Crunchtime Insights

Reference Guide

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- CES Release Version 11.00.00 or higher

Overview

This document describes how to navigate workspaces & workbooks, and create reports and charts in the Crunchtime Insights reporting tool.

Download the latest version of this document here:
https://links.crunchtime.com/RG-CrunchtimeInsightsReference

… or scan the QR code to the left.

Note: Crunchtime Insights references 3+ years of historical data. Data sets would only be capped at 3 years if necessary to maintain optimal performance.

Related Documentation

- SG - Add an Insights Widget: https://links.crunchtime.com/SG-InsightsWidgetSetup

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Reporting

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Glossary

Throughout this reference guide we will employ the following concepts:

Concept	Description
Account Type	A set of permissions for a user. Types include “Power User”, “Analyst”, and “Consumer”.
Canvas	The section of the screen where you can place the elements that make up your report.
Chart	A report element this displays data in formats such as graphs, diagrams, or maps.
Dataset	A collection of data generated or integrated with Crunchtime, which is presented as a spreadsheet. Datasets provide the underlying data for workbooks to be able to visualize and manipulate such data.
Element	The various parts of a report. Includes text, tables, pivot tables, controls, images, and charts.
Grouping Key	A column in a table that is used to define a grouping. Example: A table might include a product’s Category, which can be used to group the data in the table.
Schedule	Mechanism that allows a recurring event to send exported data to a set of users, which can be part of the team or external users.
Team	A group of users under the same organization.
Template	A ready-to-use workbook that can be duplicated, to be used “as is” or modified.
User	Individuals with credentials to access Crunchtime Insights.
Workbook	A data exploration tool with pages that display data in tables and pivot tables, similar to a spreadsheet. Users can analyze the data and create charts on workbook pages and use a page as a dashboard. In Insights, Crunchtime provides the ability to create grid reports, documents, or dossiers, which are consolidated into Workbooks.
Workspace	The repository for a team to add their workbooks and documents.

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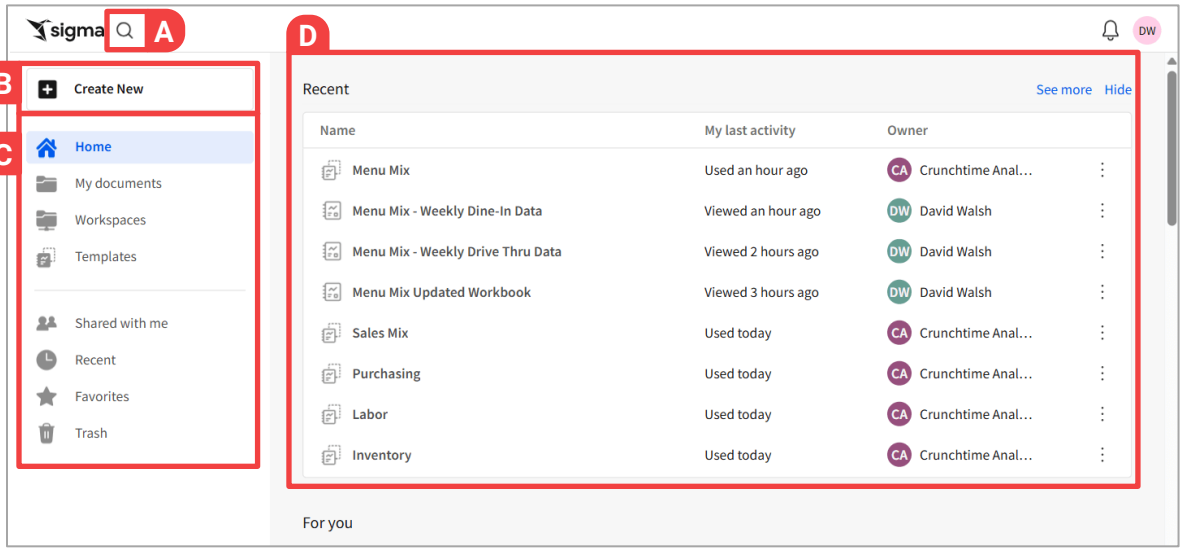
Crunchtime Insights

Navigation

There are 3 main places where you can interact with Insights: Home, Workspaces, and Workbooks.

Home

When you log in to Insights, you see your Home page. The following illustration and descriptions explain the main parts of the page.



A *Search:* Search for content in Crunchtime Insights.

B *Create New:* Create content, based on your role, including:

- *Workbook*: Used to analyze data via a spreadsheet-like interface and create reports & charts.
- *Dataset*: A centralized, shareable collection of data used in workbook analyses as sources for charts, tables, and pivot tables.

C My Content*:*

- *Home*: A dashboard with quick access to recent documents.
- *My Documents*: A personal folder for you to save content that you create.
- *Workspaces*: A way to organize and share content with specific members or teams within your organization. Items placed in a workspace can be accessed by anyone who has permission to that workspace.
- *Templates*: Allows users to create standardized workbook structures and share them for quick and consistent reuse; templates are available in any workspace.
- *Shared with Me*: Items that other users have shared directly with you.
- *Favorites*: Items that you have designated as a favorite.
- *Trash*: Deleted items.

D *Recent*: Items you have recently accessed.

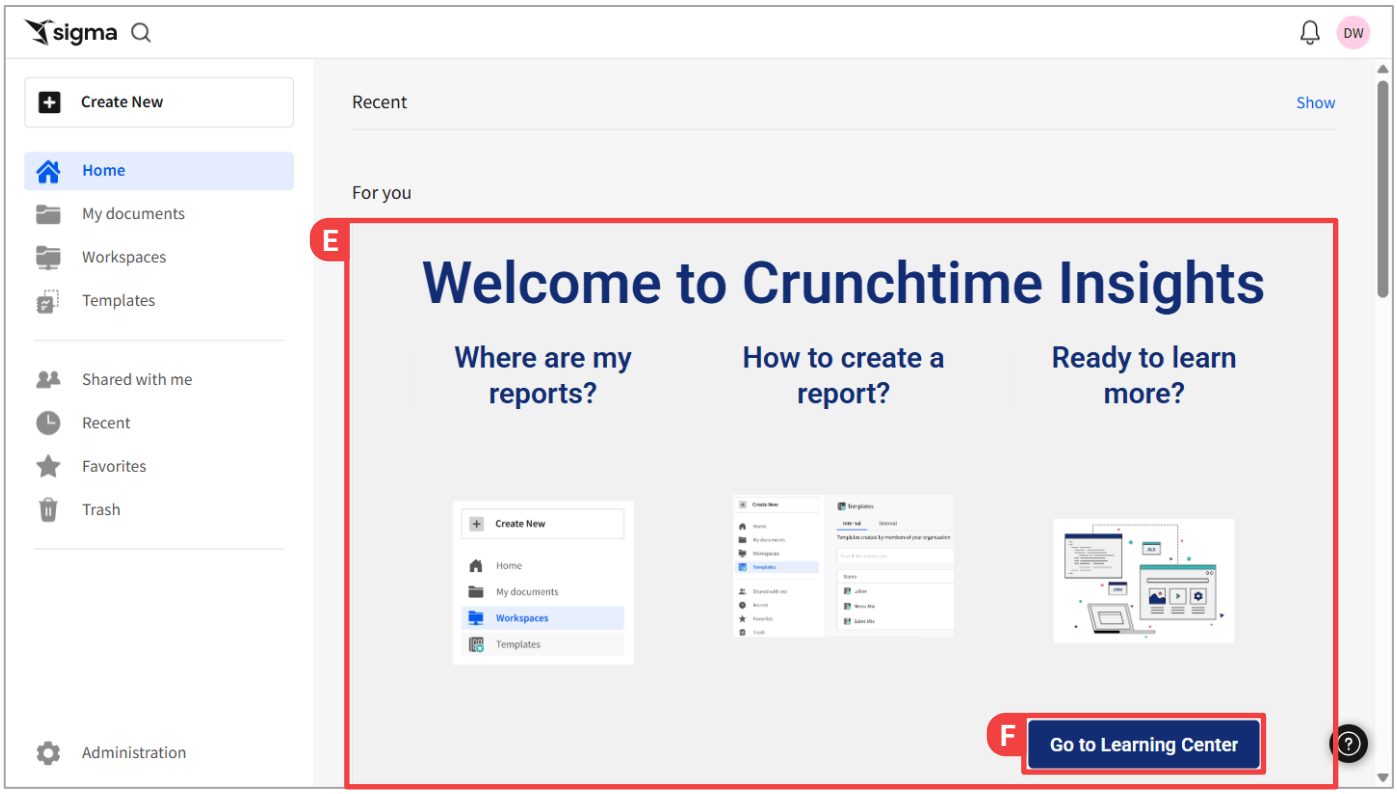
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Crunchtime Insights

Navigation (Continued)

Home (Continued)



E *Welcome* section: Provides direction regarding questions like:

- "Where are my reports?
- "How to create a report?"
- "Ready to learn more?"

Click on any of the above to get the answers!

F It also includes a button to *Go to Learning Center*.

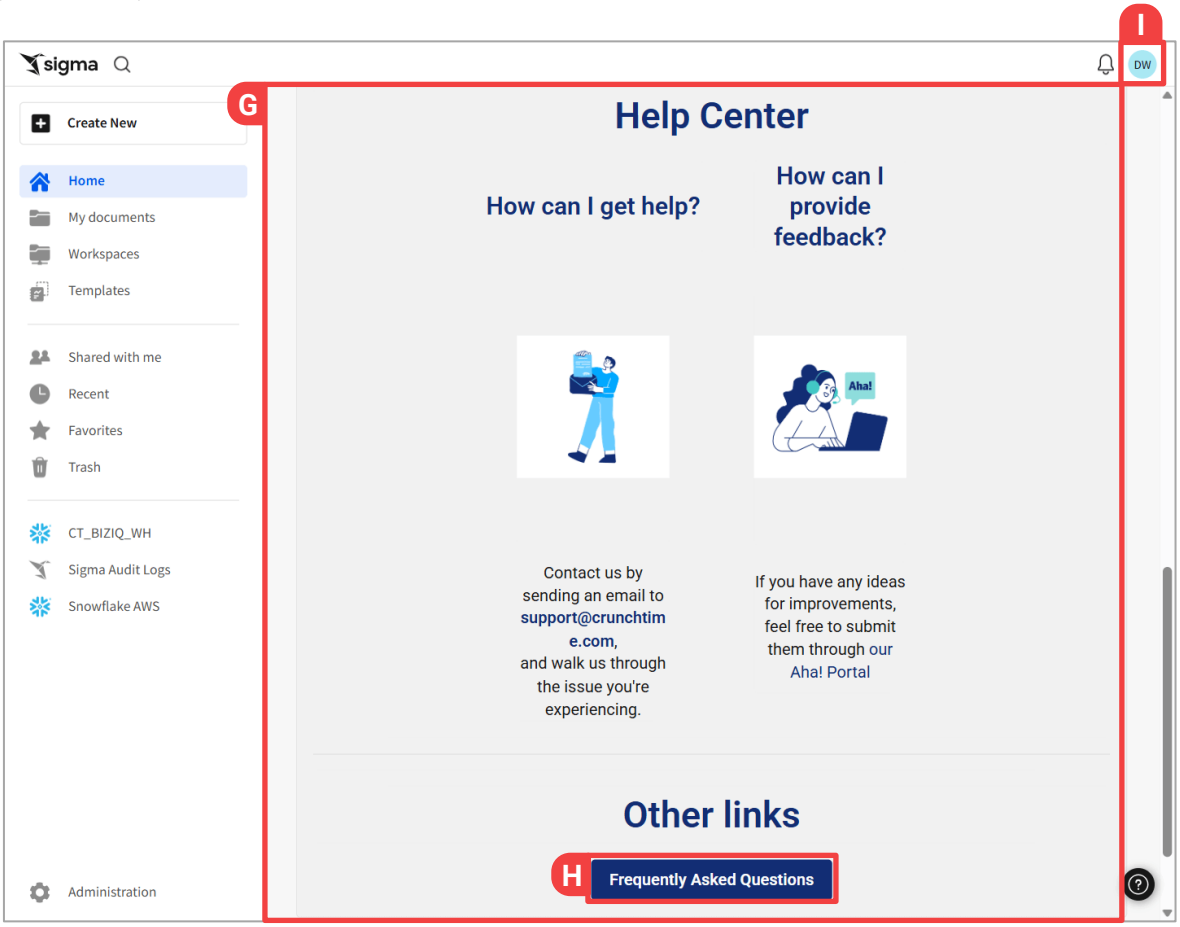
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Navigation (Continued)

Home (Continued)



G *Help Center*: Answers questions like:

- "How can I get help?
- "How can I provide feedback?"

  Click on any of the above to get the answers!

H *Other links:* Includes a button to show *Frequently Asked Questions.*

I User Profile: Your username initials, which links to your Profile, where you can make changes to your preferences and sign out. Other options also may be visible, depending on your permissions.

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Navigation (Continued)

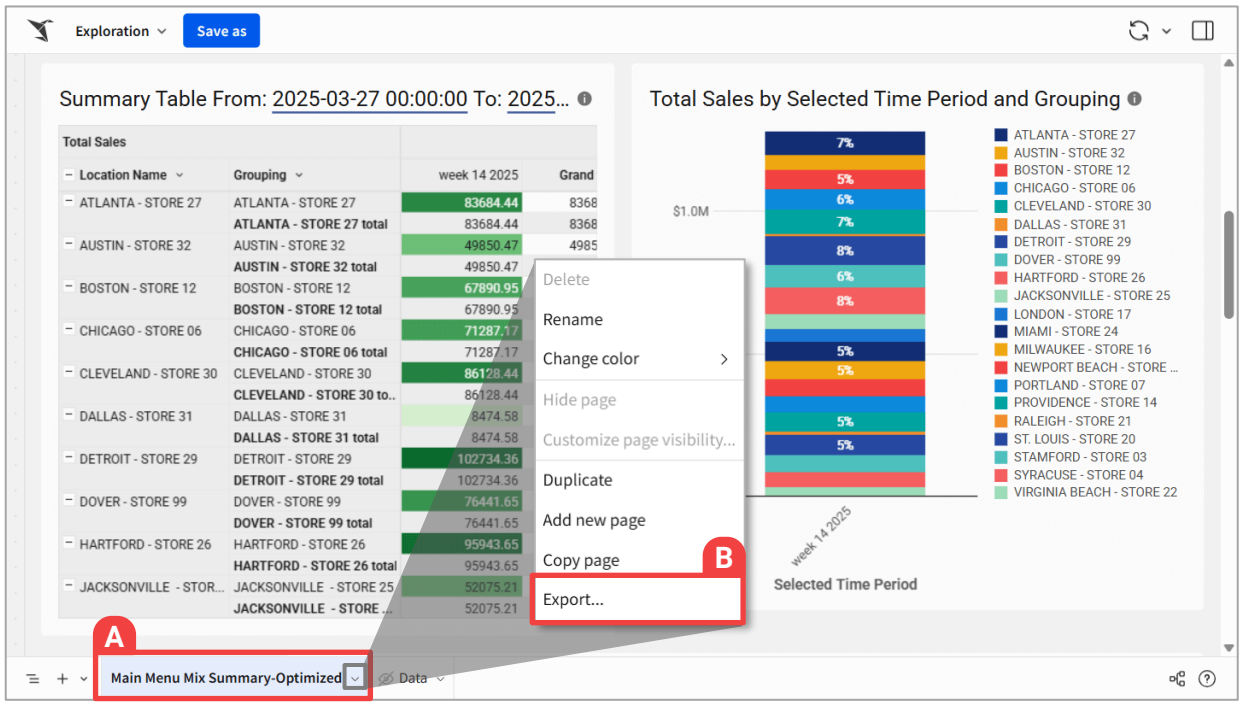
Workspaces

A Workspace is where users and teams categorize and manage their workbooks, so they can easily be accessed and shared by other members of the team.

Workbooks

This section introduces you to the basic components of workbooks.

Pages and Tabs



A A workbook contains one or more pages. Page tabs, located at the bottom of the screen, show different pages in the workbook.

B Each has a menu. When a workbook is in view mode, such as when it is provided to Consumers, it allows users to export (download) a page as a PDF file. (*See page 28 for more details*.)

Tip: In edit mode, Power Users have more options for pages, including *Delete*, *Rename*, *Hide*, *Duplicate*, and *Add new page*.

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Navigation (Continued)

Page Canvas



A Each workbook page has a canvas on which you can place elements such as text, tables, pivot tables, controls, images, and charts.

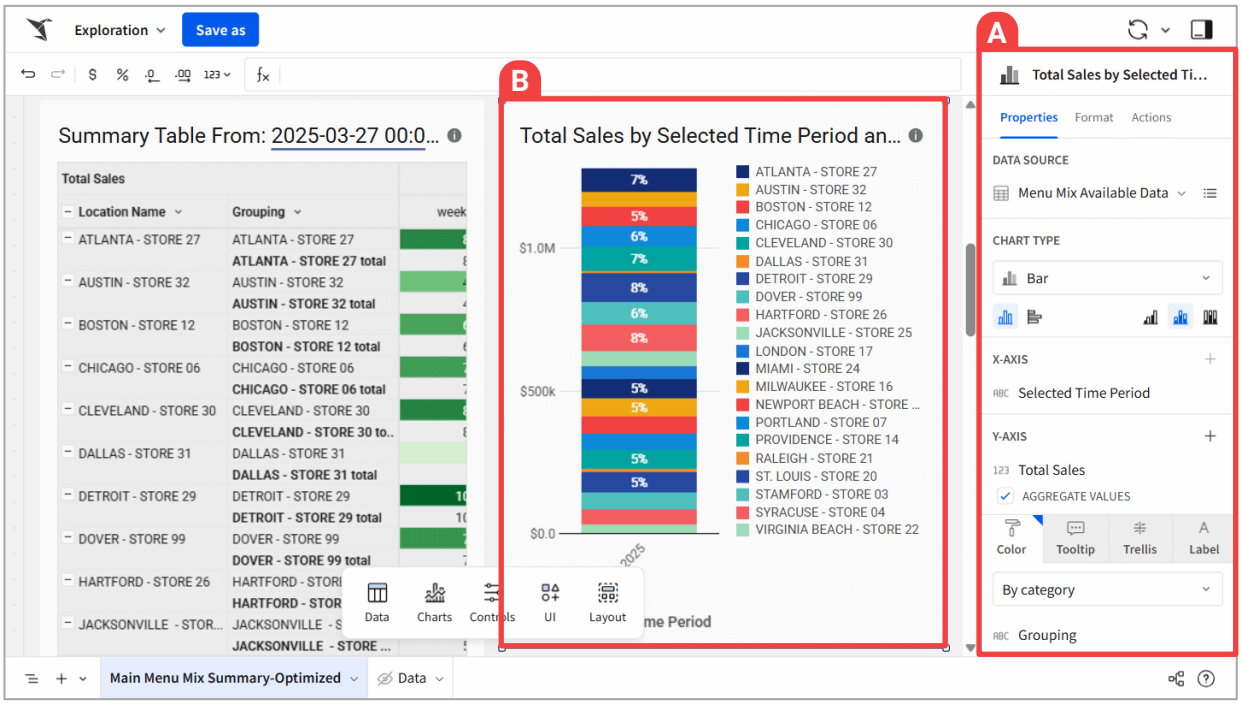
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Editor Panel



A The workbook editor panel, on the right side of the screen, allows you to interact with and update elements in your workbook. Access to the editor panel depends on your workbook view mode.

B When you select a new or existing element, the editor panel automatically displays that specific element's configuration.

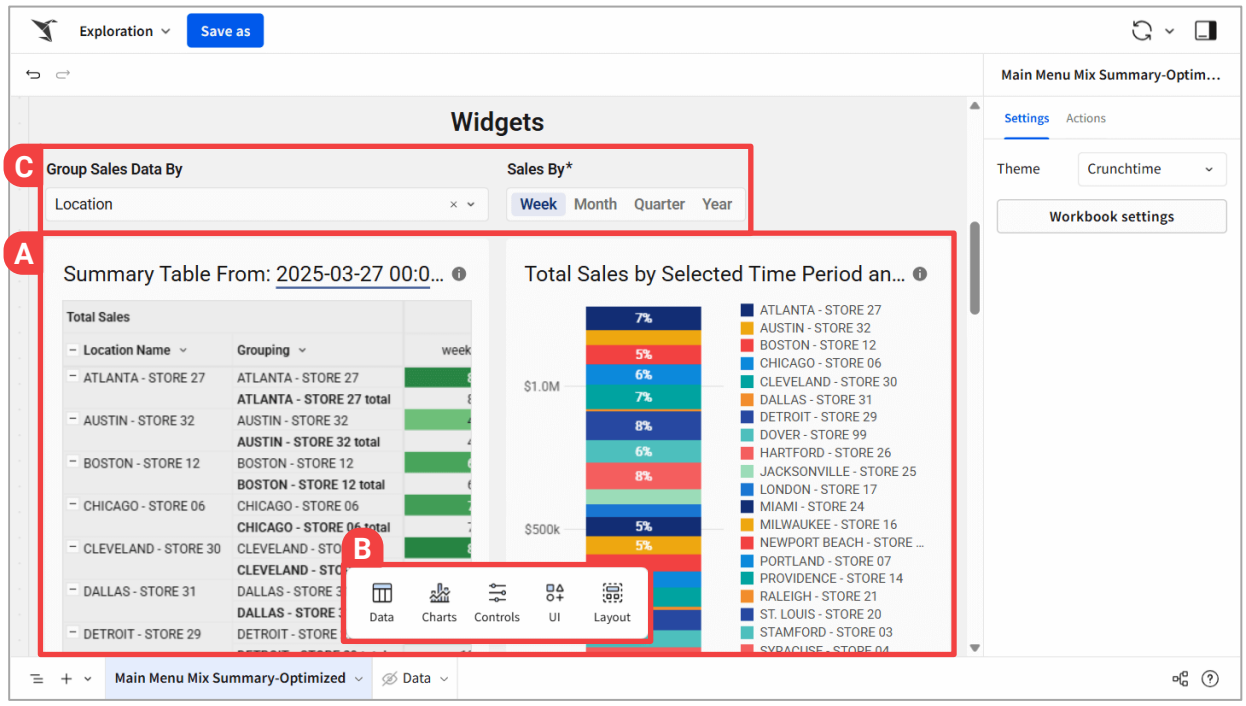
The editor panel content changes depending on how you are currently interacting with the workbook. For example, it displays one view when adding a new element and alternative views when configuring different element types.

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Crunchtime Insights

Navigation (Continued)

Elements



When building or editing a workbook, you arrange elements on the page canvas. Element types include:

- **A** Data Elements – Includes tables, charts, and pivot tables.
- **B** UI Elements – Includes text, images, buttons, embeds, and spacers.
- **C** Control Elements – Includes filters and parameters.

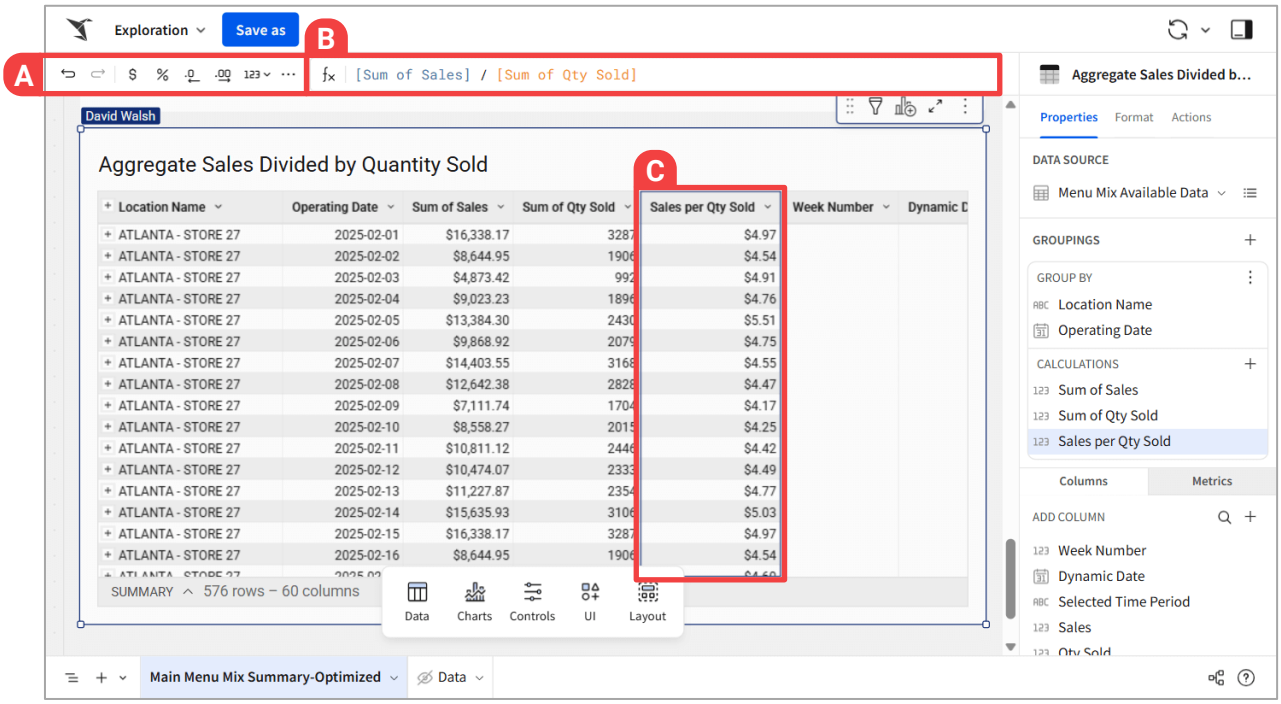
Tip: In workbooks, tables and pivot tables are not considered types of charts. Charts, tables, and pivot tables are all separate elements in the *Data Elements* category.

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Crunchtime Insights

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Toolbar and Formula Bar



A The toolbar, located directly under the workbook header, gives you quick access to select actions, formatting options, and the formula bar. The toolbar content changes depending on the element you have selected. Undo, Redo, and page theming functions are always displayed.

B The formula bar lets you calculate values based on functions, much like a spreadsheet.

C When you select a column in a data element, you can view and edit the column's formula in the formula bar (if you have *Can Edit* or *Can Explore* access to the workbook).

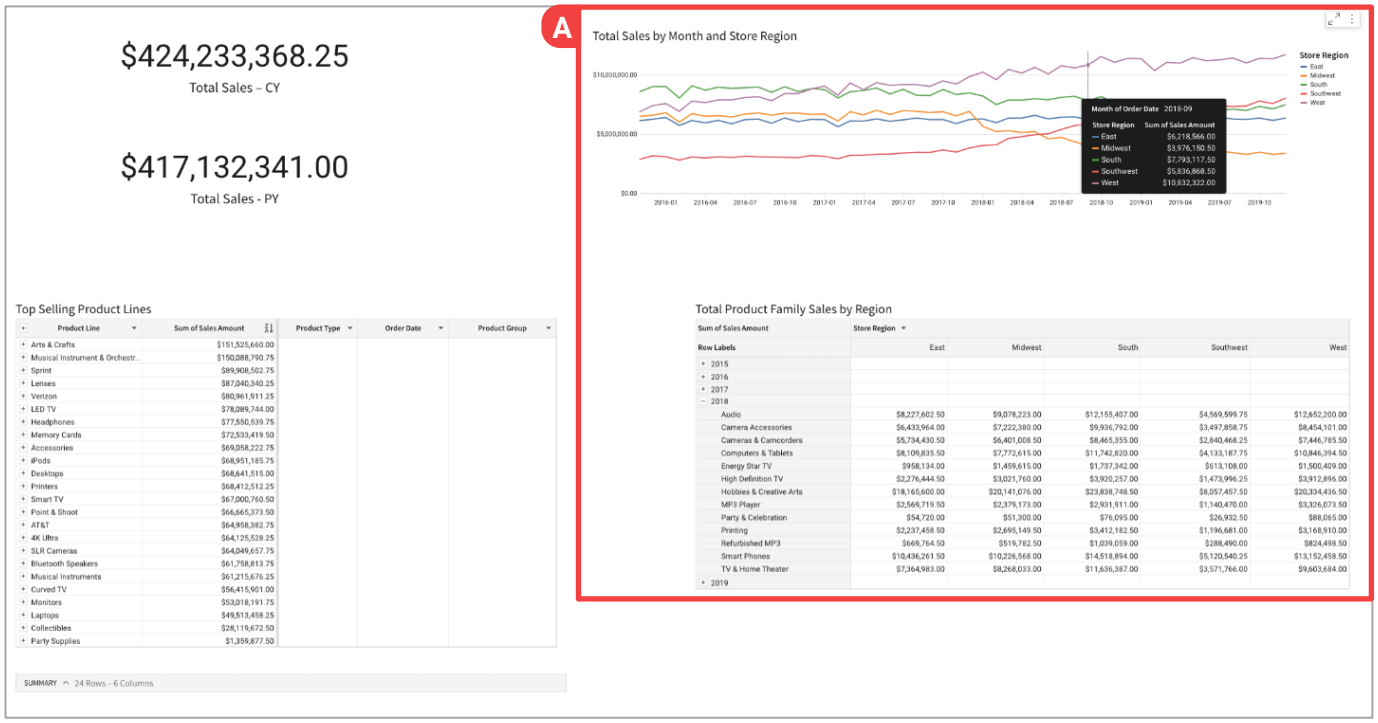
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Data Elements

Data Elements are built directly from a data source. They include tables, pivot tables, and charts. Although each type of data element displays data in a different way, the source of the data is always column-based.



A The screen above shows how column data is used to generate the chart.

Requirements: You can see data elements in *View* and *Explore* modes. To create a data element, you must have *Can Edit* access to the individual workbook and be in *Edit* mode.

Creating Elements from Data Sources

Each workbook can contain multiple elements sourced from a variety of data sources. You can add new data sources at any time and are not restricted to a single source per workbook or workbook page. An element's data can be sourced from Crunchtime Insights datasets or other workbook data elements.

Effects Of Upstream Changes

If a data source is modified, any dependent elements may be affected. For example, if *Element B* uses *Element A* as a data source, removing a column from *Element A* immediately makes that column inaccessible for *Element B*.

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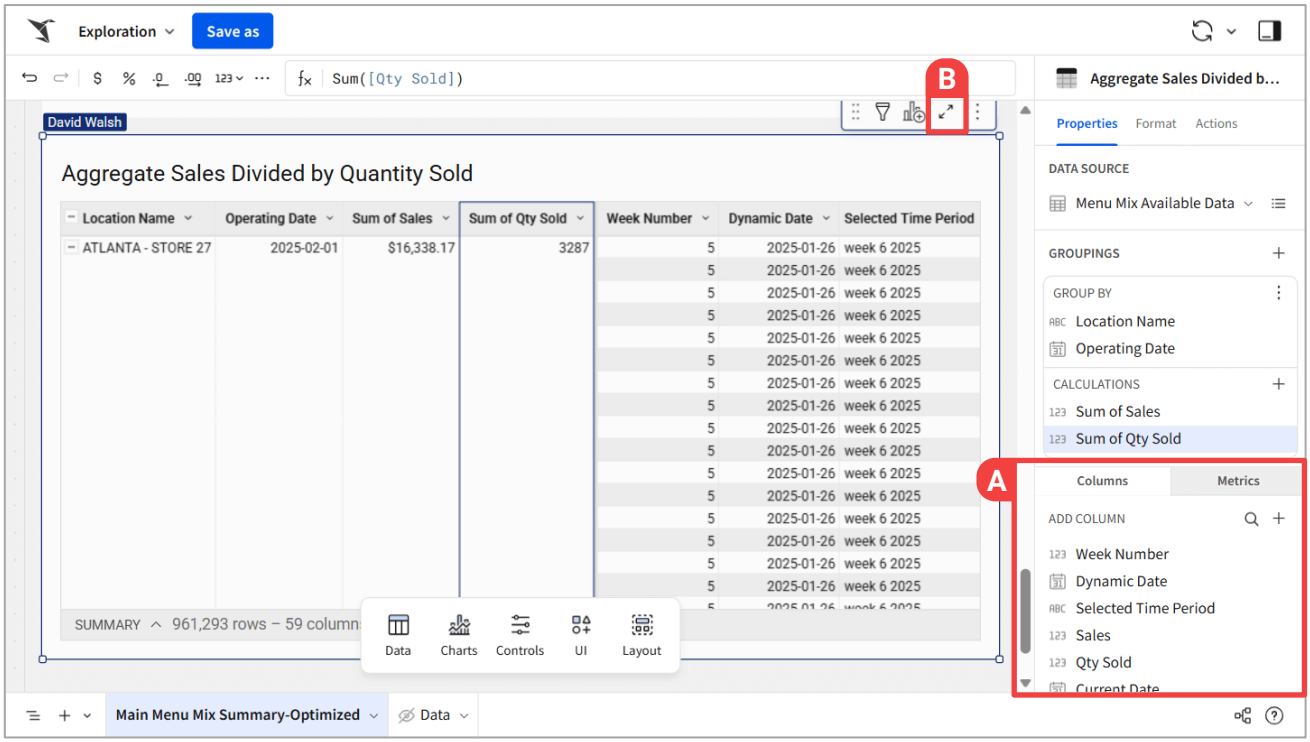
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Navigation (Continued)

Data Elements (Continued)

Working With the Editor Panel

When you edit elements in a workbook, additional functionality is available. When an element is selected, its configuration is automatically displayed in the workbook's editor panel. A data element's view in this panel displays all of the element's available columns.



A By default, all columns are listed under the COLUMNS section. To configure your element, move columns to other sections listed in the panel, using either the section's **+** menu or dragging and dropping the column.

Maximizing Data Elements

When viewing, exploring, or editing a workbook, all data elements are minimized by default to display multiple elements in the canvas.

B You can use the *Maximize* control on any data element to focus on its details and explore the underlying data.

When a chart or pivot table element is maximized, it expands to the full width of the workbook page and displays the element's underlying data table. When a table element is maximized, it expands to fill the entire workbook page. The underlying data isn't displayed in a supplemental table because it's already exposed in the table element itself.

Note: Data elements can be maximized in any workbook mode (*View*, *Explore*, or *Edit*), but changes can be made in *Explore* and *Edit* modes only.

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Tables & Charts

Create & Manage Tables

Tables are a subset of workbook data elements. Their spreadsheet-like interface allows for structuring and manipulation of data in a familiar environment. Tables support much of a traditional spreadsheet's functionality, like creating calculations and applying filters and formats. They also support a variety of other features such as data grouping and summaries. Tables and other data elements can be created via the PAGE ELEMENTS section of your workbook's editor panel or directly from an existing data element.

Requirements: To create or edit a data element, you must have *Can Edit* access to the individual workbook. Some exploratory actions are also supported with *Can Explore* access.

Table Concepts

Columns, Not Cells

If you're familiar with traditional spreadsheet tools, such as Excel, you likely associated data and formulas with individual cells. While Crunchtime Insights tables are very spreadsheet-like, *data is managed at the column level rather than individual cells.* This means actions such as calculations and formatting changes are applied to every cell in a column.

Managing data at the column level ensures consistency and accuracy, and prevents common errors, across large and ever-growing sets of data.

Groups and Groupings

Any column in a table can be used to define a grouping. When used as such, the column becomes what we call a *Grouping Key*. Its individual rows merge into single cells based on their distinct values. Subsequently, the rows of data to the right of the key column in the table are bundled into groups based on each unique value in the key column.

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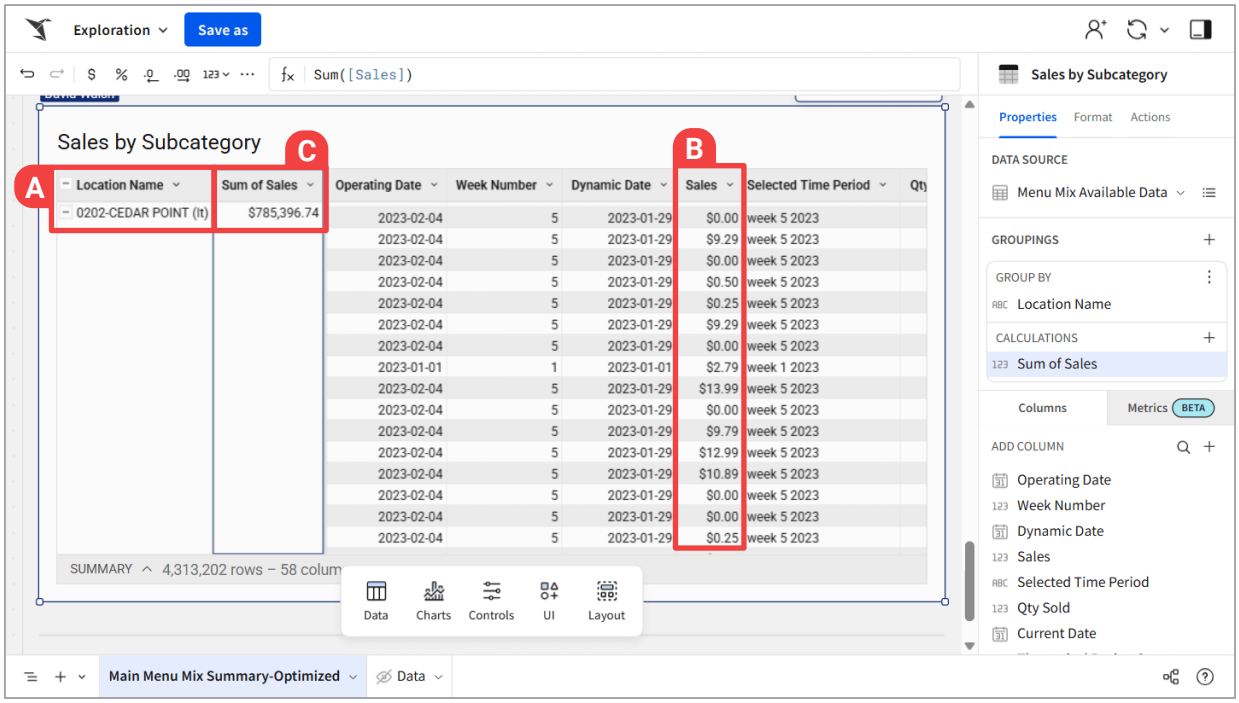
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Tables & Charts (Continued)

Table Concepts (Continued)

Groups Aggregates

Group Aggregates can then be calculated based on the cell values within each row in the group.



For example:

- **A** We can group sales data by [Location Name].
- **B** We can then calculate the total Sum of the [Sales] column…
- **C** By creating a new calculation (which creates a new column) called [Sum of Sales].

Note: This process is detailed on the next three pages.

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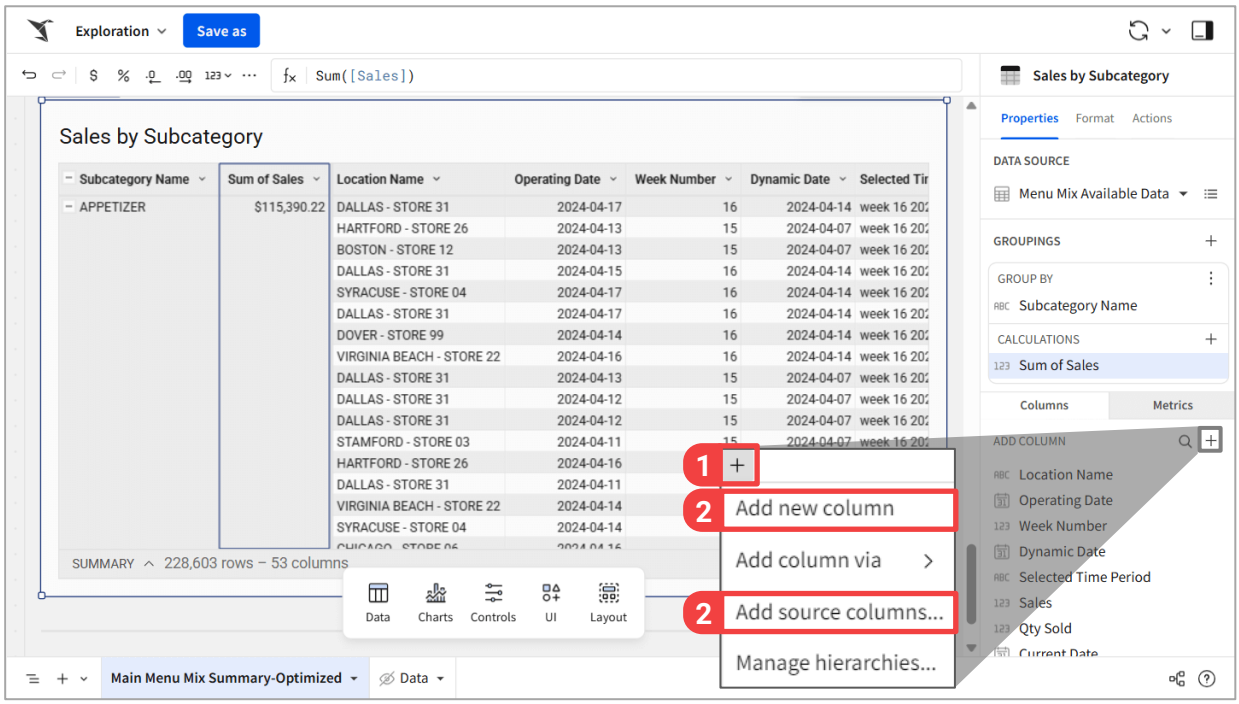
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Tables & Charts (Continued)

Add a Column & Create a Calculation

Before You Start: These actions use the Editor Panel. If you have not done so already, open the panel from either *Explore* or *Edit* mode; see Workbook Modes for more details.

Add a New Column



1. In the Editor Panel, click the Plus (**+**) icon located to the right of the COLUMNS section header.
2. Select *Add new column* to create a new calculation or *Add source columns* to select a column from the element's data source.
   - *Add new column* – Adds a new calculated column to the table and focuses the formula bar. Enter your calculation in the formula bar.
   - *Add source columns* – Expands the full list of the element's available data source columns. Check the box next to a column to add it to your table.

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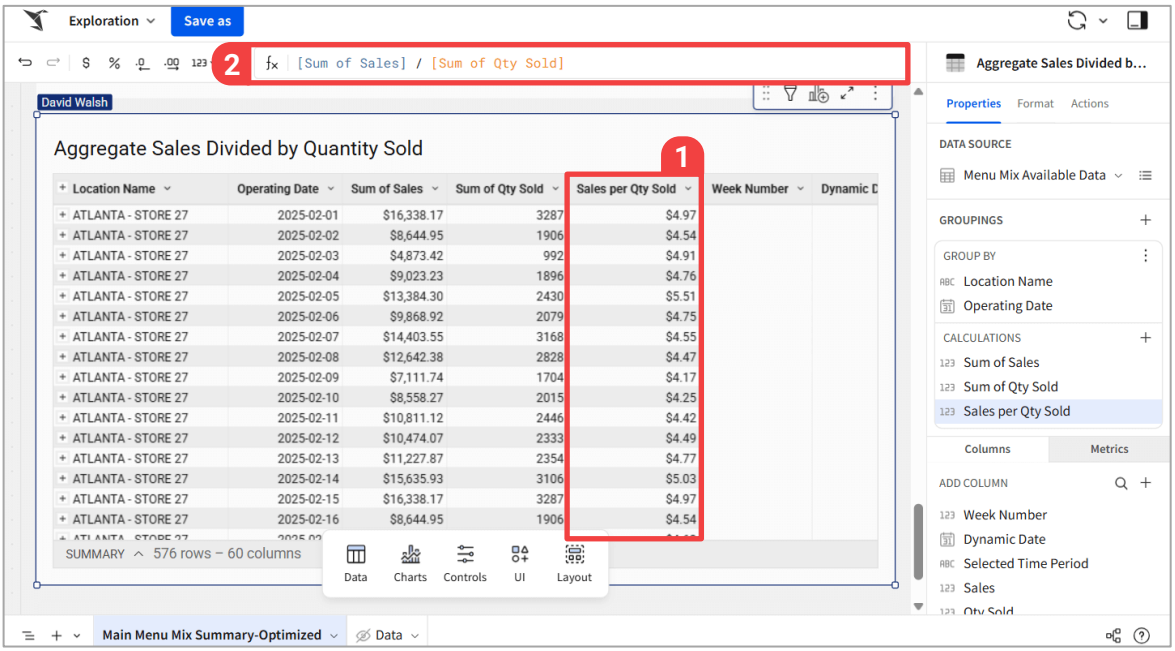
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Tables & Charts (Continued)

Add a Column & Create a Calculation

Create a Calculation

The formula bar is central to calculating data in Insights. It is located in the workbook toolbar at the top of any workbook page. Calculations are applied to entire columns. If a data element's column is selected, the column's formula will appear in the formula bar. No formula will be displayed if no column is selected.



1. Add a new column – in this example, *Sales per Qty Sold*.
2. With the column selected, type your formula into the formula bar. It will suggest auto-completed function names and column names.
3. Once your formula is complete, press *Enter* on your keyboard.

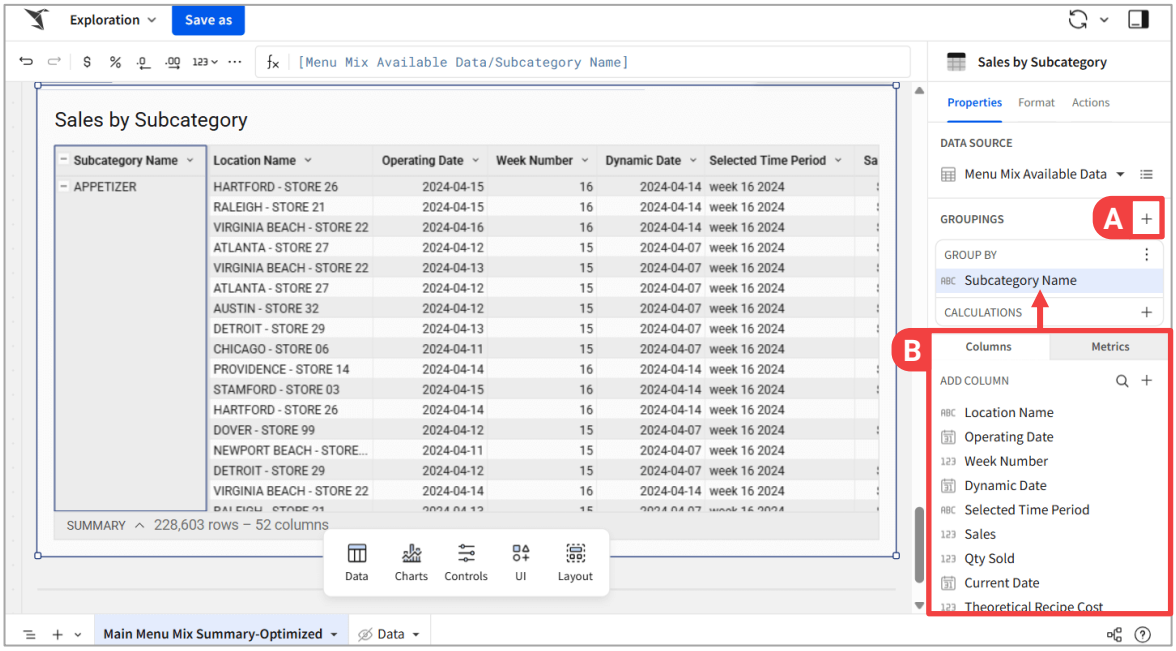
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Crunchtime Insights

Tables & Charts (Continued)

Create a Grouping

Groups and *Groupings*, which are unique to tables, are an excellent tool for comparative analytics. They allow you to analyze rows of data based on shared values within a single column. Any column in a table can be used to define a grouping.



To create a Grouping:

- **A** Click the Plus (**+**) icon next to the GROUPINGS header and select a column OR
- **B** In the element's editor panel, drag and drop a column from the COLUMNS section up to the GROUPINGS section

In the example above, we are adding the option to Group By [Subcategory Name].

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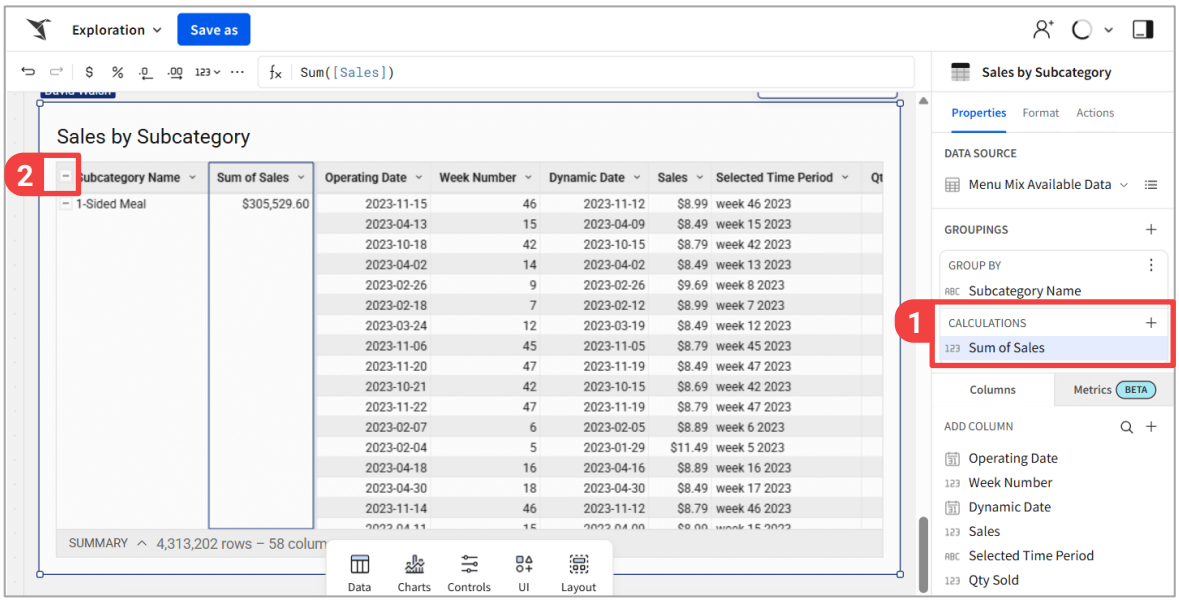
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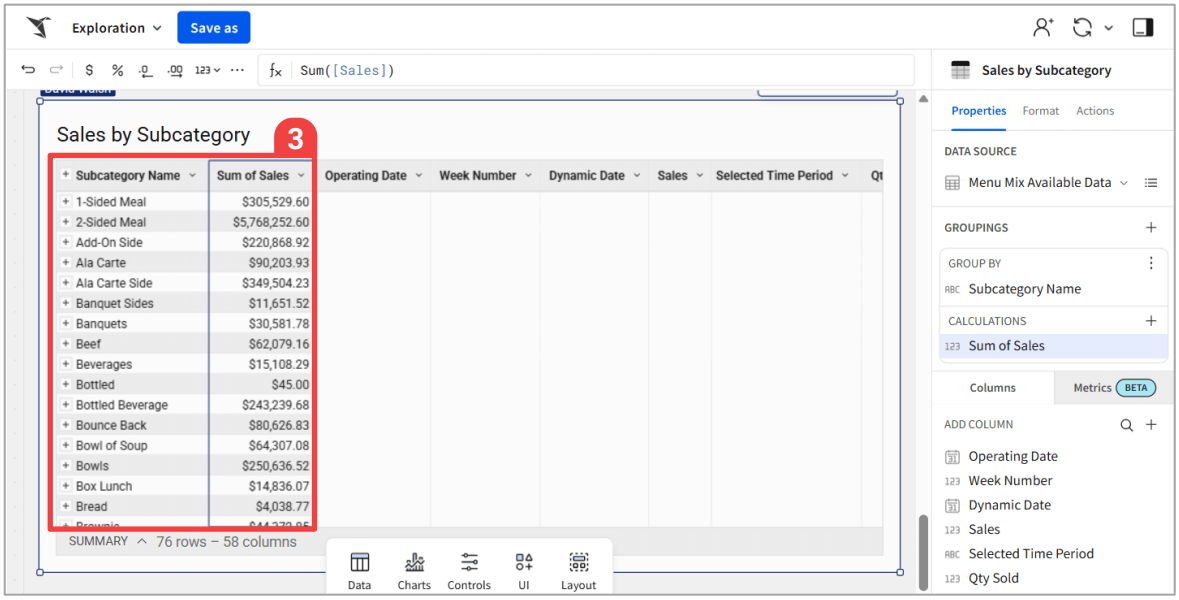
Tables & Charts (Continued)

Create Subtotals by Grouping

In this example, we show you how to calculate and display the sales subtotals by the Subcategory grouping you created on the previous page.



1. Create a calculation for [Sum of Sales]. (*See page 15 for the detailed steps.*)
2. To collapse the Subcategory details, click the minus (–) button on the grouping key's column header.



3. The report will now display the [Sum of Sales] (i.e. the subtotal) for each Subcategory.

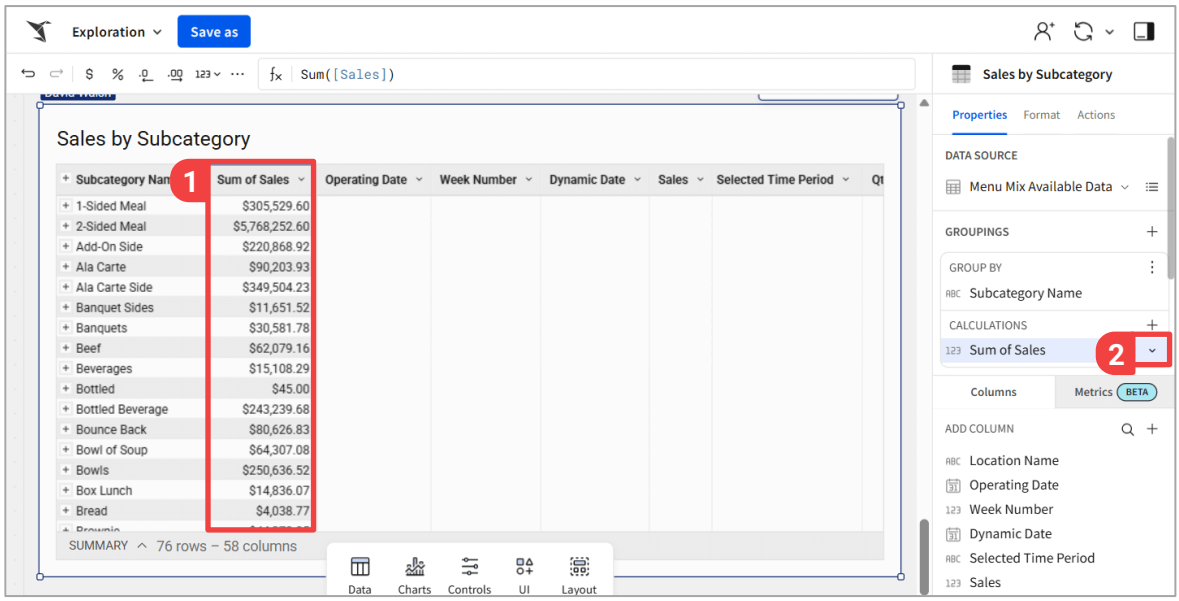
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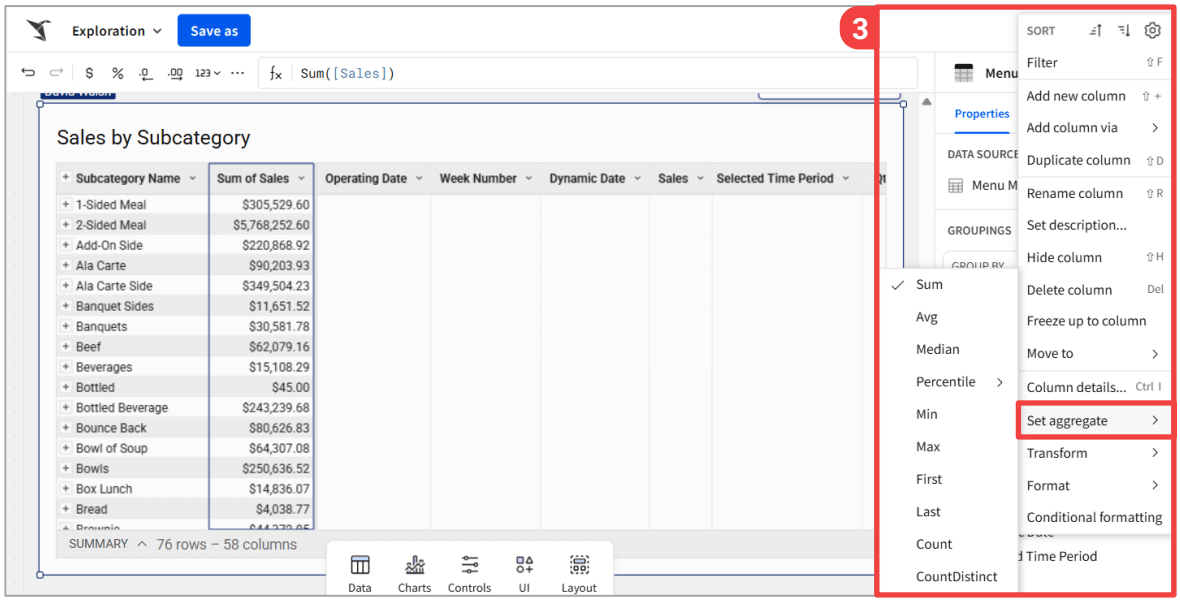
Tables & Charts (Continued)

Additional Calculations

The Sum calculation is likely to be the most commonly used, but there are additional options available.



1. Click on the calculation column to select it.
2. On the Properties panel, click the caret (▼) button to the right of the calculation.



3. From the menu, select *Set aggregate* and choose one of the options from the sub-menu. For example, you could choose *Avg* to see the average of sales for each Subcategory.

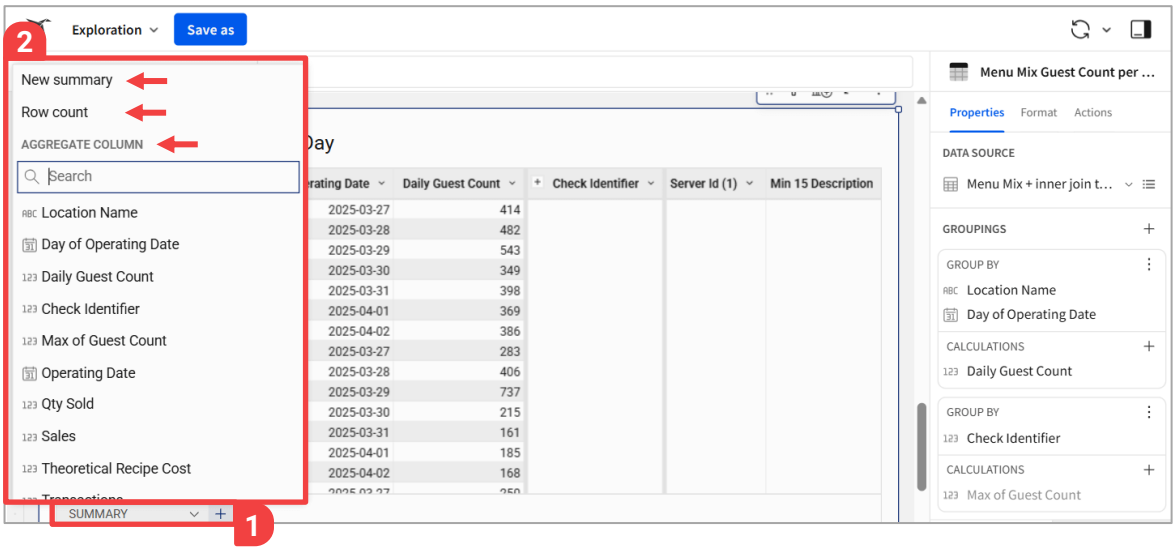
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Crunchtime Insights

Tables & Charts (Continued)

Create a Summary

Summaries display the aggregate total of a single value column.



1. Click the SUMMARY option, located in the table footer and click the Plus (**+**) icon.
2. Select a column option.
   - *New summary* – This creates a new blank summary column and focuses the formula bar. Enter your custom formula to create your summary.
   - *Row count* – This counts the total number of rows at the top-most level of the table. If there are no groupings, this calculation will match the total number of table rows. If there are groupings, the calculation will match the total number of groups in the highest grouping.
   - *Aggregate Column* section – Selecting any of the existing columns will create a summary aggregate of that column. Aggregation type (e.g. Sum vs Count) is dependent on the original column's value type (e.g. text, number, date, etc). For example, a numeric column such as [SALES] will create a new calculated column, [Sum of SALES] (e.g. Sum([SALES])).

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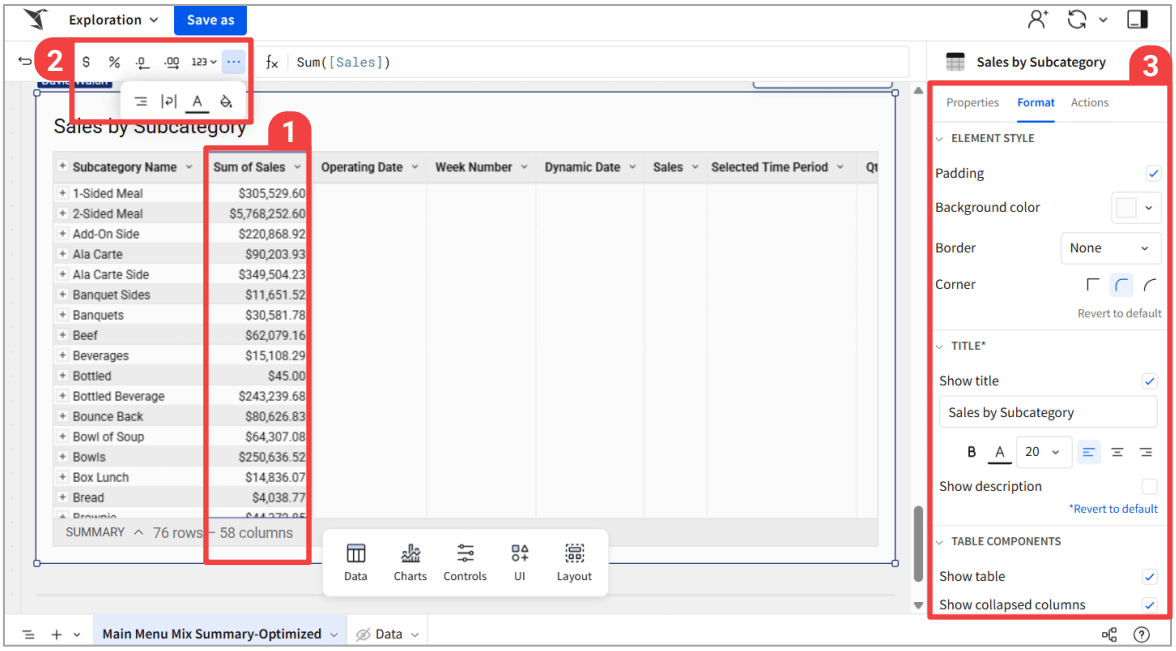
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Tables & Charts (Continued)

Column Formatting

Apply Basic Visual Formatting to a Column



1. Click on the desired column to select it.
2. For basic formatting, use the workbook toolbar to apply the column's formatting.
3. For more advanced formatting options, use the *Format* panel on the right.

Apply Conditional Formatting

1. Click on the table to select it.
2. Click the paint bucket icon in the workbook toolbar.
3. Click *Conditional formatting*.
4. The table's conditional formatting options will appear in the editor panel. The selected column will automatically receive a default format. Define your new rule.
5. [Optional] To add additional rules, click + *Add rule*.

One step further: Say you want to highlight an entire row based on the values of a single column. To do this, simply select 'All Columns' in the *Apply To* drop-down and use the custom formula option in the rule drop-down with your logic.

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Tables & Charts (Continued)

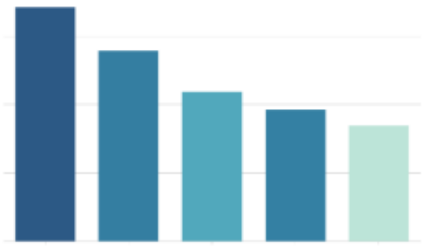
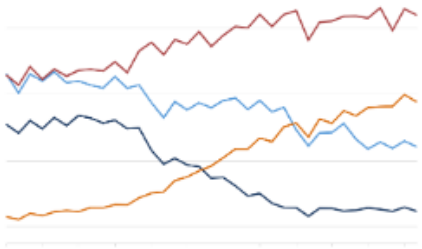
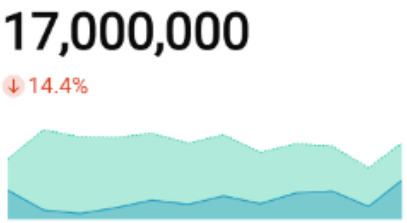
Intro to Charts

Charts are graphical data elements that add visual context to your analysis. They allow you to create, explore, and view your data in a more focused and digestible format. By adding charts to a workbook, you can reveal patterns, trends, outliers, and correlations crucial to creating a compelling data narrative. Build each chart to deliver specific data insights and answer important questions that help you make better business decisions.

Chart Types

Effective charts are essential to telling meaningful data stories, but choosing the right types of charts can be a challenge. Consider the type of data you want to visualize, the questions you need to answer, and the users who will view and consume your analysis.

The following information can help you choose the chart best suited for a clear and detailed narrative.

	**Bar Chart** Shows how values vary across categories or groups of data. Compare values against each other, in relation to a reference mark, or as proportions of a whole. See Build a Bar Chart.
	**Line Chart** Shows how values of one or more metrics change over time. Spot trends and identify anomalies in your dataset. See Build a Line Chart.
	**KPI Chart** Highlights a single metric value to measure performance or progress toward a goal. Summarize the total value for a specific period, compare the value over time, or measure it against a benchmark or target. See Build a KPI Chart.
	**Area Chart** Illustrates the magnitude or cumulative values of one or more metrics over time. Compare categories or groups of data, or evaluate the data composition or part-to-whole relationship. See Area Charts.

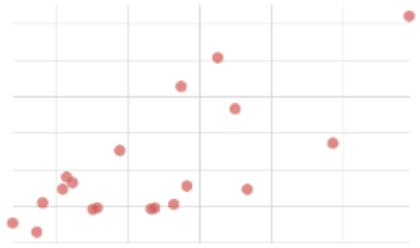
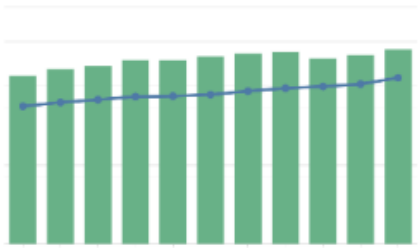
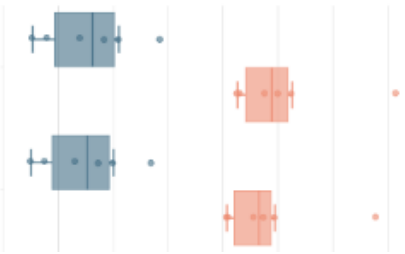
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Tables & Charts (Continued)

Chart Types (Continued)

	**Scatter Plot** Demonstrates the presence and strength of a correlation between metrics. Analyze patterns, understand distribution, and identify outliers in your dataset. See Build a Scatter Plot.
	**Combo Chart** Combines bar, line, area, and/or point marks to compare multiple types of metrics. Evaluate the relationship to identify correlations and variations between the datasets. See Combo Charts.
	**Box/Whisker Chart** Shows the value distribution of one or more metrics. Mark the minimum, median, and maximum values, and identify outliers in your dataset. See Box and Whisker Charts.
	**Pie/Donut Chart** Portrays values as proportions of a whole to convey the data distribution and part-to-whole relationship. See Pie and Donut Charts.
	**Sankey Diagram** Shows how data flows and changes throughout a process or system. Compare the movements and proportions of data across different paths to analyze distributions, workflow, networks, and more. See Build a Sankey Diagram.

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Tables & Charts (Continued)

Chart Types (Continued)

	**Funnel Chart** Measures values across sequential stages in a linear process. Gain insight into inputs across stages, identify bottlenecks and other issues, and assess the overall health of the process. See Build a Funnel Chart.
	**Gauge Chart** Measures a single-value metric against a radial scale. Evaluate growth, assess performance, and track progress toward a goal. See Build a Gauge Chart.
	**Region Map** Illustrates data distribution by region, including country, state, county, and city. Compare scale to identify variability and patterns across distinct geographical areas. See Maps.
	**Point Map** Illustrates data distribution with precise positioning based on latitude and longitude coordinates. Reveal geospatial patterns and identify outliers in your dataset. See Maps.
	**Geography Map** Illustrates geospatial objects on a map using geography (WKT) or variant (GeoJSON) data. Demonstrate data distribution, reveal patterns, illustrate spatial networks, or assess data variability across distinct geographical areas. See Build a Geography Map.

(Continued)

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Tables & Charts (Continued)

Custom Configurations

Charts feature various properties and formatting options that determine how your data is represented. With a wide range of customizable configurations, you can enhance your charts and ensure they present meaningful and actionable information.

Properties

The *Element properties* panel requires you to select a chart type and configure source columns to define chart properties, including axis categories, metrics, colors, and tooltips.

You can convert data value types, change the data aggregation or truncation, and customize chart markers and tooltips. Depending on the chart type selected, you may also have options to change the chart orientation, modify data stacking, and add trellis rows and columns.

Formatting

The *Element format* panel allows you to customize the appearance of various components, including the chart title's content, size, and alignment. Depending on the chart type selected, you may also be able to format the background, axes, legend, data labels, reference marks, trend lines, and more.

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REFERENCE GUIDE

Crunchtime Insights

Exporting Data

Send or Schedule Workbook Exports

If you want to export or download your workbook contents outside of Sigma, you can choose from a variety of methods, formats, and destinations:

- Download workbook data on demand.
- Schedule an export to one or more destinations.
- Send a scheduled export on demand.

You can export any of the following:

- An entire workbook
- A single page of a workbook
- A specific element of a workbook

Available Export Destinations and Formats

Depending on what you want to export and where you want to send it, different data formats are available:

Export Destination	Entire Workbook	Workbook Page	Workbook Page Element
Download	CSV, Excel, PDF	CSV, Excel, PDF, PNG	CSV, Excel, JSON, PDF, PNG
Email	Excel, PDF	Excel, PDF, PNG	CSV, Excel, PDF, PNG

Notes: File size limits apply to the various exports. Raw data formats are unsupported if you export a bookmark of a workbook.

While editing a workbook, you can download the draft workbook, page, or element. If you want to export content to other destinations, use the published version of the workbook.

Manage Scheduled Exports

You can manage scheduled exports in different ways:

- Manage scheduled exports that you own or that you receive.
- Manage exports scheduled for a workbook.
- As an admin, manage all scheduled exports for your organization.

Table and Pivot Table PDF Export Formatting

When you export a table or pivot table to PDF, the formatting is handled differently based on the layout used by the workbook.

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Crunchtime Insights

Other Topics

Account Type Permissions

Each Net-Chef / Enterprise Manager user can be set up with varying access to Crunchtime Insights via an account type setting of *Power User*, *Analyst*, or *Consumer*. (It is applied here: EM > Application Users > User detail).

Here is a chart showing what each account type can do:

Account Type	Power User	Analyst	Consumer
Navigate Table Sources & View Table Sources	✓	✗	✗
Create, edit, and publish workbooks	✓	✓	✗
Create custom views with customized tables & charts	✓	✓	✗
Apply tags to a workbook	✓	✓	✗
Manage workbook themes and fonts	✓	✗	✗
Download Workbooks	✓	✓	✓
Schedule Exports (Subscriptions)	✓	✓	✓
Export to Email	✓	✓	✓
Contribute to Shared Folders	✓	✓	✗
Create New Folders	✓	✗	✗
View Datasets	✓	✓	✓
View Workbooks	✓	✓	✓

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Crunchtime Insights

Other Topics (Continued)

Widgets

Embedding widgets into Enterprise Manager or your Managers' Corporate Dashboards in Net-Chef is a great way to ensure everyone is on the same page about the performance metrics that matter most.

Any Crunchtime Insights *Power User* can embed a visual element, provided they have permission to edit a dashboard in Net-Chef. (See related permissions below.)

To learn how to do this, check out our *Create a Crunchtime Insights Dashboard Widget* course here: https://links.crunchtime.com/PT-BIZ203-CreateBizIQDashboardWidget

OR

see the Setup Guide here: https://links.crunchtime.com/SG-BizIQPlusWidgetSetup

Related User Group Permissions

Screen Name	Control Name	Description
NC-Dashboard	Edit Layout	Allows users to edit their own layout.
NC-Dashboard	Edit Corporate Layout	Allows users to edit the Corporate layout.