



Market Insight Release Notes
2023 - August



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1. EXECUTIVE SUMMARY

This document outlines the Market Insight (MI) features that are scheduled to be released to production in August 2023.

The key functional areas affected by this release are:

- **Mapping:** Improvements to the point to point wizard, territories wizard and the point to point wizard. New billable transactions for Bing Maps.
- **Updated Expressions:** New functionality within Expressions.
- **Various Improvements in Market Insight Orbit:** Orbit is updated on a different schedule to Market Insight, but recent changes include Audience workbooks, Expressions as measures or filters, temporary URN files, text files as dimensions and more.

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 Territories Wizard: New thematic mapping capabilities

The Territories wizard (previously used with Microsoft MapPoint) has been repurposed to work with Microsoft Bing Maps. This allows you to more easily generate map visualisations that are thematically shaded, either according to the number of records, or another selected metric. Setting up shape files is simpler, and the types of variables you can use extend beyond the typical options of Postal Sector, District and Area to include, for example, political or health region boundaries and even custom territories.

Using the Territories wizard, you have multiple ways of creating virtual variables that are associated with map shape files and used to create the visualisations.

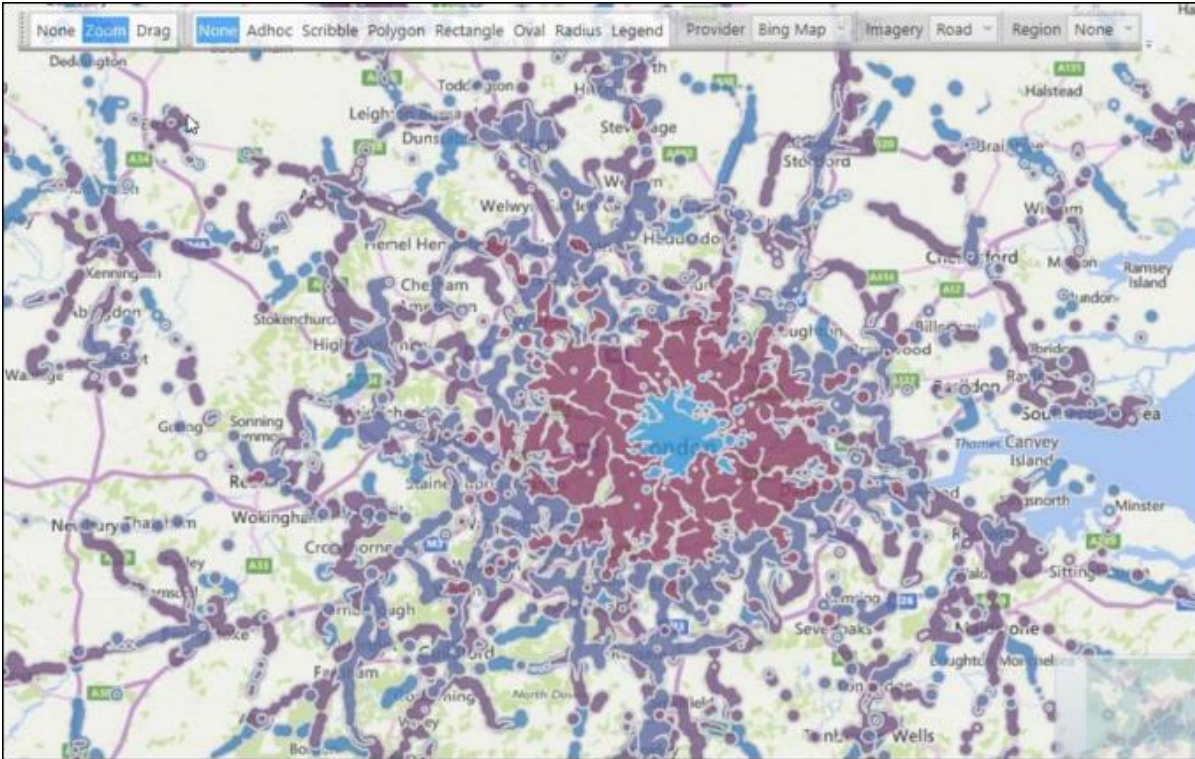
Methods include:

- I. Creating a virtual variable directly from a geographic shapefile:
Each record is categorised by shape, and a related JSON shapefile is created. This allows you to immediately use the variable to generate shaded maps or record selection.

Note: This method creates an expression to define the population of the categories of the virtual variable.



2. Creating a virtual variable directly from selections made on a map:
You can generate territories defined using the map drawing tools or from drivetime selections.



3. Options for existing virtual variables:
It is possible to link an existing variable to a shapefile, or retrofit to a virtual variable created using the Drive Zone wizard.



2.2 Territories Wizard Improvement

When working with the option to link a new shapefile to an existing selector variable, Market Insight now automatically checks for categories in the variable which do not match those in the shapefile. Once identified, you have the opportunity to update them as part of the wizard process.

Territories

←

- Bing Map Territories
- Existing Variable Optio...
- Bing Specify Map
- Geo Shape File
- Json File Details
- Kml File Details
- Shp File Details
- Duplicate Codes
- Latitude / Longitude
- Folders
- Notes
- Update Territory
- Unmatched Categories
- Finish

Unmatched Categories

The table below shows the categories in the selector VV that were not matched from the shapefile. Before continuing, you can choose to link these categories to entries from the shapefile. You do not have to do it for all of them though!

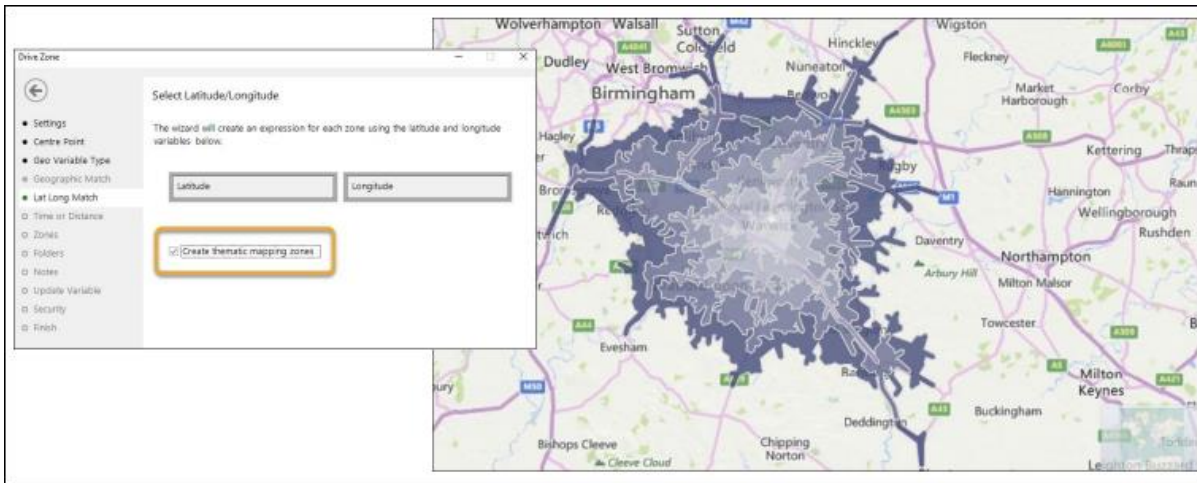
Unmatched Variable Category	Shape File Descriptions
City of London	London, City of
▶ Devon and Cornwall	Devon & Cornwall
Northern	London, City of
Grampian	
Tayside	
Fife	
Lothian and Borders	
Central	
Strathclyde	
Dumfries and Galloway	
*	

Next Cancel



2.3 Drive Zone Wizard: Thematic option

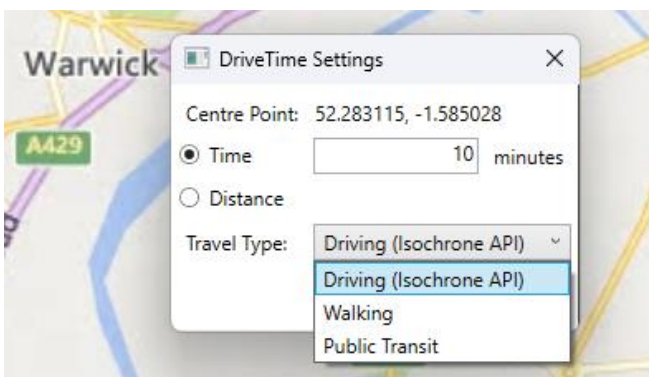
The Drive Zone wizard now has a new checkbox option which, when selected, allows you to associate the virtual variable with the shapes defined by the drive zone times to create thematic maps of drive zones around a specified location.



2.4 Bing Isochrone API: Default

By default, the Drive Zone wizard now uses the Bing Isochrone API to calculate zones more quickly and with greater accuracy. Actual performance increases are determined by factors including the number of centre points, number and size of zones, and the number of records in the system, but you can expect to see approximately ten times the number of vertices on the drivetime shape, with results returned up to twenty times faster. A new option to specify 'Walking Time' is also available

The default algorithm for generating drive time selections in the Map tool is now the Bing Driving (Isochrone API). The former Routes API algorithm remains as a Travel Type option in the Drive Time Settings panel for legacy compatibility but is significantly more costly in Bing transactions than the Isochrone method.

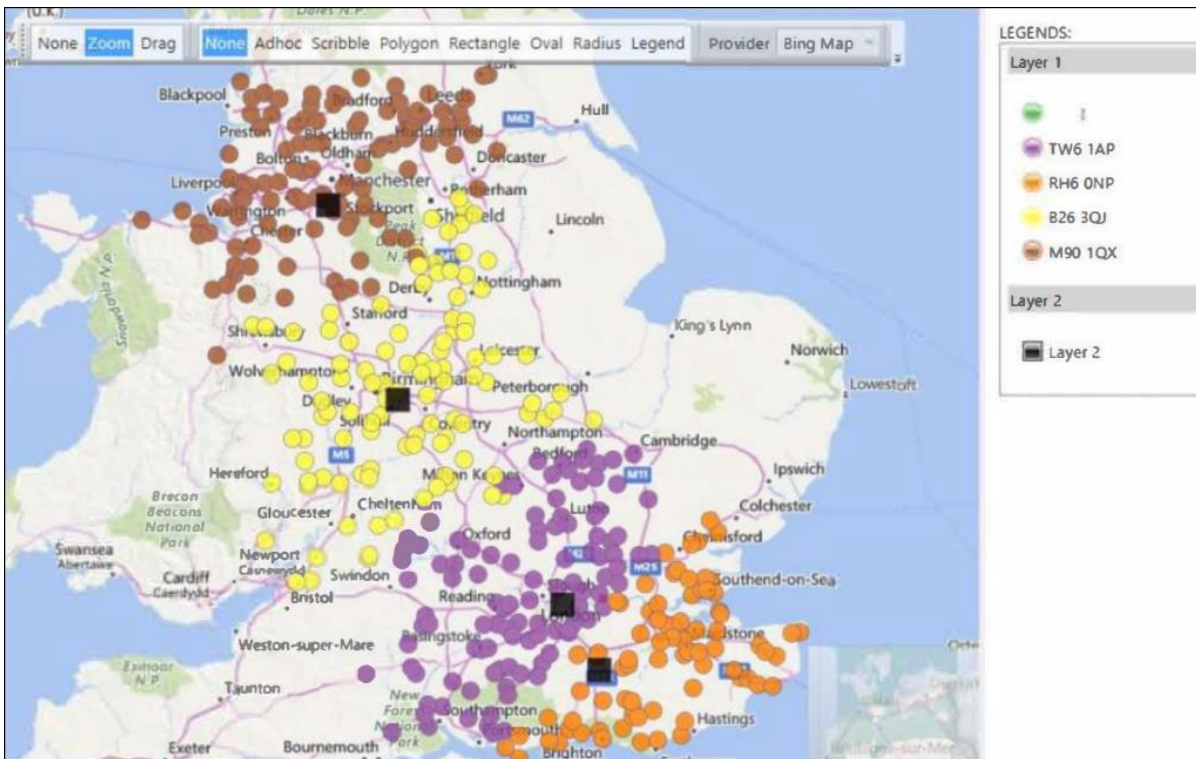


From Q1 2023 Apteco will no longer support the use of Microsoft MapPoint.



2.5 Significant Improvements in the Point to Point Wizard Capability

Identifying the nearest branch or store by a drive time measure has been useful for many businesses but, historically, has presented multiple challenges in terms of calculating precise results in a timely manner. For systems that have latitude and longitude variables marked with the 'geofmt' property, use of the new Bing Isochrone API means the Point to Point wizard can now calculate zones for larger volumes of records, efficiently, and with a user-specified level of accuracy. When specifying multiple centre points, you can select from several result type options and create a virtual variable for each centre point with the same parameters. A new option to specify 'Walking Time' is also available.



In the above example, colours are used to indicate which of the four indicated airports is a record's nearest. Notice that, whilst some records might be geographically closer to one airport, the drivetime calculation returns that they can drive to another more quickly.



2.6 New Billable Transactions for Bing Maps

To provide new functionality for geographic mapping functions, we now use billable Bing transactions. Each licensed user is credited with 6600 transactions per year, sufficient for most normal use. For example, the initial calculation using a Drive Zone wizard request for 10 centre points each with 5 zones would result in 50 billable transactions. Subsequent data refreshes would be free.

From your next renewal, additional transactions required will be supplied at 1.5p each. To protect users from unintentional spend on billable Bing transactions, we have added warning messages and maximum volume checks in the three geographic wizards: Location Geocoder, Drive Zone, and Point to Point.

2.7 Mapping Usability Improvements

The following usability improvements allow you to create maps more easily:

- You can now drag variables directly on to the Statistics panel on a map layer, rather than having to use the Add Statistics button.
- Changing the primary statistic on a thematic map layer automatically updates the thematic shading without the need to rebuild the map.
- On a thematic map layer, you can now right click on the Geographic Variable drop-box to easily access, select and add any available selector variables with a 'GeoFormat' property set.
- On a plot map layer, you can now right click on the Geographic Variable drop-box to easily access, select and add any selector or text variables with a 'GeoFormat' property set.
- In Map wizards, where you need to specify latitude and longitude variables, you can now right click and access a menu option that allows you to select and add variables which are marked with the relevant 'GeoFormat' property.
- When using the Location Geocoder wizard, you can now select a check-box to confirm that your geographic variable is a UK postcode. This allows the virtual variable to be generated using the UKPostcode expression rather than using Bing Geocode. The results are returned significantly faster and without incurring Bing transaction costs.



2.8 Map Wizards Improvements

When creating drive zones for multiple centrepnts using latitude and longitude, you now have an additional option to create a single multi-response (flag array) virtual variable for all points.

Create a selector variable for each point

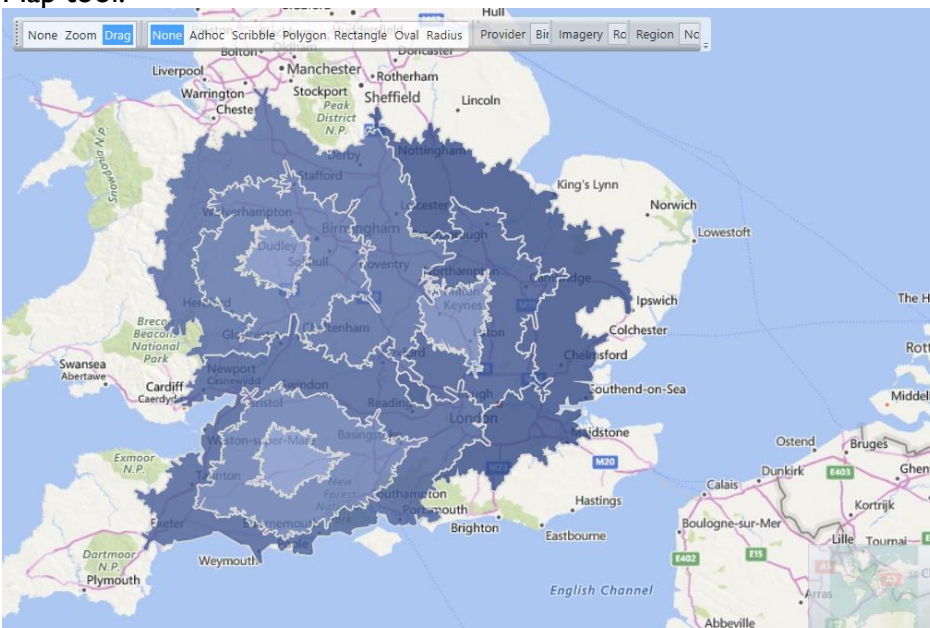
This option will create a selector virtual variable for every centrepnt. Each record will only be allocated to one zone. This will be the first zone into which it falls.

Create single drive zone flag array variable for all points

This option will create a single flag array variable with the zones for all the centrepnts. Each record will be allocated to the zone that it falls into for all the centrepnts.

Include	Code	Description	Records
<input type="checkbox"/>	BA12 7AW:30	BA12 7AW:30	30,385
<input type="checkbox"/>	BA12 7AW:60	BA12 7AW:60	243,110
<input type="checkbox"/>	BA12 7AW:90	BA12 7AW:90	773,779
<input type="checkbox"/>	DY12 1LF:30	DY12 1LF:30	75,405
<input type="checkbox"/>	DY12 1LF:60	DY12 1LF:60	474,297
<input type="checkbox"/>	DY12 1LF:90	DY12 1LF:90	621,034
<input type="checkbox"/>	MK43 OTU:30	MK43 OTU:30	161,373
<input type="checkbox"/>	MK43 OTU:60	MK43 OTU:60	1,294,258
<input type="checkbox"/>	MK43 OTU:90	MK43 OTU:90	2,295,418

You can use this variable to quickly and easily create thematically shaded drive zone visualisations using the Map tool.





2.9 Territories

It is now possible to see a sample of a selected shapefile's features and related values, allowing you to easily select a field to be used for the resulting virtual variable categories.

The Territories window shows the configuration for a JSON shapefile. The selected file is 'World.json', which contains 256 shapes. The 'Choose field for descriptions' dropdown is set to 'name'. Below this is a table of features:

iso3	continent	name	ISO_3166_ALPHA
WSM	Oceania	Samoa	WS
BEL	Europe	Belgium	BE
BGD	Asia	Bangladesh	BD
ISR	Asia	Israel	IL
NOR	Europe	Norway	NO
ATG	Americas	Antigua & Barb...	AG
AIA	Americas	Anguilla	AI
LBY	Africa	Libyan Arab Ja...	LY

The Sites window shows a list of countries/regions with a filter set to 'Description Contains'. The table below shows the data:

Include	Code	Description	Sites
<input type="checkbox"/>	US	UNITED STAT...	18,969,880
<input type="checkbox"/>	CH	CHINA	6,759,686
<input type="checkbox"/>	CA	CANADA	2,427,151
<input type="checkbox"/>	JA	JAPAN	2,190,742
<input type="checkbox"/>	IT	ITALY	2,120,381
<input type="checkbox"/>	FR	FRANCE	2,052,859
<input type="checkbox"/>	IN	INDIA	1,930,382
<input type="checkbox"/>	BR	BRAZIL	1,567,985
<input type="checkbox"/>	NO	NORWAY	1,365,486
<input type="checkbox"/>	GM	GERMANY	1,114,365
<input type="checkbox"/>	UK	UK (ENGLAN...	965,678
<input type="checkbox"/>	SP	SPAIN	892,558
<input type="checkbox"/>	NL	NETHERLANDS	769,711

2.10 Removal of Microsoft MapPoint

From this release, we no longer support MapPoint. As a result:

- The Settings page in the Drive Zone and Point to Point wizards has been removed
- It is no longer possible to select Map Regions in the Market Insight Tools-Options
- You can no longer select to use Routes API as a drivetime option in the Map tool



2.11 Bing API Caching

Bing API Isochrone: Drive zones created using the mapping wizards are now stored. This means that, when editing the variable, you do not incur new Bing API transactions for zones that have previously been calculated.

You can configure zones to have an expiry period after which they are then recalculated.

Bing API geocoding: Searching for locations on an interactive map, or through specifying centrepoinets in the Map wizards, incurs Bing API geocoding transactions. From Q2 2023, specifying a centrepoinet in 'Latitude.Longitude' format (for example, 52.281806,-1.588657) is treated as valid location information. This is a user-configurable property.

If you have to request a geocoded location from the Bing API, the resulting latitude and longitude is stored and can be reused if you request it again. This is supported in the interactive map search and the map wizards' Centrepoinet step.

The screenshot displays the 'Options' configuration interface. On the left, a navigation menu lists sections: Cascade explorer, Promotions, Programmes, Campaigns, Cluster, Decision tree, and Map (selected). Under 'Map', sub-options include Map region, Display, Thematics, and Options (highlighted). The main 'Options' panel contains the following settings:

- Records warning: 5000
- Records limit: 10000
- Keep temporary files
- Use Lat/Longs without geocoding
- Reuse cached Bing zones
- Cached Bing zones have an expiry period
- Cached Bing Zones Expiry Value: 1
- Cached Bing Zones Expiry Period: Years

Buttons for 'Apply settings' and 'Reset settings' are located at the top right of the options panel.

2.12 Import Data Wizard Enhancement

When creating a selector type variable from a data file, previously both the codes and descriptions for the resulting variable were taken from the data column and were the same. You can now specify a second column in the data file and use this to generate the category descriptions for the resulting variable.



2.13 New Options for Referencing a File of Values to Use in a Selection

The existing ability to import and reference a file of values (for example text or URN) has been extended in this release, with support added for selector and numeric variables.

- For selector variables there is a new option to reference the codes in the file at the time a selection is actually run. This is in addition to the pre-existing import option which takes the current values in a reference file and matches those current values to the relevant codes in order to select them.
- Numeric variables are supported as a set of ranges. Any updates to the reference file are also reflected when the selection is rebuilt.

2.14 Expressions

New CreateTextList expression function

A new CreateTextList function has been added. This allows you to create a text list from text values, text variables, or other text lists.

Extensions to Pattern Match aggregation capability

We have built on the existing capability to offer greater flexibility and allow previously unachievable analysis, particularly in scenarios where wildcards are used, or to find out when particular patterns happened.

You can specify an include or exclude list of codes from the pattern variable, representing either the only ones of interest (include list), or those you do not want to see (exclude list).

In addition to returning information about the first and last elements of a pattern, you can now also return an intermediate, Nth element of a pattern in terms of transaction number, order value, or item value.

A new LogN function has been added which takes the logarithm of the number to the given base.

Updated expression function

In Location Functions, the GeoPointInArea expression benefits from a significant increase in speed. Its first two parameters can be variables, but all other parameters must be fixed numeric values.

New and updated expression functions

There have been updates to existing, as well as the addition of new expression functions, including:

- Selector functions: VarSelectNth and VarSelectCodeNth
- DateTime list functions: FirstDateTime, LastDateTime and NthDateTime

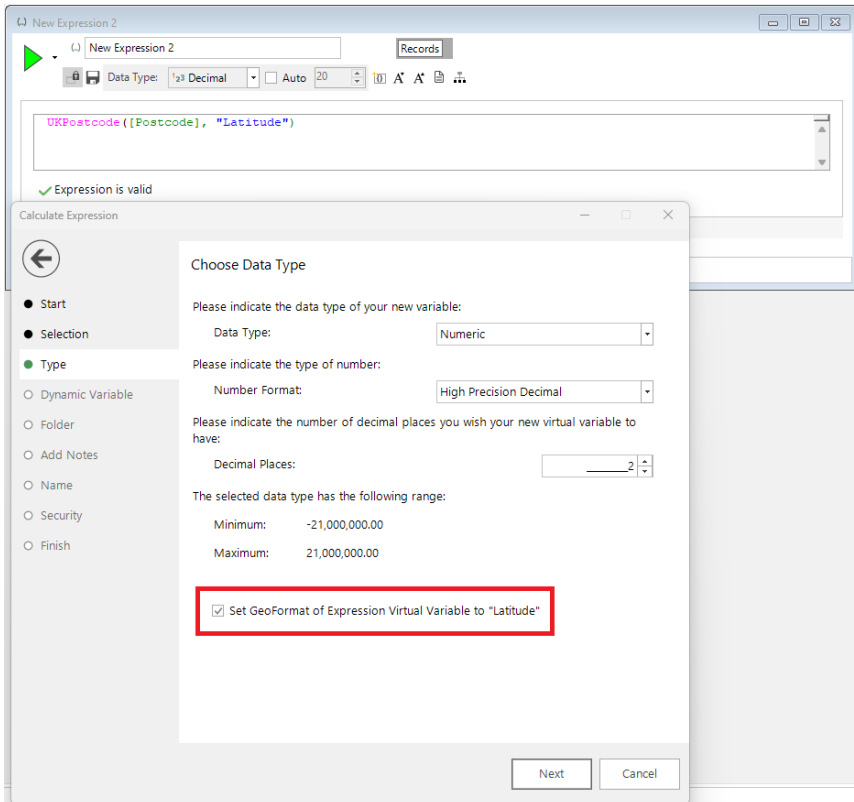
There have been updates to existing, as well as the addition of new expression functions, including:

- NthDate: a new date list function to return the Nth date in a list of dates.
- NthDistinct and NthDistinctIndex: two new sorting functions which work with numbers, dates or datetimes to sort into ascending order and select the Nth distinct or Nth distinct index parameter respectively.



New option to set GeoFormat via Calculate Expression wizard.

Recent developments in the mapping wizards often require the use of latitude and longitude variables. Where such variables are not already present in your system data, you can use the UKPostcode expression function to turn a postcode into a latitude or longitude reference. In such cases, the Choose Data Type step of the Calculate Expression wizard now also allows you to set the GeoFormat on these virtual variables so that you can then use them in the mapping wizards.



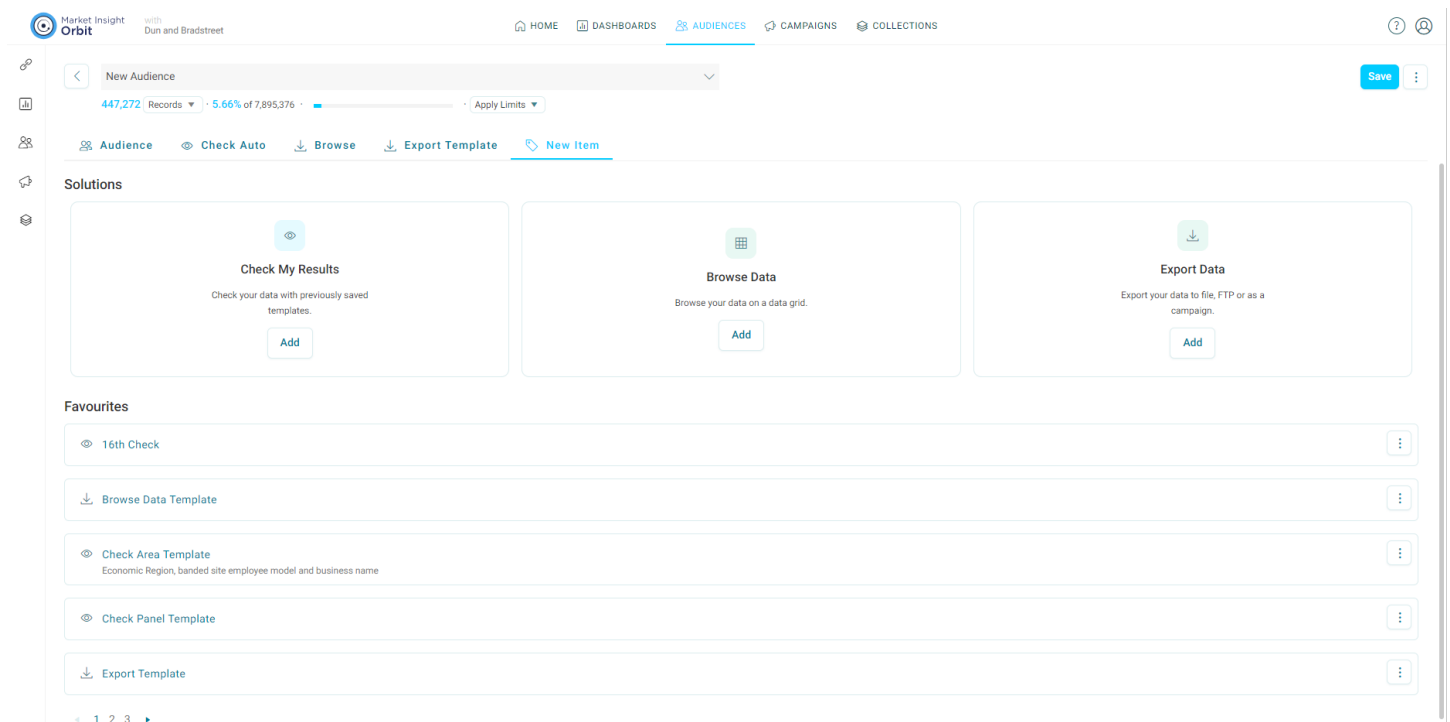


3. MARKET INSIGHT ORBIT

We have released 26 updates (versions 1.10.40 to 1.13.3) to Orbit since the last release of the Apteco Software.

3.1 Audience Workbooks

With the introduction of audience workbooks, we've re-engineered audience functionality to allow more advanced analytics and visualisation in Orbit. Where audiences supported a single, linear task flow, audience workbooks now have a single audience selection with a flexible set of tools and visualisations.



Moving forward, audience workbooks will feature full-screen interactive visualisations, allowing you to use deeper data analysis to make more informed decisions, with an enhanced and streamlined user experience.



3.2 Improved Multi-answer Selection

A wider range of options is now available for selections that utilise array and flag array variables. Arrays are multiple choice answers and so the options you choose can match with records in various ways. The updates to multi-answer selection give you improved control over how you combine values within the selection enabling more nuanced filtering and data analysis.

✔ GCA Job Functions

A screenshot of a dropdown menu. The menu is open, showing four options: 'Has any of' (highlighted in blue), 'Has none of', 'Has all of', and 'Does not have all of'. The dropdown is positioned below the header 'GCA Job Functions'.

When a variable is an array or flag array, you can now use the following selections:

- Has any of
- Has none of
- Has all of
- Does not have all of

When a variable is a selector, we've updated the selection language with the following:

- Is any of
- Is none of



3.3 Expressions as Filters in Audiences and Dashboards

Expressions are the 'Swiss Army Knife' feature in Orbit. You can now harness their full potential by incorporating them into the calculation of filters in both audiences and dashboards.

Select Filter

[Search](#) [Expression](#)

Name
Distance from Apteco × 20/60

Table
Records ▾

Expression ?
UKPostcodeDistance("CV34 4EH",[Postcode],"miles")

✔ This expression is valid

[Apply](#)

[Cancel](#)

Whether you are working with Audience selections or navigating the various dashboard filters such as user filters, predefined filters, or tile filters, expressions are at your disposal to refine and tailor your data views. These filters allow you to gain a deep understanding of an underlying data store and its manipulation, providing precise control over data analysis and visualisation within Orbit. This functionality works for both numeric and text expressions.

3.4 Expression Measures

Expression Measures can now be used by dashboard editors to calculate values for tables, cubes, and other visualisations. They can be used anywhere that there is a measure in a dashboard tile. This is a feature for advanced dashboard editors to be used where standard measures or calculated measures have reached their limits, and more bespoke calculations are required.

As this is a measure, only expressions that result in numbers can be used. Also, Derived Cube Expressions and Cube Lookups are not supported, as there is no cube to refer to. Expressions cannot refer to queries, and Aggregation functions cannot be used.



The following example shows a table showing the average distance to Apteco's Warwick office of Records by economic region.

Select Measure

Search **Expression**

Name
Distance from Apteco × 20/60

Table
Records ▼

Expression (?)
GeoDistMin(UkPostcode([Postcode],"latitude"),UkPostcode([Postcode],"longitude"),UkPostcode("CV34 4EH","latitude"),UkPostcode("CV34 4EH","longitude"))

Apply

Cancel

The expression calculates a number (or missing value) for every row in the underlying data. You can choose how to summarise these numbers in each cell of the table. In our example, we're displaying the mean of each result in the table cells for each region, so we choose Mean.

Expression Table

Economic Region	Mean (Distance from Apteco)
North	175.95
North West (Excluding G...	103.83
South East (Outside M25)	87.17
South West	104
East Midlands	48.55
West Midlands	27.74
East Anglia	97.4
Yorkshire and Humbersi...	103.11
South East (Inside M25)	81.72
Scotland	285.85
Wales	96.76
Northern Ireland	250.12
Greater Manchester	88.77
Channel Islands	312.11



3.5 Reference Keys for Selection or Suppression

In Orbit Audiences and Dashboards, reference keys can now be used to select or suppress specific individual records. These reference keys can be entered individually, copied and pasted, or loaded from a file.

Reference keys work with reference variables. There is a reference variable on each table. Choose one to get started.

Select Filter

Search **Expression**

Q duns

Variables **Audiences** **Files**
(20) (1) (17)

Include codes in search

DUNS *DUNS_NO*

The following screen allows reference keys to be entered manually. Type or paste in the keys. You can enter up to 100 reference keys here. If you need more reference keys, this can be accomplished using a file. Click Apply to update the audience or dashboard filter.

DUNS

Is ▼

Values Existing File Upload File

Add up to 100 values.

536145444
536146046
536146384
536146798
536146822
536147838
536148794

7/100



To upload a file from your computer do the following:

1. Switch to the Upload File tab.
2. Choose Select File.
3. Choose a file with the extension .TXT or .URN.
4. If the preview is as expected, then choose Next.
5. Choose the destination for the file in the FastStats system.
6. Optionally, you can change the filename.
7. Clicking Upload and Apply uploads the file and applies it to the audience or filter.

DUNS

In ▼

Values Existing File **Upload File**

Drag and drop your file here, or

[Select file.](#)

.TXT, .URN file format (max file size 25 MB) [Read Help Centre Article](#)

First 5 line preview

[Cancel](#) [Next](#)

There are some restrictions on the contents of the file:

- There can be no headers
- It must be a single column
- Separators are ignored
- The values cannot be enclosed with quotes



3.6 Temporary URN Files in Dashboard Filters

Dashboard users can now choose uploaded URN/Reference Key files to be marked as temporary in dashboard user filters, including pre-defined filters. When uploaded as temporary, these files are now deleted when:

- The associated filter is deleted
- A user explicitly logs off
- A user logs on and still has temporary files from a previous session

DUNS

In ▼

Values Existing File Upload File

File persistence
Upload file to permanent storage in a public directory or as a temporary file.

Permanent Temporary

Files will be deleted when you logout of Orbit or filter is removed

Filename
Name the upload file.

File Name

DUNS export .urn

As user filters are temporary in nature, and not saved with the dashboard or shared to other users, associated temporary URN files now no longer remain on servers after they are used.



3.7 Sharing Permissions

Dashboards can now be shared to users or groups of users with permissions set for recipients to view or edit the shared dashboard.

When a dashboard is created, it can only be edited by the person who created it (the owner). To allow others to view or edit the dashboard, it must first be shared.

The share button is at the top right of the screen:



In the first share screen you see the owner, and who the dashboard is currently shared with. Start typing the user or group that you want to share with in the Add field to find your new recipients. You can add multiple users and groups at this stage:

Share: MI Starting Dashboard

× Add

Groups

- Administrators

Owner

All users No Access ▼

Send email notification

Enter message...

[Copy Share Link](#) Cancel Done



For each user or group, you can specify whether they have View Only or Edit permission. A View Only permission indicates that the user cannot edit or share the dashboard, whereas an Edit permission can.

Share: MI Starting Dashboard

Name or email address of the user, or group name

James Morris james.morris@apteco.com	Edit
Administrators	View Only

Previously shared with:

Admin User MIAdmin@Apteco.com	Owner
All users	No Access

Send email notification

Enter message...

You can now choose not to send notification emails when sharing Dashboards and Audiences.

Share: MI Starting Dashboard

Name or email address of the user, or group name

James Morris james.morris@apteco.com	Edit
Administrators	View Only

Previously shared with:

Admin User MIAdmin@Apteco.com	Owner
All users	No Access

Send email notification

Enter message...



We've added a 'copy share link' button to the share dialog to make accessing the URL easier.

Share: MI Starting Dashboard

Name or email address of the user, or group name

James Morris james.morris@apteco.com	Edit
Administrators	View Only

Previously shared with:

Admin User MIAdmin@Apteco.com	Owner
All users	No Access

Send email notification

Enter message...

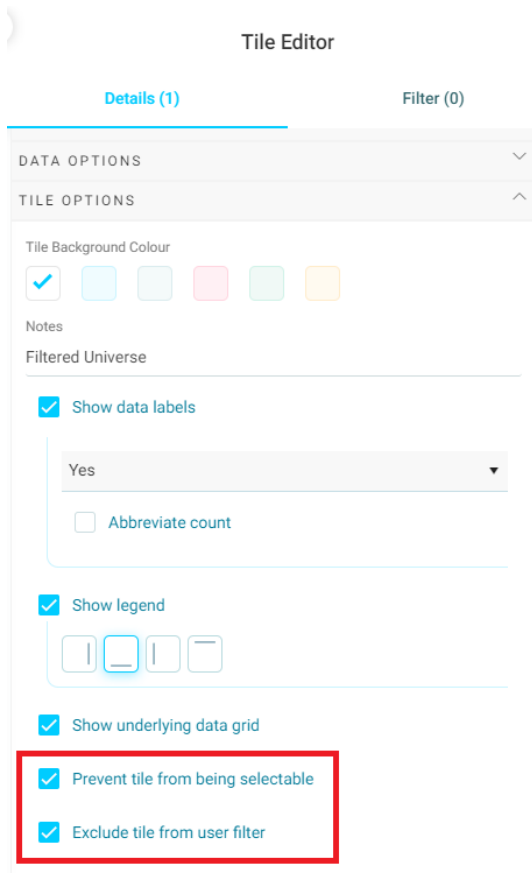
Sharing to unregistered user email addresses is now disabled when self registration is disabled.



3.8 Exclude Tiles

Dashboard editors can now choose to exclude tiles from the user filter while still respecting the dashboard filter display of summary information.

The dashboard editor now has a checkbox in the right hand panel to mark a tile as not selectable, e.g. for a visualisation displaying transactional data only.









3.9 Importing Text Values for Selection or Suppression

Text values can be used in Orbit Audiences or Dashboard filters to select records on text variables. Files of text values can be uploaded, typed, or pasted.

Text values are used with text variables which have the following appearance when searched:

Variables	Audiences	Files
	Forename	
	Middle Name 1	
	Middle Name 2	
	Surname	

Text values can be typed, one per line, into the Values tab text box. Text values can also be pasted here.

 Forename

Is ▼

Values Existing File Upload File

Add up to 100 values.

James
Lee
Matthew

3/100

Match case

Cancel Apply

Options on how the values should be matched are available via the drop down.

Is

Is not

Starts with

Does not start with

Ends with

Does not end with



To upload a file from your computer:

Switch to the Upload File tab.

Choose Select File.

Choose a file with the extension .TXT (maximum file size 25Mb).

If the preview is as expected, then choose Next.

Choose the destination for the file in the Market Insight system.

Optionally, you can change the filename.

Click Upload and Apply to upload the file and apply it to the relevant audience or filter.

Forename

In

Values Existing File Upload File

Drag and drop your file here, or

Select file.

.TXT file format (max file size 25 MB) [Read Help Centre Article](#)

First 5 line preview

Match case

Cancel Next

There are some restrictions on the contents of the file:

There can be no headers.

It must be a single column.

The values cannot be enclosed with quotes.

Value length must not exceed the Market Insight variable length.



3.10 Importing Selector Values for Selection or Suppression

This feature is an advanced selection mechanism for Orbit Dashboards and Audiences. It allows lists of selector codes to be uploaded for use in either a dashboard filter or an audience.

Once you choose a selector variable, you then have the following options:

Choose specific values.

Load values as codes from an existing file.

Upload a new file from your computer.

To select individual values, use the checkboxes on the left.

✓ PostCode Area - Sector

Is any of

Values Existing File Upload File

Search...

Select Values View Sort by

<input type="checkbox"/>	Code	Description	Records
<input type="checkbox"/>	!	Unclassified	110,345
<input type="checkbox"/>	AB	AB Aberdeen	51,030
<input type="checkbox"/>	AL	AL St Albans	33,789
<input checked="" type="checkbox"/>	B	B Birmingham	216,973
<input checked="" type="checkbox"/>	BA	BA Bath	49,091
<input checked="" type="checkbox"/>	BB	BB Blackburn	50,174
<input type="checkbox"/>	BD	BD Bradford	58,831
<input type="checkbox"/>	BH	BH Bournemouth	77,592
<input type="checkbox"/>	BL	BL Bolton	47,419
<input type="checkbox"/>	BN	BN Brighton	107,763
<input type="checkbox"/>	BR	BR Bromley	38,333

Selected 3 of 125 values

Cancel Apply



Orbit provides options to include or exclude the selected categories:

Is = Include

Is not = Exclude

To upload a file from your computer:

Switch to the Upload File tab.

✓ PostCode Area - Sector

In

Values Existing File Upload File

PostCode Area Selector Codes.txt
9 Bytes
[Delete](#)

.TXT file format (max file size 25 MB)

First 5 line preview

```
B
BA
BB
```

[Cancel](#) [Next](#)

Click Select File.

Select a file with the extension .TXT (maximum file size 25Mb).

If the preview is as expected, then click Next.

Select the destination for the file in the Market Insight system.

Optionally, you can change the filename.

Click Upload and Apply to upload the file and apply it to the relevant audience or filter.



There are some restrictions on the contents of the file:

There can be no headers.

It must be a single column.

The values cannot be enclosed with quotes.

The code must match the Market Insight selector code without conversion.

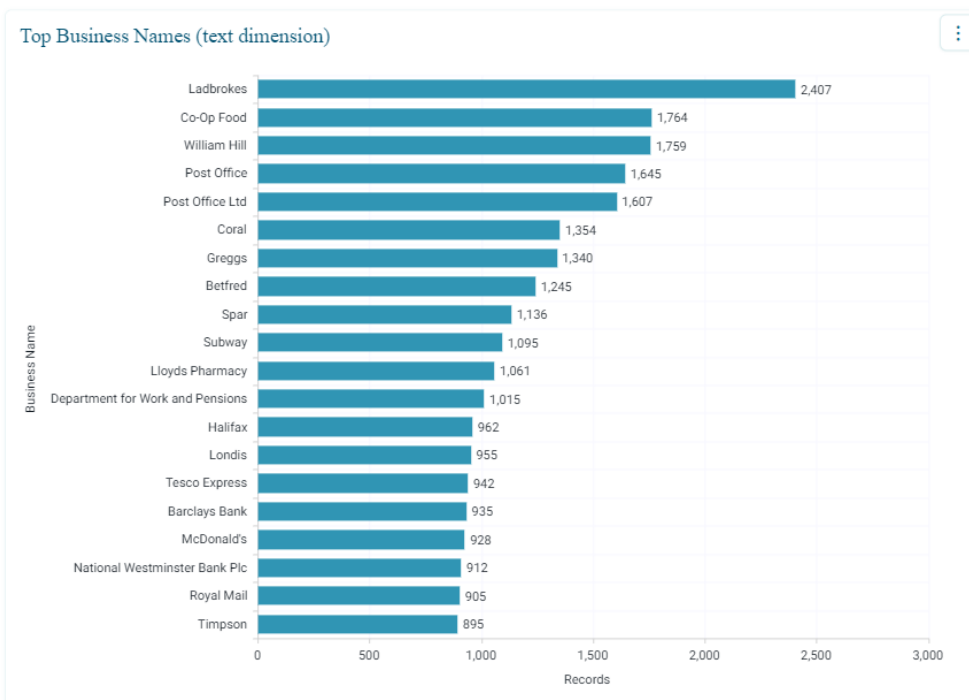
If Market Insight has previously uploaded or created the file you wish to import, then you can refer to it using the Existing Files tab.

To import a previously uploaded file:

1. Search or browse for the relevant file, then select it,
2. Click Apply to use it in your selection.

3.1.1 Text Variables as Dimensions

You can now apply text variables as dimensions on dashboard tiles. When a text variable is used, 'category display' is now enabled with the default top 1000 and 'omit zeros' applied.





3.12 Data Grids as Dashboard Tiles

With data grid dashboard tiles, you can now view and interact with your data in a table format, right from your dashboard. This powerful new functionality allows you to view records on individual lines or as a single page view.

Data Grid Business Overview Grid View

DUNS	Business Na...	Major Indust...	Economic R...	Postcode Se...	Town and C...	Banded Algo...
00000000		Unclassified	Unclassified	Unclassified	Unclassified	Unclassified
21000002	Pottersby Ltd	Real Estate, Renting &...	North West (Excludin...	IM 5 1	Douglas	£1 - £99,999
21000003	Eden Hope (Int) Ltd	Unclassified	North West (Excludin...	IM 1 1	Douglas	Unclassified
21000004	Panther Ltd	Financial Intermediat...	North West (Excludin...	IM 1 5	Douglas	Unclassified
21000005	Palmville Ltd	Unclassified	North West (Excludin...	IM 1 2	Douglas	Unclassified
21000008	Hotshoe Projects	Real Estate, Renting &...	South East (Inside M2...	EC 1N8	London	£1 - £99,999
21000009	Pethers	Construction	South East (Outside ...	OX18 4	Burford	£1,000,000 - £4...
21000011	Joss Smith Sculpture	Manufacturing	South East (Inside M2...	SE19 3	London	£1 - £99,999
21000015	Trinity Chapel	Other Community, So...	South East (Inside M2...	E 16 1	London	£100,000 - £49...
21000016	The Pine House	Wholesale, Retail & R...	East Anglia	IP31 3	Bury St Edmunds	£100,000 - £49...

1 - 10 of 100 items

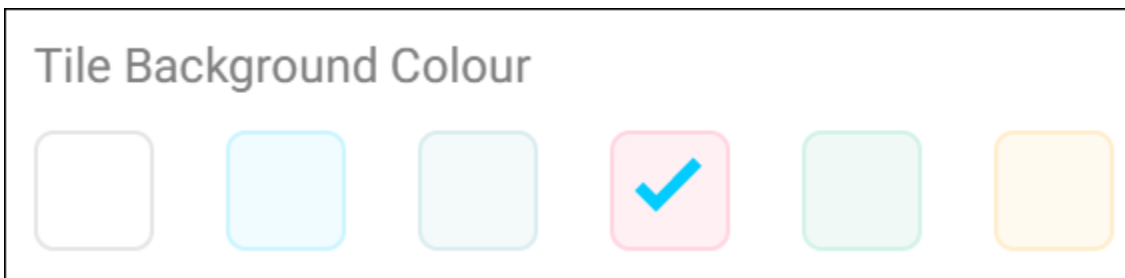
Data Grid Business Overview Page View

DUNS	21000002
Business Name	Pottersby Ltd
Major Industry Sector UK 2003	Real Estate, Renting & Busine...
Economic Region	North West (Excluding Great...
Postcode Sector	IM 5 1
Town and County	Douglas
Banded Algorithm Sales	£1 - £99,999
Algorithm Sales	66643
Banded Company Employee ...	1 to 5 employees
Banded Site Employee Model	1 to 5 Site Employees
Linkage - Record Type	Unclassified

The grid view allows for easy selection of multiple records, while the page view is ideal for examining single records in detail. The data grid tile also allows you to easily filter, sort, and search through your data to organise your results into a more comprehensive view.

3.13 Setting Dashboard tile Background Colours

You can now choose from a number of background colours to apply to a dashboard tile. This new setting available via the Tile Editor, under the Tile Options menu, allows you to create visual separation between different areas on the dashboard.





3.14 Dashboard Number Card Font Colour

We've added custom colour options for dashboard number card font.

The screenshot shows a dashboard editor interface. On the left, there is a sidebar with various settings: Data Label (#101820), Highlight (#005172), FONTS (Title #005172, Title Font Times New R..., Notes #3095B4, Note Font Times New R...), and a 'Number Card' widget highlighted with a red box, showing a font color of #3095B4. The main dashboard area contains several widgets: 'Donut' (a donut chart with 11 segments), 'Stacked Column 100%' (a stacked bar chart with two bars), 'Column' (a bar chart with four bars), 'UK Map' (a map of the United Kingdom), 'Pie' (a pie chart with three segments), and 'Number Card' (a card displaying the value 0.018 with a smaller value 0.018 below it, highlighted with a red box). A 'Text' widget is also present at the bottom right.

3.15 Reset Active Filters

You can now reset active filters and drilldowns with a button via the user filters section.

The screenshot shows the 'USER FILTERS' section of a dashboard. At the top, there are two buttons: '+ Add Filter' and 'Reset', with the 'Reset' button highlighted by a red box. Below the buttons, there are three filter sections: 'Records' (with a dropdown menu), 'Major Industry Sector' (with a dropdown menu and two selected items: 'Construction' and 'Public Administration'), 'DUNS' (with a dropdown menu and 'Add values' button), and 'Banded Algorithm Sales' (with a dropdown menu and one selected item: '£100,000 - £499,999').



3.16 General

Orbit Feature

- User email addresses are now displayed under the Username on pending add shares.
- When searching for files or variables, right clicking no longer expands a folder.
- Dashboard tile notification dot colour has now been changed to Orbit blue.
- Orbit pop up notifications are now more consistent across the Orbit UI.
- The unlinking branches function has now been changed from a dropdown to radio buttons when selecting variable values in Audiences.
- We've improved the loading time performance of Dashboards for all Orbit users.
- You can now select multiple collections, navigate through them, run presentation mode, and cycle through all collections that are selected.
- We've updated Orbit and our Apteco Partner Portal to link to this new dedicated page for release notes within our Help Hub by default.
- Cube totals are now enabled by default and are re-calculated accordingly when using category display. A default sort can also be applied to the total of the first measure but then modified by a dashboard user.
- The dashboard new item tab now displays an item type icon.
- We've introduced significant visual changes across all UI text on the Orbit platform. This new standardised typography improves the consistency, readability, and accessibility of our UI text, and creates a foundation for us to deliver further high-quality product updates in 2023.
- We've updated the dashboard header buttons to align with the rest of the Orbit UI.
- Orbit dashboard users now have caching for dashboard tiles that use Virtual Variables (except dynamic VVs). Row filters are also enabled by default, improving the performance when returning results for these tiles.
- We've refactored Orbit home page typography to align with new Orbit typography standards.
- We've refactored the login/register pages to align with new Orbit typography standards.
- We've refactored the selector variable dialog so that all columns can now be toggled via checkboxes.
- We've improved the process for validating expressions so that it now more thoroughly checks the variables and tables used in expressions.
- You can now successfully login to Orbit via the browser in a Tesla.

4. SUPPORT

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