

Credible BI

Yellowfin 7.1 Enhancements and Improvements Overview

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Enhancements and Improvements Overview

Location Intelligence Capabilities

Base Layers

Base Layers empower you to immediately create insightful multilayered maps without needing to source WMS layers, enabling you to create beautiful maps with ease.

Shape files are used to create an image (native Base Layer). As a result, you will be able to export multilayered maps, complete with Base Layer, straight to PDF to collaborate and share with colleagues.

The native Base Layer also supports faster content creation, enabling you to quickly and easily switch between different map types, whilst removing the need to write multiple reports when creating multilayered maps. Query performance is also enhanced, as you will no longer be required to run separate reports to generate and display multilayered maps.

GeoPacks

GeoPacks provide you with the geographical data you need – including location-relevant demographic data, as well as geometry and GIS data encompassing zip codes, polygons, latitude and longitude coordinates – to create insightful location-based reports using your existing business data.

Geocoding to Zip Code Level

Credible BI now includes GIS records and geometry points, enabling you to quickly turn your address data into stunning maps. Geocode your address data to zip code level on-the-fly, and render this information on maps with ease, to quickly produce stunning visualizations and actionable insight.

Credible BI automatically assigns zip codes, latitude and longitude coordinates as well as polygons – where available – to address-level data. Subsequently, you are able to immediately geocode selected address, or other, data to individual zip codes on a map without having to source separate GIS records and geometry points.

Effortlessly plot data points at zip code granularity to achieve detailed context for existing business data. Uncover fresh insights and previously unidentified spatially significant relationships with ease.

Geographic Data Enrichment

Easily access demographic data to enhance your location-based analysis. Credible BI also includes demographic data for key regions – including population, average household income, median age, employment information and more. These data sets will assist you to quickly detect correlations or interrelationships between existing business and spatially relevant third-party data.

Merging location-based and traditional BI information also provides context to your business data, enabling you to fully exploit that information and see new opportunities.

Geography Fields

A new type of field has been introduced – Geography Fields. Previously, Credible BI only contained Geometry Fields. The new Geography Fields enable users to link existing datasets straight to GIS records and geometry points contained in GeoPacks.

View Level GeoPack Linkage

View level GeoPack linkage enables you to link GeoPack data to a field at the View level. This describes the process of linking from your existing address data (location dimension) to a GeoPack attribute (post code number, name, etc.).

Auto Charts for Maps

With this release, the Auto Chart feature will now automatically identify when you are using geometry data and instantly create a suggested map based on your selected fields (GIS, bubble or heat). For example, if a user has a thematic map, then drags on size attributes within the Chart Builder, a bubble chart will be automatically created.

GIS Layer Selection Restyle

The layer selection rollout panel has been restyled to improve look and feel.

GeoPack Export

When users attempt to export a View or a report that has a dependency on information contained in a GeoPack, Credible BI will automatically flag that GeoPack as a dependency, which can then be optionally included within that same export file.

Using GeoPack Alias

You can use the alias name for fields in a report created from a GeoPack. For example, your existing dataset might only contain ISO or FIPS codes for a certain area. This allows you to display human readable names of the areas you have linked to, even if the data you have linked on would be meaningless to an end user (i.e., ISO or FIPS codes).

Demographic Calculated Fields

Use advanced functions to create a Calculated Field using demographic data from a GeoPack. Calculations performed between your existing business data and demographic data from a GeoPack will be executed within Credible BI, rather than at the database level.

More Color Settings for GIS Maps

Credible BI now includes more color setting options for GIS maps. In addition to a set of default color sets, users are now able to manually create and select color options. Whereas some map types previously limited users to three color choices per map, users can now select as many colors as desired.

Color Range for GIS Maps

Users now have the ability to apply range settings to GIS color sets – e.g., color-coding from light to dark blue – to demonstrate a range within a metric.

Render Type Selection for GIS Maps

In instances where both polygon and point data is available, users can select the render type – e.g., Heat, Bubble, Thematic – for GIS maps.

Set Layer as a Boundary for GIS Maps

When creating GIS maps, users are able to set a layer of the map as the boundary of the primary map, i.e., set the visible boundary of the map based on the background layer, rather than the data itself. For example, even if you only have data for one particular state or region, you can set the country border as the boundary of your map. This change will provide additional geographic context when visualized, enabling you to easily see plotted data in relation to the surrounding space.

Multilayered maps

Quickly create multilayered maps within a single report to attain faster insight. Credible BI now enables users to create and add additional layers to a map within the Chart Builder, without having to first build a new report.

Base Layer Distance Legend

A distance legend, or scale, is now automatically applied to the base layer of a map to assist users in determining the relative distance between data points.

Metric as a Color (Thematic or Bubble Map)

Dragging a metric into the color selection panel of an Auto Chart will automatically define the color of a thematic or bubble map.

Bubble Formatting for GIS Maps

Set minimum and maximum bubble sizes when creating a bubble map. This is particularly useful when mapping a data set with significant outliers, ensuring that all points within the dataset remain visible.

Visualizations

Toggle from Auto Chart to Manual Chart Selection

You now have the ability to toggle between the Auto Chart option and manual chart selection, without affecting settings and fields. This adds a greater level of flexibility when building visualizations. Business users can still enjoy the guided support offered by Auto Charts, while more adept users – with a predefined idea of the style of chart they want to create – can simply toggle to manually create specific visualizations.

For basic charts in ‘auto’ mode, you can now also seamlessly swap back and forth between chart types (e.g., pie, bar, etc.) – not just toggle between Auto Chart and manual chart selection – without having to rebuild content.

Customizable Big Number Charts

The output canvas, part of the recently overhauled Report Builder, enables you to drag-and-drop multiple charts onto a single space and arrange them side-by-side to produce multi-chart reports – a miniature dashboard type experience for data consumers. This feature enabled you to resize the charts, the canvas itself – and add a range of custom widgets (text, images, icons, etc.) to the output canvas – to create a customized view of visualizations and add context to multi-chart reports.

The upgrade adds to this experience by allowing you to also create bespoke Big Number charts within the output canvas. This change empowers you to build customized summary charts within a multi-chart report, using the range of available font types within Credible BI.

Metric as a Color for Auto Charts (Bar, Column, Scatter, Trellis)

You now have ability to color an Auto Chart generated Bar, Column, Scatter or Trellis chart – including combination charts – based on a metric. This includes both assigning a particular color to a metric (for example, green) to denote a category, as well as assigning different shades of the same color (for example, dark to light green) to signify a range within a metric.

Dimension as a color for Auto Charts (Bar, Column, Scatter, Trellis)

You now have the ability to color an Auto Chart generated Bar, Column, Line, Scatter or Trellis chart – including combination charts – based on a dimension. This includes both assigning a particular color to a dimension (for example, green) to denote a category, as well as assigning different shades of the same color (for example, dark to light green) to signify a range within a dimension.

Series Selection Aggregation

Users are now able to apply an aggregation — an average, maximum or minimum — to a Series Selection chart.

Color by dimension (including Auto Charts)

Users are now able to apply color by dimension, as well as color by metric, to Credible BI's range of charting options. Color by dimension is now also supported in Auto Charts.

Conditional Formatting on Heat Grids

Users now have the ability to use a metric with a conditional format on a Heat Grid. This enables users to assign a particular color to a specific number or number range.

Conditional Formatting for Auto Charts

Users now have the ability to apply conditional colors on Auto Charts. This enables users to assign a particular color to a specific number or number range. For example, a user might denote any visualized value under 20 as red, and any over 30 as orange. This can be used to both demonstrate segments within a metric and pinpoint exact figures.

Conditional Formatting Legend

A new chart legend informs users if conditional formatting has been applied to a chart and what it represents, for example: red = less than 36, yellow = more than 36.

Radar Chart Category Enhancement

Categories can now be displayed on a radar chart. Users can set-up groups on a radar chart by color, using conditional formatting.

Time as a Dimension in Combination Charts (Auto Charts)

The Auto Chart functionality detects Date Fields and automatically creates Time-Series combination charts.

Combination Trellis Charts in Auto Chart

The Auto Chart functionality can now create combination Trellis charts with two dimensions and two or more metrics.

Trellis Multi-Metric Line Charts in Auto Chart

The Auto Chart functionality can now create Trellis multi-metric line charts. That is, when a user drags time and dimension attributes – in conjunction with multiple metrics – into the Chart Builder, a chart will be automatically generated.

Multi-Scatter Charts in Auto Chart

The Auto Chart functionality can now create Multi-Scatter charts. This enables users to display multiple Scatter charts on one axis – with two metrics in one section, and one metric in another.

Multi-line Time-series Charts in Auto Chart

The Auto Chart functionality can now create multi-line time-series charts – both single and combination. This chart type will be automatically generated when users add a Date Field on the horizontal axis and a Dimension Field on the vertical axis.

User Interface

Personalized Dropdown Menu

A dropdown menu has been added to the menu bar of a users' login screen. This menu enables users to navigate directly to their related items, including Timeline, favorites, subscriptions, connections, discussions and settings.

Return to Report Link Added to View Summary

A link has been added to the View Summary which directs a user to the last report that they edited from that same View.

Link to Draft Report on Output Page

This update informs users as to whether they are viewing a draft or active version of the report.

Prompt to Save Draft Report

If a user attempts to exit a draft report without saving it, an automated message prompts them to consider saving the report before leaving.

Error Message Refresh

Error messages have been restyled to keep them consistent with the application's modern look and feel.

Geography Folder

The Credible BI upgrade has introduced a new field category: Geography Fields. These enable users to link existing data sets directly to GIS records and geometry points contained in GeoPacks. As such, there is an all-new Geography Folder, specifically designed to house all GeoPack data.

Miscellaneous & User Experience

Default Report Data Setting

A refresh option has been added to the View, enabling users to disable automatic preview as a report is being built. Disabling the automatic preview feature is designed to increase responsiveness when writing against a slow data source, where changes might be taking minutes to refresh.

Dashboard Memory Optimization

New configuration items have been introduced for managing memory on dashboards.

PDF File Type Extension

PDF file type extensions have been added to make identifying the file type easier. This enhancement ensures that PDFs open in a supported application when downloaded after exporting.

Rollover Field Details (Tool Tips)

New Tool Tips functionality allows users to see long names and a description of the field when rolling over on a field.

Report Summary Rollover (Tool Tips)

New Tool Tips functionality enables users to see the whole number when rolling over a Report Summary.