



Market Insight Release Notes
2019 – June



Table of Contents

1. Executive Summary	3
1.1 Target Audience	3
2. Features	4
2.1 Salesforce.com data source for Market Insight	4
2.2 Running and rolling aggregations	5
2.3 Support PatternMatch on-the-fly aggregation within Expression UI	7
2.4 Calculated Measures are now supported in CubeLookup expressions / Output Wizard	5
2.5 Two new measures in cubes	8
2.6 Transaction summary wizard is now able to flag transactions within a min-max range	9
2.7 Personal Best on-the-fly aggregations are now supported within Expression UI	10
2.8 Sequence number has been added as a column to exports / data grid	11
2.9 Extensions to expressions	11
2.10 Output wizard now supports rank and percentile calculated measures	11
3. market insight orbit	12
4. Support	13



1. EXECUTIVE SUMMARY

This document outlines the Market Insight (MI) features that are scheduled to be released to production in June, 2019.

The key functional areas affected by this release are:

- **Salesforce.com data source:** MI can now connect to your Salesforce instance and download data without manual intervention.
- **Pattern matches in expressions:** Market Insight now supports a more flexible way of matching patterns on a single variable from a transactional table, enabling users to specify a set of patterns in order of priority
- **New measures in cubes.**
- **The transaction summary wizard is now able to flag transactions within a min-max range.**
- **Personal best aggregation in expressions.**
- **Sequence number has been added as a column to exports / data grid.**
- **Further augmentations to expressions and the output wizard.**

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.

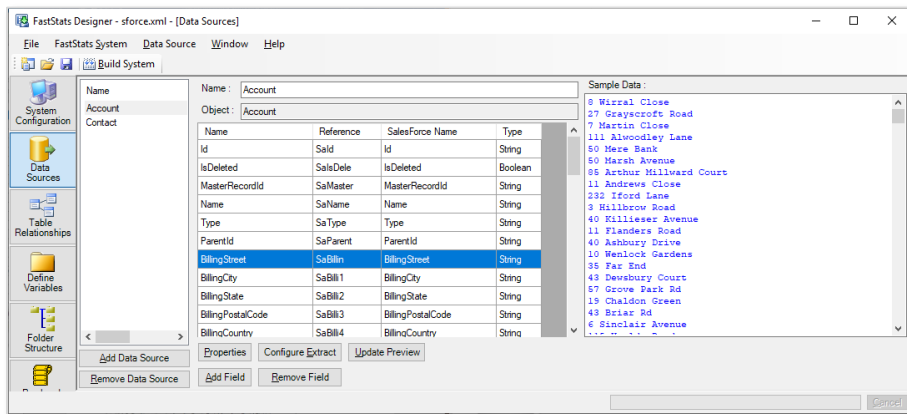
2.1 Salesforce.com data source for Market Insight

Market Insight's ETL tool can now download data from Salesforce on demand, without manual intervention.

This allows for:

- Automation of updates into Market Insight and flows of data back to the CRM/MAP
- The 'freshest' data to be used within MI, for example transactional level data can be updated to drive segmentation, or new leads can be added to review via the mapping tool for territory updates.
- Data can be refreshed daily if required, including transactions, that up to now, may be aggregated to a monthly view.

To do this it uses the Salesforce.com Bulk API to maximize performance and minimize the number of API calls to Salesforce.com. This completes the Market Insight / Salesforce loop, as Market Insight users can upload data to Salesforce via the Salesforce Wizard. Market Insight must be added as a 'Connected App' within Salesforce, and Salesforce credentials (Consumer Key and Consumer Secret) passed to the Market Insight Support team.



Once the appropriate settings have been made in Salesforce and credentials created and passed to the Market Insight team, the ETL tool can connect to your Salesforce instance.

If you are interested in this integration, please contact your Market Insight representative and they can send you the relevant documentation.



2.2 Calculated Measures are now supported in CubeLookup expressions / Output Wizard

In this release, the calculated measures will be available in the drop-down list of measures and can be used to create selections such as 'Select customers in the 3 counties with the highest average revenue'.

	Sites	Mean(Sales Volume I	Rank Mean Sales	▲
State ▼ DISTRICT OF COLUMBIA	53,857	6,083,336.88	1	
RHODE ISLAND	57,663	5,669,167.15	2	
ARKANSAS	141,468	5,299,153.34	3	
ILLINOIS	620,923	4,746,454.01	4	

(.) CubeExpression Sites
Data Type: '123 Decimal' Auto 20 A' A'

Cube to look up:

Use default measure

Measure:

Return subtotals

Subtotal Dimension:

Selection *

- ← New Selection 4
 - ↳ CubeExpression of <=3

All the calculated measures that have server-side equivalents can be used in this way in the CubeLookup expression / Output Wizard. If these aren't yet supported a message is displayed to notify the user.



2.3 Running and rolling aggregations

Market Insight now supports a new type of on-the-fly aggregation to more easily calculate running and rolling aggregations. This development makes this process quicker and easier to set-up.

- Running aggregation – will work out a value for this transaction from ALL the transactions up to and including it.
- Rolling aggregation – will work out a value for this transaction from a fixed number of transactions up to and including it.

The functions available are Minimum, Maximum, Sum and Average. With the Average function there are several options to control weighting on how important the previous transactions are.

The screenshot shows a configuration window for an aggregation. The fields are as follows:

- Name:** Running Average(Policy Premium) [Save icon]
- Type:** Running/Rolling [Dropdown]
- Grouping Table:** Customers [Dropdown]
- Transactional Table:** Policies [Dropdown]
- Order records by:** Policy Inception Date [Text input]
- From:** Earliest to Latest [Dropdown]
- Pick the:** Policy Premium [Text input]
- Radio buttons:** Running Rolling
- Function:** Running Average [Dropdown]



2.4 Support PatternMatch on-the-fly aggregation within Expression UI

We now support a more flexible way of matching patterns on a single variable from a transactional table. In each PatternMatch aggregation, users can specify a set of patterns in order of priority. These patterns are made up of a list of codes from a selector variable on the transactional table that will occur in order, in each record, from each of the grouping table records.

A use-case on the Demo system would be to search for patterns of product types purchased for each customer. We are supporting three wildcards – '?', '*' & '='.

The ordering variable can be date/date time, a numeric variable or an ordinal selector.

The screenshot shows the Expression UI configuration for a 'Pattern Match' aggregation. The main configuration includes:

- Name: Pattern Match (Policy Product Type)
- Type: Pattern Match
- Grouping Table: Customers
- Transactional Table: Policies
- Order records by: Policy Inception Date
- From: Earliest to Latest
- Pattern Match Variable: Policy Product Type

The 'Define pattern for Policy Product Type' dialog box is open, showing a table with the following data:

Pattern Name	Value 1	Value 2	Value 3	Value 4
P01	PRODUCT A	PRODUCT B	PRODUCT C	
P02	PRODUCT B	PRODUCT A	PRODUCT C	
P03	PRODUCT C	PRODUCT B	PRODUCT A	
*				

Grid		
Client Reference Number		
[-] Client Reference Number : 300820 (3 items)		
Policy Inception Date	Policy Product Type	Pattern
01-08-2011	PRODUCT A	P01
01-11-2011	PRODUCT B	P01
01-12-2011	PRODUCT C	P01
[+] Client Reference Number : 300887 (5 items)		



2.5 Two new measures in cubes

Two new measures have been added to cubes that work on selector variables. They are Count Distinct(variable) and Count Mode(variable).

CountDistinct() returns a value in this cell for the number of distinct instances of this variable found for the records in that cell (e.g. number of distinct job titles for each state).

Count Mode() returns a value in this cell for the number of times the modal value has been found (e.g. how many times did records in this state have the most popular job title).

Σ		Drop your variable here			
	State	Sites	Mode(Primary SIC 4	Count Distinct(Primar	Count Mode(Primary
	Unclassified	1,657,750	941.00	1,005	108,844
	ALABAMA	40,977	750.00	882	4,311
	ALASKA	7,834	941.00	508	583
	ARIZONA	51,811	750.00	872	6,333
	ARKANSAS	24,761	750.00	815	2,618
	CALIFORNIA	317,112	750.00	986	37,051
	COLORADO	53,112	750.00	874	6,331
	CONNECTICUT	34,819	750.00	846	3,058
	DELAWARE	8,919	750.00	637	907
	DISTRICT OF COLUM	12,454	750.00	455	910



2.6 Transaction summary wizard is now able to flag transactions within a min-max range

The Transaction Summary wizard takes a selector variable on the transactional table and creates a flag array on the grouping table where a value is flagged if that grouping table has an instance of that transactional value (e.g. customers have a transaction with this product code).

This extension allows the user to optionally specify a minimum and/or maximum number of transactions of that value that are required in order for the flag to be set (e.g. customers must have bought this product 4 or more times for a Yes flag).

The screenshot shows a window titled "Transaction Summary" with a sidebar on the left and a main content area. The sidebar contains a back arrow icon and five menu items: "Target", "Grouping Table", "Transaction Selection", "Priority Settings", and "Number of Transactions" (which is highlighted with a green dot). The main content area has the title "Choose Number of Transactions needed to Set Flag". Below the title, there is explanatory text: "By default a category will be flagged if one or more instances of that category are found in the grouping record item." and "Optionally specify the minimum and maximum number of matching transactions needed to flag a Assigned Salesperson category for the Records record." There are two input fields: "Minimum Transactions" with a checked checkbox and a spinner box containing the value "4", and "Maximum Transactions" with an unchecked checkbox and a spinner box containing the value "1".



2.7 Personal Best on-the-fly aggregations are now supported within Expression UI

A new type of aggregation has been added to the on-the-fly aggregation functionality that enables easier working out of the number of times a person has broken their previous record on a numeric value.

Transactions are sorted into order and a numeric value is returned for each transactional record as follows:

- 2 current transaction has lowest value in sequence so far (worst so far "PW")
- 1 current transaction has lower value in sequence than previous record ("worse")
- 0 current transaction has same value in sequence as previous record ("unchanged")
- 1 current transaction has higher value in sequence than previous value ("better")
- 2 current transaction has highest value in sequence so far (best so far "PB")

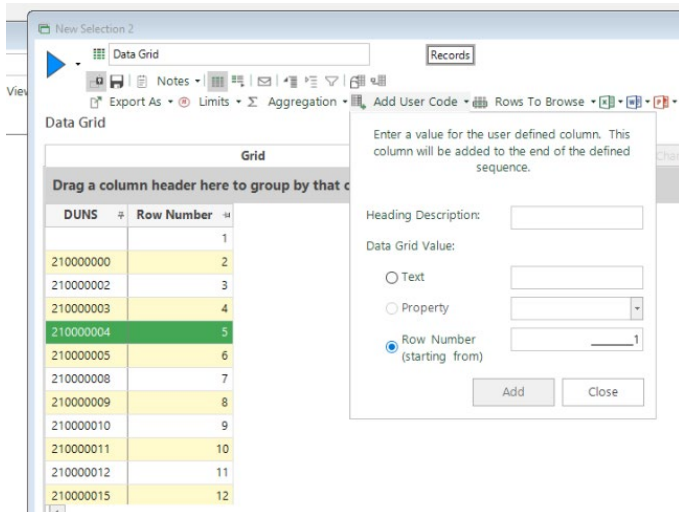
The screenshot displays the Expression UI interface. On the left, a 'Data Grid' window shows a table of policy data. The table has columns for 'Policy Inception Date', 'Policy Premium', and 'Personal Best Policy Premium'. The data is grouped by 'Client Reference Number'. The right window shows the configuration for the 'Personal Best Policy Premium' aggregation. The 'Name' is 'Personal Best(Policy Premium) ordered by Policy'. The 'Type' is 'Personal Best'. The 'Grouping Table' is 'Customers', and the 'Transactional Table' is 'Policies'. The 'Order records by' is 'Policy Inception Date' and 'From' is 'Earliest to Latest'. The 'Pick the' field is 'Policy Premium'. The expression at the bottom is 'Personal Best(Policy Premium) ordered by Policy Inception Date'.

Client Reference Number	Policy Inception D...	Policy Premium	Personal Best Policy Premium
136045 (4 items)	06-06-2010	321.00	0
	13-07-2010	240.75	-2
	24-09-2010	294.25	1
	02-11-2010	214.00	-2
	20-06-2011	267.50	1
	14-02-2012	1337.50	2
	136261 (2 items)	09-11-2010	70.00
17-11-2010		14.00	-2
08-02-2011		28.00	1
21-05-2012		28.00	0



2.8 Sequence number has been added as a column to exports / data grid

An option has been added to the user code column in a data grid to quickly add a sequence number to a data grid.



2.9 Extensions to expressions

Some new additions to expressions:

a) Lookup function allows you to look up values from an external file and match to data held in the Market Insight system.

Lookup ([UK 2007 SIC Code 1-5 digit], "Public:SIC Codes wanted.txt")

b) MakeDate now supports a single numeric value parameter. This can be useful when using in conjunction with the VarInfo() function returning a date value in numeric format.

MakeDate(YYYYMMDD)

c) Nth() and NthIndex() functions now accept date parameters to enable you to pick from a list of dates. It used to only allow a pick from a list of numeric values.

d) A new expression function has been added which can return information about a given table.

2.10 Output wizard now supports rank and percentile calculated measures

Cubes that are output through the Output Wizard could not support client-side calculated measures. Some support had been added for this with a limited number of the calculated measures which had server-side equivalents in an earlier release. In this release we have extended this to include Rank() and Percentile() calculated measures as well.



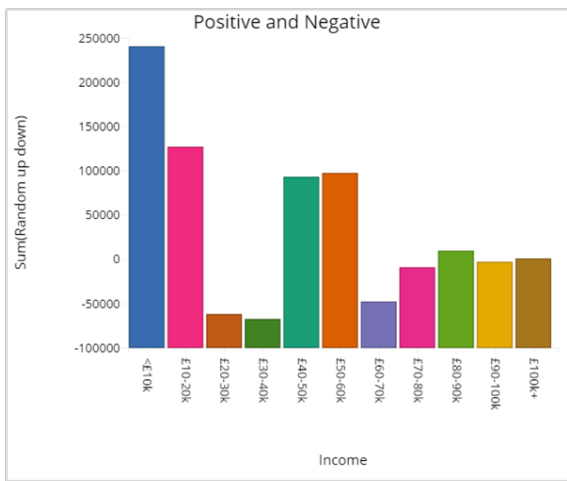
3. MARKET INSIGHT ORBIT

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

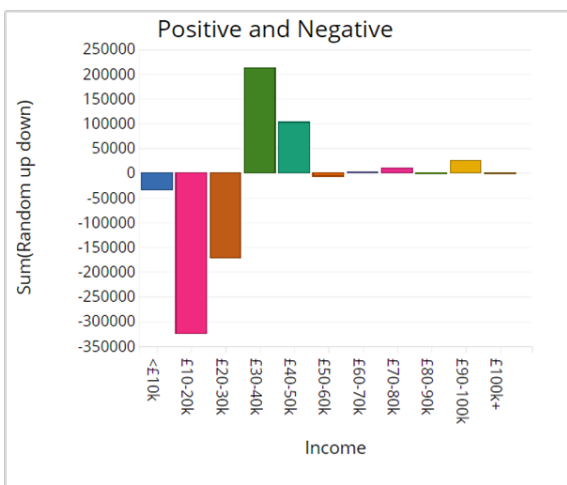
Displaying positive and negative values in storyboards and Orbit

Column and bar charts were affected in one dimension, and in two dimensions as clustered, stacked, stacked 100 and all the trellis configurations.

Before the fix (the bars don't start at zero)



After the chart copes with positive and values





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/>.