



Market Insight Release Notes
2021 - February



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EXECUTIVE SUMMARY

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

Records With Linkage Present (Inc Branches)

Filter: Description Contains

Include

954,713 Records

| Linkage - Record Type | 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 | 2 |
| 6 to 10 Site Employee | 8,221 | 22,668 | 5,766 | 80,481 | 522 | 3,277 | 2,218 | 2 |
| 11 to 25 Site Employee | 11,393 | 25,149 | 3,817 | 67,706 | 1,123 | 3,220 | 2,608 | 2 |
| 26 to 50 Site Employee | 7,083 | 13,373 | 1,189 | 8,001 | 1,016 | 6,594 | 1,615 | 2 |
| 51 to 100 Site Employee | 396 | 7,933 | 563 | 3,372 | 173 | 2,591 | 579 | 2 |
| 101 to 250 Site Employee | 566 | 4,914 | 391 | 346 | 322 | 168 | 101 | 2 |
| 251 to 500 Site Employee | 62 | 1,465 | 200 | 71 | 164 | 20 | 32 | 2 |
| 501 to 1000 Site Employee | 9 | 695 | 10 | 12 | 7 | 20 | 8 | 2 |
| >1000 Site Employee | 2 | 440 | 2 | 1 | 1 | 5 | 1 | 2 |
| TOTAL | 125,356 | 314,452 | 45,767 | 389,304 | 6,629 | 48,635 | 15,910 | 8 |

Transformation applied:

Apply Transform...

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



TRM 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. This is a MI system with a UK universe, so not all DUNS returned are held within this MI system, resulting in the warning below. Again, this is the same as using the wizard. MI will return the DUNS that do form part of the universe, they're now the basis of the selection and any visualisations built onto it.

| | | |
|---|------|---|
| ⚠ | 2504 | 208862 records read from file Global Ultimate Parent_4b826310f7124f29a0329fde3af3e253.urn but not all valid |
| ⚠ | 2504 | 177752 matched reference number(s) from file Global Ultimate Parent_4b826310f7124f29a0329fde3af3e253.urn |
| ⚠ | 2504 | Warning : 31110 reference number(s) not matched from file Global Ultimate Parent_4b826310f7124f29a0329fde3af3e253.urn |

TRM 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

| | 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 Employee | 11,393 | 3,817 | 1,123 | 16,333 |
| 26 to 50 Site Employee | 7,083 | 1,189 | 1,016 | 9,288 |
| 51 to 100 Site Employee | 396 | 563 | 173 | 1,132 |
| 101 to 250 Site Employee | 566 | 391 | 322 | 1,279 |
| 251 to 500 Site Employee | 62 | 200 | 164 | 426 |
| 501 to 1000 Site Employee | 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.

| 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 |

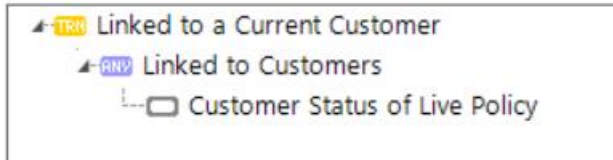
| Include | Code | Descri... | Records |
|-------------------------------------|------|---------------|-----------|
| <input type="checkbox"/> | ! | Unclassifi... | 3,614,473 |
| <input checked="" type="checkbox"/> | 01 | 1 - 5 Em... | 3,315,825 |
| <input checked="" type="checkbox"/> | 02 | 6 - 10 E... | 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 |

| | 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.



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

File To Export

Output File

Append Date To Output Filenames

Edit Task

Enabled

By Minute/Hour 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).

```
DateDiff (MakeDate (2019, 1, 1), [Policy Inception Date], \"Weeks\")
```

| 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.

```
DateDiff ([Policy Inception Date], MakeDate (2019, 1, 1), \"Weeks\", 1)
```

```
DateDiff (MakeDate (2019, 1, 1), [Policy Inception Date], \"Weeks\", 1)
```

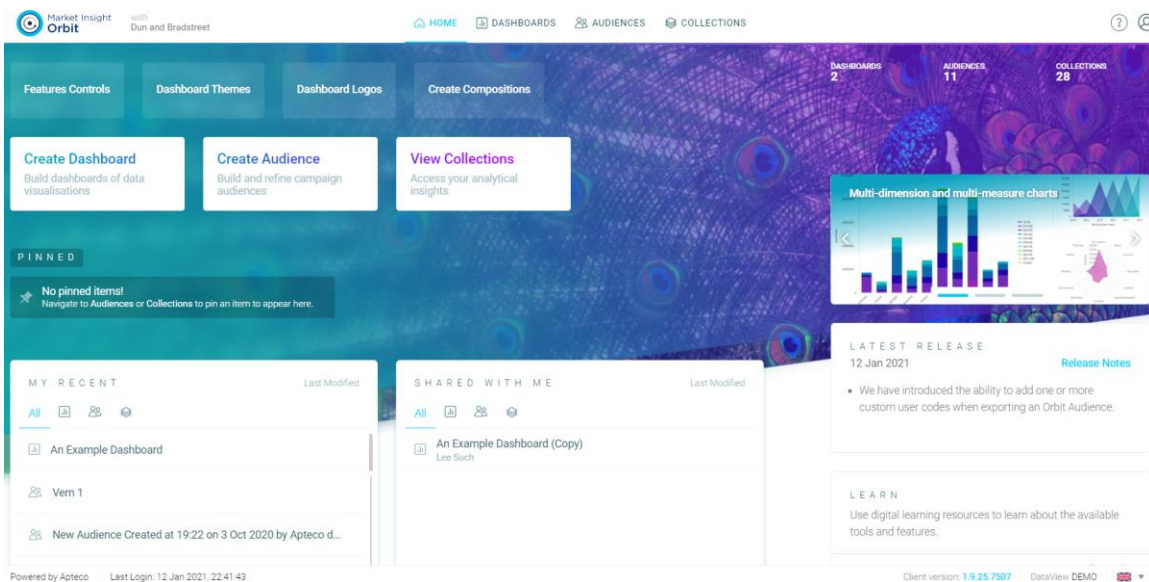


3. MARKET INSIGHT ORBIT

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

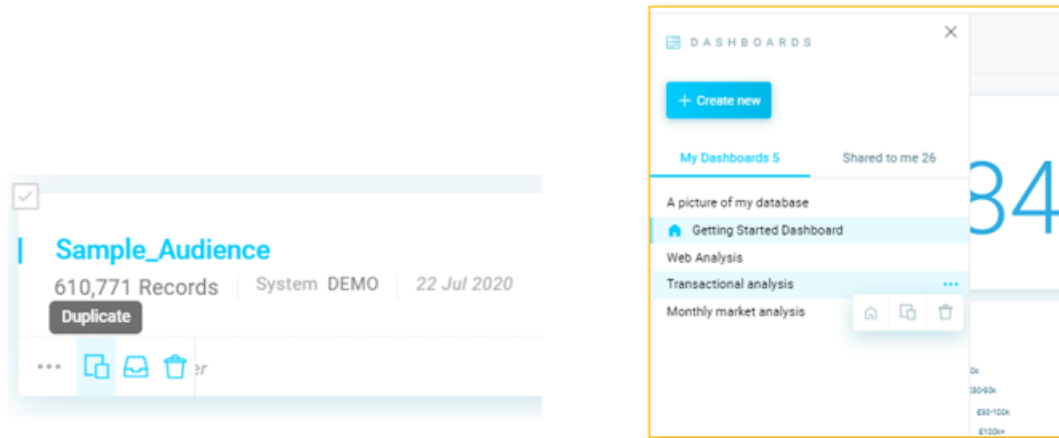
New icons have been added to the top level navigation bar to consistently identify the different types of resource available in Orbit, as shown in the lists on the home screen.





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.

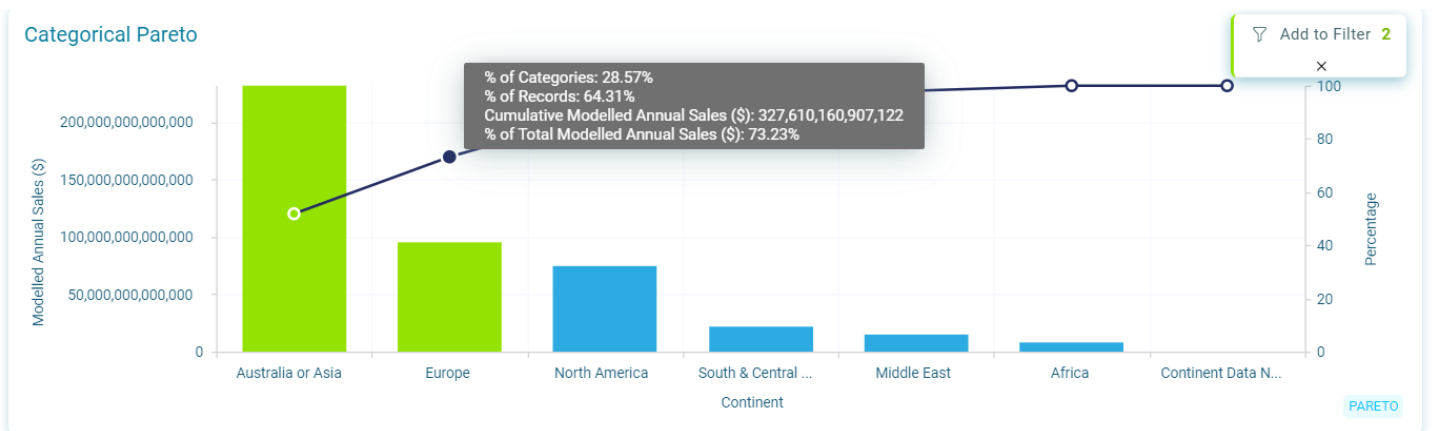
☰ dun&bradstreet Sample Demo Dashboard



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

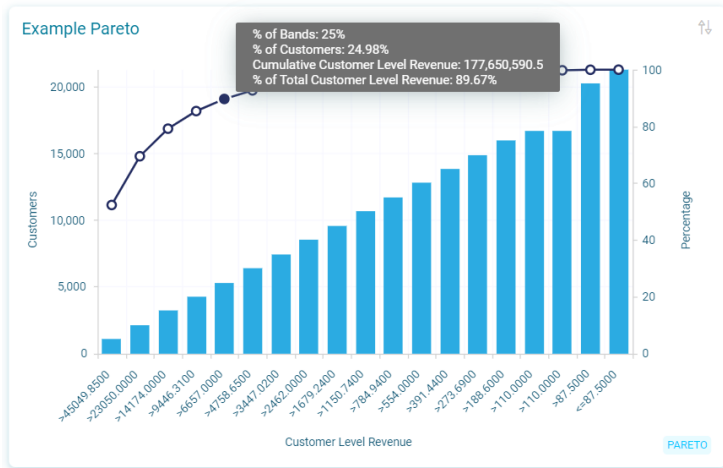
Dashboard administrators can now create Categorical and Banded tiles.

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.

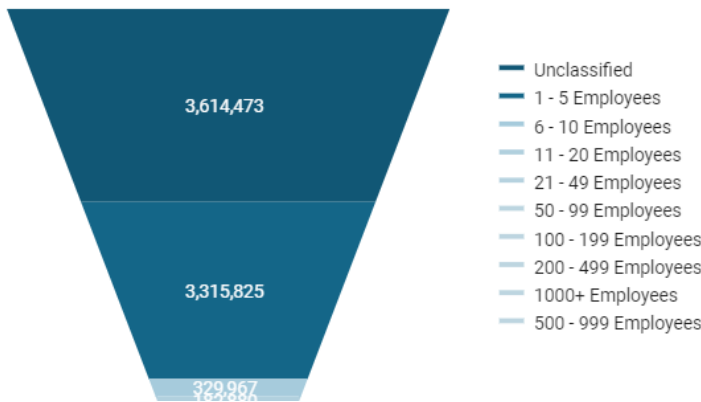
As with all dashboards, you can then build audiences from the filtered dashboards to identify and market to these high value segments.



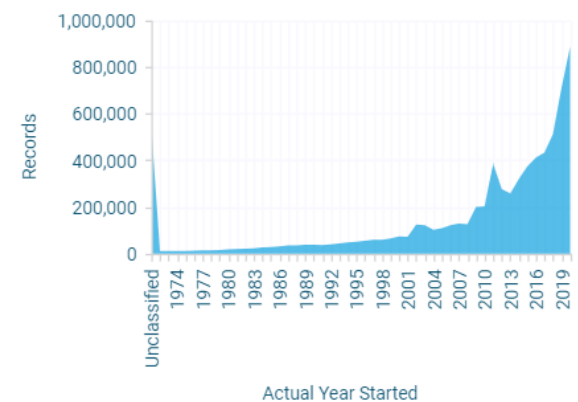
3.6 Orbit Dashboards – New chart types

Funnel charts allow the user to display categorical data in progressively decreasing or increasing proportions, organised 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 visualisations 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 visualisation techniques available to our users.



3.7 Orbit Dashboard Latest Developments – Legends

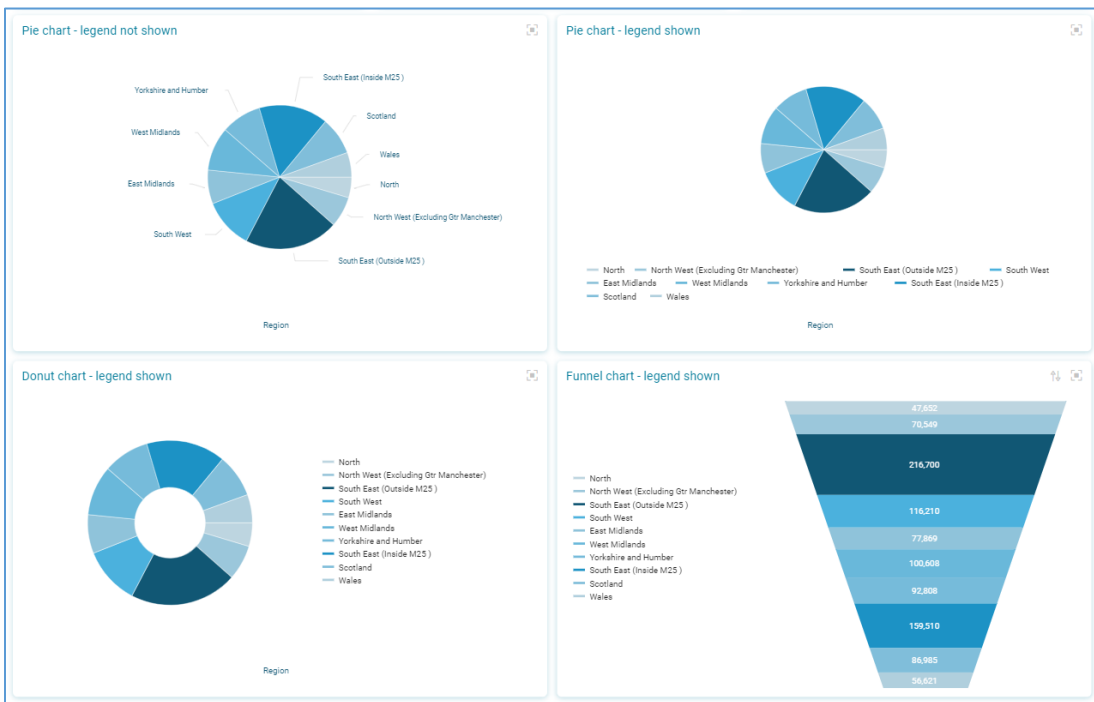
Users can now include legends in their chart tiles, helping to provide more clarity from the dashboard. Legends can be positioned to the top, bottom, left or right of the chart.

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 analysed 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

Banded Nr of Employees (Company) ...

is

1 - 5 Employees x

AND

UK Postcode Area ...

is

CV x LE x NN x

Cancel Apply Filters



3.11 Orbit Audiences - Customisable 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.

255% most profitable for this year - package hols by SW bookers

0, 5,129 Bookings 0.24% of 2,130,081 Bookings Apply Limits Show Brief

Template: Name and Address Output filename: 255% most profitable for this year - package hols by SW bookers Output type: CSV Delivery: download Export

Preview

| Person URN | Title | Initial | Surname | Email | Address | Town | Postcode |
|------------|-------|---------|-----------|-----------------------|----------------------|--------------|----------|
| 10120097 | Mr | C | Page | c.page@FunkyTiger... | 4 The Mount | Bristol | BS4 5DF |
| 10125963 | Mr | E | Winshurst | e.winshurst@Tesco... | 23 Fawns Manor Close | Bristol | BS16 5NJ |
| 10314393 | Mrs | H | Cardwell | | 16 Malam Gardens | Bridport | DT6 4PP |
| 10787709 | Ms | B | Ponting | b.ponting@FunkyTig... | 80 Pier Avenue | Gunnislake | PL18 9BB |
| 10311812 | Mr | L | Sherry | l.sherry@LookSmart... | 68 Hayes Way | Dorchester | DT1 1QQ |
| 10380031 | Ms | A | Watkins | a.watkins@LookSma... | 70 Huntsmore House | South Molton | EX36 3RD |
| 10380181 | Ms | T | Way | t.way@WindyGates... | 29 Park Avenue | Umberleigh | EX37 9AB |
| 10052731 | Ms | S | Few | s.few@LiveClub.co.uk | 35 Rookery Drive | Warminster | BA12 0SQ |
| 10083263 | Mrs | V | Dear | v.dear@Funmail.co.uk | 2 Cranage Lane | Poole | BH16 5NF |
| 10121403 | Mrs | L | May | l.may@ABCFlash.uk... | 3 Newmer Road | Bristol | BS6 5BT |

1 - 10 of 1000 items

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.

Template: PersonEmail Output filename: Profit from Bookings Banded Pareto Output type: Comma Separated Values Delivery: download Export

Use authorisation code

Preview

| Title | Initial | Surname | Email Address | Campaign Code |
|-------|---------|---------|------------------------------|---------------|
| Mrs | H | Jones | h.jones@AltaVista.com | ABC-123 |
| Mrs | B | Biemat | b.biemat@Tollon.co.uk | ABC-123 |
| Mr | S | Morgan | s.morgan@FreeServe.com | ABC-123 |
| Mrs | F | Morgan | f.morgan@EasyPost.uk.com | ABC-123 |
| Mr | S | Brookes | s.brookes@PurpleTurtle.co.uk | ABC-123 |
| Mrs | H | Brookes | h.brookes@UK111.uk.com | ABC-123 |
| Mr | G | Cooper | g.cooper@ABCFlash.com | ABC-123 |
| Mrs | B | Cooper | b.cooper@hotmail.uk.com | ABC-123 |
| Mr | R | Ferris | r.ferris@FetchMail.co.uk | ABC-123 |
| Mrs | C | Ferris | c.ferris@aol.uk.com | ABC-123 |

1 - 10 of 1000 items



4. SUPPORT

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