



Market Insight Release Notes  
2020 – February



## Table of Contents

<b>1. Executive Summary</b> .....	<b>3</b>
1.1 Target Audience .....	3
<b>2. Features</b> .....	<b>4</b>
2.1 On-the-fly aggregations with text item variables .....	4
2.2 On-the-fly variable efficiency in cubes and data grids.....	5
2.3 Improvements to the Modelling Environment .....	6
2.4 Derived cube expressions .....	9
2.5 Changes to the Market Insight Load Engine .....	10
<b>3. Market insight Orbit</b> .....	<b>11</b>
3.1 Orbit Overview.....	11
3.2 General Orbit Changes.....	11
3.3 Orbit Collections .....	13
3.4 Orbit Audiences .....	15
3.5 Orbit Dashboards – Coming soon!.....	17
<b>4. Support</b> .....	<b>18</b>



## 1. EXECUTIVE SUMMARY

This document outlines the Market Insight (MI) features that are scheduled to be released to production in February, 2020.

The key functional areas affected by this release are:

- **On-the-fly aggregations with text item variables:** Allows fuller aggregation of elements from lower tables, such as contact surname or customer name.
- **On-the-fly variable efficiency in cubes and data grids:** Allows Market Insight users to use aggregations in various visualisations (eg datagrids and cubes) more efficiently.
- **Improvements to the Modelling Environment:** Making the Modelling Environment more powerful and more user-friendly.
- **Derived cube expressions:** Allowing for powerful analysis of cube results.
- **Orbit updates:** The latest new developments towards Market Insight in a browser, including Audiences and the forthcoming interactive Dashboards.

### 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 On-the-fly aggregations with text item variables

NB – This new feature and the next one use the power of aggregation within the expression tool. Unsure how to use this? Ask your Market Insight contact for details!

Support for textual item variables have been added to certain on-the-fly-aggregations. (These are ‘Recency Select Nth’, ‘Recency Select Nth Distinct’ and ‘Relative’.)

In previous releases, text variables could not be dragged onto these 3 types of on-the-fly-aggregations. In this release they can be used.

This has the potential to be a useful development for many Market Insight users – it will allow users to easily aggregate contacts, client information and data from other transactional tables onto the same site level datagrid.

The way that Market Insight data is held means that the method for retrieving textual aggregations is different to other data elements. The result of the below calculation gives an integer – this is a lookup number into the data file records for that particular item variable.

To then turn this into text we have added a new expression function ‘VarValueText(variable reference, lookup number)’ which will then look up the relevant text value from that particular variable.

Name

Type

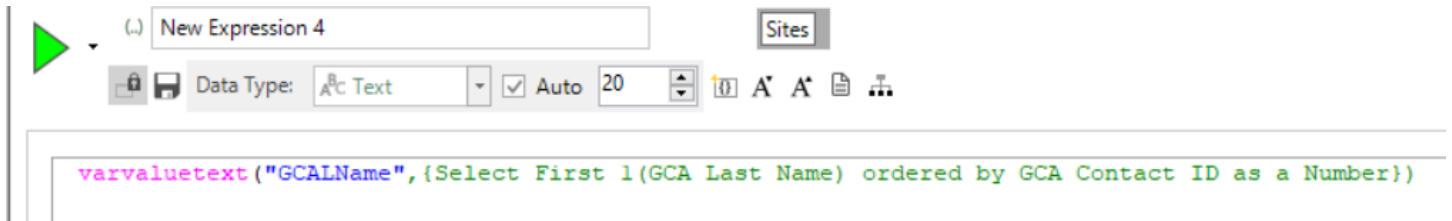
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Order records by

From

Select GCA Contacts number  Distinct

Pick the



## 2.2 On-the-fly variable efficiency in cubes and data grids

Previously, where on-the-fly variables were present in a MI workbook, the results were calculated for all the records in the MI universe and then applied to the workbook. This approach can be inefficient often it only needs to use a fraction of them.

In this release this has been improved as follows:

- Any on-the-fly variables used in cube requests are calculated only on the records in the base selection.
- Any on-the-fly variables used in browse requests are calculated only on the records in the base selection and further restricted to the limited records visible in the browse grid.
- Any on-the-fly variables used in export requests are calculated only on the records in the base selection with any export limits applied.

There are two important notes here:

1. If the base selection has a random element then due to the way the requests are sequenced, we calculate the on-the-fly variable on all the records.
2. On-the-fly variables used in selections have to be calculated on all the records.

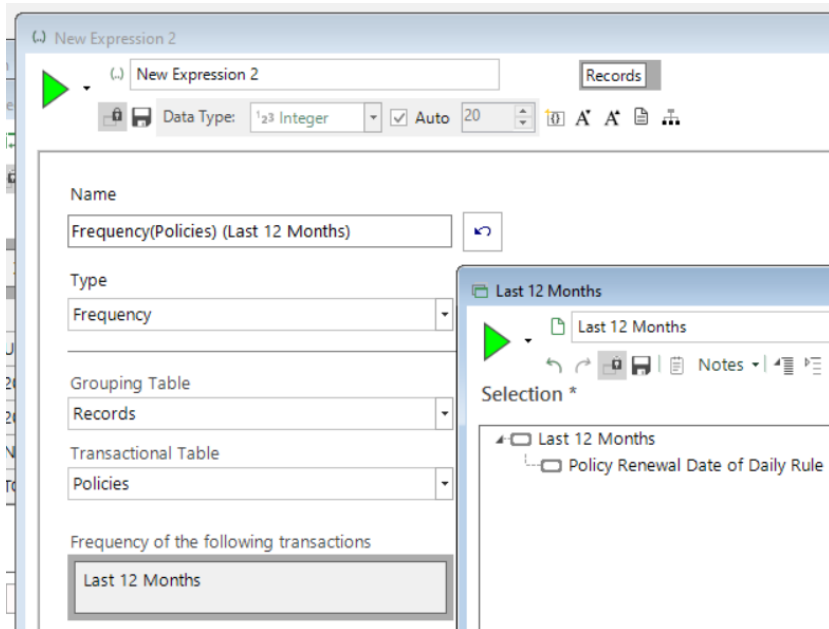


## 2.3 Improvements to the Modelling Environment

The Modelling Environment is being developed over the next few releases to facilitate the creation of models based on transactional data. Don't have access to the Modelling Environment? Please ask your MI contact about this feature.

### Support for Expressions

The success of a model is largely driven by the quality of the input features. The Modelling Environment now supports numeric expressions to be used as dimensions.

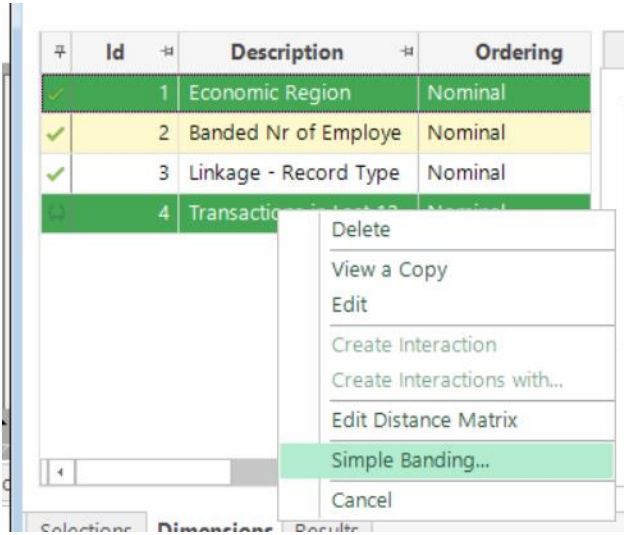


For example, “On-The-Fly-Aggregation” expressions can be dragged on to the Modelling Environment to identify which transactional features are predictive, such as “number of customer transactions in the last 6 months”, or “percentage of income via internet purchases last year”.

### Banding of numeric dimensions

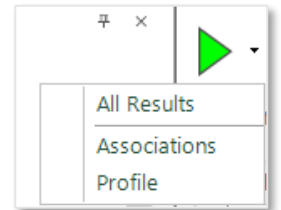


Numeric expressions and variables can be banded using a right click option. If multiple dimensions are selected, the same banding will be applied to all.



### Evaluation of dimensions

The aim of the Modelling Environment is to first evaluate the best dimensions (e.g. transactional features) and then to use these to create and evaluate the best model. The build profile button uses a standard profile to evaluate the dimensions.

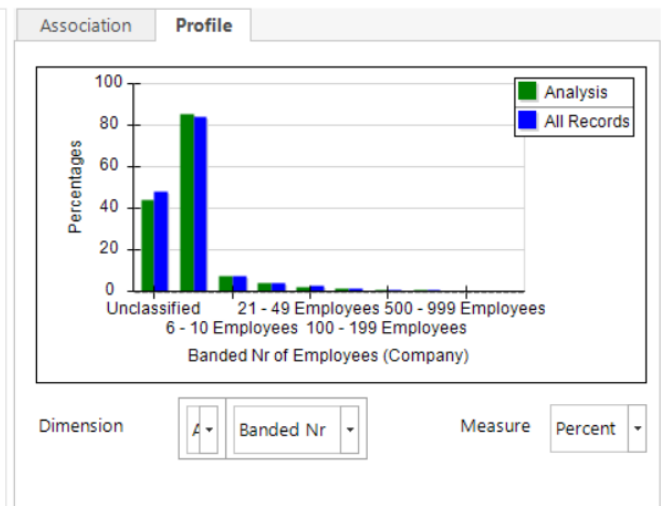


There is a new “Mean PWE” column which enables dimensions to be ranked.



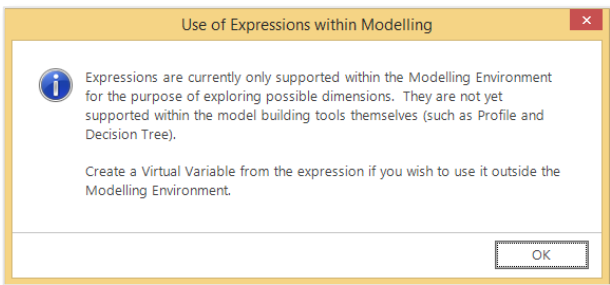
### Dimensions

Id	Description	Ordering	Mean PWE
2	Banded Nr of Employee	Nominal	0.042
1	Economic Region	Nominal	0.061
3	Linkage - Record Type	Nominal	0.258
4	Transactions in Last 12	Nominal	



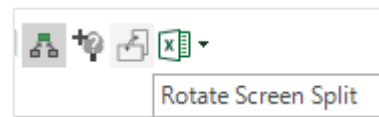
The selected row is now automatically highlighted in the profile chart opposite.

Note that expressions are not yet supported on the other modelling tools, so Virtual Variables would need to be created once the best features have been identified using the Modelling Environment.

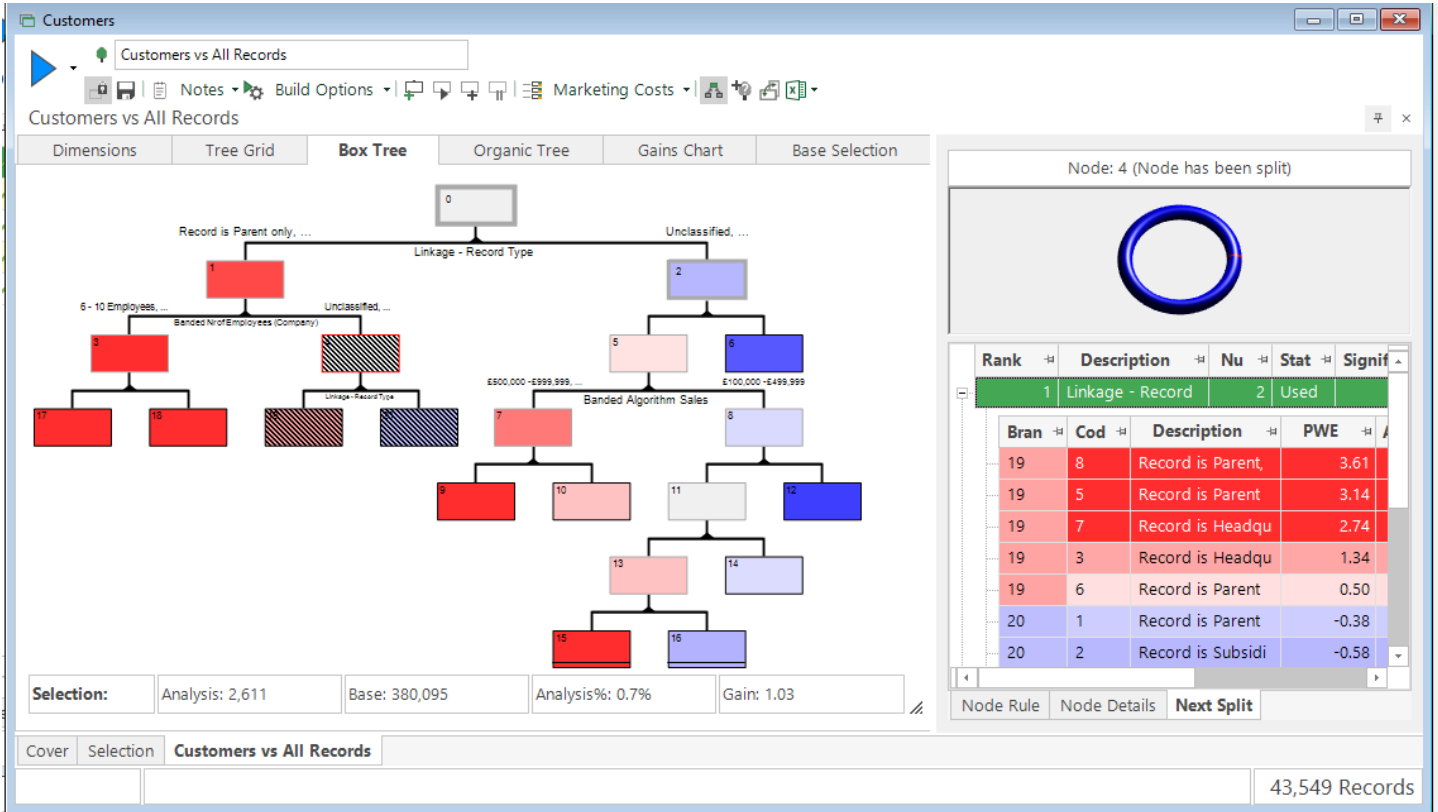


### Improved layout of Modelling Environment and Decision Tree tool

The dimensions tab of the Modelling Environment and the Decision Tree now have an option to split the screen vertically, for use on wide-screen monitors.







## 2.4 Derived cube expressions

This development builds on the existing calculated measures in cubes to provide a wholly new expression framework that allows for more powerful derived results in cube statistics. These new 'derived cube expressions' allow for far more power in producing results that were not possible previously.

This development includes:

1. User interface to allow derived expressions to be defined and edited in cubes etc.
2. 5 new expression functions (CubeCell, CubeRange, CubeCellIndex, CubeCellHeader and PeriodToDateCubeRange) to refer to cells or ranges within a cube. The range functions return a new data type – a 'list'.
3. 7 new functions to work on lists. 2 of these (RankList, NTileList) are equivalent to calculated measures, 2 are for filtering lists (TrimList, FilterList), and the remaining 3 are generic functions to work with lists (CreateList, CountList, ListContains).



4. Reworking existing functions to accept list parameters. 7 of these are functions working on lists of numeric values (sum, mean min, max, mode, stddev, median) and 2 of them work on lists of numerics or dates (rankcoeff, ranksequence).

This development makes it possible to return a wide variety of numeric results from existing cube cells. A more detailed document will follow soon on this feature. If you already use statistics / calculated measures in cubes, ask for more details on this new feature.

## 2.5 Changes to the Market Insight Load Engine

### **Delta update data sources are now in production release.**

This major change to the method of populating Market Insight systems is now fully released. Until now, Market Insight systems have been built from a full snapshot of the source data. In some cases, this has required the re-processing of hundreds of millions of rows of data when most of that data is static. The new mechanism enables system administrators to populate Market Insight systems by providing the changes since the previous refresh. These changes are commonly known as “deltas”, hence the feature name. Delta data sources are best suited to tables in which the majority of data is static, for example transactional tables such as purchases, web visits, communications, etc. Please speak to your Market Insight contact if you think this feature would be helpful in your system’s data refresh.



We now support Snowflake data sources using a specialised ADO.NET driver.



Market Insight Designer can now download from Salesforce.com data sources using custom queries.



### 3. MARKET INSIGHT ORBIT

#### 3.1 Orbit Overview

Market Insight Orbit is the power of your Market Insight system within a browser.

The original element of Orbit was '**Orbit Collections**' allowing you to share visualisations and MI results with other members of your organisation – including those who do not use Market Insight.

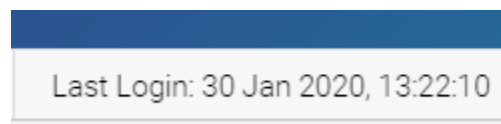
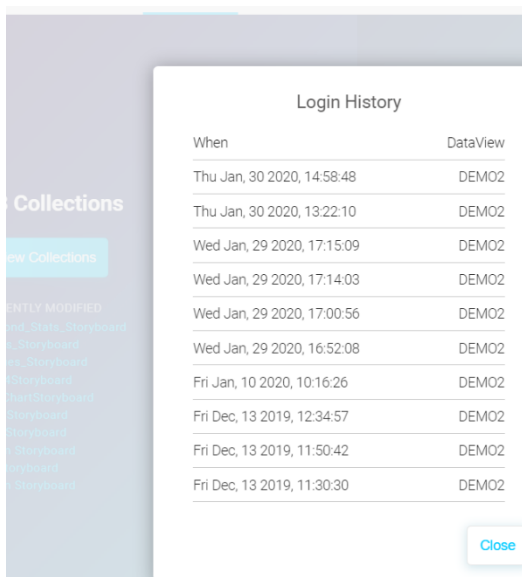
Development of Orbit Audiences has continued apace since the last Market Insight update. Orbit Audiences allows you to select, license and export data from your MI system in a browser rather than the MI windows installation.

A third element to Market Insight Orbit is coming soon – Orbit Dashboards. This feature will allow you to show key metrics of your MI system in a dashboard. The dashboard is interactive, so you can change it and drill down to further delve into the details held within the dashboard.

Please speak to your Market Insight contact if you are interested in using Market Insight Orbit.

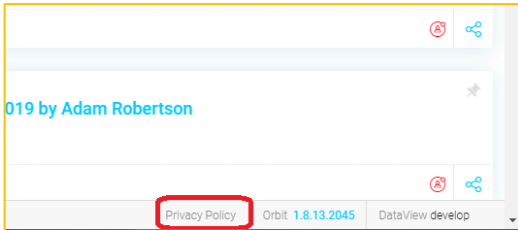
#### 3.2 General Orbit Changes

The last time you logged in is now displayed in the application footer and you can view a list of your recent login history by clicking on it.

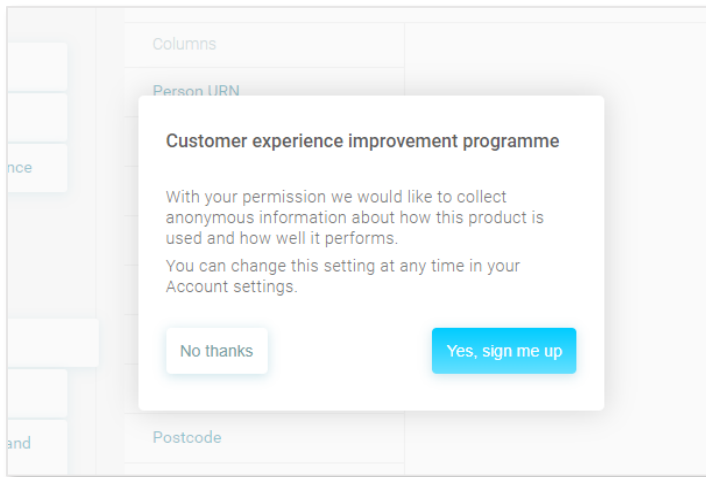




A link can be displayed in the login page and the footer of the application to take the user to a privacy policy page.



Telemetry data gathering has been added to enable us to gather user feedback and make enhancements accordingly (referred to in the product as the “Customer experience improvement programme”).

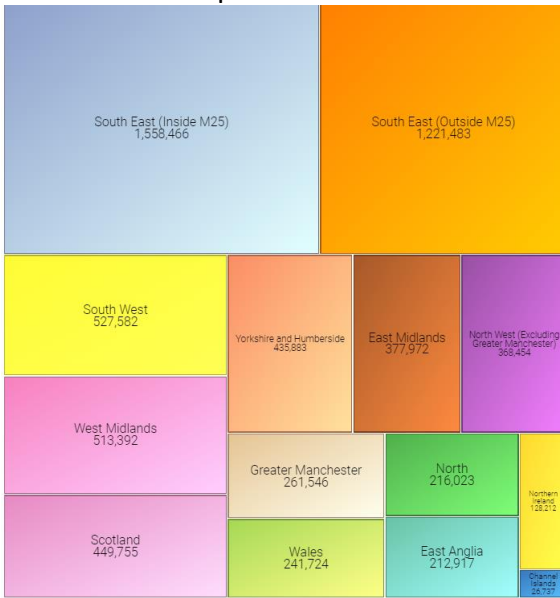


Single sign-on (SSO) functionality has been developed and tested with the OneLogin identity provider. It is not currently live in the Market Insight environment but could be enabled in the future. Users will be able to log in via the OneLogin portal or direct via the Orbit URL. Multi-factor authentication (MFA - sometimes also known as two factor authentications or 2FA) is also supported.



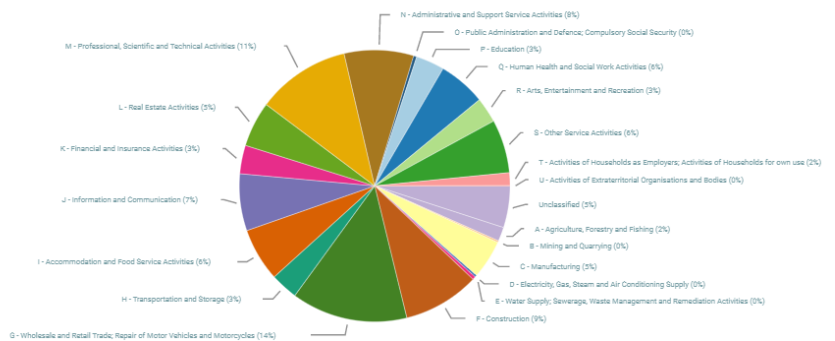
### 3.3 Orbit Collections

The data labels specified on the chart in Market Insight are now displayed on charts in Orbit collections.



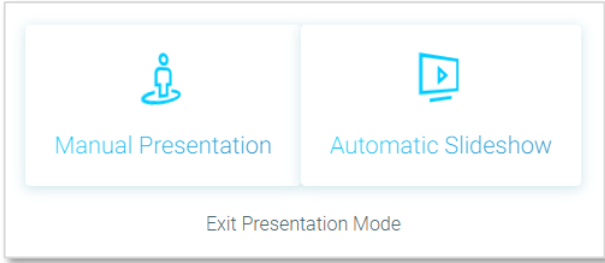
Pie chart and Treemap visualisations in collections have been improved.

- Unclassified
- A - Agriculture, Forestry and Fishing
- B - Mining and Quarrying
- C - Manufacturing
- D - Electricity, Gas, Steam and Air Conditioning Supply
- E - Water Supply, Sewerage, Waste Management and Remediation Activities
- F - Construction
- G - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles
- H - Transportation and Storage
- I - Accommodation and Food Service Activities
- J - Information and Communication
- K - Financial and Insurance Activities
- L - Real Estate Activities
- M - Professional, Scientific and Technical Activities
- N - Administrative and Support Service Activities
- O - Public Administration and Defence; Compulsory Social Security
- P - Education
- Q - Human Health and Social Work Activities
- R - Arts, Entertainment and Recreation
- S - Other Service Activities
- T - Activities of Households as Employers; Activities of Households for own use
- U - Activities of Extraterritorial Organisations and Bodies

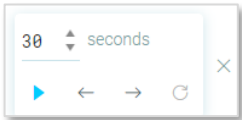




Improvements to collection presentation mode - Presentation mode for collections has been improved to provide options Manual Presentation or an Automatic Slideshow that rolls from slide to slide.



Each option displays a control panel at the bottom of the screen to allow the user to play or pause the automatic slideshow, step forward or backwards, toggle repeat at the end of the slideshow, control the timing or exit the slideshow. Automatic slideshows are a great way to share insight with your colleagues.





### 3.4 Orbit Audiences

Data Licensing - Market Insight users can now license records within Orbit Audiences as well as the main Market Insight environment. This is a major step forward in making Orbit Audiences viable for live customer use.

The screenshot shows a 'Data Licensing' modal window. At the top, it says 'Data Licensing' and 'Licensing set' with a dropdown menu currently showing 'sites'. Below this, a message states: 'The following data shows the number of records that fit this audience.' This is followed by a table:

Available to license:	42,374
Records in transaction:	555,530

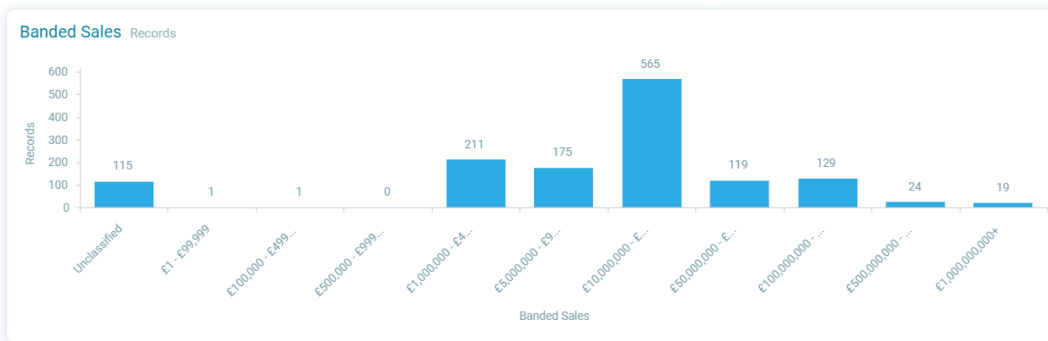
Below the table, a note says: 'If you want to proceed with this licensing, please enter the purchase order number and password.' There are three input fields: 'Purchase order #' (empty), 'Password' (with a strength indicator icon), and 'Output filename' (containing 'Joni Test'). At the bottom left, there is a checkbox labeled 'Use authorisation code' which is currently unchecked. At the bottom right, there are three buttons: 'Export' (blue), 'License' (grey), and 'License & Export' (blue).

The audience check panel compositions editor has been greatly improved and allows users to edit composition layouts within the application.



Audience Compositions

The layout of the audiences check panel has been simplified so that there is no splitter between the Check panel charts and data sample.



DUNS	Business Name	Banded Sales	Banded Sales Percentage...	Banded Pre-Tax Profit	Banded Risk Score 1-100	Financial Strength
210015079	Calder Industrial Materials Ltd	£10,000,000 - £49,999,999	Unclassified	£-999,999 - £500,000	21 - 25	3A = 7,000,000 - 14,999,999

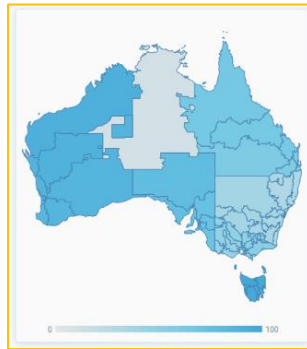
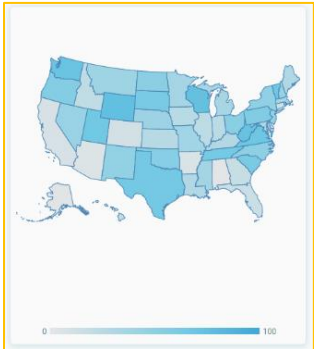
X

Audiences limits dialog box - The limits dialog box in the Orbit audiences tool has been made clearer and validation of variable choices improved.





Map visualisations are now available in the Orbit audiences check panel, giving users the ability to quickly scan the map to validate and understand the geographical distribution of their chosen audience. These maps help marketers understand the distribution of recipients in an audience. You can determine whether you have correctly restricted the audience to the geographic area intended and get an idea of where the majority are located.



### 3.5 Orbit Dashboards – Coming soon!

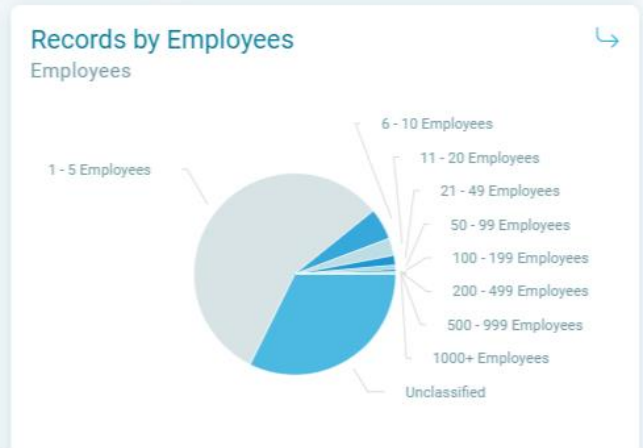
Development of the interactive dashboards has continued over the last few months and will be available to Market Insight Orbit users in the near future. Some of the exciting new features planned include the ability for users to drill-down into the dashboard tiles and apply filters to analyse their data base and discover insights that can be used to select audiences to utilize in campaigns.



## Sample Demo Dashboard



Navigation and settings: Refresh, Home, Add (+), Align Items (None), Auto adjust (OFF)



### 4. SUPPORT

Should you have any questions or need assistance, please contact the [UKCS@DNB.com](mailto:UKCS@DNB.com) team or by contacting your Customer Experience Representative.