

Spectrum™ Technology Platform

Version 2018.2.0

Spectrum Visual Insights™ Guide



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1 - Introduction

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What is Spectrum Visual Insights™?

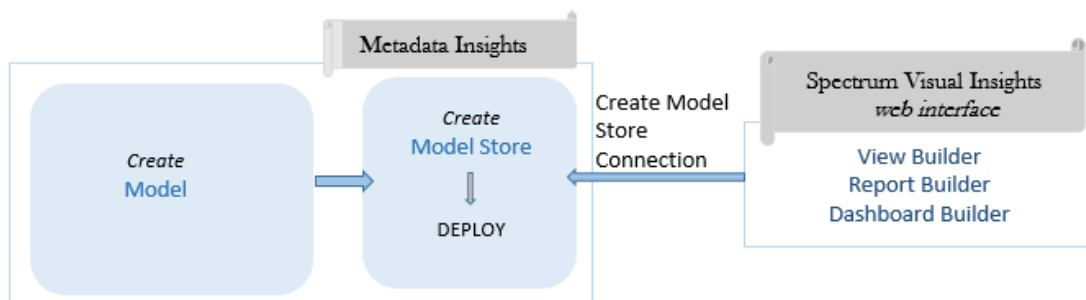
The Spectrum Visual Insights™ Module allows you to visualize complex data from heterogeneous data sources using powerful dashboard, reporting, and charting tools. It allows you to take informed business decisions by effectively analyzing the reports and charts.

The Spectrum Visual Insights™ Module provides:

- Platform to view information in a uniform user interface through unified views of data.
- Consolidation of data from multiple data sources in common reports, thus saving you from combining data manually.
- Analytical and adhoc reporting capabilities that facilitate quick retrieval of new or different combinations of data.
- Capability to design reports autonomously, rather than depending upon experts.
- Access rights based on roles for generating reports and charts.
- User-friendly user interface with multiple visualization options, such as graphs and charts to choose from.
- Reduced time and effort for generating standard reports for the organization.
- Rich, exact, up-to-date and visually appealing information formats for decision makers.

To visualize data and generate reports, the Spectrum Visual Insights™ Module utilizes data through the Model Store created and deployed through Metadata Insights. For more information about Model Store creation, see *Metadata Insights Guide*.

Architecture



Visual Insights - Components

Component	Purpose	Process
Metadata Insights	Create Models and Model Stores	Sign in to Metadata Insights web interface. Create a model, create a model store based on the model, and deploy the model store.
Spectrum Visual Insights™ web interface	Visualize the data using reports, charts and graphs	Sign in to Spectrum Visual Insights™ web interface. Create Model Store connection. Data in model stores is used as input to generate the desired reports, charts, and graphs as output. For more information, see Model Stores .

Key Features

The key features of Spectrum Visual Insights™ web interface include:

Key Features	Description
Data Sources	Stores connection details of how Spectrum Visual Insights™ uses to connect to the external database based on which the reports are to be generated. For more information, see Data Sources on page 12. Note: Source connections can have many views.
Views	Acts as the metadata layer that allows you to define which fields, from which tables in your source database can be made available for reporting. For more information, see Views on page 12. Note: Multiple reports can be generated based upon any view.
Reports	Report can be generated based upon any view. Note: Reports can be used on one or more dashboard.

Key Features	Description
Charts/Graphs	Provides option to represent data in graphs or charts format.
Dashboard Tab	Facilitates the creation of customized dashboard, once the report is generated. Report can be generated with one or more reports. The feature is designed to display Key Performance Indicators (KPI) in order to allow quick and clear examination of actual performance. A typical dashboard is designed with high level reports that can drill down to more detail when required. You can display all key reports on a single page, using tabs to organize by subject and type.
Storyboard	Helps you create slide shows with fully functional reports, text, images, and videos. You can share your storyboard with various users, collaborate with other viewers of the storyboard for reviews on slides, and also make private notes on the slides during presentation.
Collaboration	Allows you to collaborate by using various features such as 'Timeline', which help track events occurring within the system. You can comment on reports, perform discussions while referencing to several reports simultaneously, perform annotations on dates so that you can comment on the occurred events leading to trend changes and more.

2 - Signing In

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Signing In to Spectrum Visual Insights™

Spectrum Visual Insights™ is a browser-based tool that allows you to visualize and analyze your business data using advanced features like highly interactive dashboards and reporting tools.

This procedure describes how to access Spectrum Visual Insights™ using a web browser.

Note: Ensure you install the Spectrum Visual Insights™ Module before signing in. For more information, see [Installing Spectrum Visual Insights™](#).

1. Open a web browser.
2. Go to the URL `http://server:port`.

where:

server: Server name or IP address of your Spectrum Visual Insights™ server.

port: HTTP port used by Spectrum Visual Insights™ server.

This is the port you have entered while installing Spectrum Visual Insights™.

3. Enter a valid user name and password.

The administrative user name is `admin` and the default password is `admin`. You should change the admin password immediately after installing Spectrum Visual Insights™ to prevent unauthorized administrative access to your system.

Note: Even existing users of the SVI module need new credentials for successful login to Spectrum Visual Insights™ 12 SP1. The administrative user creates other user IDs with relevant roles.

4. Click **Login**.
5. On the NOT FOR RE-SALE LICENSE information, click the **Click Here To Continue** link. The Spectrum Visual Insights™ home page is displayed.

Roles and Permissions

Spectrum Visual Insights™ consists of pre-defined roles with pre-set privileges for each specific role. Any Spectrum Visual Insights™ user can be assigned any of these pre-defined roles. This set of pre-defined roles are:

- Consumer and Collaborator
- Personal Content Writer and Collaborator
- Public Content Writer and Collaborator

- System Administrator

For a description of these roles and process to create a new role, see <http://wiki.yellowfin.com.au/display/USER73Plus/Roles>

3 - Data Visualization

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Connecting to Data Source

In Spectrum Visual Insights™, the only data source you can connect to is Model Stores configured and deployed in the Metadata Insights module.

Note: For details on creating and deploying model stores, refer to the Metadata Insights guide.

To connect to a data source, perform these tasks:

1. On the Spectrum Visual Insights™ home page, click () **Add > Data Source**. The **New Connection** pop-up window is displayed.
2. Select **Create a data source connection using JDBC**.
3. In the **New Connection** pop-up window, specify these connection parameters:


- A name for the connection
- Description of the connection
- Spectrum Model Store as the database type

Note: This is the only database type you can connect to in Visual Insights.

- Spectrum™ Technology Platform host detail
- Port for connecting to the model store

Note: The default port is 32750.

- Name of the model store to which you are connecting
- Credentials to connect to the model store in Metadata Insights

4. Click () and select **Test Connection**. If the connection succeeds, **Connection Succeeded** message is displayed.
5. Click **Create View** to move to the next stage, and specify these details:

- Your view type

Note: Details of the view type are displayed when you select the option.

- The table of the model store that you want to analyze.
- Name your view and its description

6. Click **Create Analysis** to begin creating reports and charts using data in the selected table of the model store.

Admin Console

This *Administration* feature allows you to customize views, reports, and dashboards. It is a centralized configuration page that allows the admin users fast access to all controls required to maintain the system.

To access the **Administration** tab, login into Spectrum Visual Insights™ web interface, and go to **Administration > Admin Console**.

For more information, see [Signing In to Spectrum Visual Insights™](#) on page 8.

Data Sources

The **Data Sources** page contains the connection details, which the system uses to access source data for reporting. The only data source connection available is to the model stores created and deployed in the Metadata Insights module.

For more information, see [Connecting to Data Source](#) on page 11.

Views

A View is a metadata layer that defines the relationships between tables.

Go to **Administration > Admin Console > Views**. The deployed model stores are listed.

For more information, see <http://wiki.yellowfin.com.au/display/USER73Plus/Creating+a+View>.

Users

Users provides access to the system based on users logins. The user list provides administrators with the ability to browse all the users within the system.

To access this list, expand the **Users** section in the main panel of the **Admin Console**.

Note: Users are read-only and can be managed using Management Console.

Go to **Administration > Admin Console > Users**.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/Users>.

User Groups

User Groups feature groups together a common set of people. Groups can be created and managed through the Admin Console.

Go to **Administration > Admin Console > User Groups**.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/User+Groups>.

Content Folders and Content Subfolders

Content Folders are used to group similar Subfolders. These do not contain any content directly.

Content Subfolders are located within the respective folders and are used to store content with specified function and access permissions. The content types that are stored in this case are Reports and Dashboard Tabs.

Go to **Administration > Admin Console > Content Folders**.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/Content+Categories>.

Content Tags

Content Tags allow labeling a certain similar entities.

Tags can be used by these content types:

- Discussions
- Reports
- Dashboards
- Images
- Annotations

Go to **Administration > Admin Console > Content Tags**.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/Content+Tags>.

Date Filter Periods

Date Filter Periods provide various date filtration options.

Go to **Administration > Admin Console > Date Filter Periods**.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/Date+Filter+Periods>.

GeoPacks

GeoPack Management is designed to work with your data without being incorporated and stored into your source database.

Packs provide three types of data:

- Geographical Labels
- Geographical Fields (Points, and sometimes Polygons)
- Demographic Metrics

Go to **Administration > Admin Console > GeoPack Management**.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/GeoPacks>.

Creating Reports and Charts

The **Create** feature allows you to build and generate reports and charts.

It contains these sub-features:

- **Report** on page 14
- **Data** on page 14
- **Charts** on page 15
- **Output** on page 15

Report

Reports are created based on Views.

Go to **Create > Report**.

For more information, see <http://wiki.yellowfin.com.au/display/USER73Plus/Creating+a+Report>.

Data

The **Data** page allows you to build, edit and view the report data definitions used to generate reports.

Go to **Create > Report > Data**.

For more information, see

<http://wiki.yellowfinbi.com/display/USER73Plus/Report+Builder+-+Data+Step>.

Charts

Charts are the graphic equivalent of tables and cross-tab tables.

Go to **Create > Report > Charts**.

For more information, see

<http://wiki.yellowfinbi.com/display/USER73Plus/Report+Builder+-+Charts+Step>.

Output

The **Output** has two different functions, based on the status of the report:

- Draft** When a report is in the *draft* mode, the Output allows you to format the display of tables, and define a multi-chart canvas if required.
- Active** When a report is in the *active* mode, the Output allows you to report action. Based on role permissions, a report also provides the option for appropriate users to place the report back into *draft* mode and edit various components. Report actions include exporting, sharing, and broadcasting the report.

Go to **Create > Report > Output**.

For more information, see

<http://wiki.yellowfinbi.com/display/USER73Plus/Report+Builder+-+Output+Step>.

Creating a Storyboard

Storyboard facilitates creation of slide shows with fully functional reports as well as text, images, and videos.

Go to **Create > Storyboard** to create slide shows.

For more information, see <http://wiki.yellowfinbi.com/display/USER73Plus/Storyboard>.

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