

Exploring Data Insights with ConverSight's Drill Down

A Comprehensive Guide to Drill Down for Enhanced Data
Analysis and Decision-Making.





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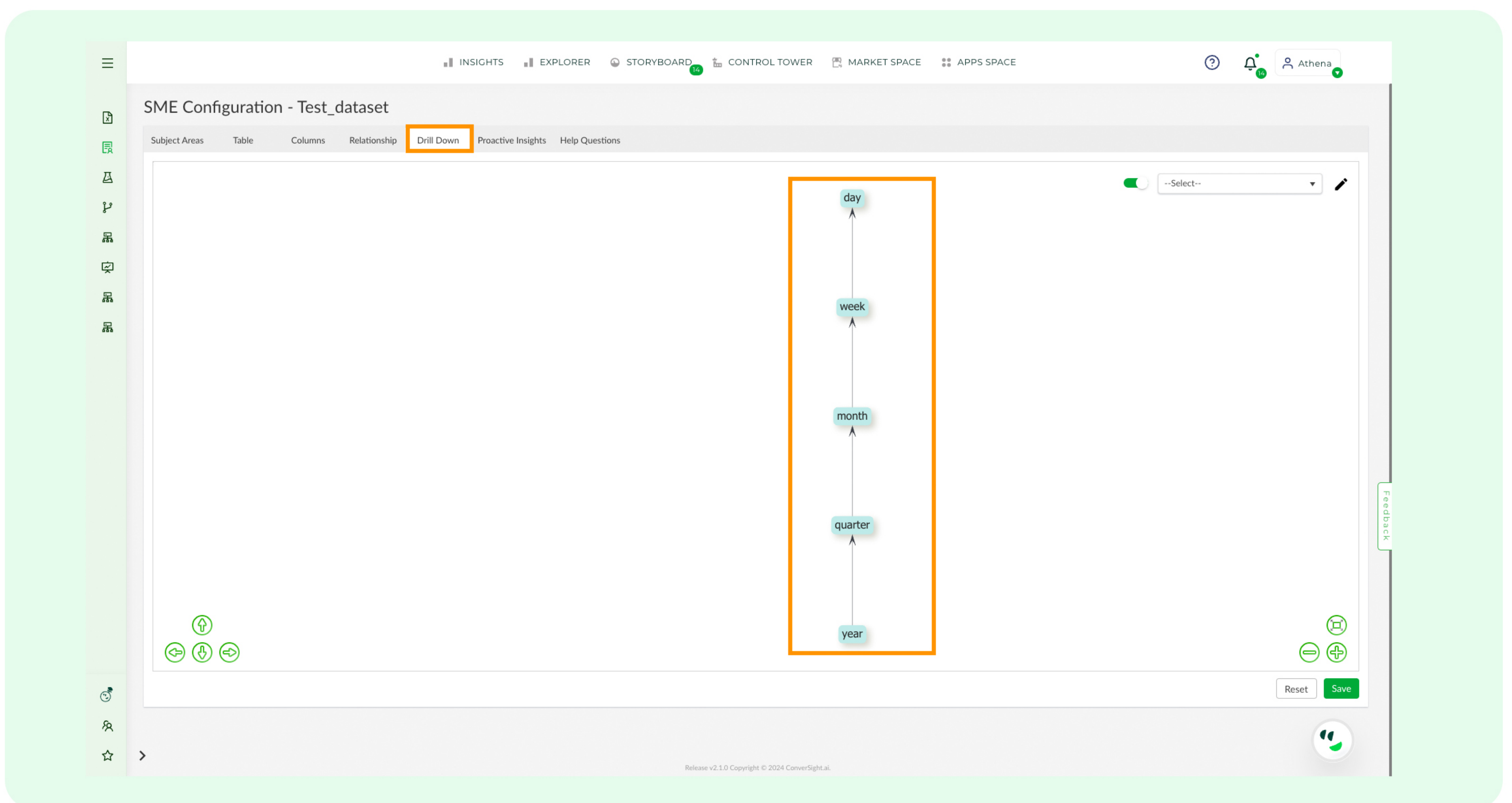


I. Introduction

In the realm of business intelligence, the concept of Drill Down is a powerful tool that allows users to seamlessly transition from a high-level summary of data to a more detailed and granular perspective. This feature is akin to peeling back the layers of an analytical onion, where each click or interaction reveals deeper insights into the data being examined. ConverSight's Drill Down is an indispensable function, to analyse your data, offering the ability to explore, dissect and understand complex datasets with ease. This exploration capability empowers you to uncover hidden trends, patterns and valuable information lurking beneath the surface, ultimately aiding in more informed decision-making and a deeper comprehension of the data at hand.

2. Drill Down in ConverSight

Drill Down is a functionality that enables users to seamlessly transition from a broader data overview to a more detailed perspective with a simple mouse click. For instance, consider a revenue by year report where you can select the revenue, click on it and promptly access revenue breakdowns by quarter, month, week and day. This detailed exploration occurs when you've defined a specific path for deeper data analysis.



Drill Down allows users to delve deeper into increasingly specific layers of the data or information under analysis. This approach provides users with deeper insights into the data by revealing the constituent elements contributing to the figures they are scrutinizing. Moreover, by presenting only one layer of data at a time, features like drill down streamline server queries, substantially improving and delivering significant value to the end-user.

2.1 Navigating to Drill Down

The drill-down feature is user-customizable in ConverSight for added convenience. Let's now explore the steps to create a drill-down within the platform.

Step 1: Select **'Data Management'** from the **'Data Workbench'** menu.

The screenshot shows the ConverSight Data Workbench interface. On the left sidebar, the 'Data Management' menu item is highlighted. The main content area displays two charts:

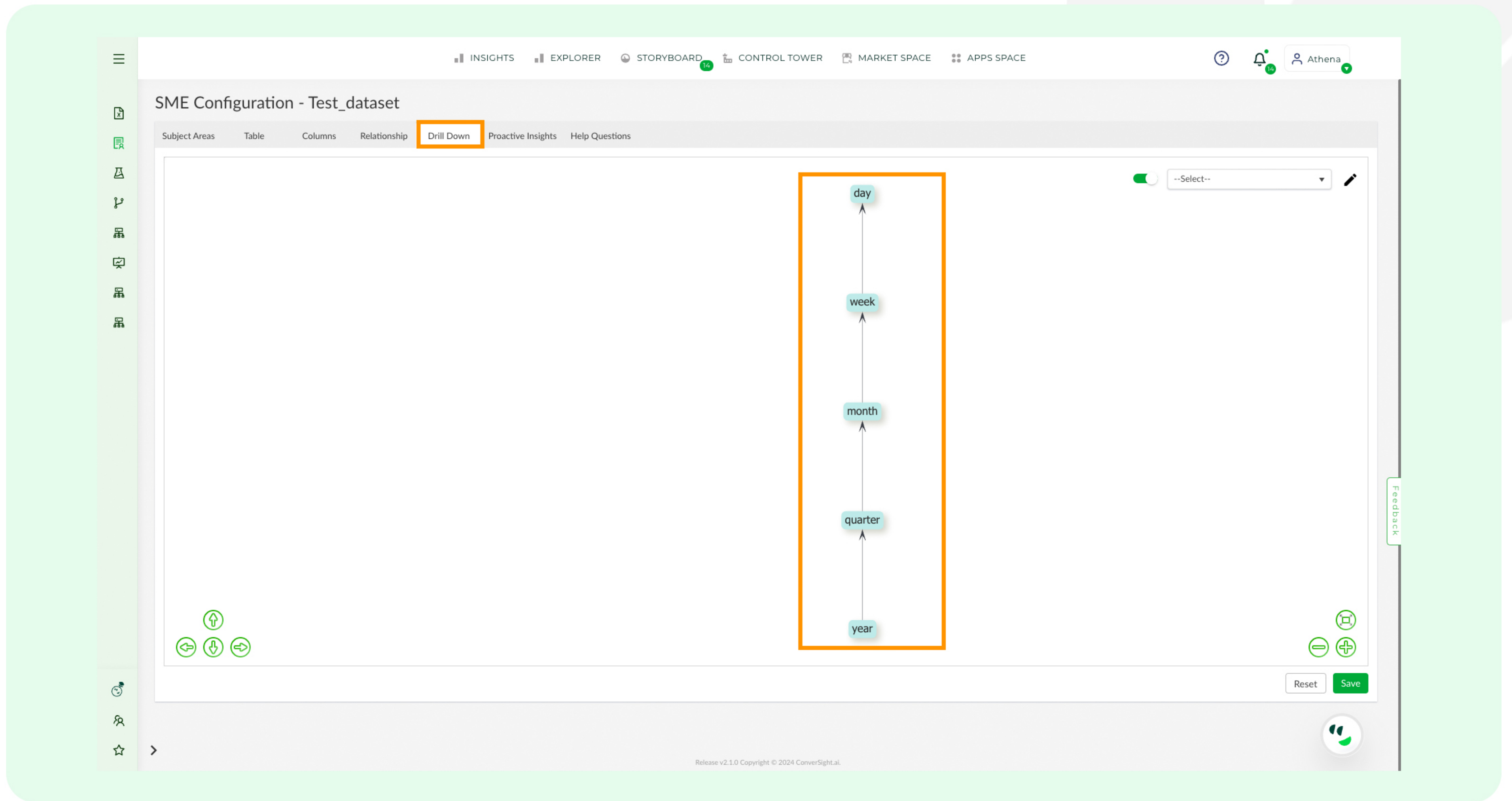
- Revenue by customer and units sold:** A bar chart showing revenue (left axis, 0 to 60m) and units sold (right axis, 0 to 100k) for various customers. The x-axis lists customers: Chris Martino, Fran Sullivan, Izzi Jones, Kei Thompson, Mo Myers, Nass Torres, and Sascha Johnson.
- Customers who generated the highest revenue:** A pie chart showing the revenue contribution of five customers: Fran Frumine (\$54.11 m), Sascha Johnson (\$65.50 m), Nass Torres (\$54.49 m), Kim Rogers (\$63.82 m), and Kei Thompson (\$64.85 m).

Step 2: Choose the dataset you want to set up a drill-down for, then click the **'Settings'** icon located in the Action column. A dropdown menu will appear, where you should select **'Configure SME'** from the available options.

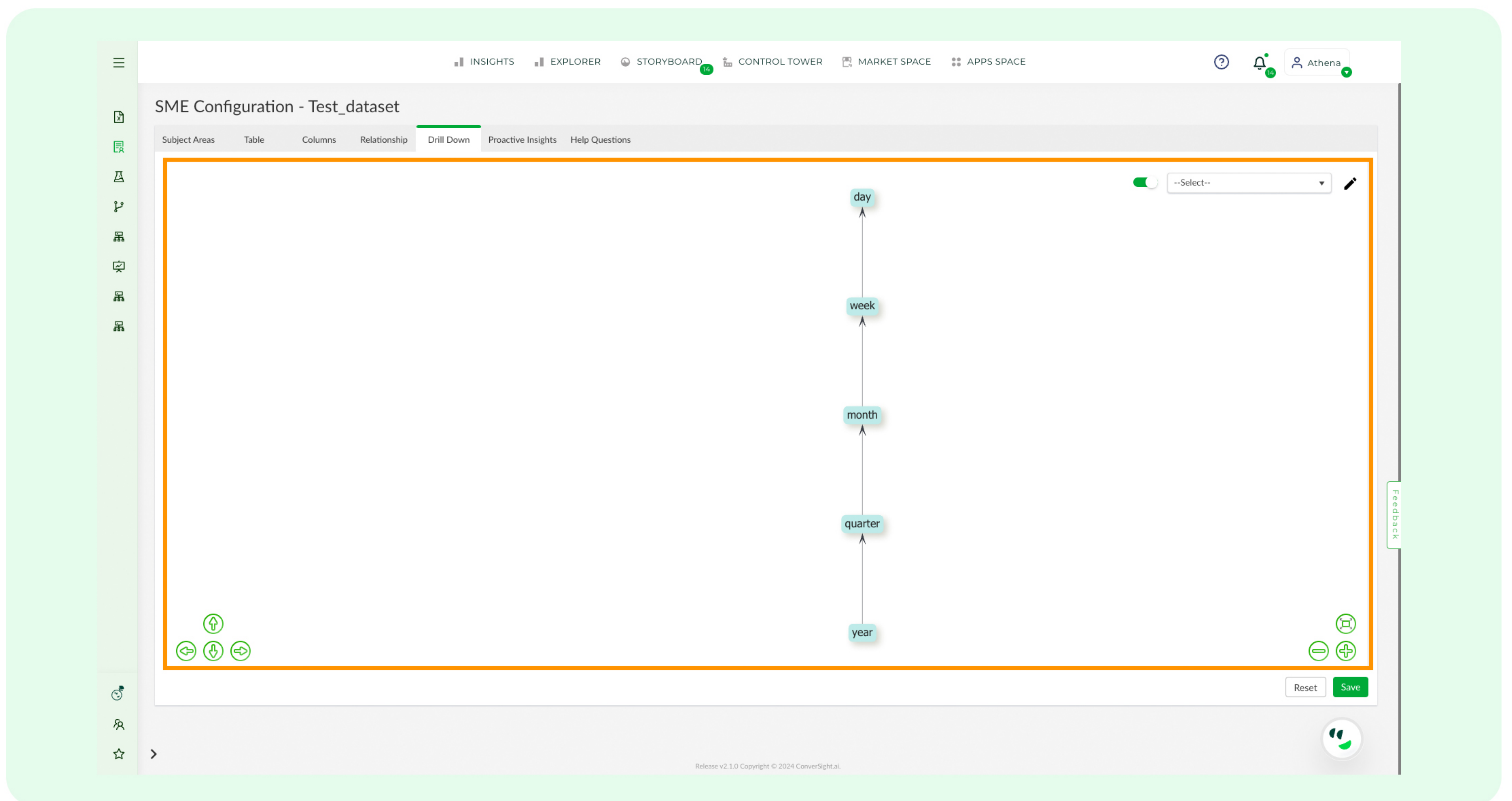
The screenshot shows the ConverSight Datasets table. The table has columns: NAME, ACTIVITY STATUS, LAST PUBLISH, LAST ACTIVITY, and ACTION. The 'Test_Dataset' row is selected, and the 'Settings' icon in the ACTION column is highlighted. A dropdown menu is open, showing the following options:

- Edit
- Configure SME**
- Show Recent Activity
- Role & Group Management
- Republish
- Schedule
- Show Jobs
- Fork
- Delete

Step 3: Now, click on the 'Drill Down' Tab.



Step 4: Upon arriving at this page, you will immediately encounter a pre-existing drill-down structure.

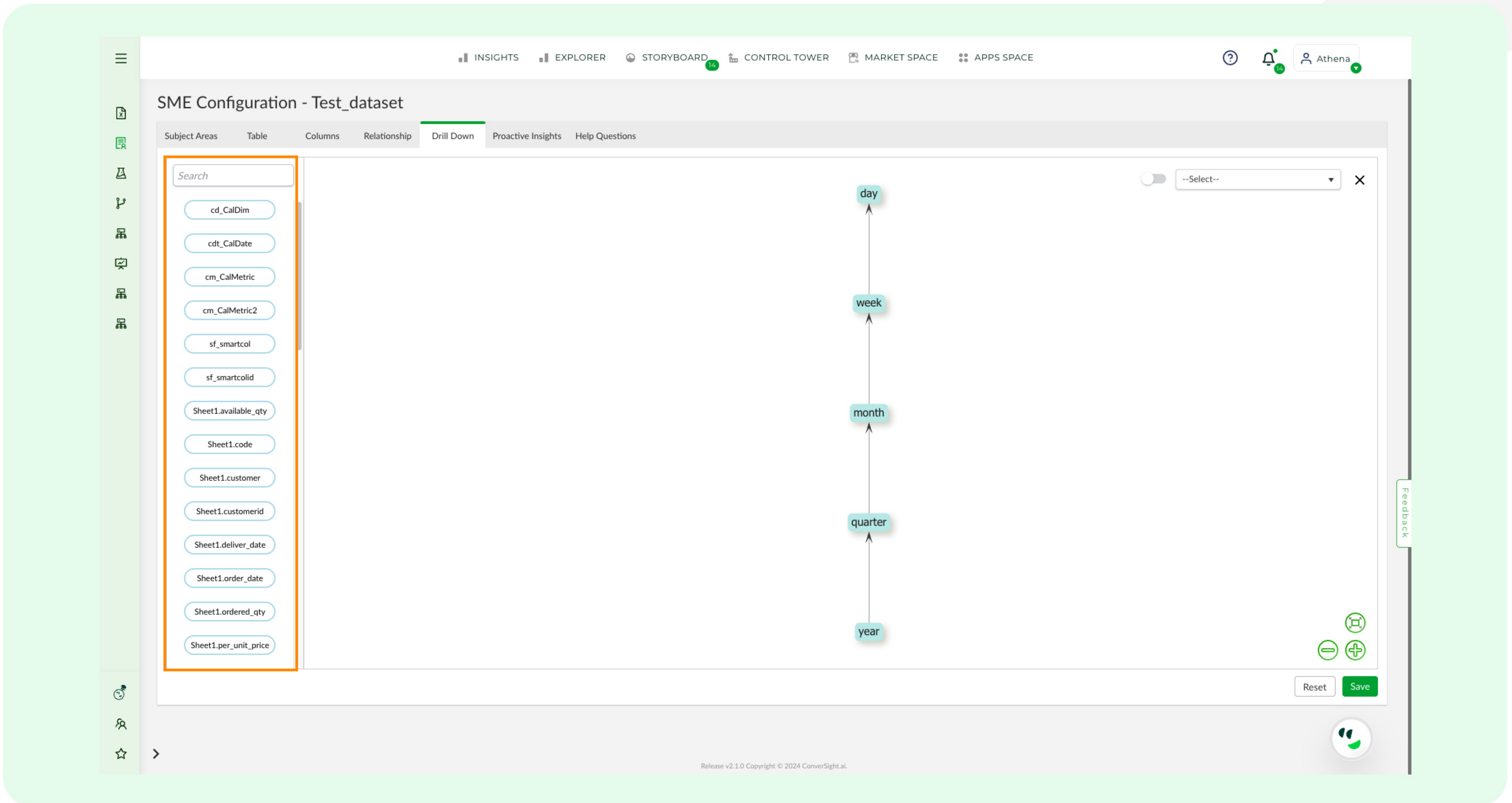




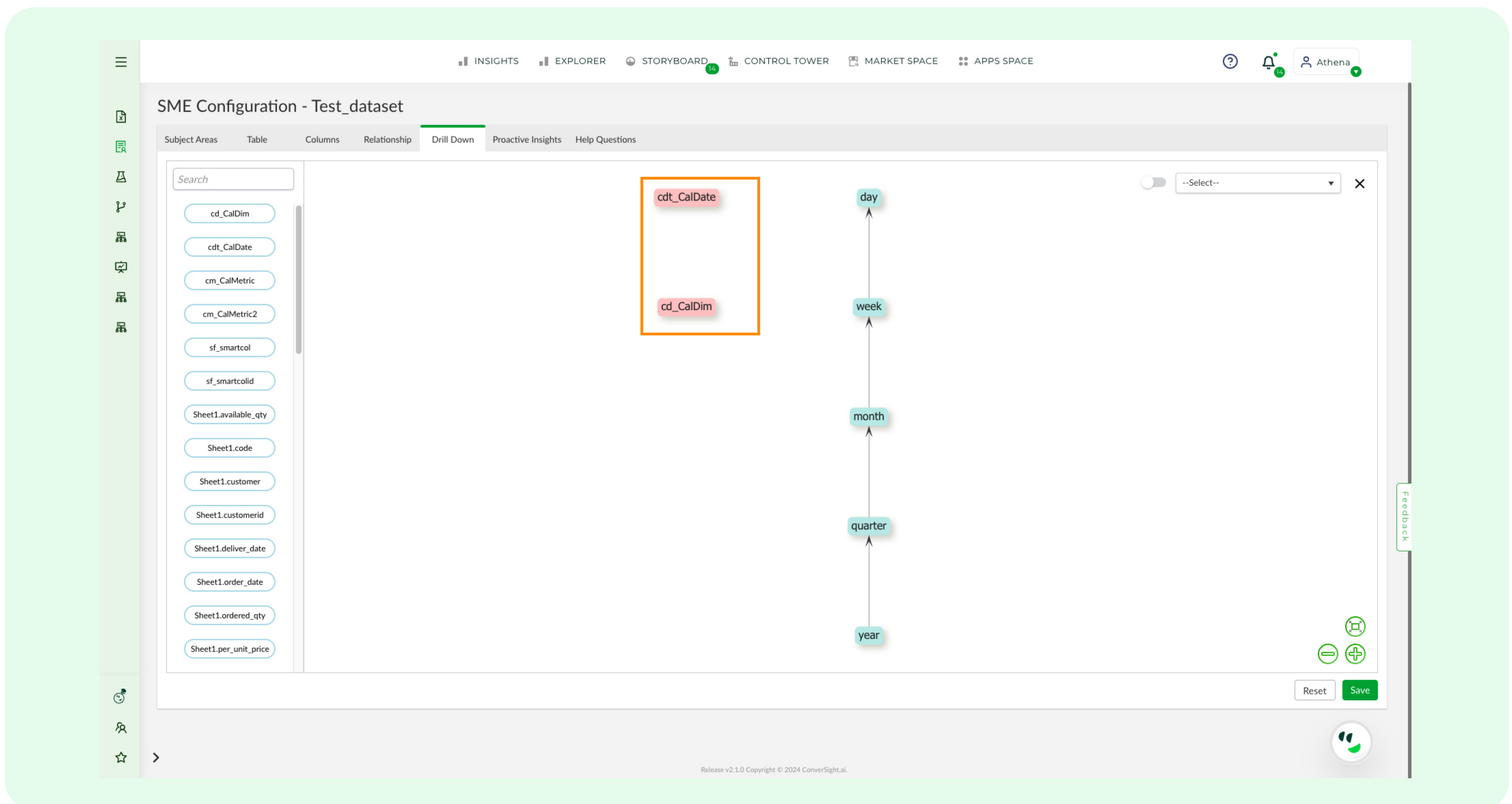
2.2 Creation of Drill Down

Now, let's learn how to establish a Drill Down structure for the dataset.

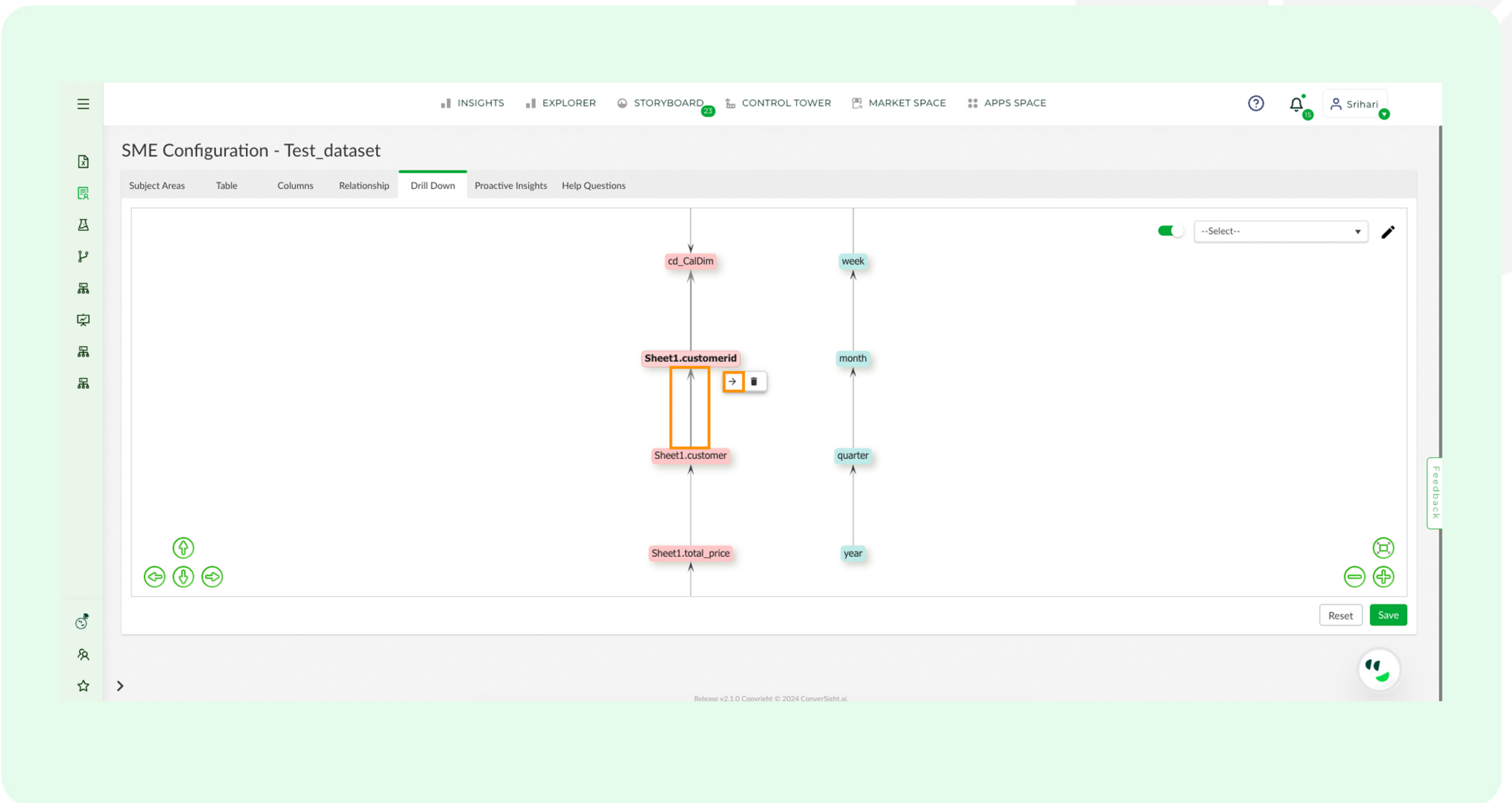
Step 1: By clicking on the 'Edit' icon, you can observe that the columns within the dataset are listed on the left side.



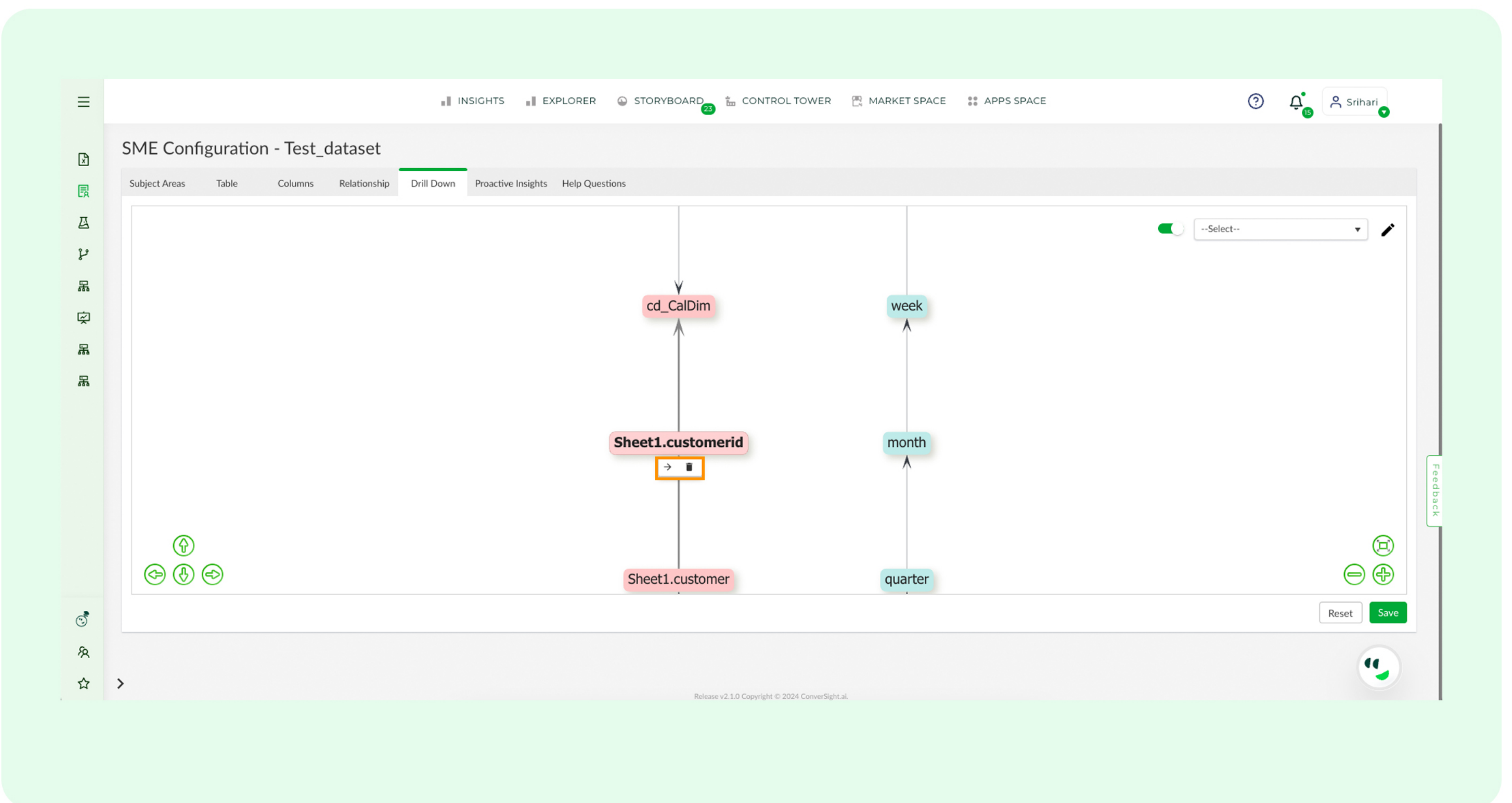
Step 2: Feel free to drag and drop the column onto the screen to establish the hierarchy you intend to create.



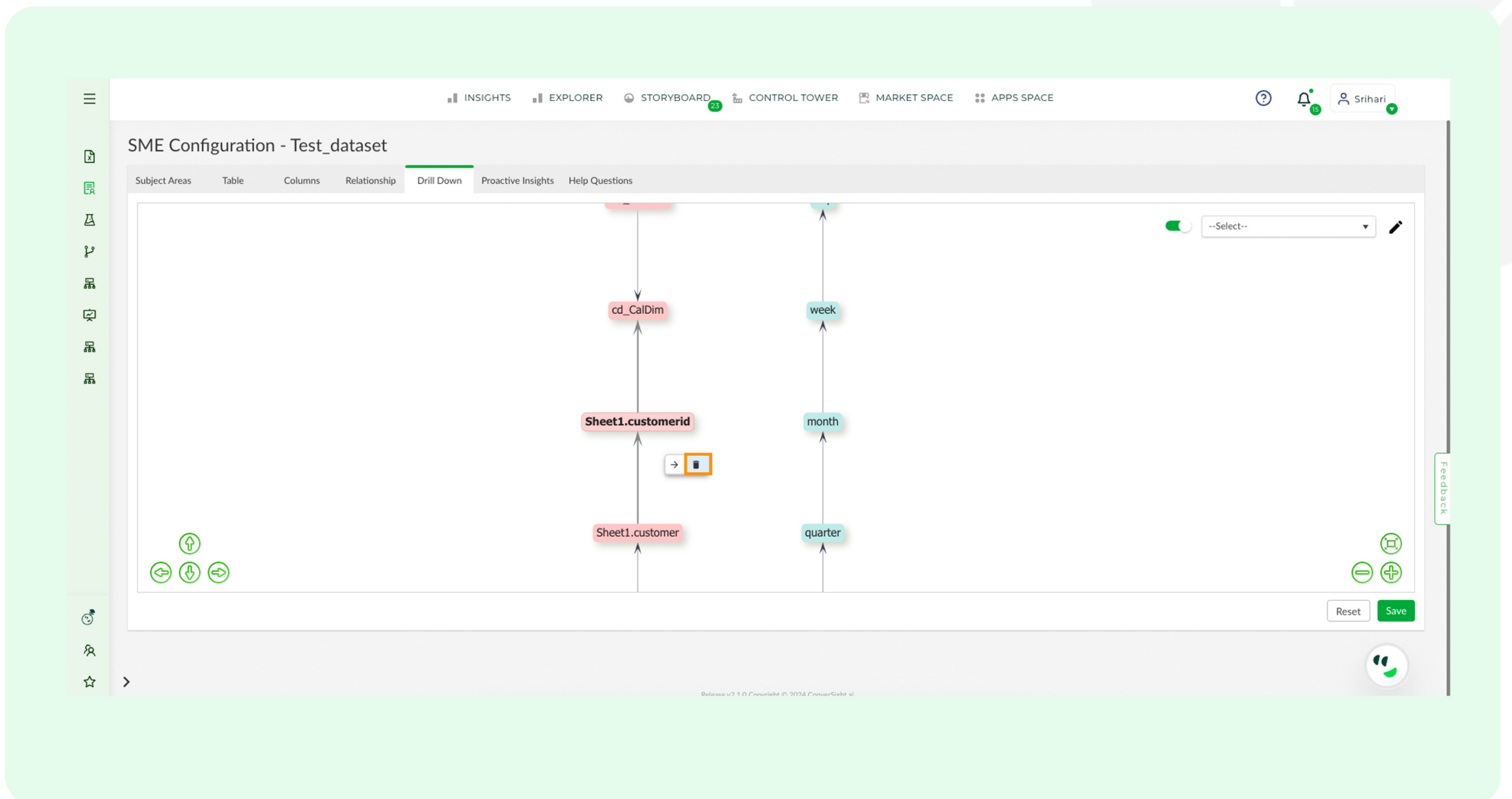
Step 3: To establish a link between the chosen columns, click on the **'Column'**, locate the **'Arrow'** icon and use it to connect the respective columns as needed.



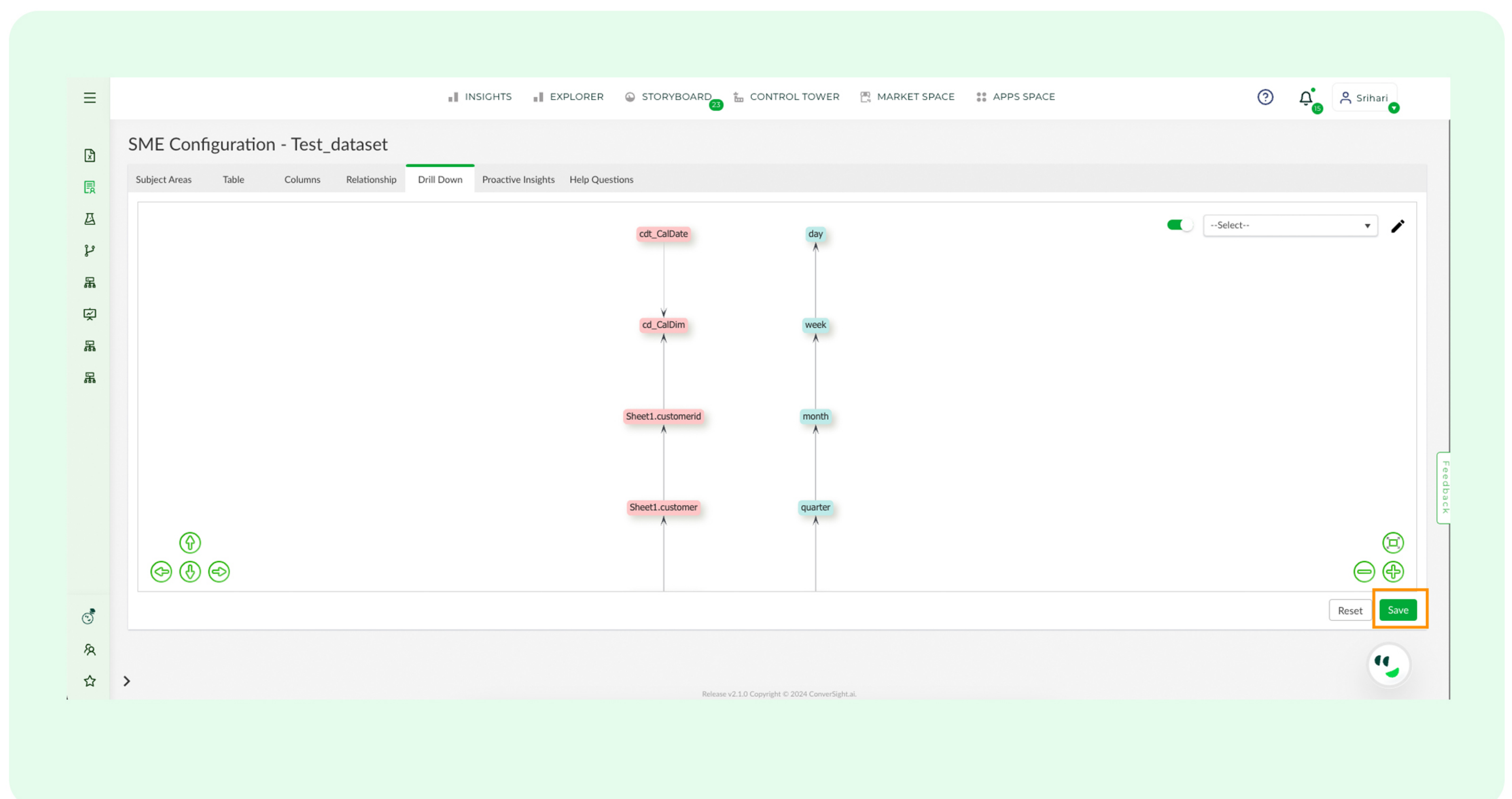
Step 4: By clicking on the **'Arrow'**, you can access the corresponding icon that permits you to either delete or modify the arrow.



Step 5: Clicking on the column also provides you with the capability to delete it by selecting the **'Delete'** icon.



Step 6: Press the **'Save'** button to retain your modifications or creation of your Drill Down structure, then navigate to the **'Columns Vocabulary'** page and select the **'Publish'** button to make your changes live.

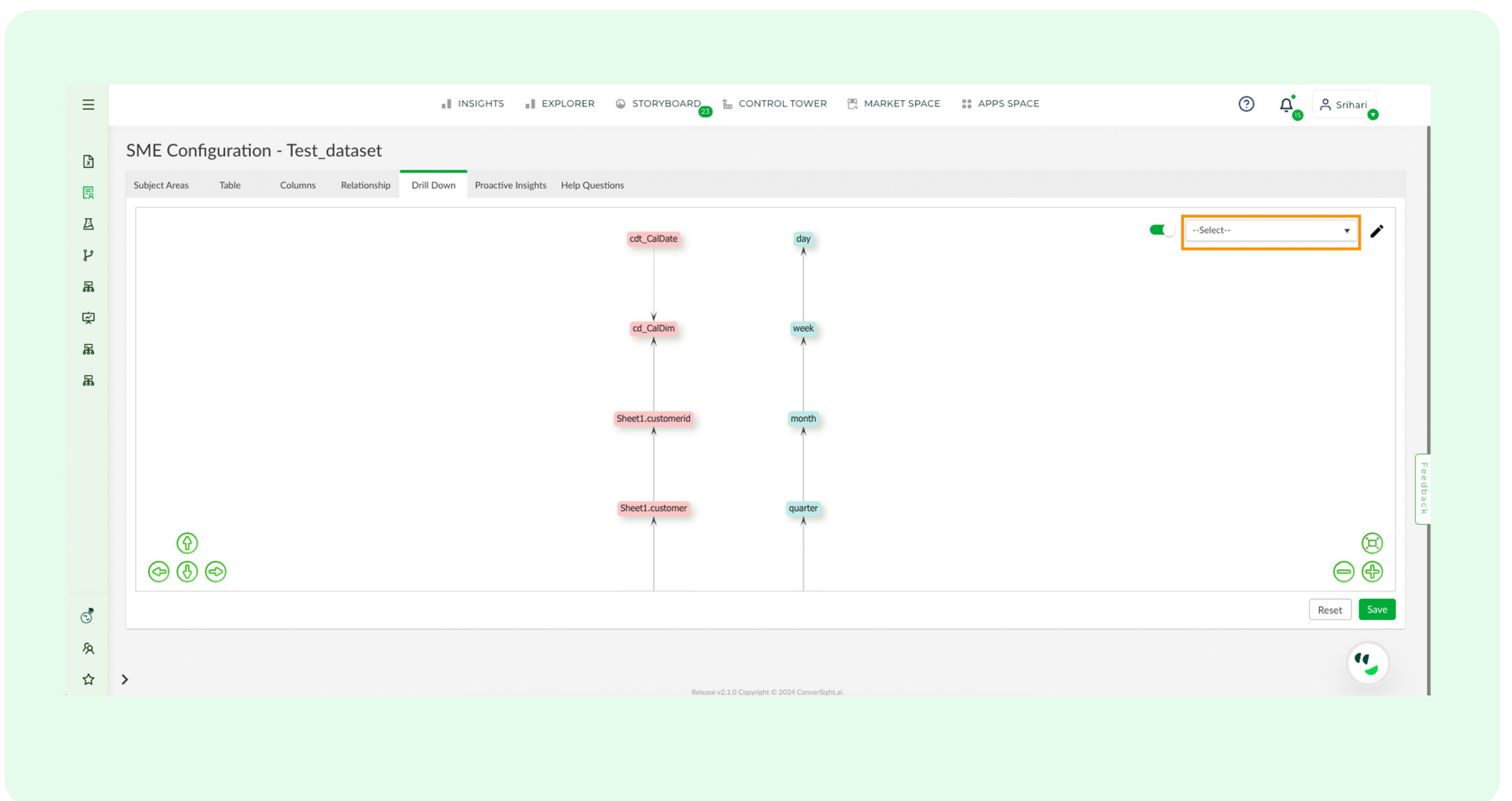


Note:

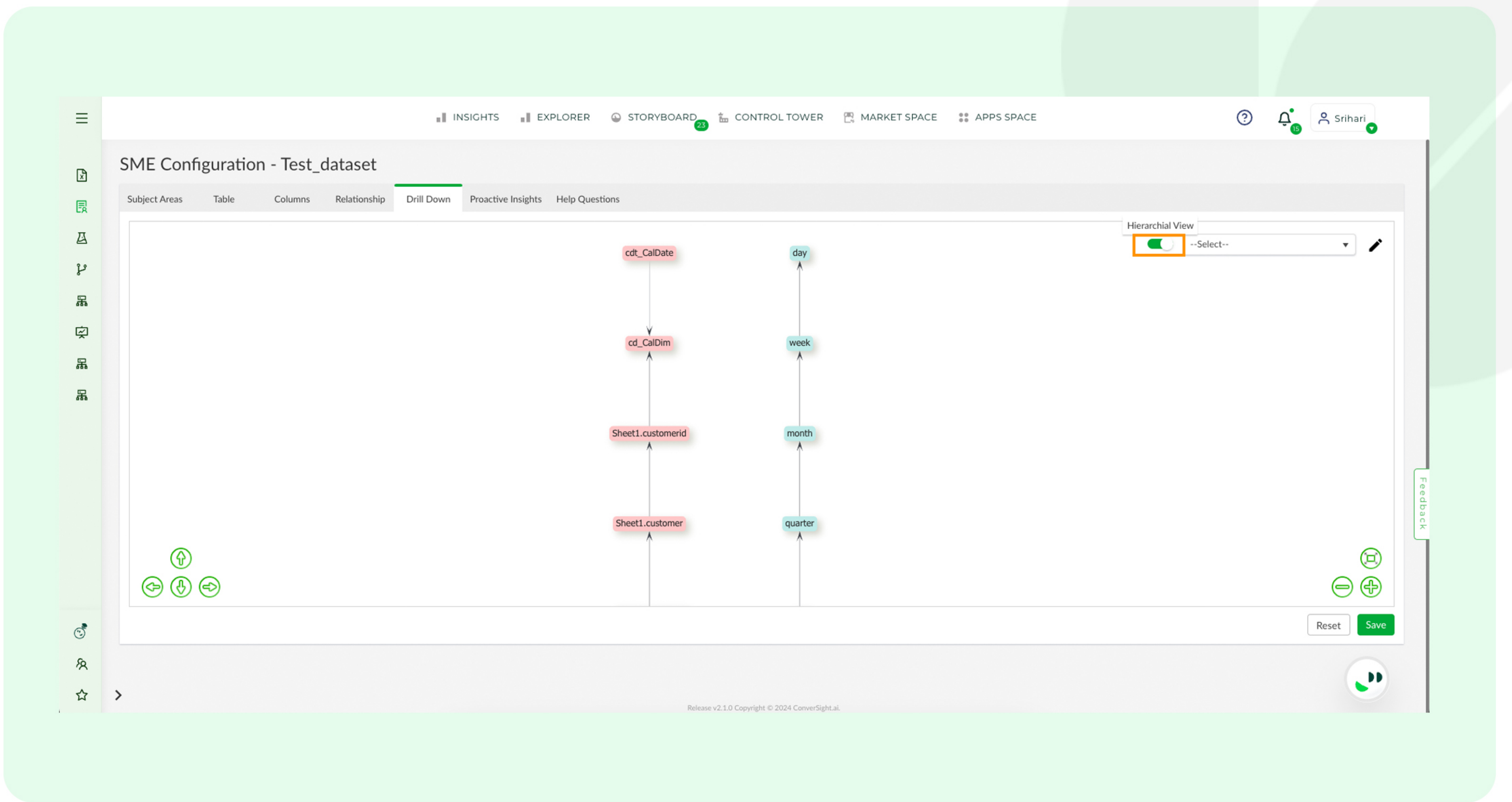
When establishing connections between arrows, please be aware of the limitations, which include the disallowance of one-to-many relationships and self-looping connections.

The **'Select'** option within the drill down feature displays a list of all the column names from the dataset that you've chosen for the drill-down path. This functionality is particularly useful when working with the same dataset that contains multiple drill-downs. By providing a convenient list of column names, making it easier for you to pinpoint and choose the desired drill-down path.

In scenarios where you've created several drill-down paths for a dataset, it can become challenging to quickly identify and select a specific path due to the sheer volume of columns involved. This ensures efficient navigation and analysis of complex datasets with multiple columns and paths.



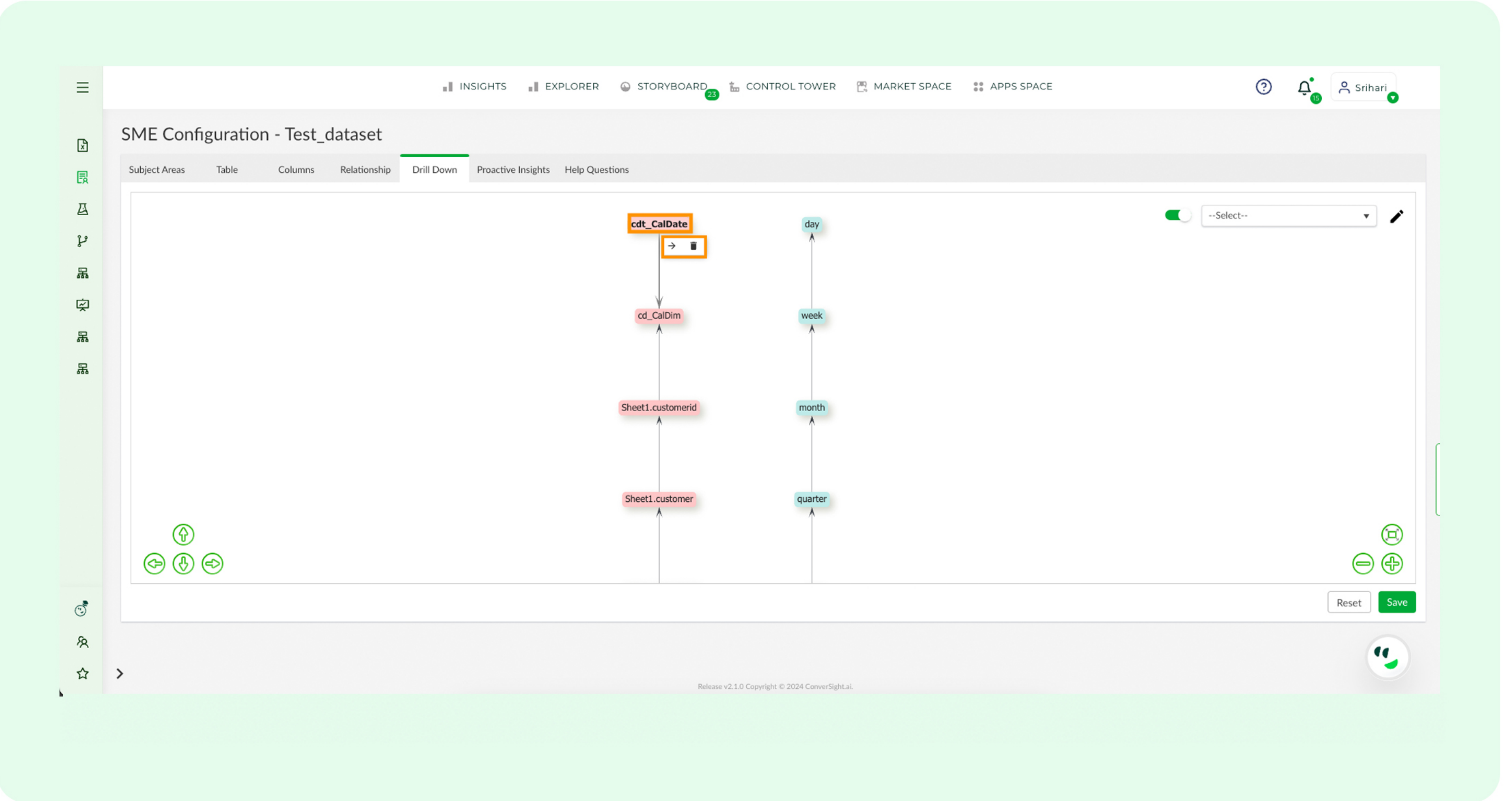
The **'Toggle'** feature enables you to display the drill-down information in a hierarchical view. It is a way of organizing data, in a structured format that represents a system of levels, with each level containing sub-levels or components. It typically resembles a tree-like structure where higher-level elements have subordinate elements branching from them.



2.3 Tailoring Existing Drill Down

To modify the existing drill-down structure, specific columns from the dataset have already been selected.

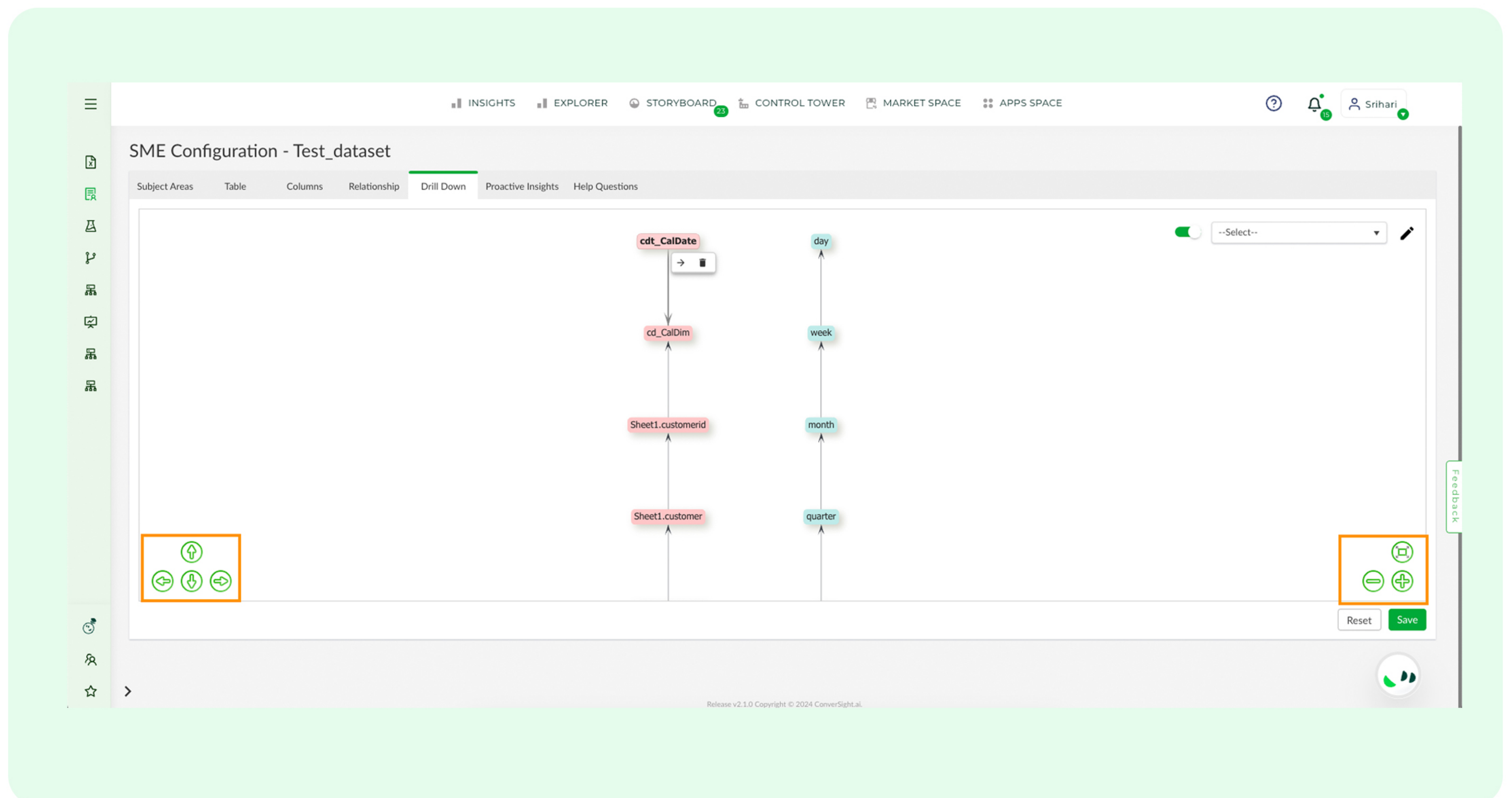
You have the capability to interact with these selected columns by clicking on them, either for directing arrows to connect a column with another or remove a column from the selection entirely.



3. Visual Configuration

The **Directional Arrows** which include, left, right, up and down, provide you with the means to precisely reposition your Drill Down structure, aligning it to your preferred visibility. These arrows enable you to shift the Drill Down location, ensuring that your viewpoint is optimized for effective observation of the relevant elements.

In addition, the minus, plus and reset icons grant you meticulous control over the adjustment of your Drill Down. The minus icon decreases its size, the plus icon enlarges it and the reset icon restores the proper alignment. Utilizing these icons allows you to finely calibrate the configuration and achieve accurate alignment for your Drill Down structure.



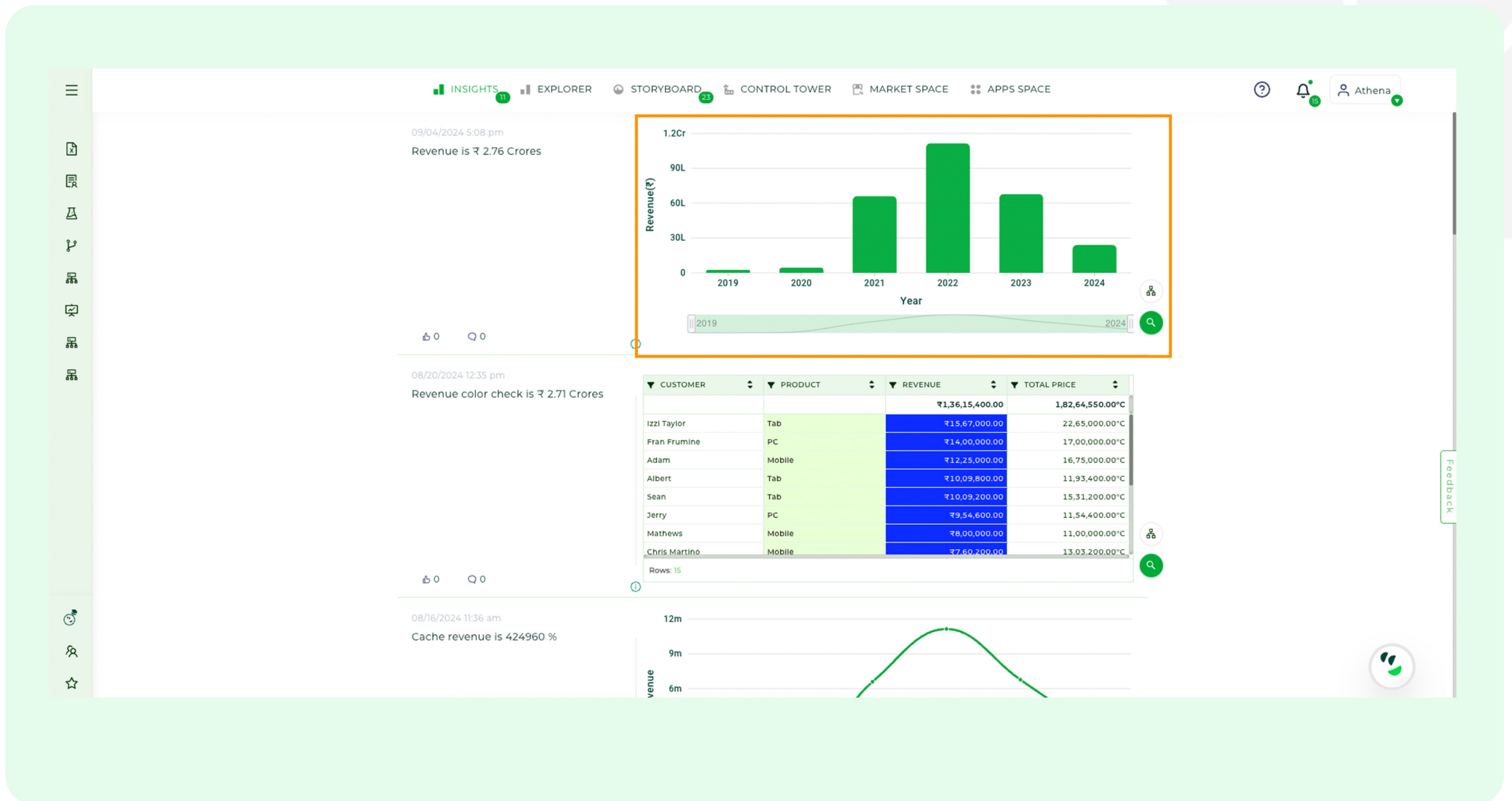
4. Accessing Drill Down

Once you've established your Drill Down structure, let's explore how this Drill Down feature can be utilized in different ways. You can access it via,

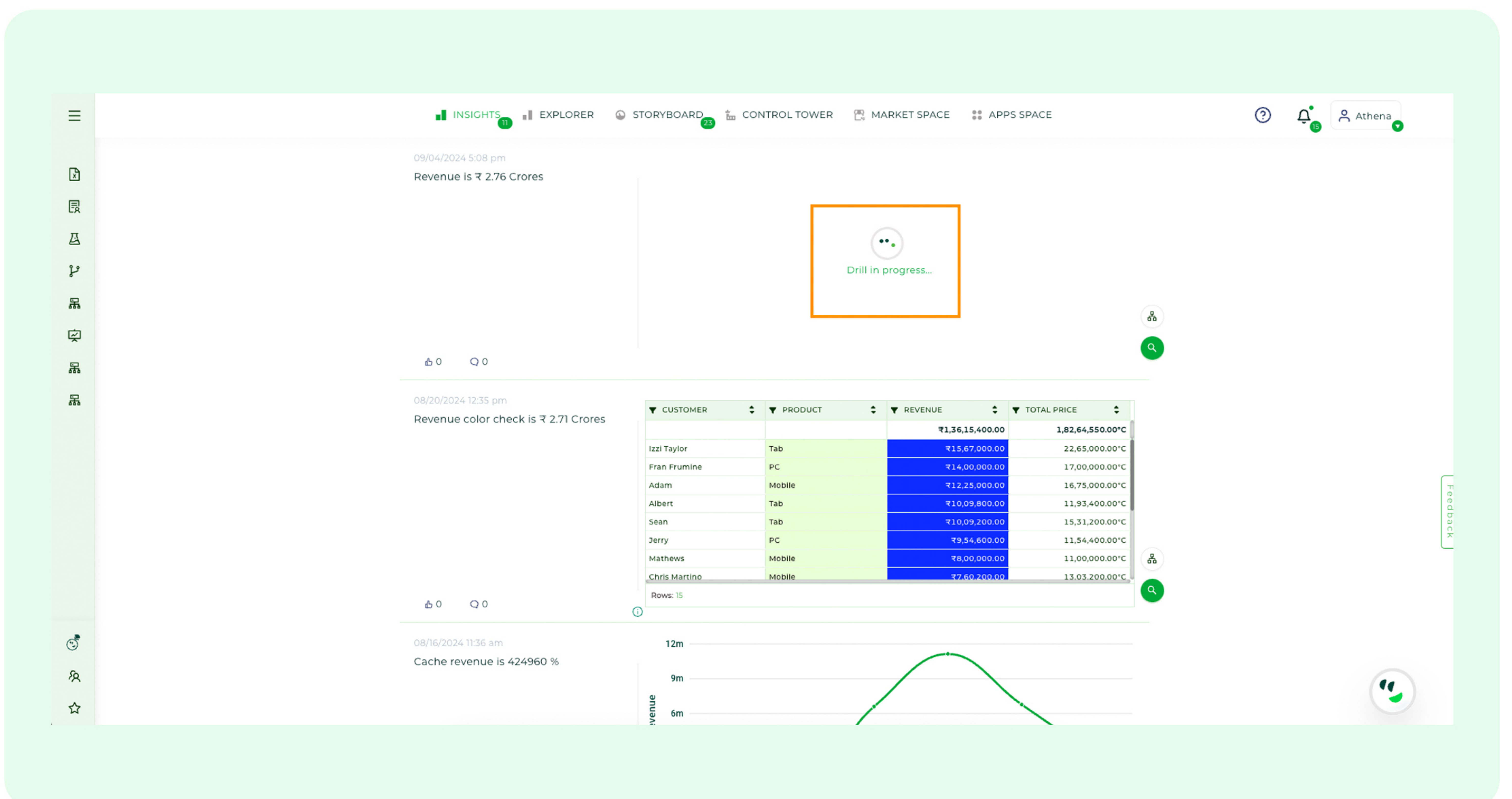
- Insights
- Storyboards
- Querying Athena

Insights

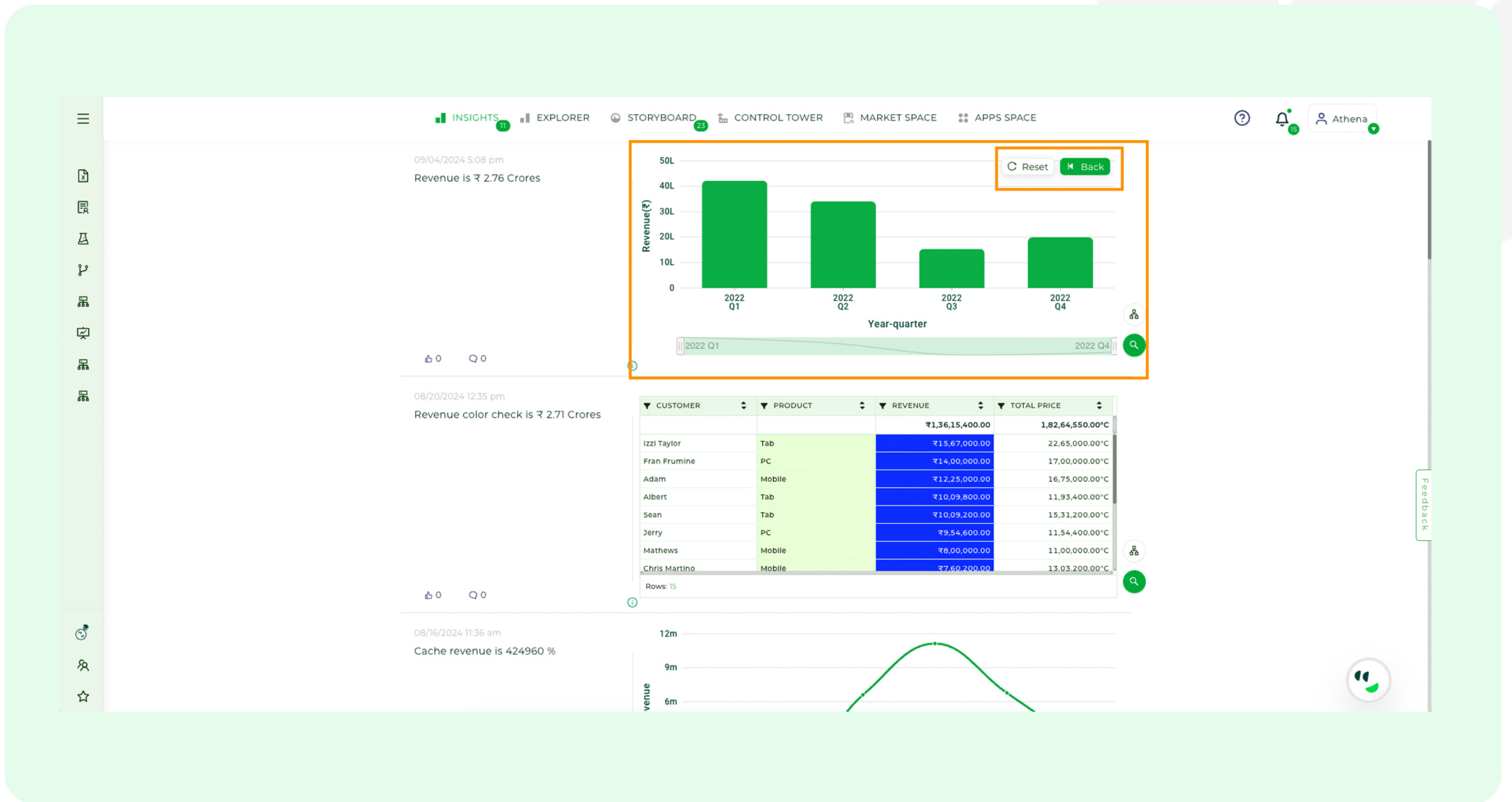
In Insights, you can access your drill-down feature in the following ways: Either directly double-click on the **'Column'** or click on the **'Explore'** icon and then double-click on the **'Column'**.



Doing so will trigger the selected column to be drilled down, revealing a detailed view.

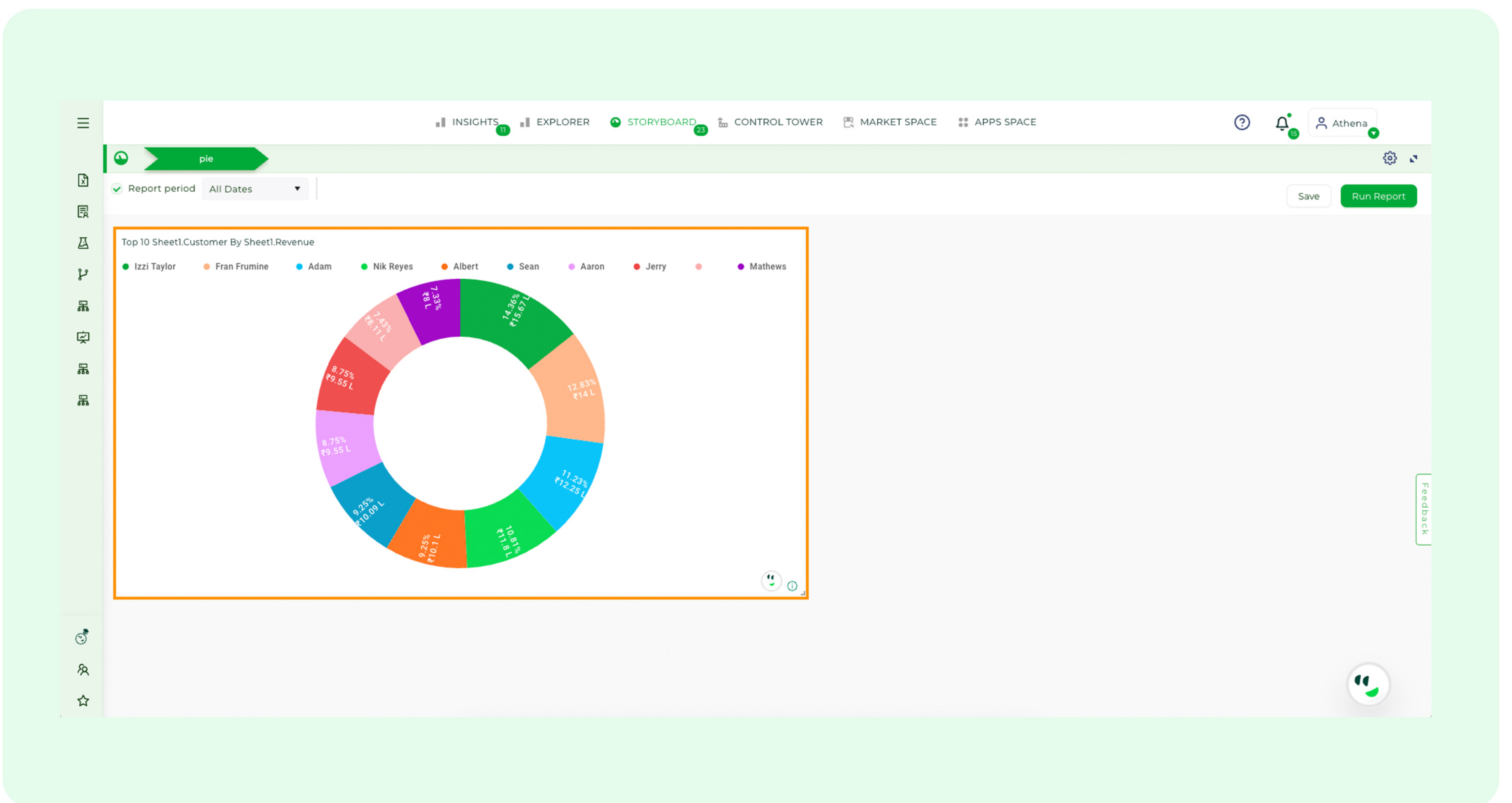


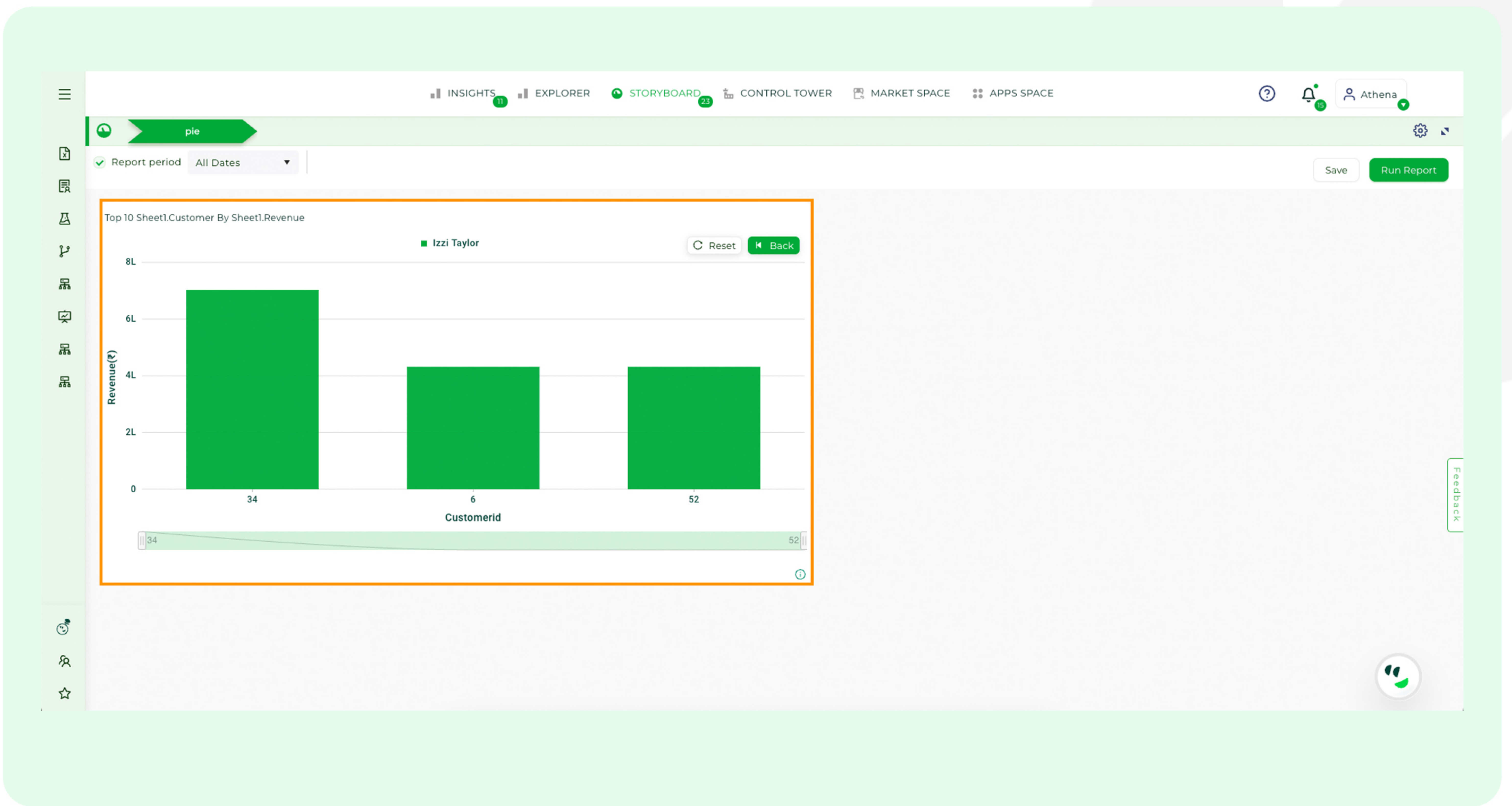
The **'Reset'** option enables you to restore to the initial state and the **'Back'** option lets you go back to the previous state.



Storyboards

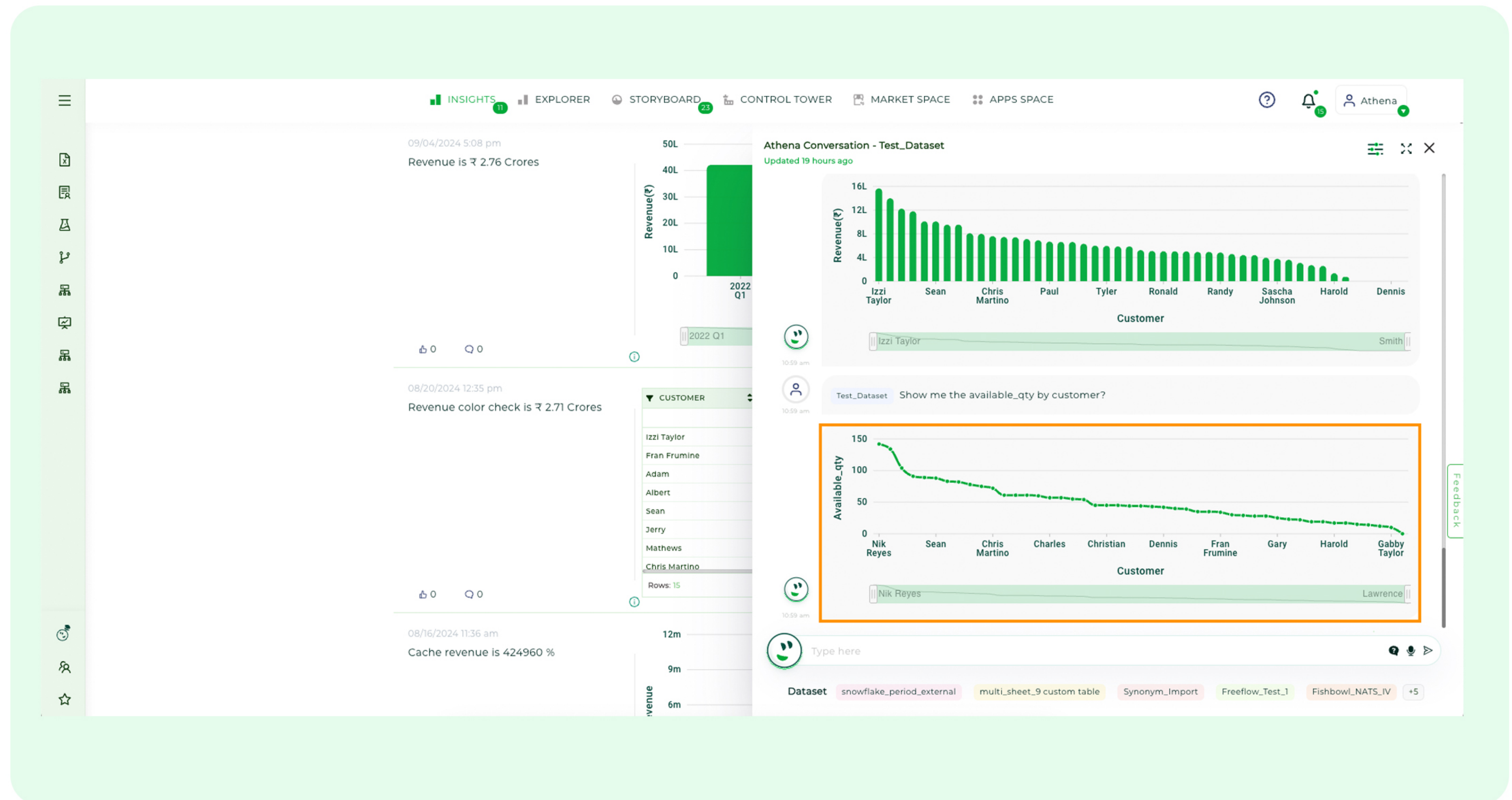
In Storyboards, you can access the Drill Down, select the **'Pinned Storyboard'** and then double-click on the **'Column'**.

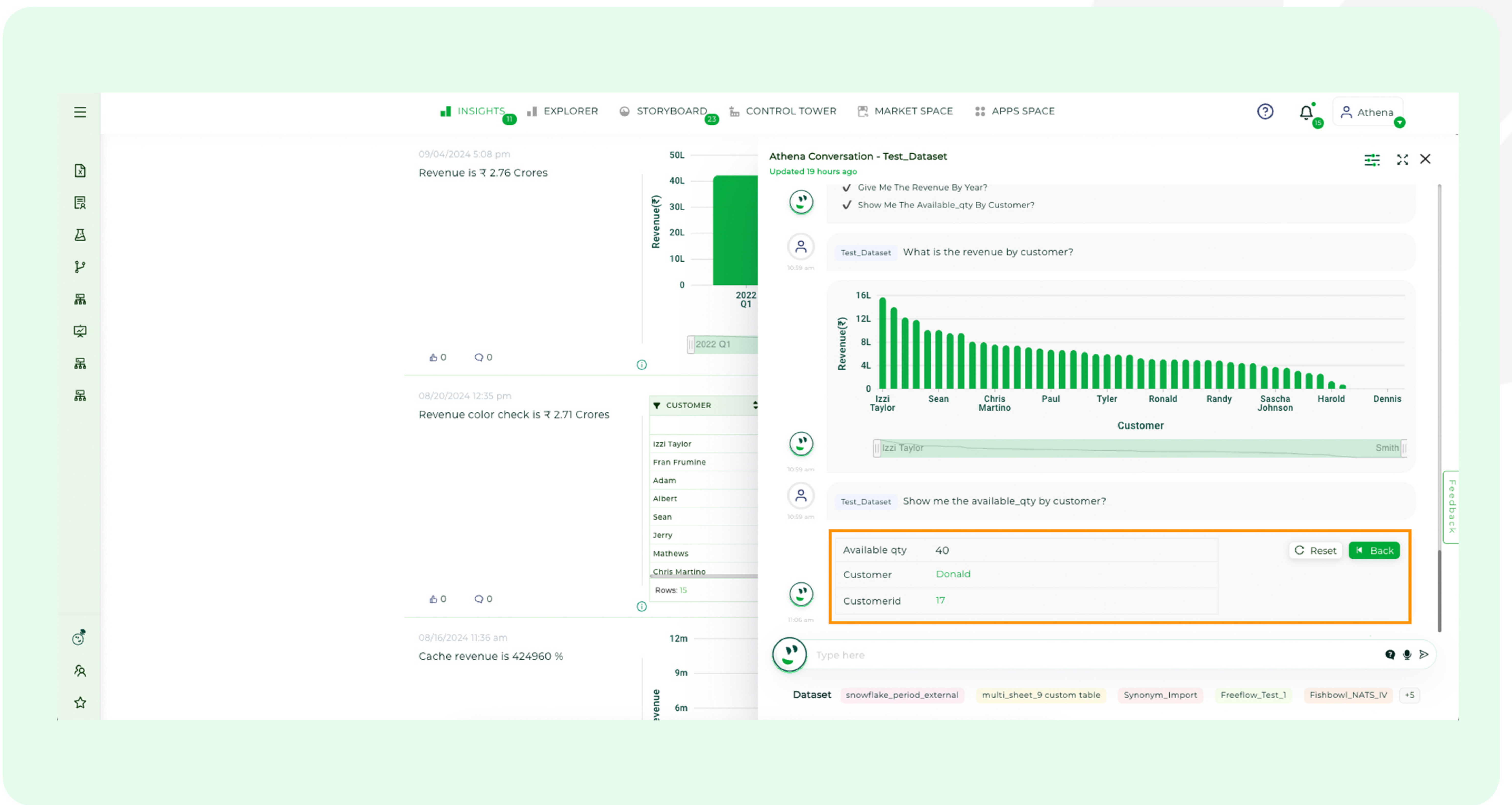




Querying Athena

In Athena, you can access the drill down feature by executing a relevant query and then double-clicking on the desired **'Column'**.





5. Conclusion

The Drill Down feature in ConverSight emerges as a potent instrument, facilitating a seamless transition for users from overarching data summaries to intricate insights. By merely clicking and interacting with the interface, you can dissect data from multiple angles, thereby fostering a profound understanding of the information at hand. Whether users access it through Insights, Storyboards or Athena queries, the Drill Down feature provides versatile pathways to access enriched data views. In essence, ConverSight's Drill Down functionality transforms the data analysis process into an engaging and insightful journey, unlocking deeper layers of information and maximizing the potential of data-driven decision-making endeavors.

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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

