

External Connectors

Seamless Integration for Real-Time Data Retrieval.





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I. Introduction

ConverSight simplifies connections to various data sources like databases, spreadsheets, cloud storage and APIs using data connectors. With over 120+ connectors, accessing and retrieving data becomes straightforward. External connectors play a crucial role in ConverSight's dataset configuration, establishing seamless connections between the platform and external data sources. These connectors act as direct pathways for fetching data from source databases through querying, ensuring efficient and real-time access.

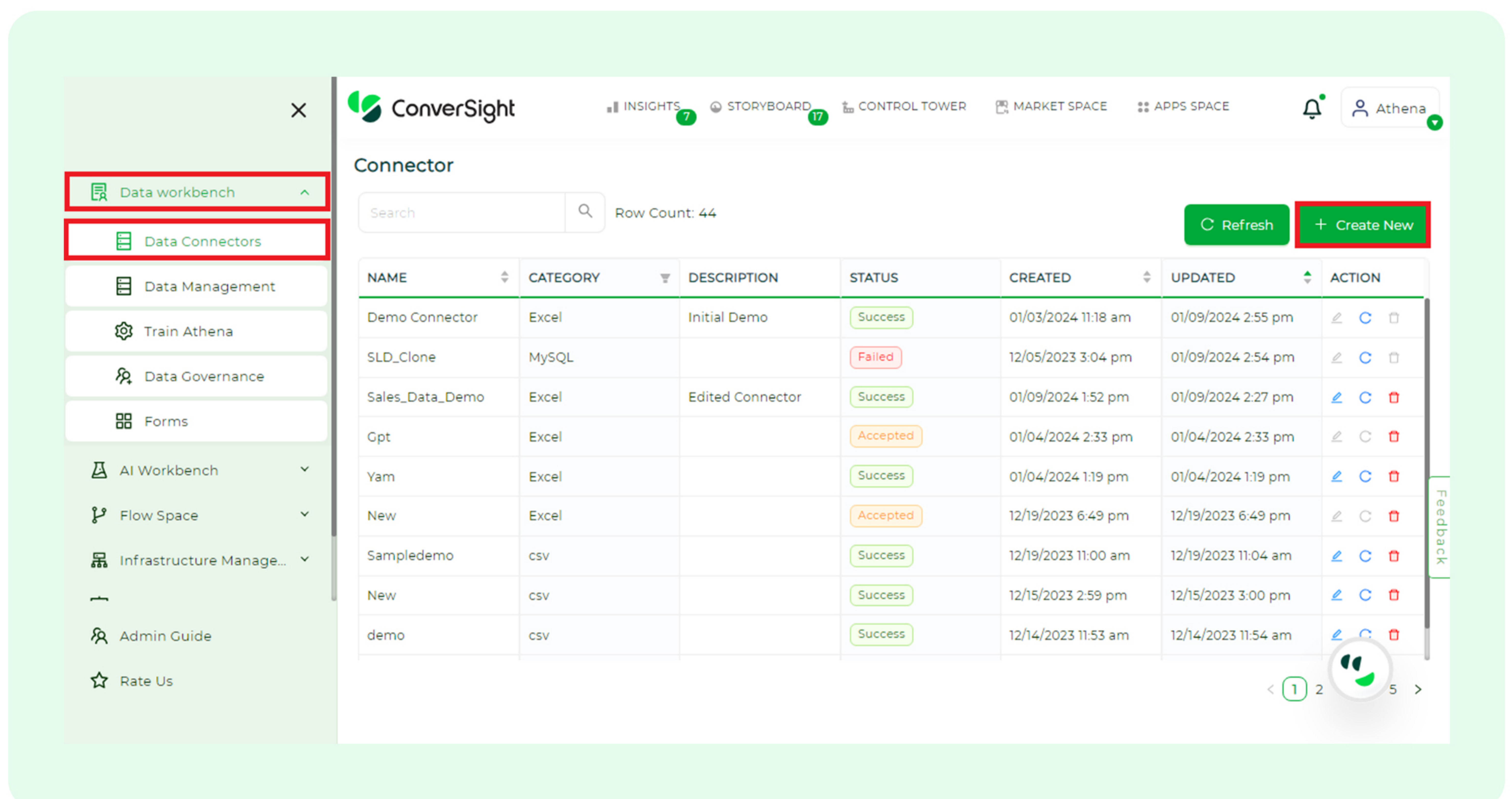
Enabling the '**External Connector**' option in dataset details allows for establishing a direct connection, ensuring privacy and optimizing the data retrieval process. External connectors are vital in ConverSight's data loading process, enhancing versatility by offering users a secure and streamlined method to integrate source databases without storing data within the ConverSight platform. In ConverSight, the term '**External Connector**' denotes a feature facilitating direct connections to source databases for data retrieval.

Note

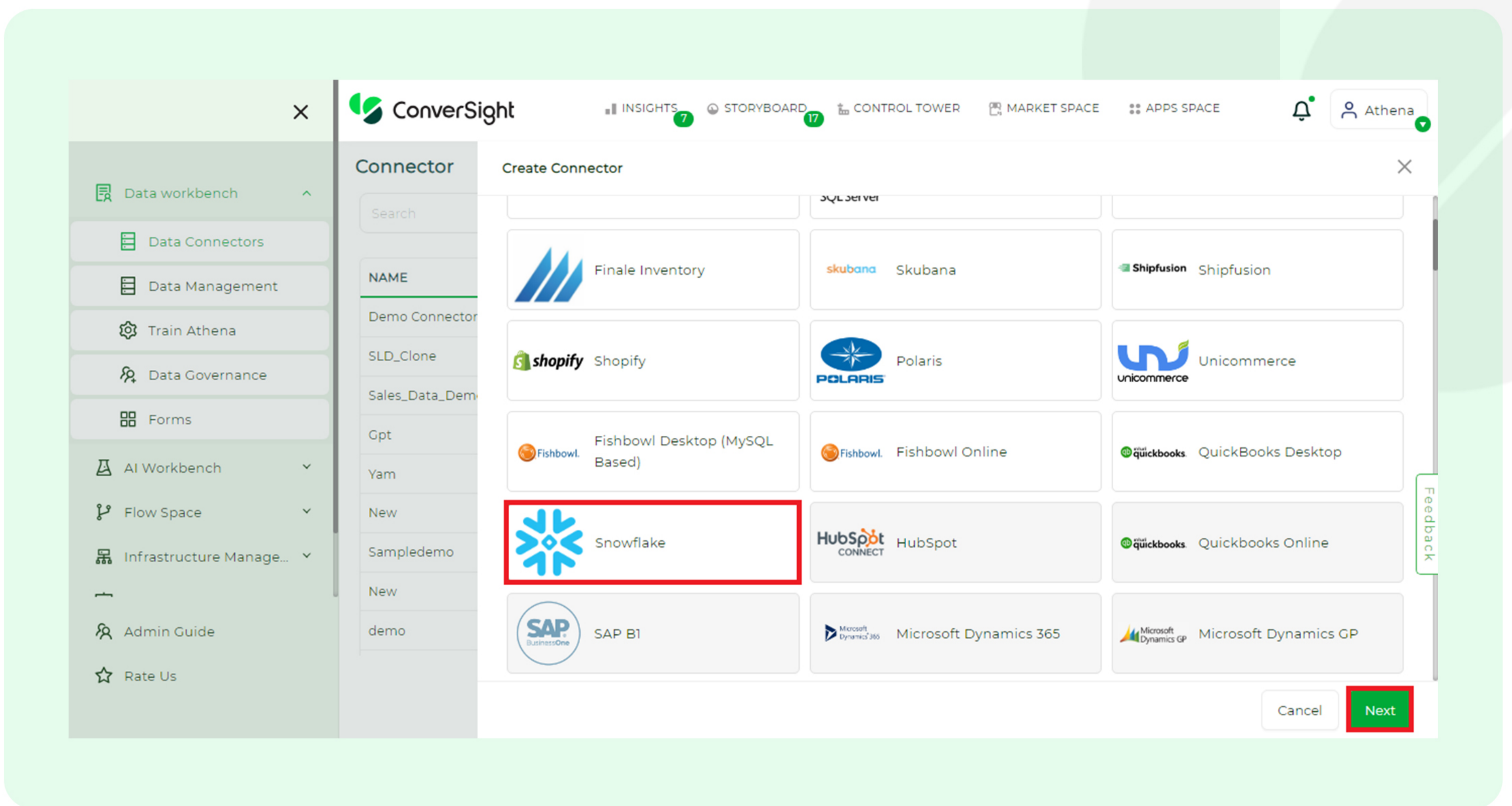
Currently, the External Connector is exclusively accessible for Snowflake.

2. Creating External Connectors

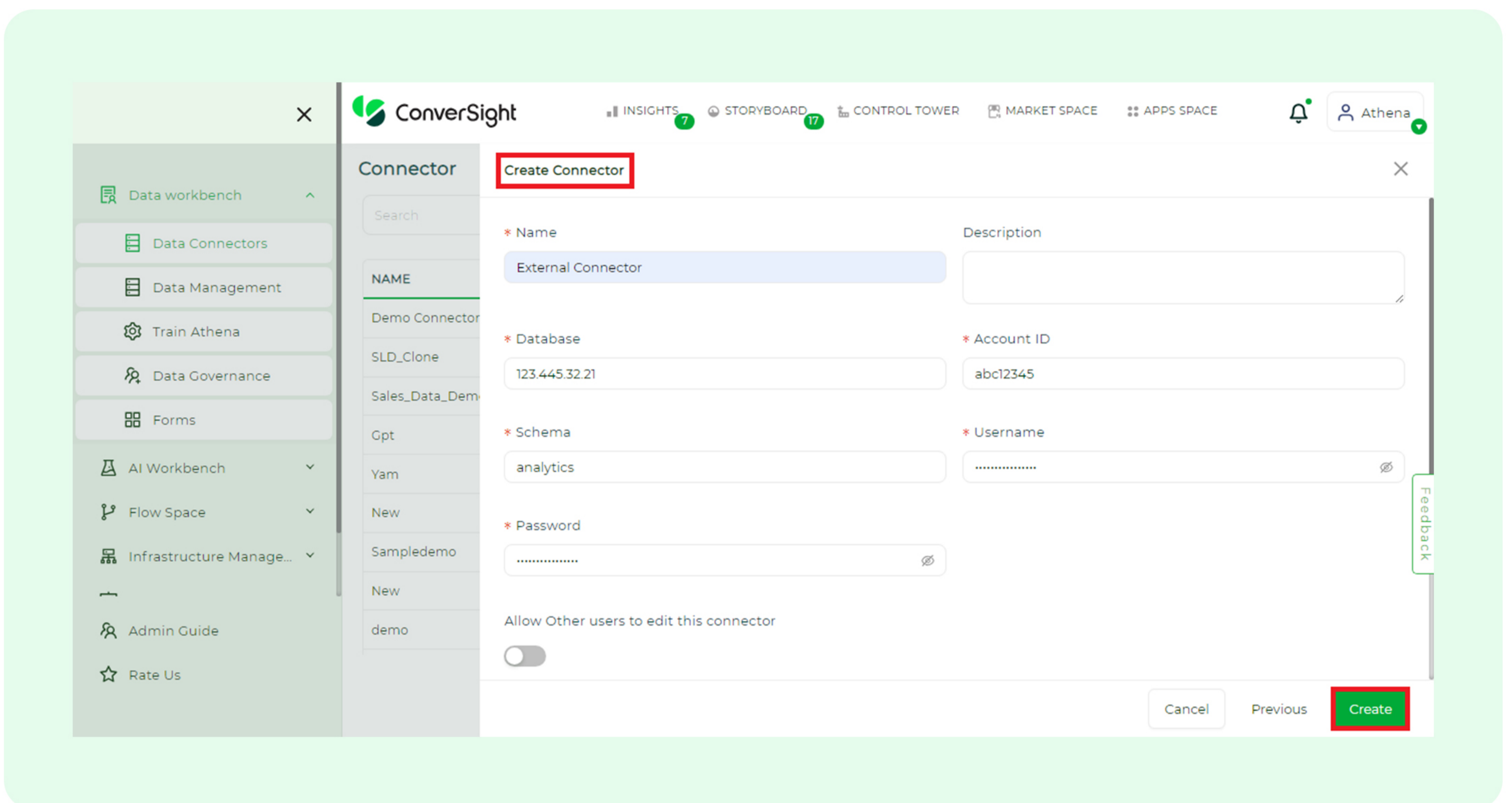
- To create a '**Snowflake Connector**', navigate to the '**Data Workbench**' menu in the '**Data Connectors**' section and click '**Create New**.'



- On the '**Create Connector**' page, choose the '**Snowflake**' connector and click '**Next**.'

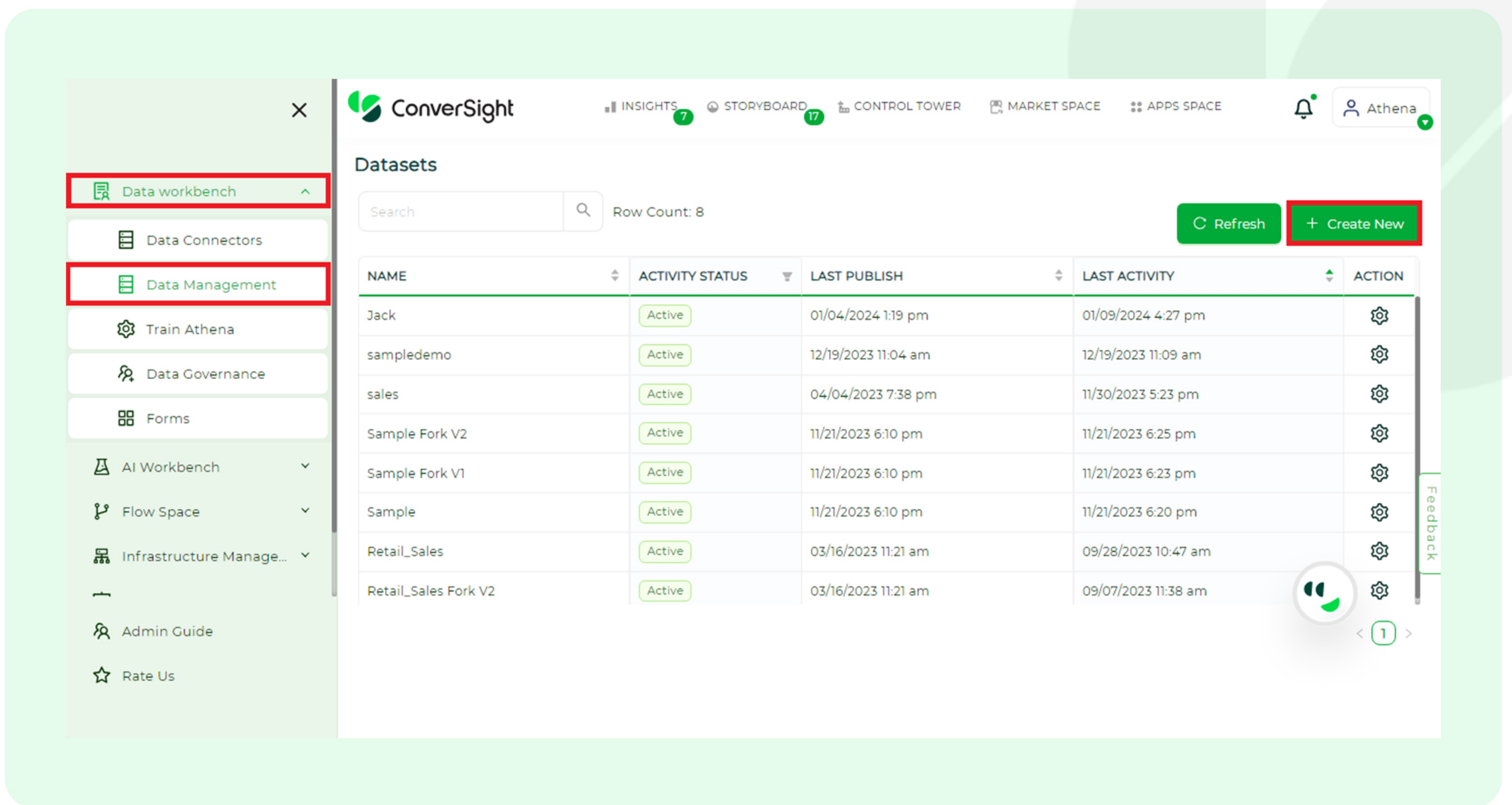


Provide all necessary details and click on **'Create'** to create the Data Connector.



Once you have created the connector navigate to the **'Data Management'** section under the **'Data Workbench'** menu in the configuration sidebar.

Click on the **'Create New'** option to commence the dataset creation in ConverSight.



Users must provide all the details required to create a dataset in ConverseSight. The following are the input arguments required to create a dataset.

ARGUMENT	DESCRIPTION
Name	Provide a name to your dataset.
Type	You must define the type of your dataset by categorizing it based on its inherent characteristics, such as metrics or documents. This is important for organizing the dataset in a way that aligns with its properties, facilitating effective analysis and utilization in later stages of data processing.
Description	Provide a description according to your preference or for enhanced comprehension.
Knowledgebase Type	Knowledgebase enables you to choose an engine for your dataset. SynapsNet is an enhanced version designed to improve the natural language understanding of your data. Choosing SynapsNet is preferable over KBNNet.

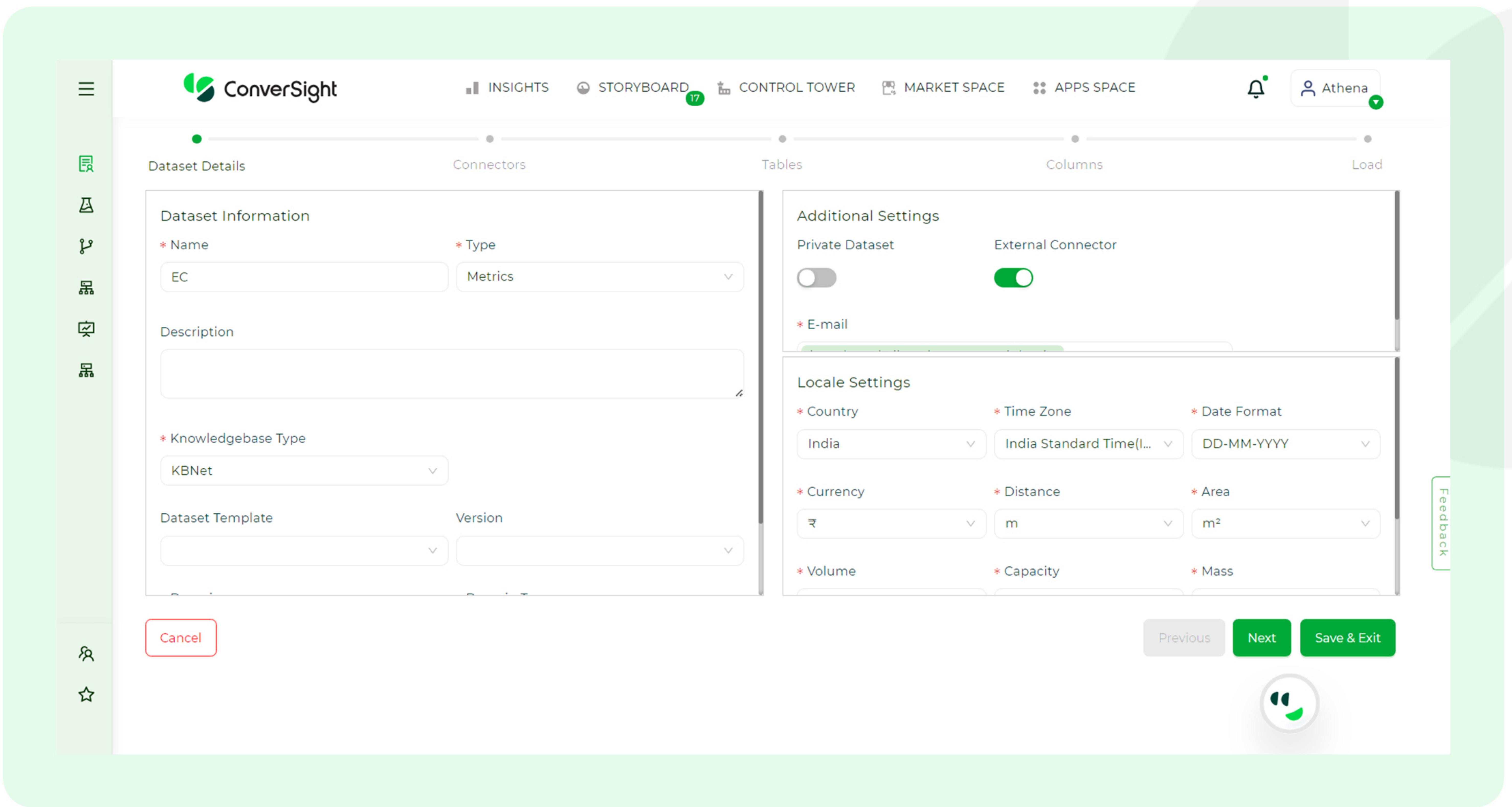
Replica	<p>A replica is employed to maintain duplicates of your data. You can choose any number of replicas. It is advisable to generate at least two replicas, particularly for critical datasets.</p> <p>Note: By default, we will furnish you with a single replica of your dataset.</p>
Dataset Template	<p>When selecting a dataset template, it is essential to choose one that matches with your dataset. Templates offer a predefined structure, which can be advantageous for maintaining consistency, especially when working with specific applications or tools. Essentially, using a template ensures that your dataset adheres to a standardized layout, making it easier to work with and compatible with various systems or analyses.</p>
Version	<p>Selecting a dataset template prompts you to choose a version, ensuring data integrity. Aligning with the appropriate version of your selected Dataset template enhances compatibility with applications, maintaining the dataset's desired structure and minimizing potential issues during analysis or use.</p>
Domain	<p>Specify the dataset's domain by identifying its primary category, such as industry, subject matter or a specific use case.</p>

Locale settings are customizable configurations tailored to your specific location. Once you choose your locale, the metric options, including currency, volume and distance, will adapt according to the selected locale.

The **'ISO format'** checkbox is selected when the data is loaded in one geographical time zone and the insights derived from it are utilized across various geographical locations. This consideration is important because there may be a time lag in data calculations, which might end in a one-day difference and to avoid such, we can check on ISO Format.

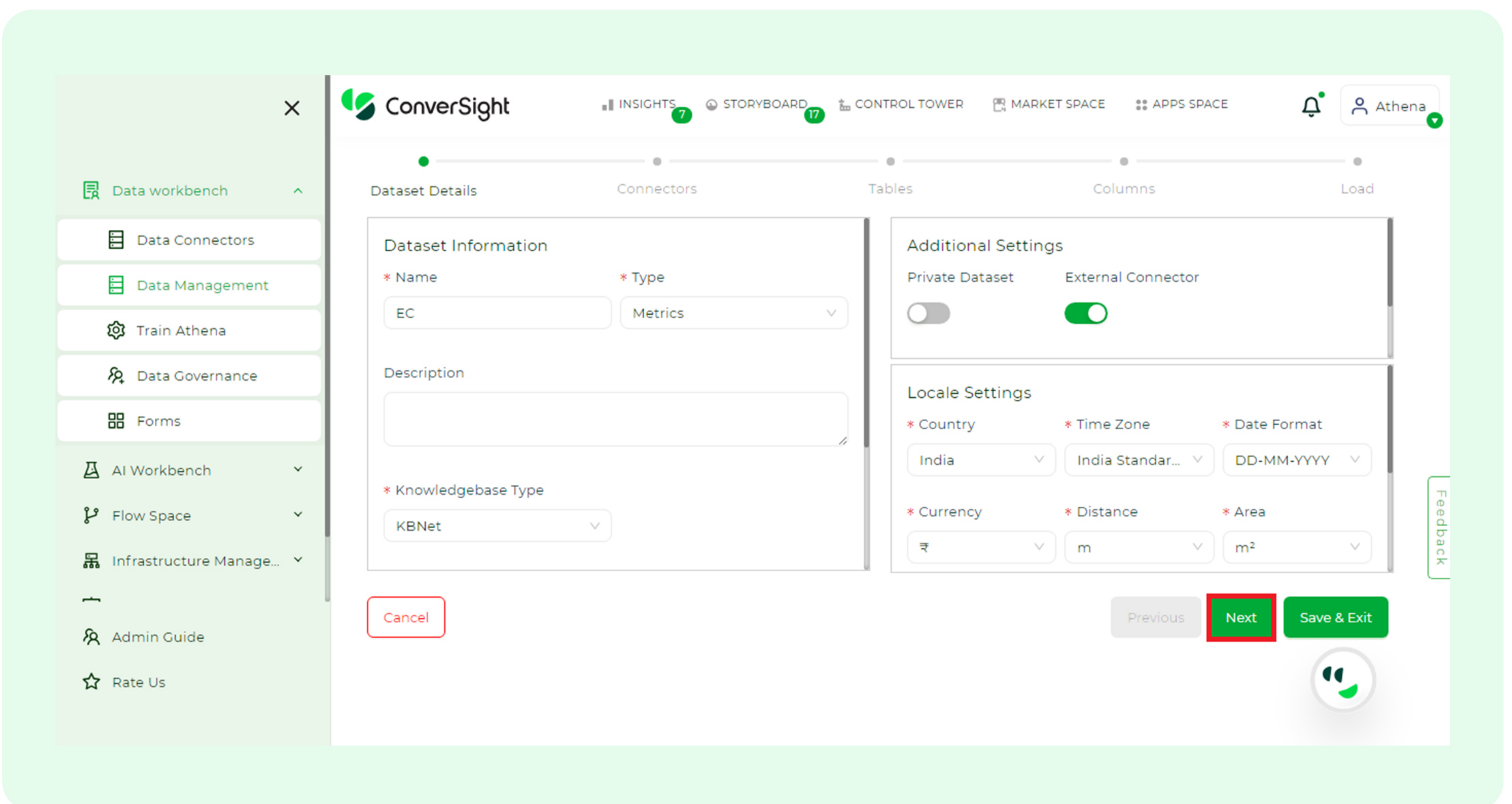
Enabling the **'Private Dataset'** toggle option ensures the security of your dataset, granting exclusive access restricted solely to you.

Enabling the **'External Connector'** toggle option allows you to connect to your dataset where data retrieval occurs directly from the source database through metadata. Enabling the external connector serves to sustain privacy by directly from the source database every time a query is made to Athena.

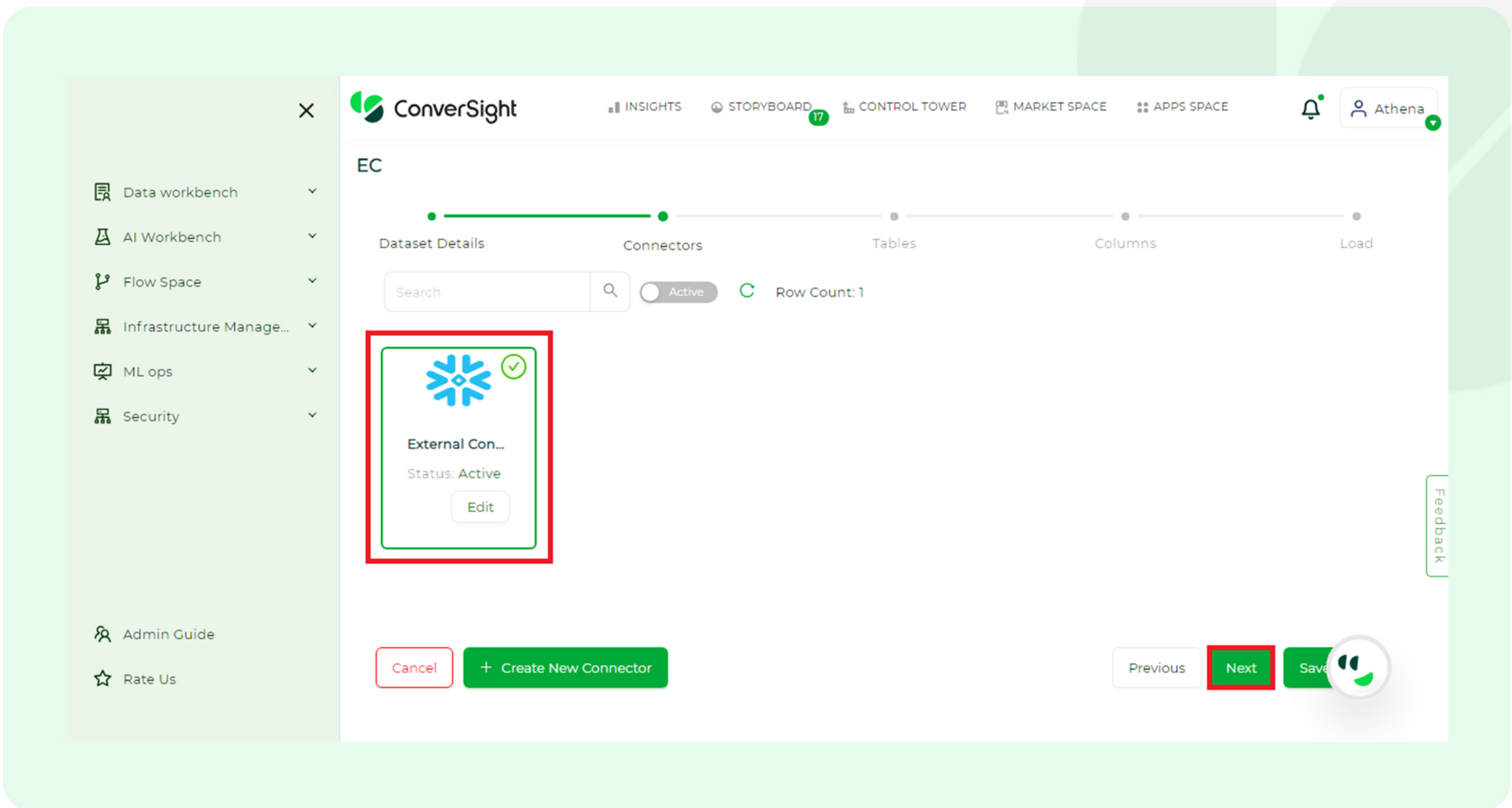


The email includes your email address. You may also include alternative email addresses, if necessary, you can also append additional email addresses.

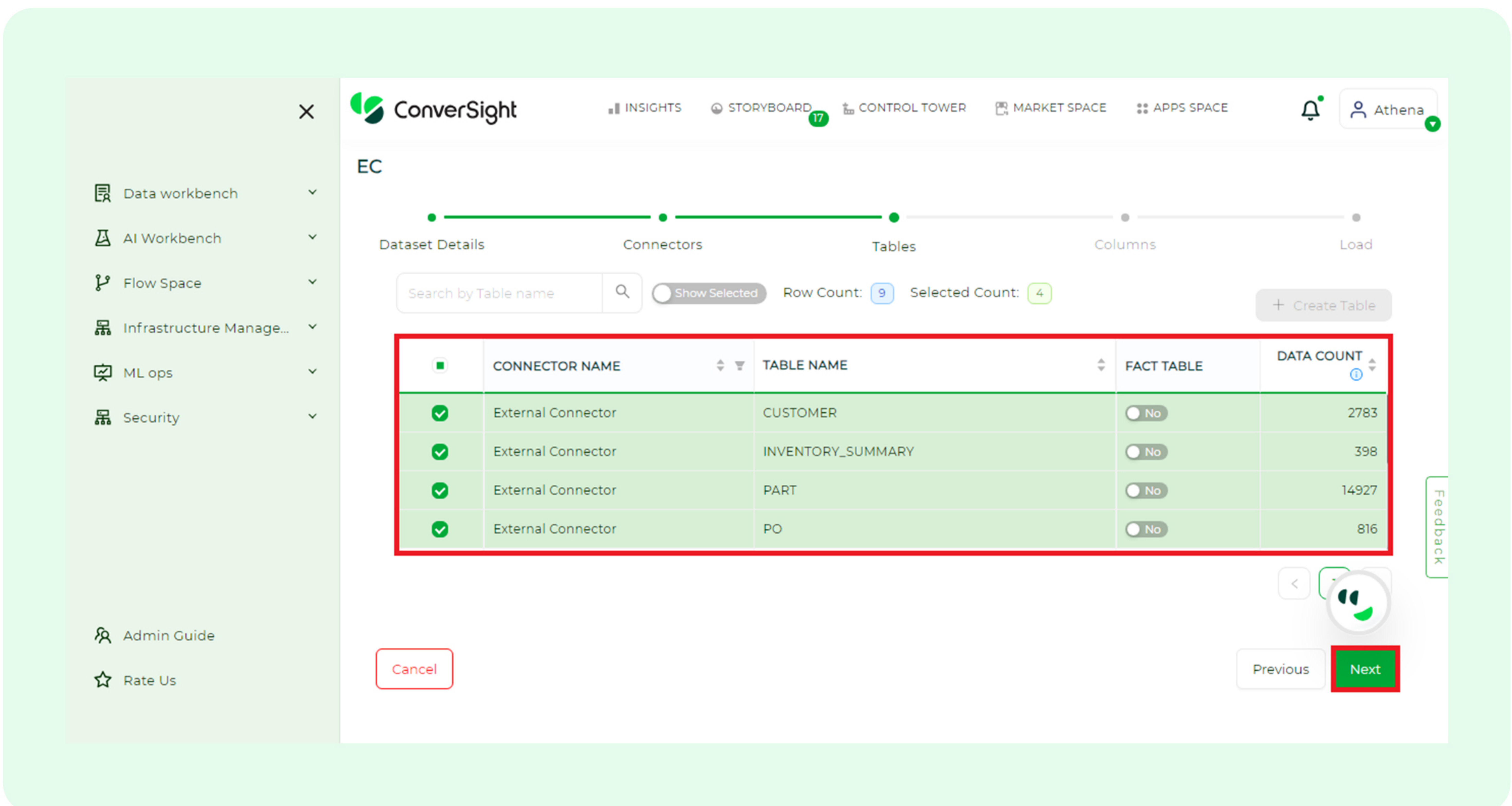
- Once you have completed entering all the necessary details, proceed by clicking the **'Next'** button.



- Select the connector that you have created and click on **'Next'**.

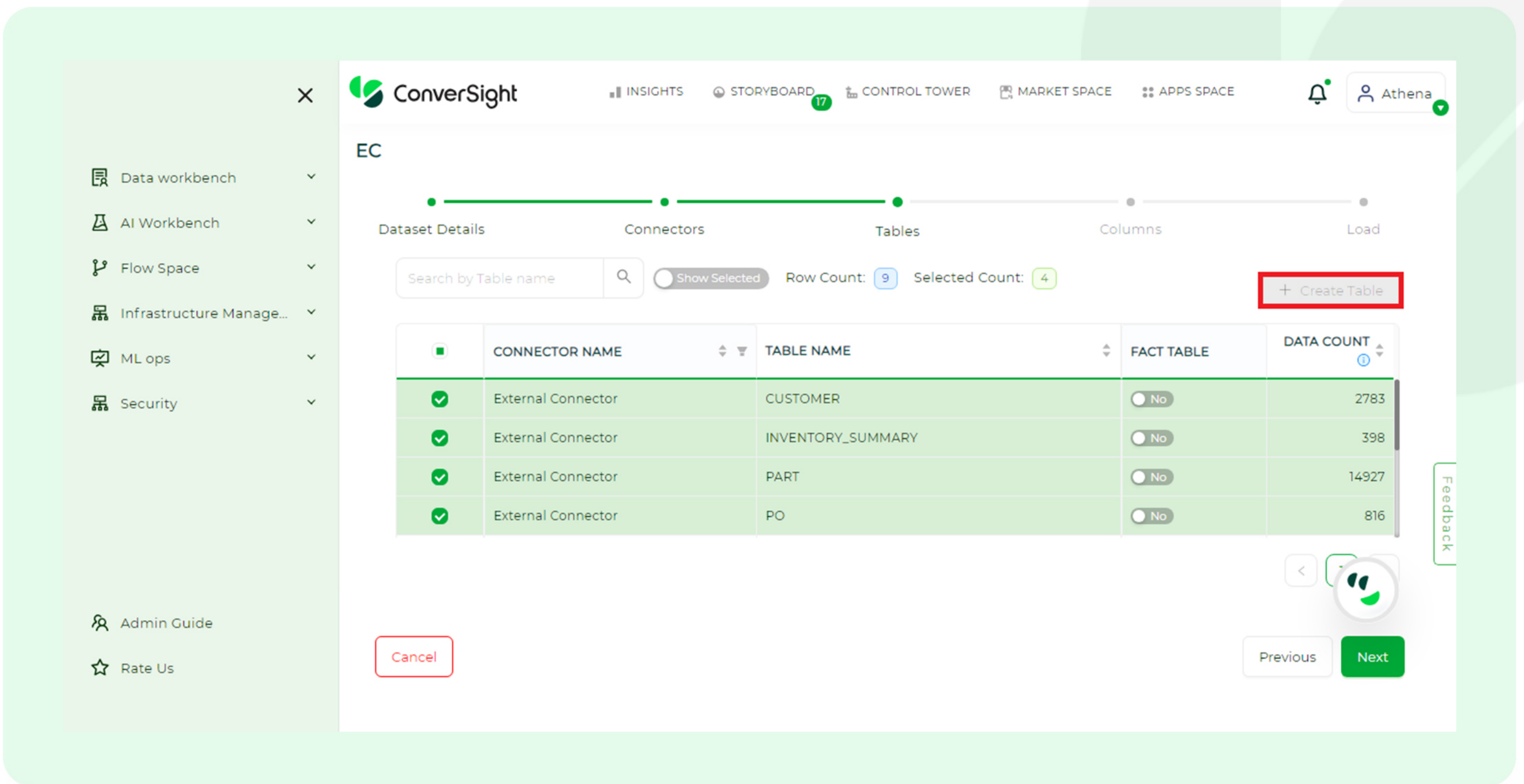


Now you can choose the tables you want to include in your dataset and click **'Next'**.

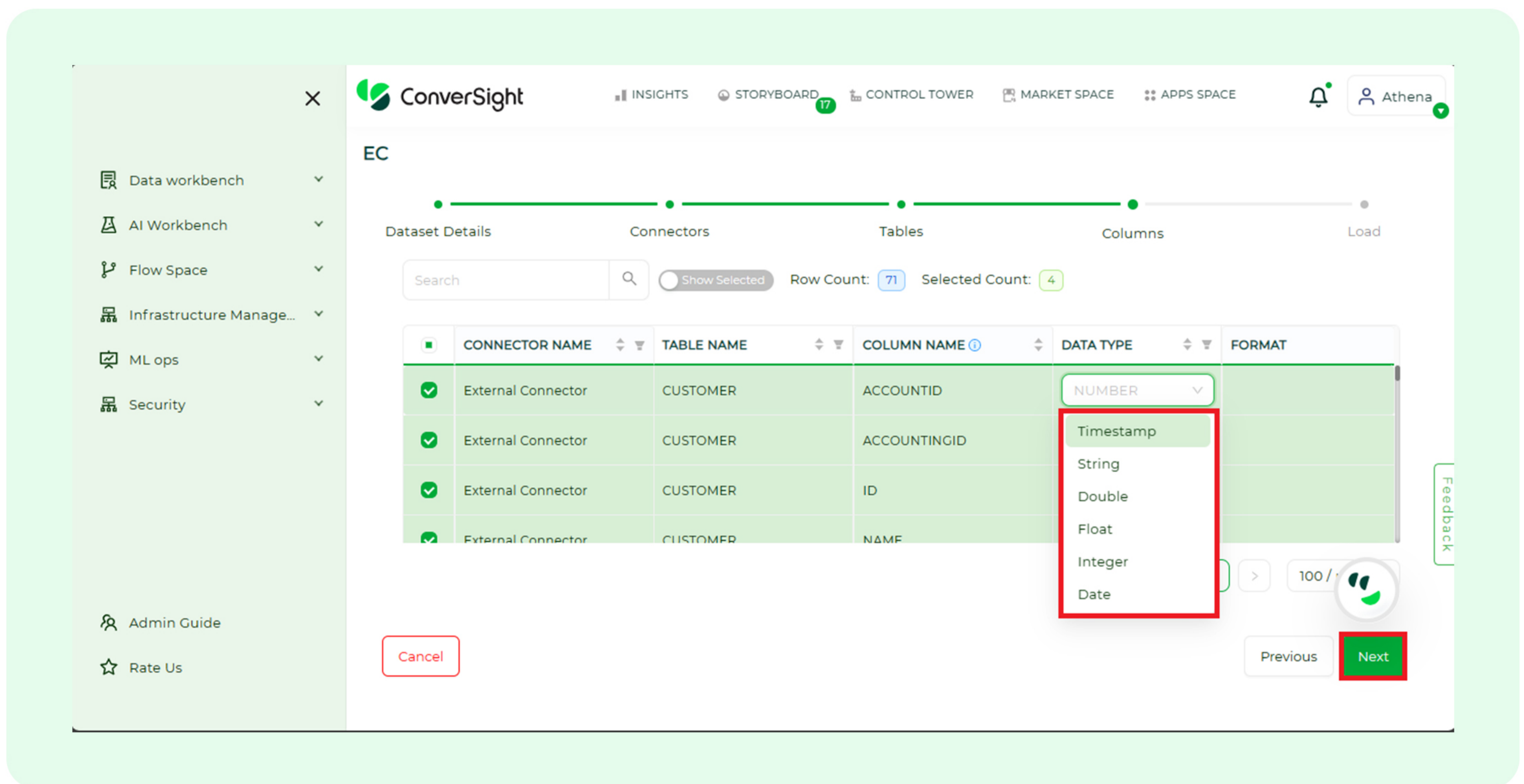


Note

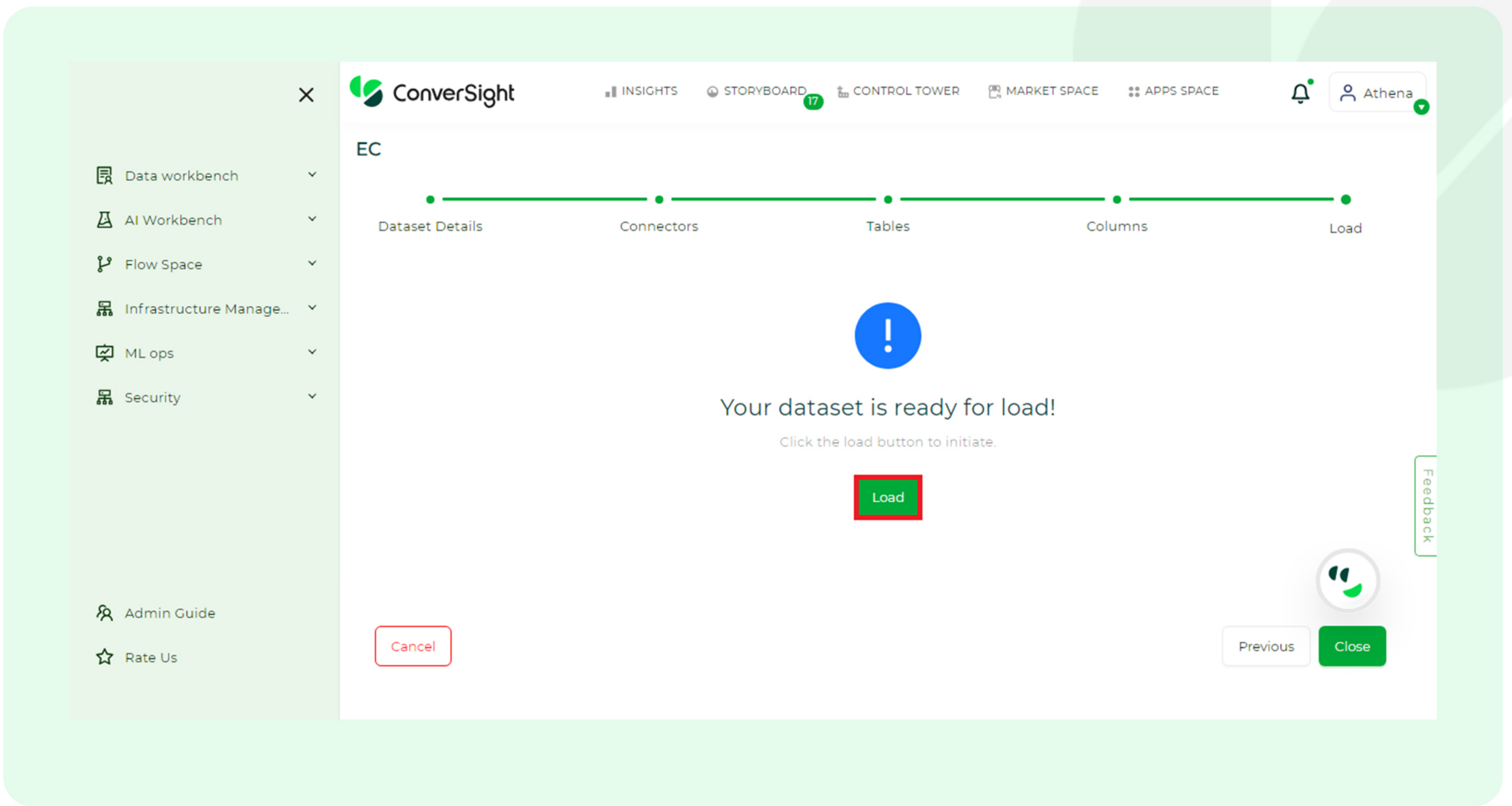
Upon activation of the 'External Connector', the 'Create Table' option will be disabled.



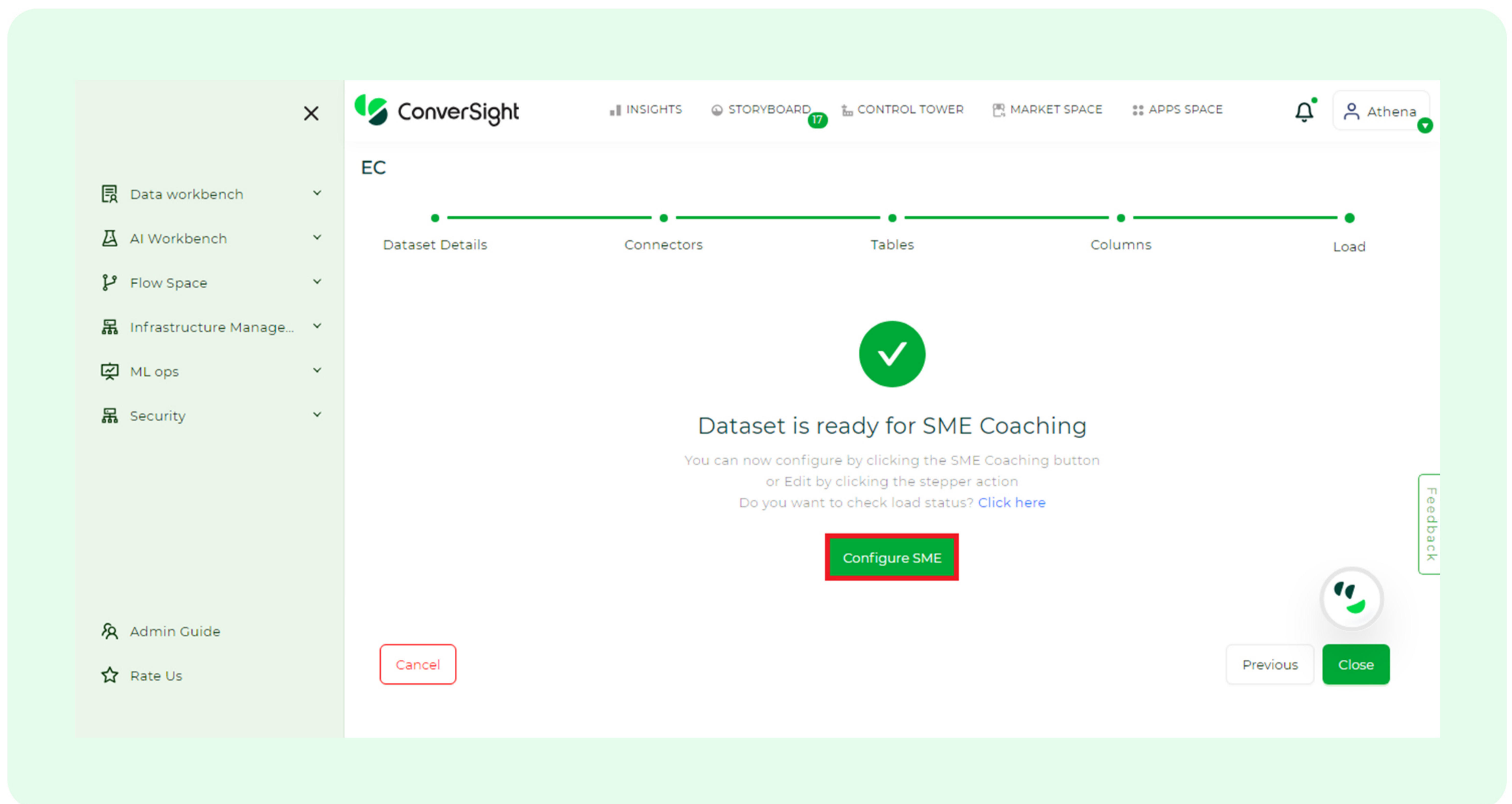
Furthermore, you can choose columns and alter their data type from the drop-down menu before clicking 'Next'.

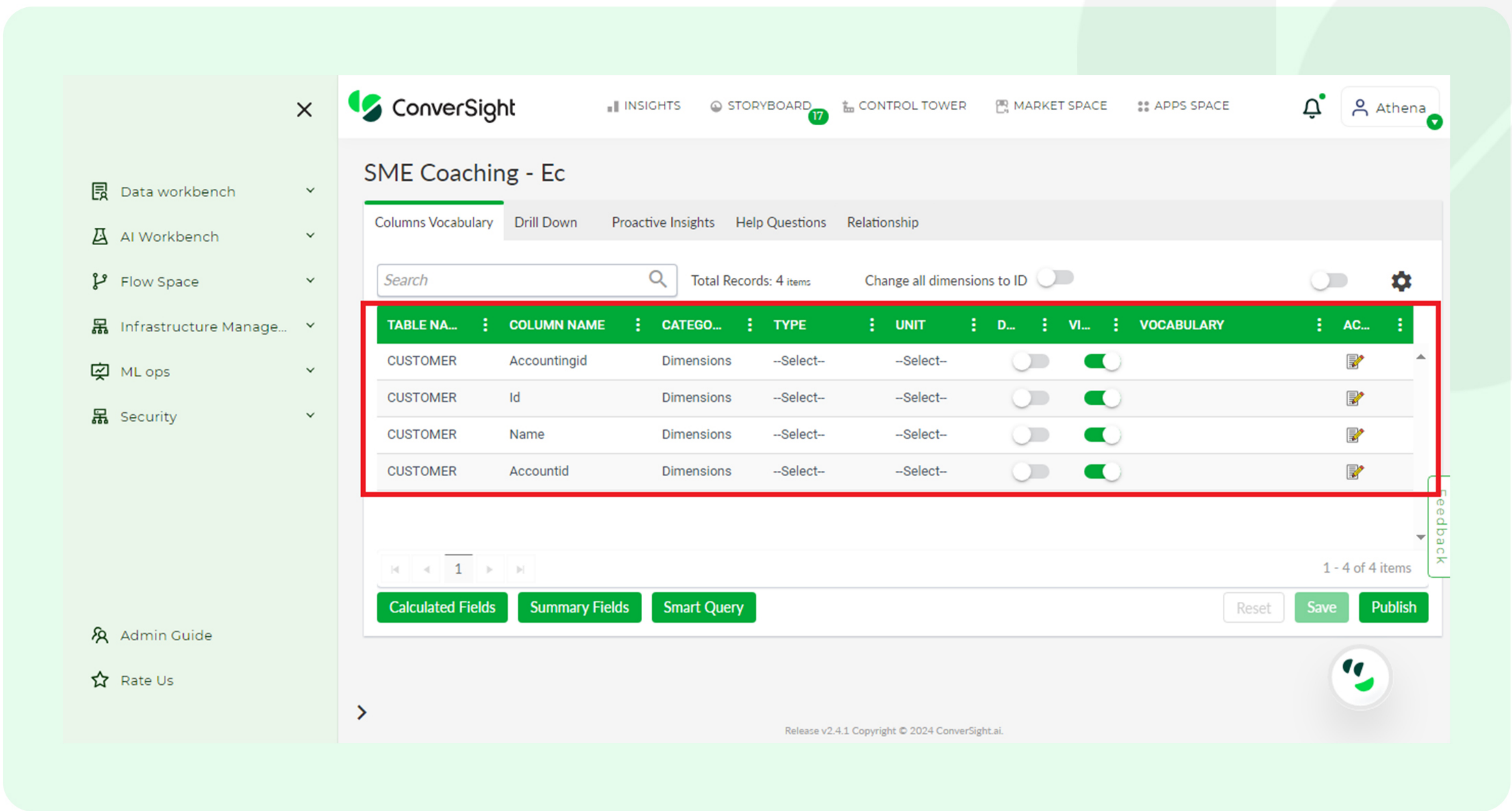


After successfully completing the creation process of your dataset, it is now ready for loading. Simply click on the 'Load' button to initiate the loading process.



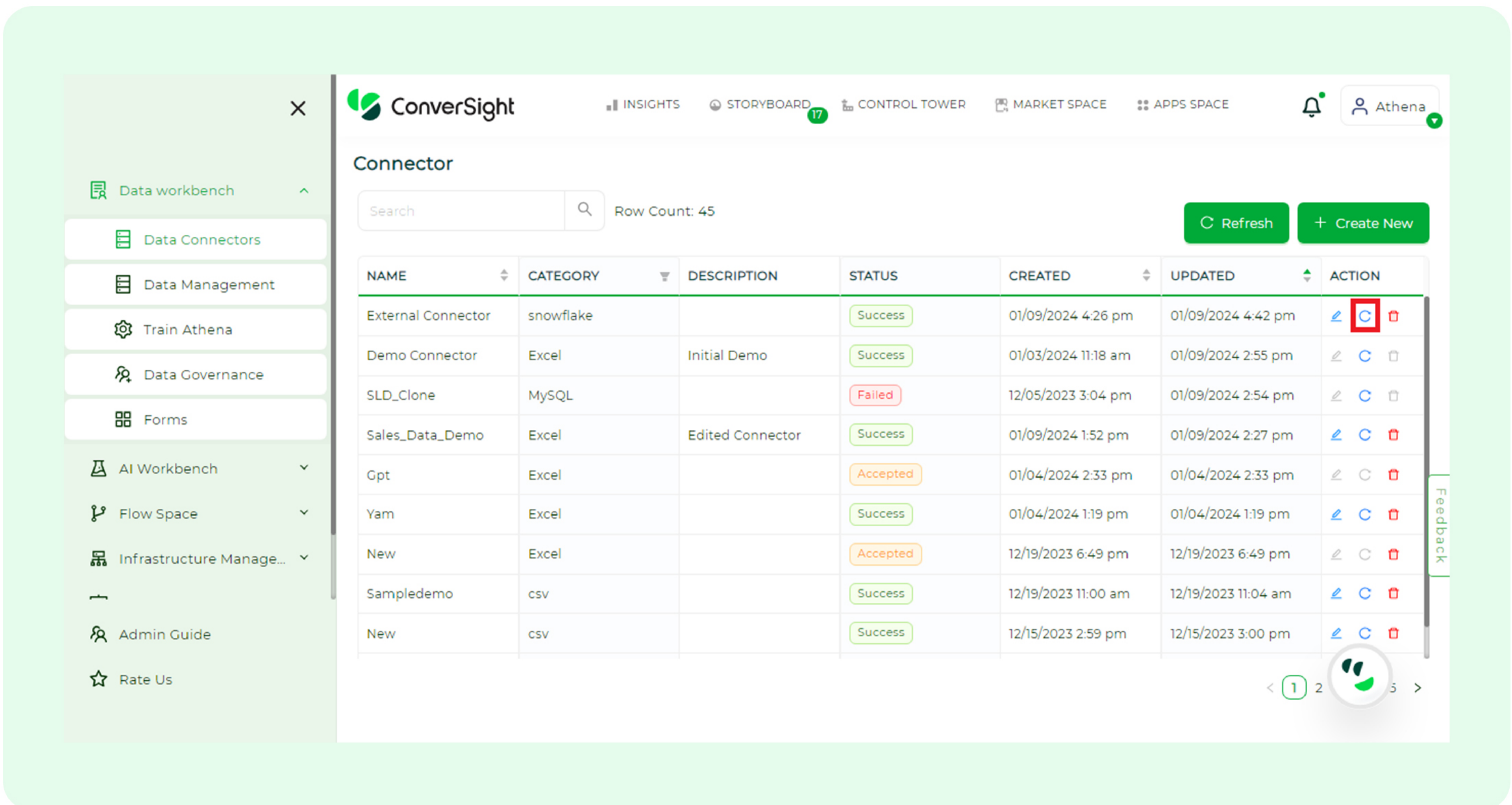
Once the dataset is loaded click on **'Configure SME'** to configure the settings for training Athena and AI/ML models.



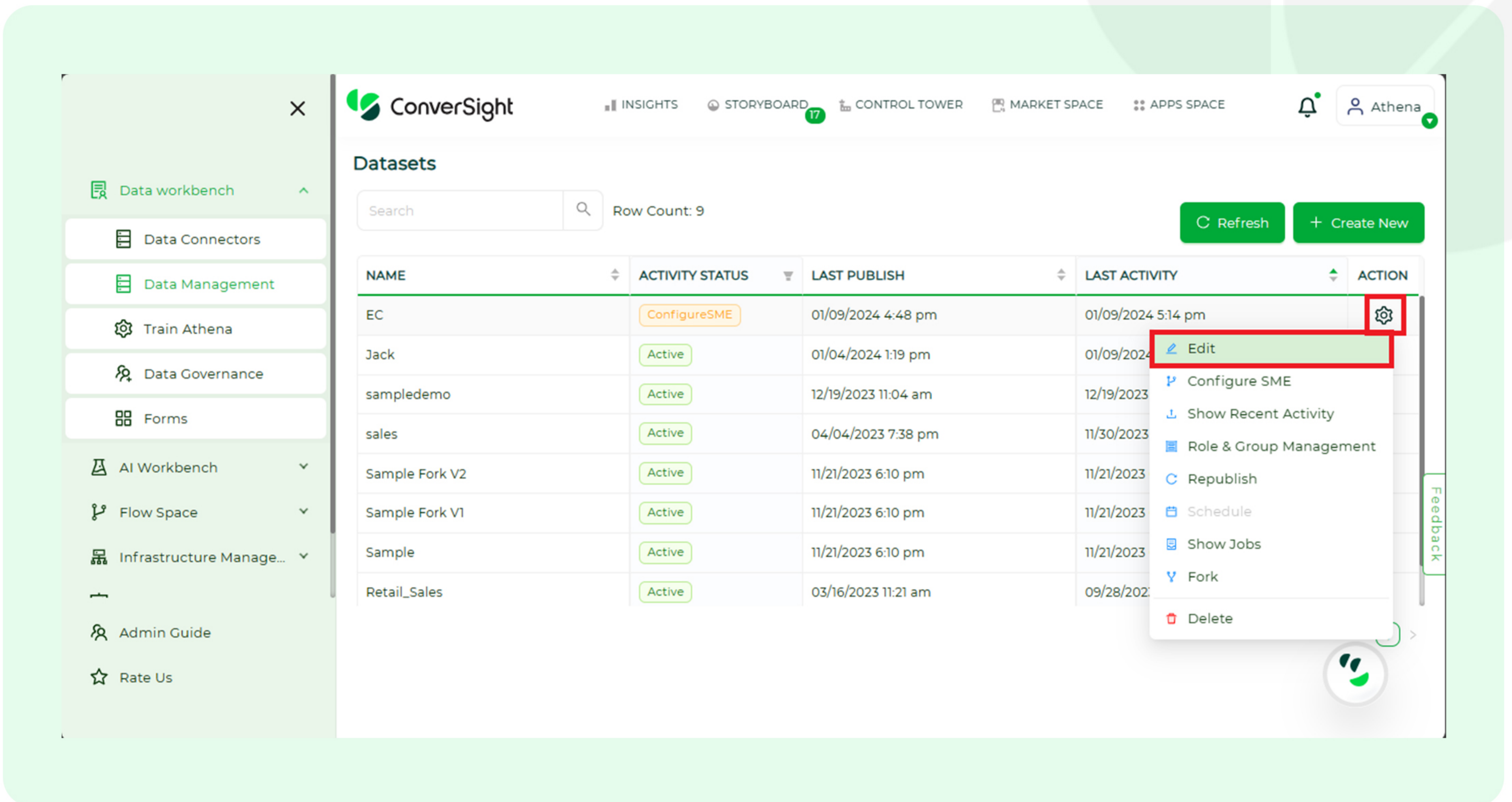


3. Updating Data

In the event of changes in the metadata of the source database, such as the addition of tables and columns, users should start by refreshing the connector on the **'Data Connectors'** page.



Then, on the Data Management page, click the **'Settings'** icon for the specific dataset and choose **'Edit'**.



After clicking the Edit option, you will be directed to the dataset details page. From there, navigate to the tables section, select the additional tables needed and repeat the process for columns. Once all additional tables and columns are chosen, click on **'Next'** and then select the **'Load'** option to load the latest data into the ConverSight platform for further processing.

Note

At present, the functionality to generate Smart Queries and create Custom Tables is unavailable. We are actively planning to introduce these features in our future updates.

4. Conclusion

In conclusion, the External Connector plays a crucial role in ConverSight's data setup, offering users an effective tool to directly link with source databases. The datasheet provides a clear step-by-step guide for creating connectors, configuring datasets and selecting tables, enhancing ConverSight's ability to retrieve real-time data efficiently. While currently specific to Snowflake, the document highlights the platform's flexibility in responding to changes in source database details, demonstrating a commitment to user-friendly adjustments. The expectation of upcoming features like Smart Query and Smart Analytics further emphasizes ConverSight's commitment to remaining innovative in dataset configuration.

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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.

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