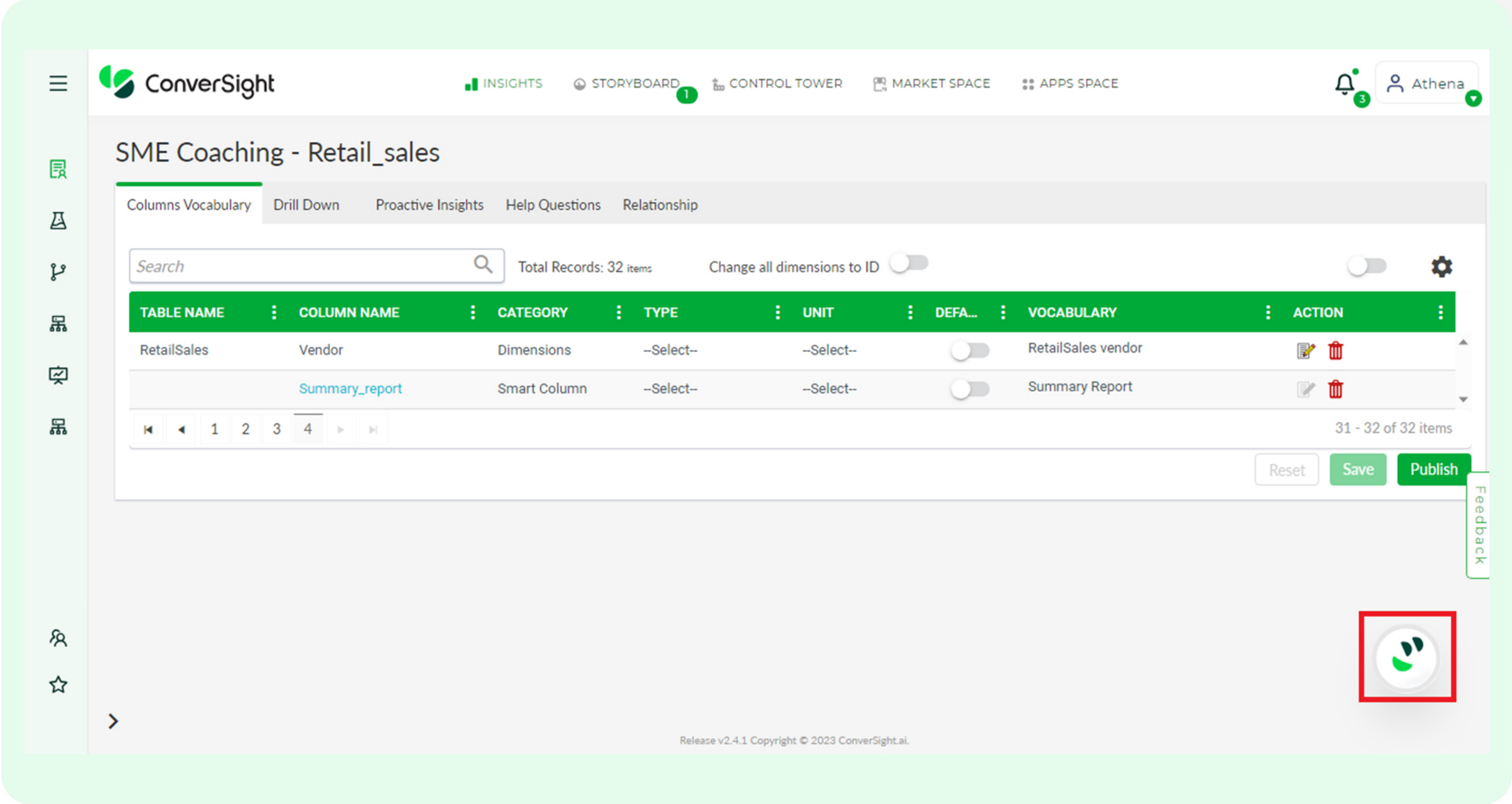
If a user wishes to edit a Summary Field, they can do so by clicking on its name. This action quickly opens the relevant page where they can make necessary edits. Once the changes are done, they can save them by clicking the **'Update'** button.



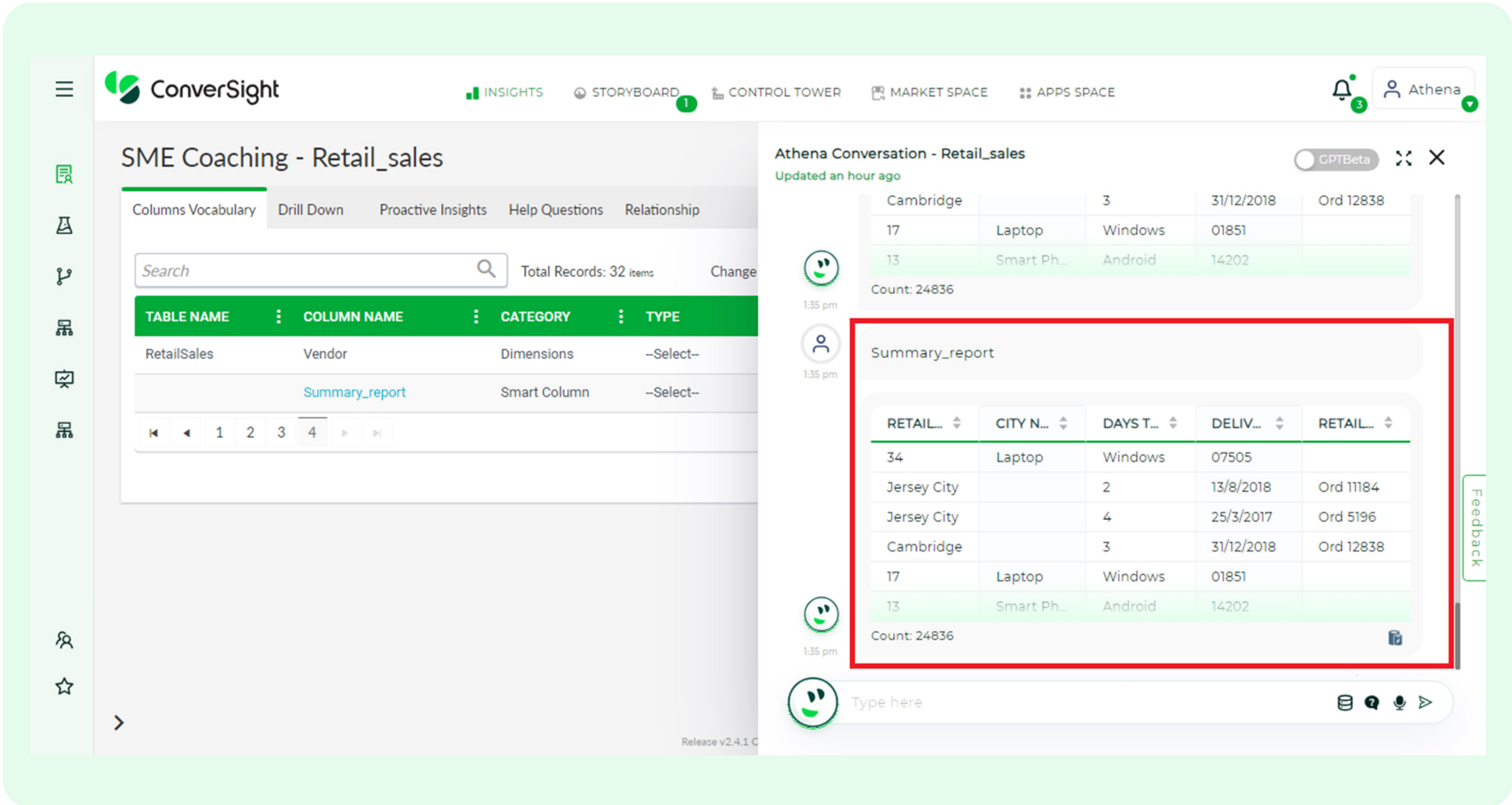


2.5 Viewing Summary Fields

To view the created Summary Field, users can click on the 'Athena' icon.



Now search for the Summary Field's name. This will retrieve all the columns that were selected while creating the Summary Field.



Note

Summary Fields are classified as Smart Column within the column field.

Users can also view the generated Summary Fields in Athena by searching for its designated name. This search will retrieve all the initially selected columns during the creation of the Summary Field.

The screenshot displays the ConverseSight interface. On the left, a 'Columns Vocabulary' table lists various columns from different tables. On the right, an 'Athena Conversation - Retail_sales' window shows a message about a relationship error and a 'Smart_column' table with data.

TABLE NAME	COLUMN NAME	CATEGORY	TYPE
Sales	Product_	Dimensions	--Select--
RetailSales	Costprice	Date	DD-MM-YYYY
RetailSales	Street	Dimensions	--Select--
RetailSales	State	Dimensions	--Select--
RetailSales	Vendor	Dimensions	--Select--
RetailSales	Days_to_deliver	Dimensions	--Select--
RetailSales	Item_id	Date	DD-MM-YYYY
Sales	Totoalprice	Metrics	Currency
RetailSales	Store	Dimensions	--Select--
RetailSales	Units	Metrics	Quantity

RECEIV...	RETAIL...	DAYS T...	DELIV...	ORDER...
	Ord 10797	5	15/7/2018	10/7/2018
	Ord 5537	1	19/4/2017	18/4/2017
13-11-2020	Ord 0318	3	6/2/2016	3/2/2016
	Ord 8657	3	11/1/2018	8/1/2018
	Ord 8964	3	6/2/2018	3/2/2018
	Ord 5551	5	25/4/2017	20/4/2017

3. Benefits

Efficient Report Generation

Summary Fields are incredibly useful for generating reports that require data from multiple columns across different tables. Users can create a Summary Field that includes all the relevant columns for a specific report, making it quick and efficient to generate comprehensive reports without the need for complex queries.

Cross-Referencing and Analysis

When users need to analyze relationships and patterns between different data points, Summary Fields can be used to combine columns that are relevant to a specific analysis. This allows for easy cross-referencing and in-depth analysis of data.

Time Savings in Data Exploration

Instead of manually constructing queries or performing guided searches, users can leverage Summary Fields to quickly retrieve predefined sets of columns. This feature is particularly valuable when exploring large datasets, as it saves a significant amount of time and effort.

Data Visualization and Dashboard Creation

Summary Fields provide a foundation for creating data visualizations and dashboards. Users can select the most important columns for visualization and use these fields to create informative charts, graphs, and dashboards that convey insights effectively.

Standardized Data Analysis Workflows

Summary Fields can be used to establish standardized data analysis workflows within an organization. Teams can create and share Summary Fields to ensure consistency in data analysis approaches, making it easier to collaborate and share insights across the organization.

4. Conclusion

ConverSight's Summary Fields feature emerges as a pivotal asset in the realm of data analysis, offering a streamlined and efficient approach to report generation and data exploration. Whether accessed through SME or Athena, this transformative feature empowers users to customize fields, add filters and categorize columns with precision enhancing overall user experience. The ability to enhance search outcomes by applying multiple filters, coupled with the flexibility to easily modify or remove fields, ensures adaptability to evolving data analysis needs.

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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

