



Market Insight Release Notes
2021 - January



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EXECUTIVE SUMMARY

This document outlines the Market Insight (MI) features that are scheduled to be released to production in January 2021.

The key functional areas affected by this release are:

- **DUNS Transformations within Selections:** It is now possible to run transforms within selections, making it much more flexible than having to use the wizard. This also means that family tree transforms and exports can be used in scheduled tasks, removing the reliance on manual work.
- **Additional transactional analytics in expressions:** Additional functionality has been added to grouping aggregations.
- **Various improvements in Market Insight Orbit.**

1.1 Target Audience

This document is intended for all users of Market Insight.



2. FEATURES

This section outlines the new features and improvements to Market Insight.

2.1 DUNS Transformations within MI Selections

In this release we have added the ability to process DUNS Transformations within selections. If this functionality is available in your Market Insight system, then you will be able to right click any selection clause and apply one of the configured transformations to that clause.

Example 1 – all linked records:

Linked

- Records With Linkage Present (Inc Branches) of Records with Linkage Present - inc. HQ/Branches

FilterDescription Contains

Include

954,713 Records

Linkage - Record Type	Drop your variable here	Record is Parent only	Record is Subsidiary	Record is Headquart	Record is Branch onl	Record is Parent & H	Record is Parent & S	Record is Headquart	Record is Parent
Employees Data Not		42,119	80,151	4,799	138	2,668	14,521	4,476	2
1 to 5 Site Employee		55,505	157,664	29,030	229,176	633	18,219	4,272	
6 to 10 Site Employee		8,221	22,668	5,766	80,481	522	3,277	2,218	
11 to 25 Site Employee		11,393	25,149	3,817	67,706	1,123	3,220	2,608	
26 to 50 Site Employee		7,083	13,373	1,189	8,001	1,016	6,594	1,615	2
51 to 100 Site Emplo		396	7,933	563	3,372	173	2,591	579	2
101 to 250 Site Empl		566	4,914	391	346	322	168	101	
251 to 500 Site Empl		62	1,465	200	71	164	20	32	
501 to 1000 Site Empl		9	695	10	12	7	20	8	
>1000 Site Employee		2	440	2	1	1	5	1	
TOTAL		125,356	314,452	45,767	389,304	6,629	48,635	15,910	8

Transformation applied:

Linked

- Records With Linkage Present (Inc Branches) of Records with Linkage Present - inc. HQ/Branches

Transform

Transform Table

Records

Transform

Global Ultimate Parent

Global Ultimate Parent

Immediate Parent

Siblings

Subsidiary

Subsidiary and Branch

Whole Domestic Group

Whole Domestic Group (exc. branches)

Whole Global Group



Linked
 Records With Linkage Present (Inc Branches) of Records with Linkage Present - inc. HQ/Branches

When the selection is run, the transform is processed. This works in exactly the same way as it would when a user runs the transform via the wizard. So MI connects to the linkage database and return the DUNS numbers from the requested transformation. In the example here, we are asking it to return Global Ultimate Parents.

Linked
 Records With Linkage Present (Inc Branches) of Records with Linkage Present - inc. HQ/Branches

Filter: Description Contains:
 Include: OR

Cover **Selection** Cube Cube 2

177,752 Records

Linkage - Record Type				
Drop your variable here				
	Record is Parent only	Record is Headquart	Record is Parent & H	TOTAL
Employees Data Not	42,119	4,799	2,668	49,586
1 to 5 Site Employee	55,505	29,030	633	85,168
6 to 10 Site Employee	8,221	5,766	522	14,509
11 to 25 Site Employ	11,393	3,817	1,123	16,333
26 to 50 Site Employ	7,083	1,189	1,016	9,288
51 to 100 Site Emplo	396	563	173	1,132
101 to 250 Site Empl	566	391	322	1,279
251 to 500 Site Empl	62	200	164	426
501 to 1000 Site Emp	9	10	7	26
>1000 Site Employee	2	2	1	5
TOTAL	125,356	45,767	6,629	177,752

The results of transformations are not cached, so every time the selection is run, it will apply the transform afresh.



Example 2 – Sub selection.

As mentioned previously, the transform can be applied to any selection node / clause.

The screenshot shows a selection tree on the left with the following structure:

- Large Sites OR Transform ... Records with DU of small Site
 - Large Sites
 - OR Transform ... Records with DU of small Sites
 - DU of small Sites

On the right, a table displays the following records:

Include	Code	Description	Records
<input type="checkbox"/>	04	21 - 49 Em...	104,286
<input checked="" type="checkbox"/>	05	50 - 99 Em...	11,312
<input checked="" type="checkbox"/>	06	100 - 199 E...	549
<input checked="" type="checkbox"/>	07	200 - 499 E...	391
<input checked="" type="checkbox"/>	08	500 - 999 E...	124
<input checked="" type="checkbox"/>	09	1000+ Em...	139

Below the table, there are filters for 'Include' and 'OR'.

The screenshot shows a 'Transform' dialog box with the following settings:

- Transform Table: ☒ Transform
- Records: Domestic Ultimate Parent

On the right, a table displays the following records:

Include	Code	Description	Records
<input type="checkbox"/>	!	Unclassifi...	3,614,473
<input checked="" type="checkbox"/>	01	1 - 5 Em...	3,315,825
<input checked="" type="checkbox"/>	02	6 - 10 E...	329,967
<input checked="" type="checkbox"/>	03	11 - 20 E...	182,880
<input checked="" type="checkbox"/>	04	21 - 49 E...	104,286
<input type="checkbox"/>	05	50 - 99 E...	11,312

Below the table, there are filters for 'Include' and 'OR'.

Σ Records With Linkage Present (Inc Branches) Drop your variable here			
	Records without Link	Records with Linkage	TOTAL
Unclassified	0	33,040	33,040
1 - 5 Employees	0	82,710	82,710
6 - 10 Employees	0	12,480	12,480
11 - 20 Employees	0	10,618	10,618
21 - 49 Employees	0	8,338	8,338
50 - 99 Employees	7,625	3,687	11,312
100 - 199 Employees	47	502	549
200 - 499 Employees	30	361	391
500 - 999 Employees	16	108	124
1000+ Employees	17	122	139
TOTAL	7,735	151,966	159,701



Example 3 – Scheduled Tasks

A MI customer may want to see family members of their customers.

▶ TRN Linked to a Current Customer

▶ RNV Linked to Customers

▶ Customer Status of Live Policy

Transform

Transform Table

Records

☒ Transform

Whole Domestic Group

On the rebuild/refresh of Market Insight, the linkage database will have been updated, and the customer flags also may have changed, so the customer might want to see an up-to-date output of this version.

They can use scheduled tasks to output the data without manual intervention; previously they would have to run the DUNS Transformation wizard each time.

▶ CustomerGroup

Notes

Export As

Limits

Aggregation

Add U

CustomerGroup

Grid

Drag a column header here to group by that column.

DUNS	Business Name	Linkage - Record Type
210000151	Axion Polymers L...	Record is Subsidiary only
210000167	Dairy Crest Ltd	Record is Branch only
210000241	Farmfoods	Record is Branch only
210000258	Farmfoods	Record is Branch only
210000282	Forever Living Pr...	Record is Branch only



☒ Enabled

Export ▼ Export CustomerGroup.xml and save to CustomerGroup.csv with the Run Date app...

File To Export

Output File

Append Date To Output Filename

Edit Task

☒ Enabled

☐ By Minute/Hour ▼ Minutes ▼ after a ▼ event

☐ Daily

☐ Weekly

☐ Monthly

☐ Yearly

☐ Single Instance

☒ On An Event ☐ From

2.2 New grouping aggregation features

This development has added new possibilities to the grouping aggregation wizard. For example, a user can now create a selection of sites which have a particular product type as one of their top 3 spend items.

In all these grouping aggregations, transactions are assumed to be grouped by product type.

1. Top N / Bottom N groups – Previously you would have had to use 3 select Nth category grouping aggregations to answer the question.

For the remainder of the examples the assumption is that there is a calculation function of frequency(transaction purchase year).

2. All groups – In previous releases the user could specify a minimum and/or maximum number of years the person had transactions in. Now we can choose all groups or all populated groups as two additional options. For example, the user may want to select customers who have purchased a product in all years or customers who have purchased a particular product in all years that they have had a transaction.



3. This release also supports new functions for when the main value function is a frequency (selector) choice.
 - a) Maximum – returns the maximum value across the whole grouping variable (x) selector variable.
 - b) Maximum distinct count – returns the maximum number of populated values across either the grouping or the selector variable.

For example, a user may want to answer the questions:

What is the greatest number of times a product has been purchased in any year?

Which product is it?

Which product has been bought in the greatest number of different years?

In which years has the greatest number of products been purchased?

4. Another improvement in this release, is that 0 and negative values are now allowed. The InRange grouping function now allows 4 numeric values to be specified. In previous releases the minimum value was 1. The minimum value is now 0 for frequency functions and negative values are allowed for other functions. A user may apply this analysis to determine which customers have purchased a given product 0 or 1 times or to select all the products a customer has **not** bought. Users may also use this when selecting people who are returning high value items regularly (return being a negative value).

2.3 BuildDateTime expression function

A new expression function has been added – BuildDateTime(n) which returns the build time, optionally shifted by n seconds.



2.4 Change to DateDiff Function

The standard DateDiff function has always calculated the whole number of units between the two dates. This has the effect for units other than days, that the zero band extends in both a forward and backward direction from the reference date (01 Jan 2019 in the example below).

DUNS	Client Ref...	Policy Number	Policy Inception Date	Days	Days Before	Days After	Weeks	Weeks Before	Weeks After
236644522	293869	1005652	29-12-2018	-3	3		0	0	
214887163	353958	906409	30-12-2018	-2	2		0	0	
233280515	293940	980285	31-12-2018	-1	1		0	0	
227249281	445964	1002042	01-01-2019	0			0		
228597951	145494	1050842	02-01-2019	1		1	0		0
213195089	358421	918907	03-01-2019	2		2	0		0
237516559	352663	907601	04-01-2019	3		3	0		0

A new optional 4th parameter has been added which ensures that results are only returned when the date parameters are in chronological order (i.e. the first date is before the second date).

The optional final parameter can be set to 1 to return missing value if the first date is after or the same as the second date.

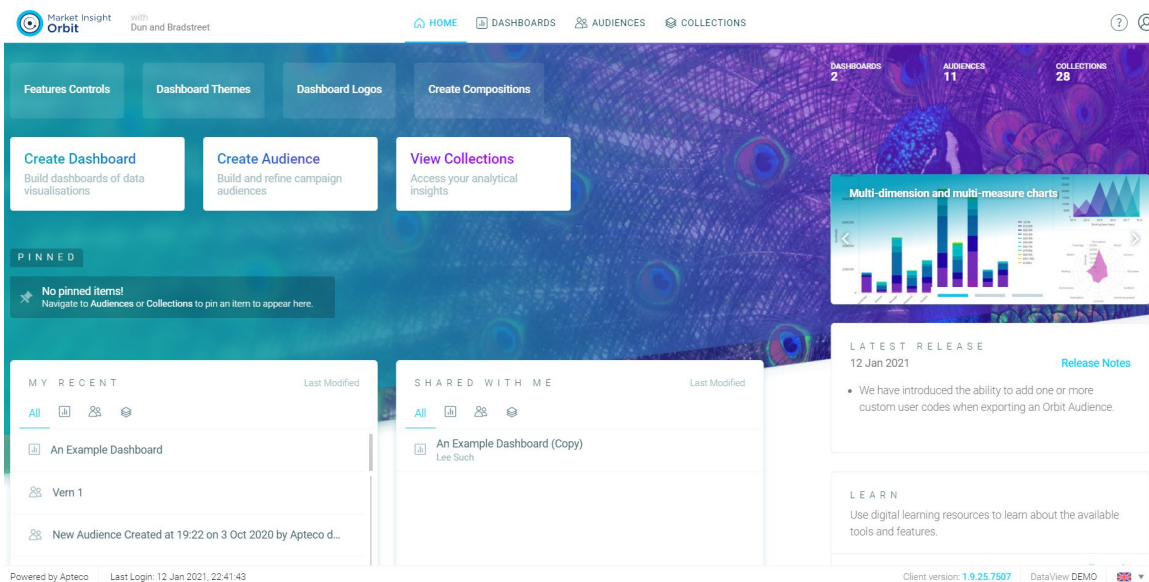


3. MARKET INSIGHT ORBIT

This section outlines the new features and improvements to Market Insight Orbit.

3.1 Orbit – Home screen and navigation

The Orbit overview screen has been replaced with a completely revamped home screen. This shows information about the users recent and shared items (such as dashboards, audiences and collections) as well as action buttons to create or view new items and perform administrative tasks (if the user is an administrator). There are also links to the online help, release notes and other resources. This provides a more welcoming, useful and attractive entry point to the application.



Consistent navigation icons

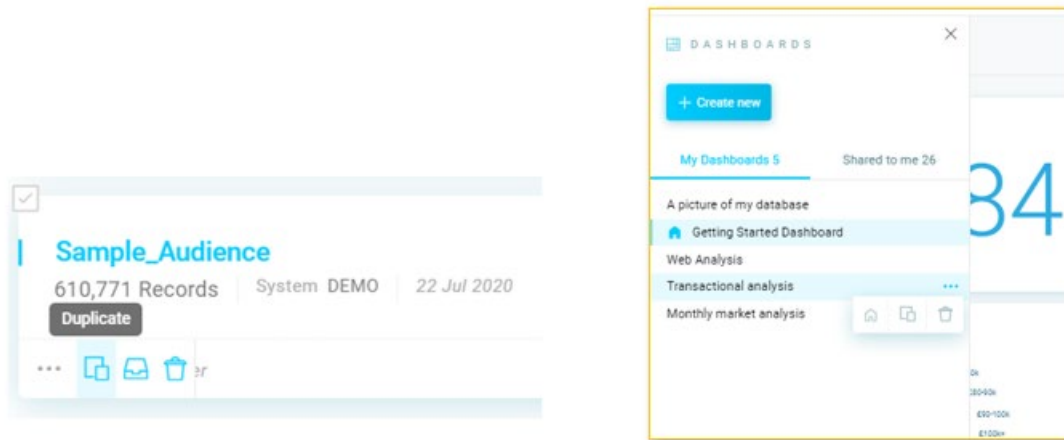
New icons have been added to the top level navigation bar to consistently identify the different types of resource available in Orbit, as shown in the lists on the home screen.





3.2 Orbit – Duplication of resources

It is now possible to duplicate Orbit audiences and dashboards. This means that you don't have to start afresh if you want to create a second, similar audience or dashboard. It also means that you can create your own version of a resource that's been shared with you, and then make changes to your copy.



3.3 Orbit – Performance

The calculation speed of dashboards has been improved by being able to reuse already calculated results stored in the MI audit trail. Cached results will be used where the result has already been calculated for this build of the MI system (i.e. by another user viewing this dashboard).



3.4 Orbit Dashboards – Logos

Orbit Administrators can now upload logos for use on dashboards. This allows administrators to apply a default logo to branded themes or for dashboard creators to use a logo on a specific dashboard.

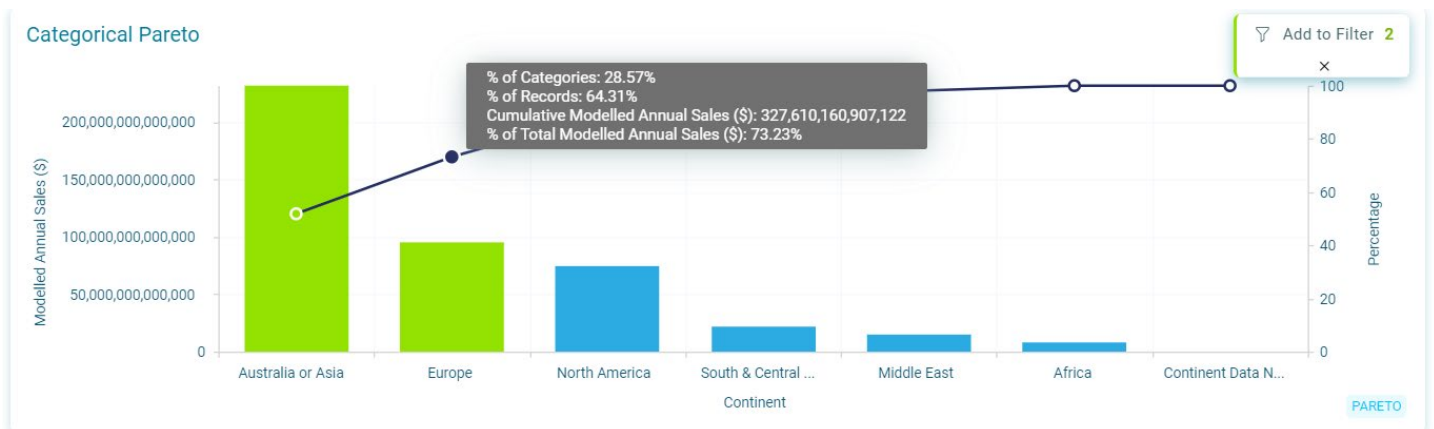
☰ dun&bradstreet Sample Demo Dashboard



3.5 Orbit Dashboards – Pareto charts (categorical and banded) in Dashboards

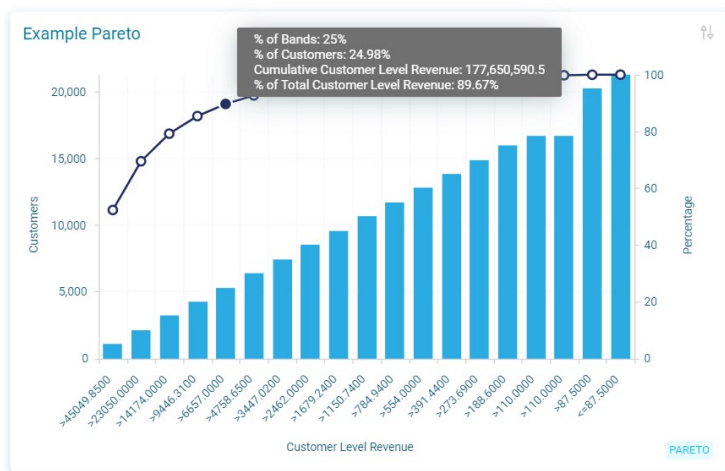
Dashboard administrators can now create Categorical and Banded tiles.

Categorical Pareto charts are offered by some competitors and allow you to see what proportion of the total value comes from the different categories of a selector variable. The simple example below shows modelled sales totals for each continent.





Banded Pareto charts are closer to the Pareto numeric banding in Market Insight. They show a split of a set of records (sample customer revenue here) into a number of bands, ordered by the records with the highest value.



In both cases, you can both view enhanced statistics on the chart and also filter the dashboard based on the highest value categories or bands.

Note that Pareto tile filters apply to all other tiles on the dashboard, however the Pareto tile is only subject to the dashboard filter and is NOT affected by filters created on other tiles. We use this approach to allow the Pareto tile to act as a base for the dashboard. The Pareto tile will show in lowlight all the Pareto bands or categories that are within the main dashboard filter, but not currently selected by the filter on the Pareto tile. This provides a consistent base for your exploration and analysis on a dashboard that contains a Pareto tile.

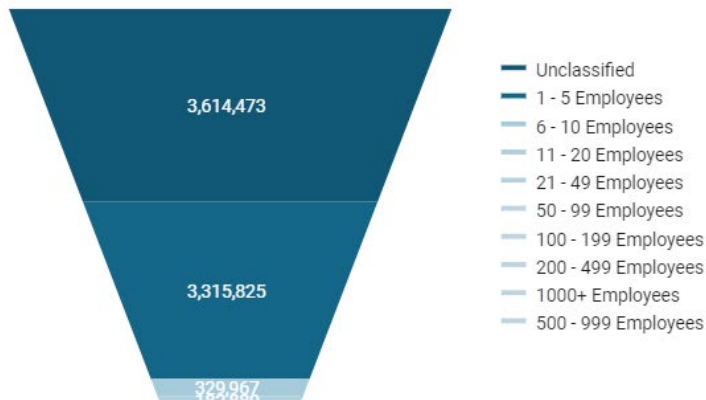
As with all dashboards, you can then build audiences from the filtered dashboards to identify and market to these high value segments.



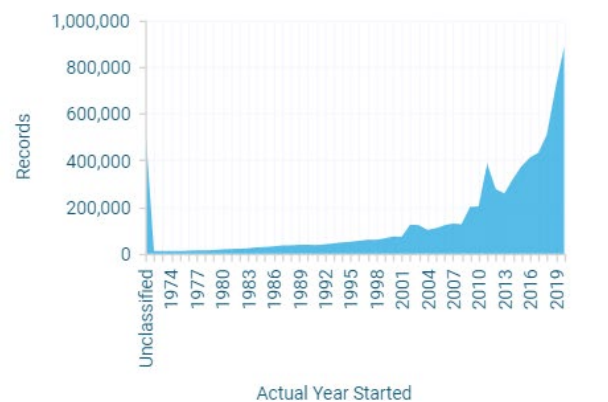
3.6 Orbit Dashboards – New chart types

Funnel charts allow the user to display categorical data in progressively decreasing or increasing proportions, organized in segments. The new single series area chart displays data as a continuous line that passes through points, with the area beneath the line being filled and is particularly effective for showing time related data.

Employees
at filtered sites



Actual Year Started
at filtered sites



Dashboard users are now able to create, edit and view three types of radar chart in Orbit – line, column, and area. Each is presented with the categories around the perimeter of a circular display containing a grid scale. Ideal for use on cyclical data such as Month of Year, the dashboard creator can choose to show a line between points, individual columns, or a shaded area on the radar chart. Adding chart variety can help your dashboard viewers focus on the visualizations and insights you share with Orbit.

Customer Start Date
at filtered sites





Column, bar line and area charts now support 1 or 2 dimensions. For 2D column, bar and area charts the data can be clustered, stacked or stacked as percentages of the total. 2D line charts only support clustering. Column charts can show a single measure as before, or now also show a second measure as a line. You can also add a second dimension to the multi-measure chart to give a column chart with 2 dimensions and 2 measures.



All of these charting improvements make Orbit dashboards more powerful and expand the range of visualization techniques available to our users.



3.7 Orbit Dashboard Latest Developments – Legends

Users can now include legends in their chart tiles, helping to provide more clarity from the dashboard. Legends can be positioned to the top, bottom, left or right of the chart.

OPTIONS

☒ Allow category display

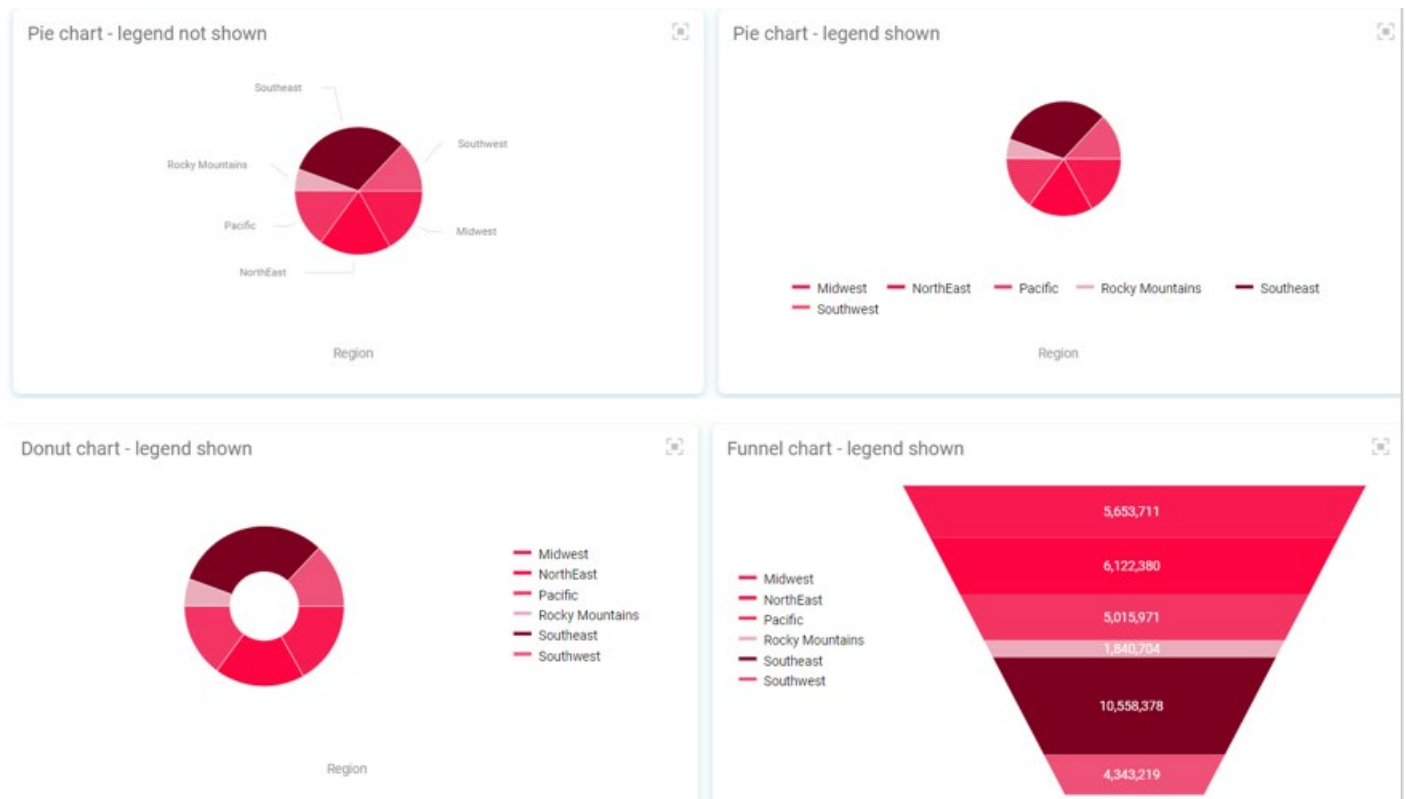
☒ Omit zeros

☒ Show legend

☐ Show underlying data grid

Notes

Show legend right selected





3.8 Orbit Dashboards - Live update of charts whilst editing a dashboard

Previously, when editing a dashboard tile you could only see what the tile would look like once you had accepted the change. Now the tile updates as you make changes to the settings (such as chart type, dimension, measure, legend, etc.) so that you can see what effect your changes have as soon as you make them.

3.9 Orbit Dashboards - Dashboard hit counter

Orbit now records in the database every time a dashboard is viewed. This information isn't currently displayed in the Orbit UI, but can be analyzed by Orbit administrators. In the future this could be used to rank popular dashboards or to show if particular users have viewed a dashboard yet.

3.10 Orbit Dashboards - Optionally manually apply dashboard filters

Orbit has always recalculated any filters that are applied when using the dashboard immediately. We had feedback that on some larger systems, when the user wants to apply filters from multiple tiles they have to apply the first filter and then wait for the dashboard to recalculate before they can apply the second. If this wait takes a number of seconds it can become frustrating.

There is now an option, set by Administrators, to prevent changes to a dashboard filter being applied automatically. This means that the dashboard isn't recalculated after the first filter is chosen and the recalculation only happens when the user says they have finished applying all of their changes.

USER FILTERS

Emp Here Range
is
5 - 9 x

AND

State
is
TEXAS x

Cancel Apply Filters



3.11 Orbit Audiences - Customizable export grid

The export grid used to output data from the audiences tool can now have its columns rearranged and renamed on a per-export basis. This gives the user some more control over the format of the generated file, for example if it is required to be in a certain format for downstream processing.

Template
Company Summary ▾

Output filename
Texas 5-9

Output type
CSV ▾

Delivery
download ▾

Export

☐ Use authorisation code

Preview

[Add user code](#) [Reset column headers](#)

Duns Number	Business Name	US City	State Name
001008007	C L Crowover Incorporated	MARBLE FALLS	Texas
039806190	General Insulation Company	HOUSTON	Texas
070471116	General Insulation Company	FORT WORTH	Texas
172389710	Cabot Corporation	MIDLAND	Texas
834875981	Norit Americas, Inc.	DALLAS	Texas
026829221	Cabot Corporation	THE WOODLANDS	Texas

It is now possible to add custom columns with fixed values to exports in Orbit audiences. This is useful when outputting data for campaigns to identify the data export or provide custom per-export information. User codes can be added, edited and removed.

Duns Number	Business Name	US City	State Name	ExampleUserCode  
001008007	C L Crowover Incorporated	MARBLE FALLS	Texas	ReleaseNotes
039806190	General Insulation Company	HOUSTON	Texas	ReleaseNotes
070471116	General Insulation Company	FORT WORTH	Texas	ReleaseNotes
172389710	Cabot Corporation	MIDLAND	Texas	ReleaseNotes
834875981	Norit Americas, Inc.	DALLAS	Texas	ReleaseNotes

4. SUPPORT

Should you have any questions or need assistance, please contact the Customer Support Team directly at 800.234.3867. You can also open a support request at any time by visiting our support website directly at <https://support.dnb.com/>.