dun & bradstreet

Market Insight Release Notes
2021 - October

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EXECUTIVE SUMMARY

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

The key functional areas affected by this release are:

- **Quicker Results:** We've improved the efficiency of some complex MI selections and auto generated instant counts for all systems.
- **New Mapping Features**: Records selected on maps use co-ordinates rather than shape files, giving a more accurate result and there are now more thematic shading options.
- **Decision Tree changes**: Numeric variables and expressions can now be used and a new Mosaic Tree view has been added.
- **Updated Expressions**: New functionality allowing the use of delimited files within Expressions.
- **Various Improvements in Market Insight Orbit:** Orbit is updated on a different schedule to Market Insight but recent changes include Workspaces, a Search facility and the ability to use Audiences and DUNS Number files in other Audiences and Dashboard filters.

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 Improved MI experience – Complex queries

In this release we have re-engineered how Market Insight handles certain complex queries, increasing parallelization where possible. This should lead to faster results for Market Insight users on queries that previously took a long time to complete, giving a better user experience.

2.2 Improved MI experience – Selector counts

For Market Insight systems with a filter applied, the 'instant counts' on selector variables would show dashes until the counts are calculated for the first time after a data refresh. In some cases, re-generating these counts could take a considerable time. We've made a change so that these counts are now pre-populated for filtered systems, removing the wait for users.

Previous experience:

2.3   Accurately drag and drop selections by drawing custom shapes in maps

With the latest functionality in maps users can draw any shape using the scribble or shape tools to select data that exactly matches the drawn shape. The shape can then be dragged-off and saved as a selection. Previously drag-offs from maps have been limited to selecting at the level of detail of the underlying map shape files that are displayed on the map being built. In the example below, selecting from 'Scribble' the rectangular shape will give 3 States, each of which is touched by the shape, but which span an area much bigger than the shape.
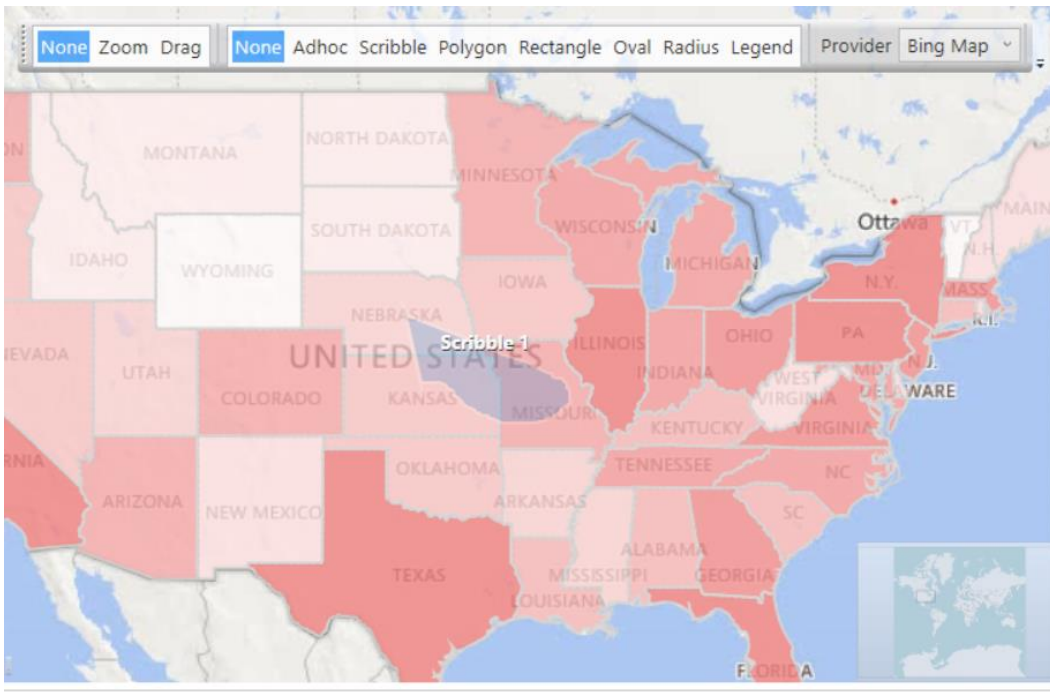
Previous dragged off selection from Scribble 1 vs new selection:
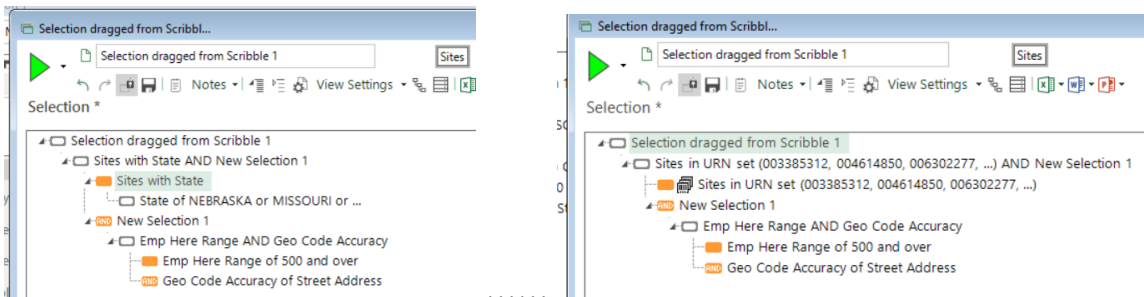
Now, any map shape can be turned into a selection that exactly matches the drawn shape.
This has some added advantages:

- The drag-off is independent of shape files. You don't need shape files for them to work.

- The drag-off uses latitude and longitude variables so will work anywhere in the world.

Before and after – drag offs now use co-ordinates, not the underlying shape file:
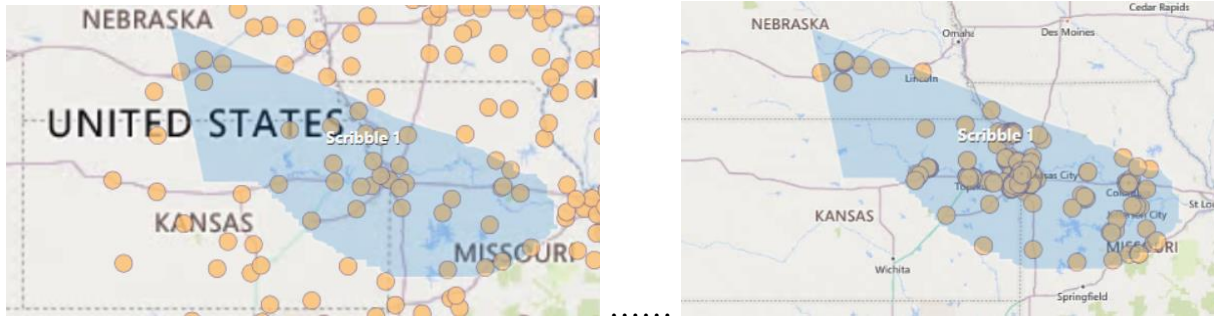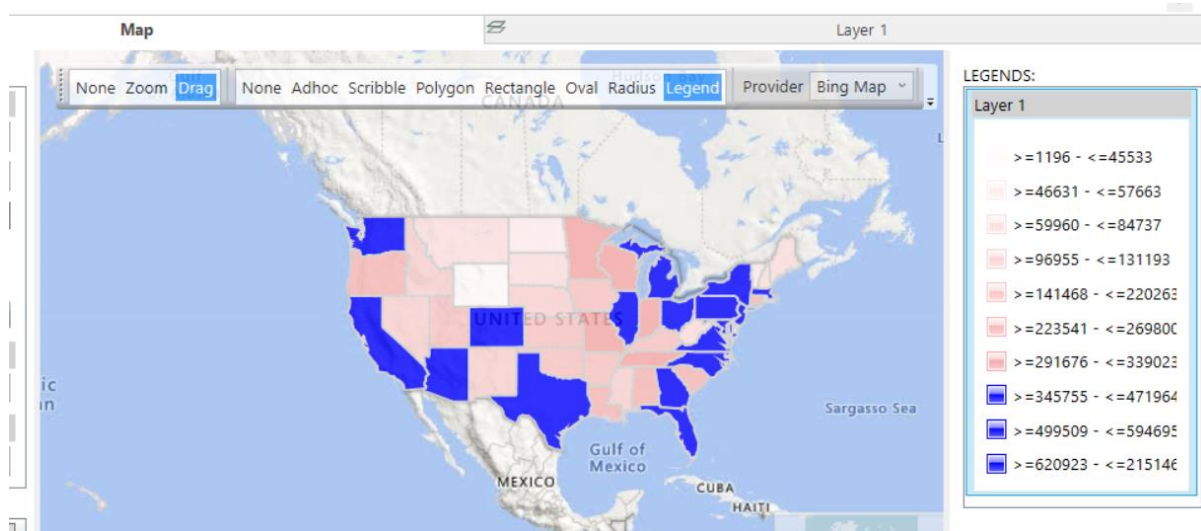

2.4   Improved thematic shading in Maps

The possibilities for shading and colouring a Map have been extended and brought into line with the options offered in the Cube and Tree tools. By default, shading will be applied to your map based on quantile ranges but you can change how the thematic is applied, and select the colours to use, via the new "Thematic" option in the Layers panel.
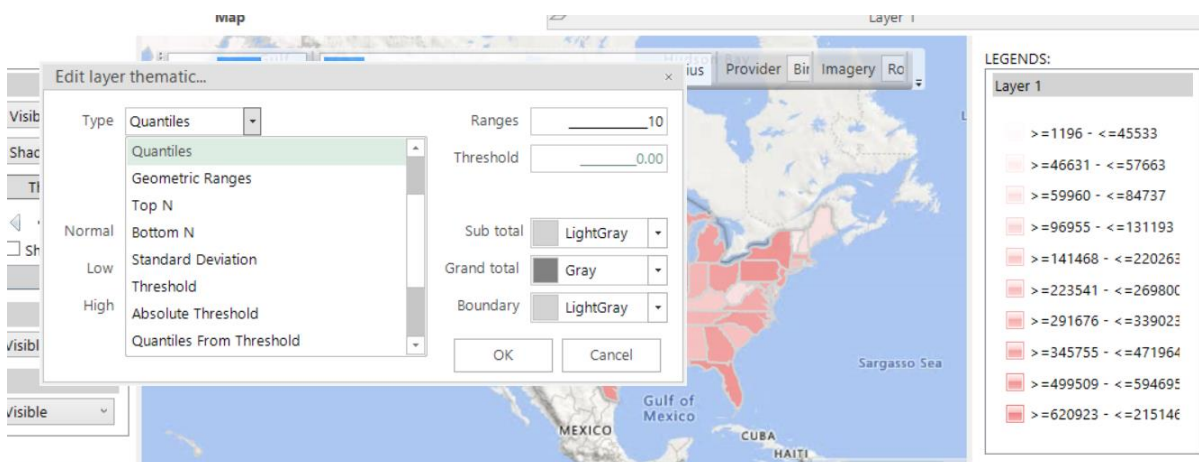
2.5   Selectable Thematic Map legends

On gaining insight from a map, you can now take action more easily by clicking onto and highlighting the colour ranges of interest in the Legend panel on the right. Using the new Legend selection option at the top of the display, you can then create a drag-off selection of all map areas shaded in your chosen colour ranges.

2.6   User-defined thematic shading in Cubes, Trees and Maps

A new "user-defined" thematic option is available in Cubes, Trees and Maps, available to select from the thematic dialog Type menu. This allows you to create ranges manually that make better sense for your data and which cannot be satisfied by the existing scheme options.

2.7   Copy Map layer

For multiple similar layers on a Map, you can now right-click on a map layer tab and copy it before editing the settings as required.
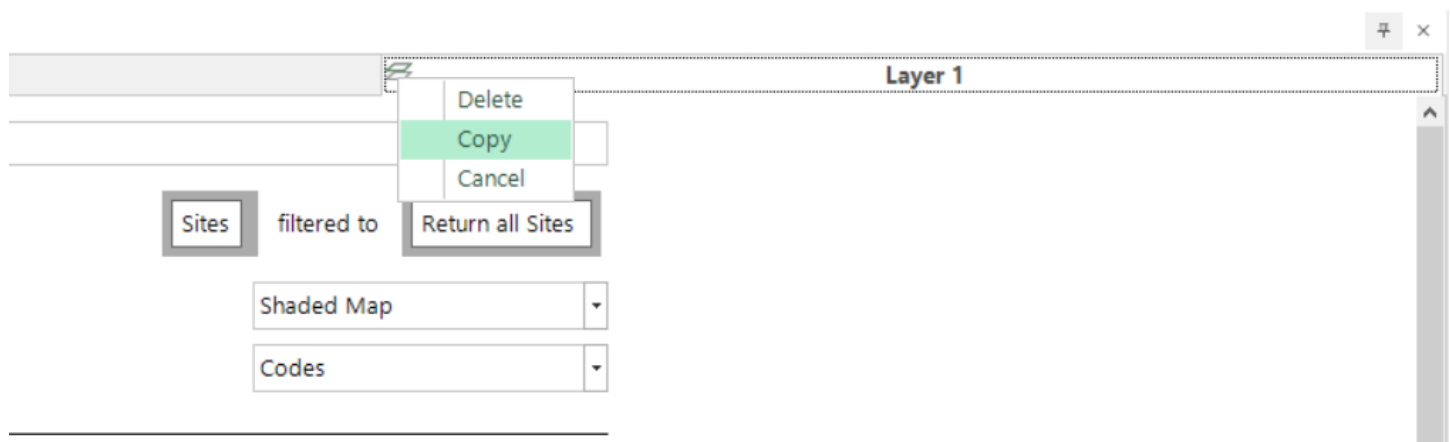
2.8   Edit Virtual Variables created using the Create from Cube wizard

Virtual Variables created using the Create from Cube wizard can now be edited. From the Choose Cube or Tree step within the wizard, you can also right-click on the drop panel to view a copy of the cube originally used to create the Virtual Variable.
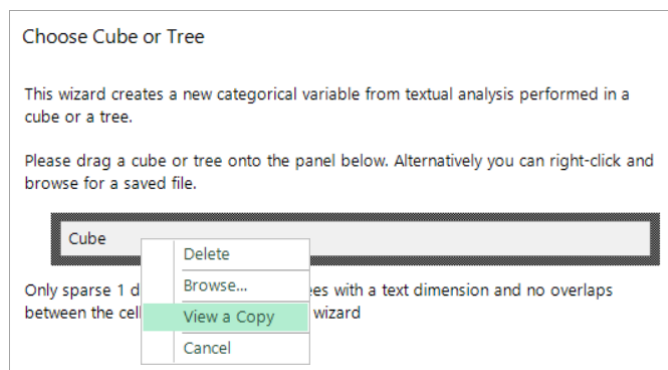
2.9   Improvements to the Decision Tree tool

Several improvements have been made to the Decision Tree tool in Market Insight. These include the ability to include numerical variables and expressions into the Decision Tree Modelling process making the technique more flexible and more powerful.

•   Use of numeric variables

The Decision Tree will now accept numeric variables. These are added with a default banding in the same way as they would when dropped on a cube. This banding is based on the distribution of the variable, which can be modified using a right drag.
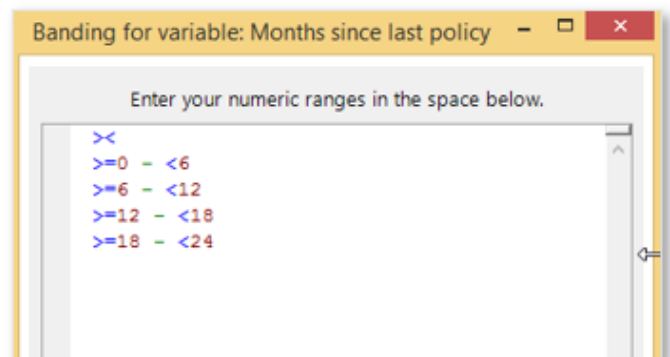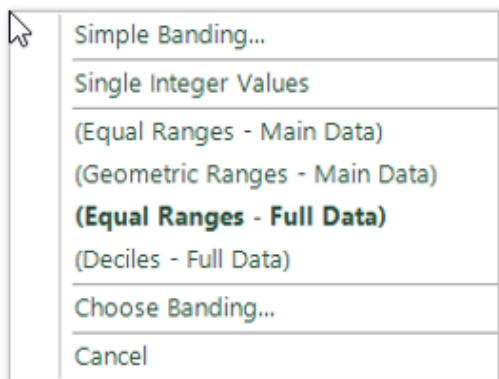
•   Use of the numeric expressions

The Decision Tree will now accept numeric expressions. Again, these are added in the same way as they would be when dropped on a cube. This is a simple negative/zero/positive banding (since the distribution processing doesn't yet support expressions). The bands can however be updated manually:

The banding of numeric variables and expressions can be modified using a right click option once they have been dropped onto the Decision Tree. Numeric expressions only support the" Simple Banding" option allowing bands to be typed in manually. Numeric variables also support "Edit Banding" which uses the more flexible banding editor.

It is possible to make changes to the banding of variables and expressions which have already been used in splits within the Decision Tree. The updated banding will only apply to new splits created from that point onwards.

Care should be taken when thinking about how missing values are handled. For example, a variable such as "months since last policy" will allocate missing to anybody who has never had a policy. To create a separate band for these people, use the syntax "><" as above. without this band people with missing values will be part of the unclassified group, along with values that are outside of the bands (e.g., "over 24" in the example above).

Note that numeric variables and expressions are added to the Decision Tree with the option set to keep unclassified values separate. It is important within a Decision Tree not to "omit unclassified" (as is the default for a profile) since this will remove large volumes of people from the analysis.

2.10 New Mosaic Tree view

There is a new graphical view to the Decision Tree which particularly helps visualise the volumes and quality of the leaf nodes. The traditional box tree is particularly helpful in understanding the rules and their hierarchical nature. The organic tree is useful to understand the significance of a split (conveyed by the angle of a branch) but can also be used to understand volumes of both the leaves and branches.

Three views of the same Decision Tree – Mosaic, Box and Organic
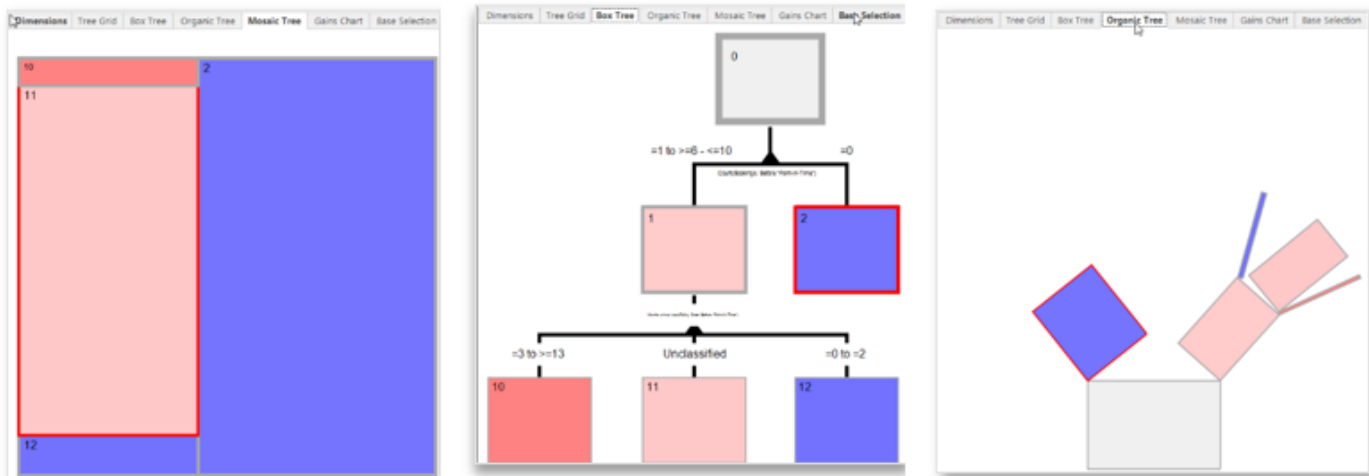
2.11   New Expression features

DateTimeShift([DateTime], Number, "Units") -> DateTime

This function shifts a DateTime variable by a number of units which can be day-based (years, quarters, months, weeks, days) or time-based (hours, minutes, seconds).

GeoPointInArea([refLatitude], [refLongitude], Lat1, Long1, Lat2, Long2, …) -> 0 or 1.

This function will return whether the given point defined by the reference latitude / longitude in the first pair of parameters is within the shape defined by the vertices described in the other latitude / long pairs. This enables the user to specify shapes anywhere in the world and know whether a point lies within that shape or not.

New numeric/text list from file Expressions

Two new File Functions have been added, allowing you to create and easily update an Expression which contains reference points that may change. Rather than manually updating the Expression, and any dependent analyses containing that Expression, instead you can use the new functions to refer the Expression to a data file which you can centrally amend when your list of points needs to be updated. The new functions are:
-   TextListFromFile(filePath, columnNumber, headerRows, {delimiter},{encloser})
-   NumericListFromFile(filePath, columnNumber, headerRows, {delimiter},{encloser})
Delimiter and Encloser are optional parameters which default to tab-delimited and double-quote enclosed.

Expressions with open-ended parameters extended

To ensure the usability of the new File Functions, 26 existing functions that take open-ended parameters have been extended to also allow list parameters. These include:

Geo	GeoNearest; GeoDistMin; GeoNth; GeoDistNth; GeoPointInArea
String	AddStr; StrContains; StrContainsI; StrBegins; StrBeginsI; StrEnds; StrEndsI; StrShredContains
Other	VarSelect; InList; Index; MaxIndex; MinIndex; BandUp; BandDown; Nth; NthIndex

Existing utility functions on lists (CountList, StrList) have also been extended to take TextList parameters.
A new function – TextListContains({textList}, string,…) has been created.

2.12 Relative DateTime selections

Date Rule selections have been enhanced to meet the changing needs of marketers, to enable more regular daily data refreshes. This new feature provides users with the ability to select date and time units of less than 1 day

For example, this could be used when users would like to select people who have abandoned their shopping basket.

'Select me people who have booked so far today'

'Select me people who have booked in the last 3 hours'

We have added capabilities to selections on DateTime variables to support this:

3 new relative time points

• Now
• This hour (start / end of)
• This minute (start / end of)

3 new offsets

• Hours
• Minutes
• Seconds

As an example, this is how we would select transactions made in the last 3 hours:

3. MARKET INSIGHT ORBIT

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

3.1   Orbit Workspaces

We have added Workspaces to the Orbit user interface to help you manage your resources and allow you to return to your work quickly.
The Workspaces panel lives on the left-hand side of the screen, and on first viewing, an "Onboarding" message displays to introduce the feature provides a more welcoming, useful and attractive entry point to the application.
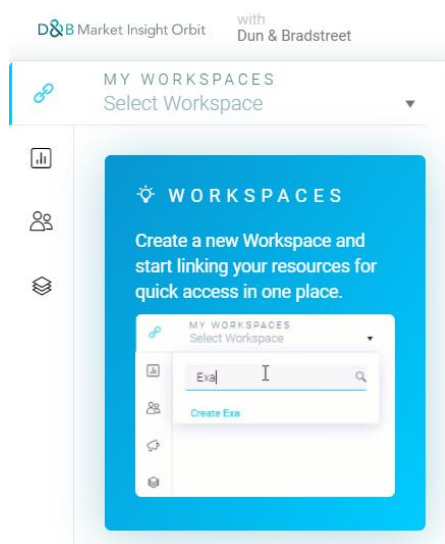
You can either search for resources or add the current resources. You can add or remove the following resources: - Dashboards, Audiences and Collections to a Workspace to help organise your work. You can rename or delete a Workspace without affecting any resources.
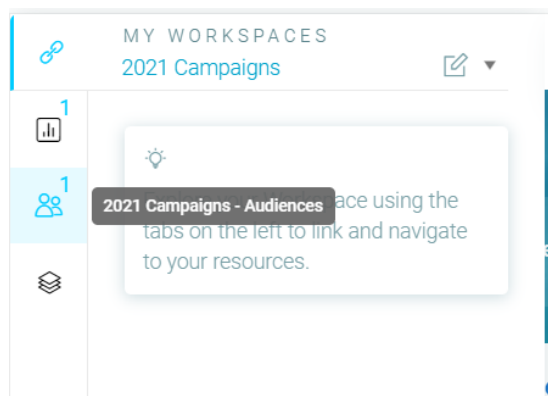
3.2   Orbit Search

The new search functionality in Dashboards (and Audiences) makes it easier to search and browse for variables and codes within selector variables and tables, and also search for Audiences and Files.
We have also combined searching and browsing so that you don't have to switch between the two modes.
You start by browsing or can type in the search box, and you also have the option to view categories by selecting the "View codes in search" checkbox.
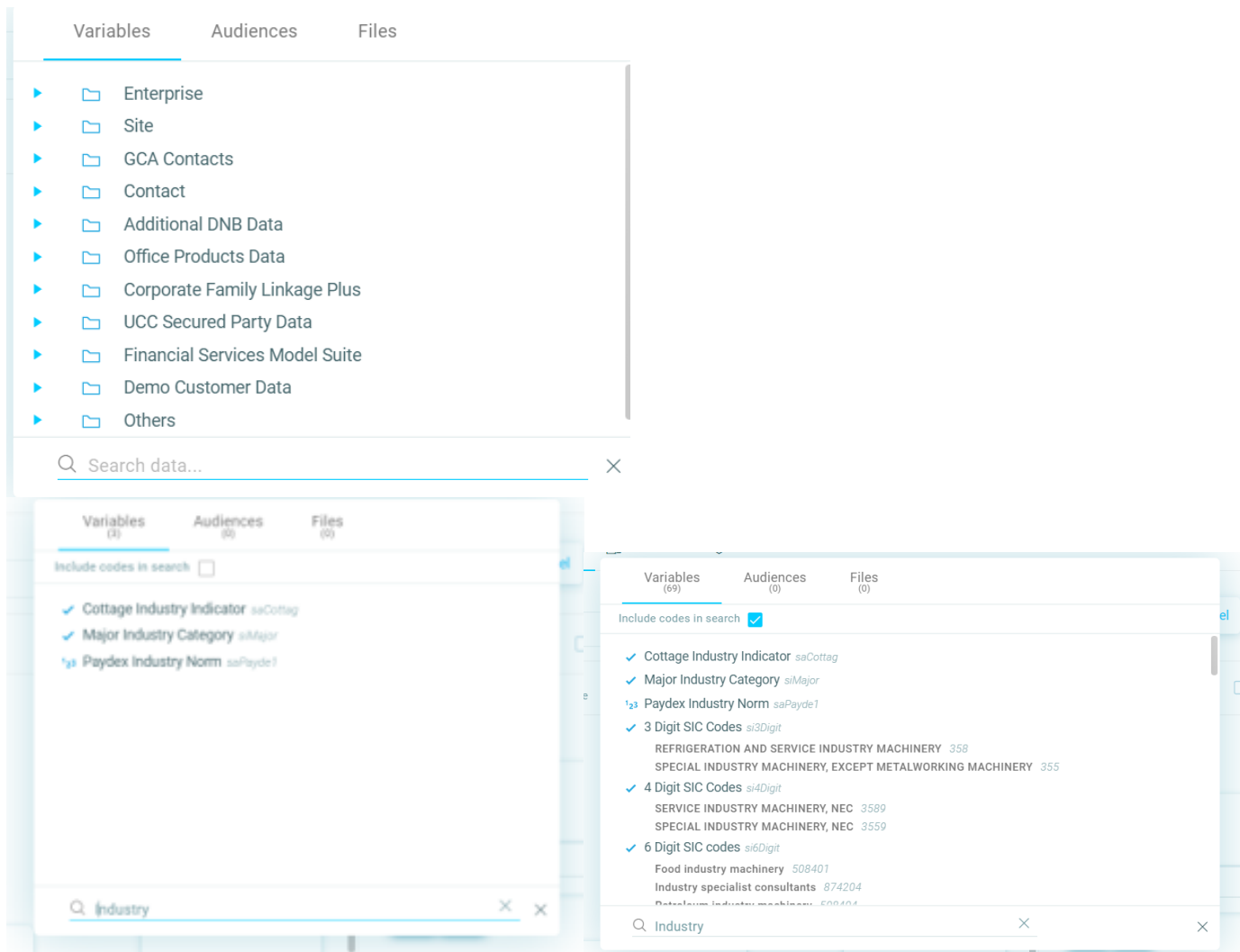
The new search is available throughout Orbit and displays the appropriate options for each area. For example, you can select URN when applying limits to an Audience or creating an Export Template.

3.3   Orbit – Case sensitivity options for text variables

You can now specify whether you want to select a text variable in a case-sensitive or case-insensitive way.

3.4   Orbit Dashboards – Data Labels

A dashboard editor can now configure how a dashboard tile displays Data Labels.

The options are:
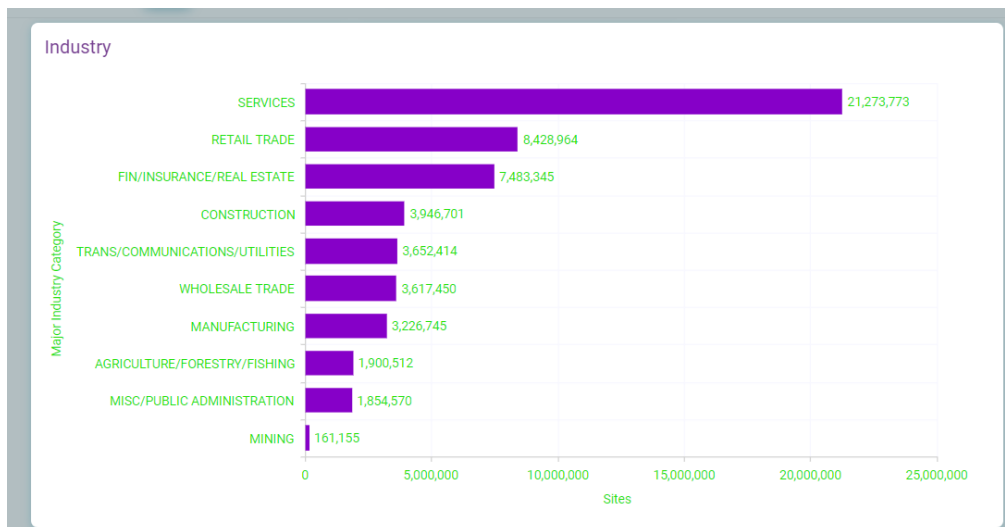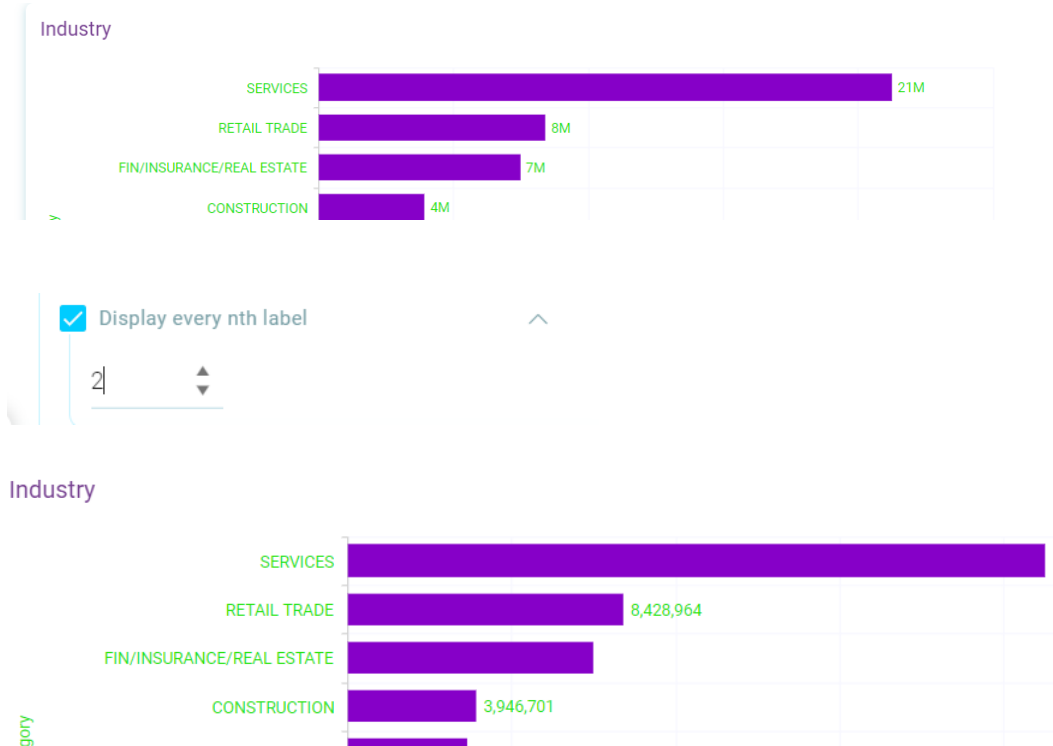*   Display - Turn labels on or off or set to Auto (Auto - data labels will automatically display when the tile is large enough)
*   Abbreviate count - Abbreviate the data label values.
*   Display every nth label - Set a step value to prevent labels from clashing.

Industry

SERVICES	21M
RETAIL TRADE	8M
FIN/INSURANCE/REAL ESTATE	7M
CONSTRUCTION	4M

☑ Display every nth label ⌃

2 ▲▼

Industry

SERVICES	
RETAIL TRADE	8,428,964
FIN/INSURANCE/REAL ESTATE	
CONSTRUCTION	3,946,701

The user viewing the dashboard then has the option to tailor these initial settings for their session.

3.5   DUNS Numbers in Audiences and Dashboard filters

Orbit can reference the power of DUNS Number files saved in MI as part of Audiences and Dashboard base queries. For example, you can use a DUNS file to either include or exclude sites from your selection or campaign.

3.6   Audiences in Audiences

When creating campaign files or customer segments for analysis, a subset of customers is continually referenced in most or all customer selections. These Audiences can define active customers, frequent spenders, dormant customers, or master exclusion lists such as complainers, do not contacts, marketing preferences, or deceased lists. These criteria to select customers are usually recorded and updated in one central place as Includes, or Excludes (suppression lists), for campaigning or analysis. You can use the Search function to find and add an Audience to new or existing Audiences.

The benefits of referencing Orbit Audiences within new or existing Orbit Audiences are:
•	The ability to create and maintain one Audience as the master copy to be used in all Audiences as required
•	The flexibility to change these Audiences and have that change automatically apply to Audiences where it is referenced

- The ability to reference multiple Audiences within one Audience to ensure consistent criteria is applied
- Ability to reference a read-only version of an Audience that has been shared with you as criteria within your Orbit Audience
- To have peace of mind that Audiences created which include these Audiences are consistently selecting the same people as the basis of the selection

3.7   Orbit Audiences in Dashboards

You can use an Audience to filter a Dashboard, for example a list of "Active customers", in this case customers who have made at least booking in the last three years.

With the Dashboard in Edit mode, an editor can click in the Filters use the Search box to select an Audience
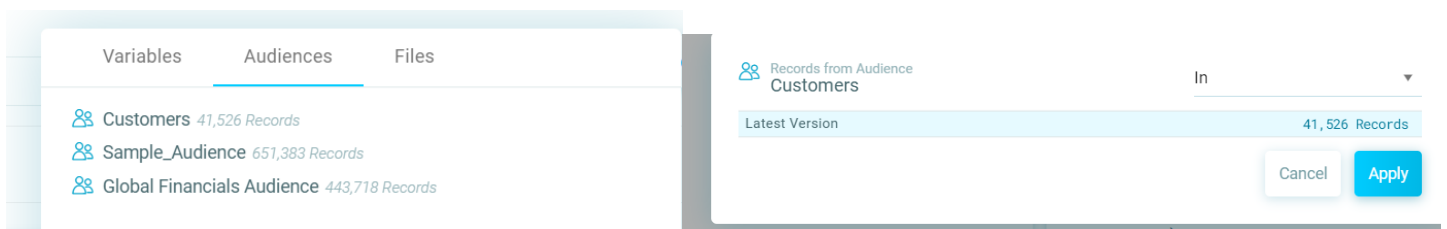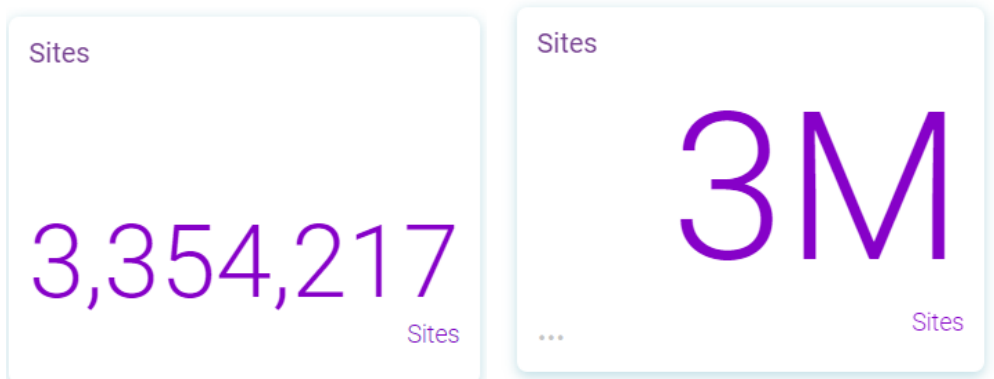

3.8   Abbreviated Counts on Number Cards

You can abbreviate the count on a number card.

Select the Abbreviate count check-box to enable this feature.
The following abbreviations will be applied:

- 1 => 1
- 21 => 21
- 321 => 321
- 4321 => 4.3K
- 54321 => 54K
- 654321 => 654K
- 7654321 => 7.7M
- 87654321 => 88M
- 987654321 => 988M
- 1987654321 => 2B

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/.