



## WHAT'S NEW AND RELEASE NOTES

Release: 2020.7

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## NEW FEATURES AND IMPROVEMENTS

### DATA PREPARATION

#### *Data catalog for datasets*

The number of organizations' datasets keeps growing, and so does the demand for data cataloging features to help users quickly find the right datasets for further in-depth analysis. The new DataClarity's dataset exploration feature is a detailed inventory of a dataset that allows you to review the technical, process, and business metadata to help you better manage, understand, and trust your data.

Using the **Explore dataset** pane, you can review the dataset by navigating through the following sections:

- **Overview** – Get a comprehensive overview of the important dataset information gathered in one place: the business description, tags, the date of the last update, the endorsement information, the list of users with authoring or management permissions, the list of top users, and the dataset popularity (in views).

EXPLORE DATASET

EDIT

Overview

Data

Columns

Calculations

Filters

Joins

Lineage

**Name**

Sales Dataset

**Description**

Daily Sales dataset. Includes data from the Enterprise Warehouse. Data is updated every day at 8:00 am east time. Provides support for product and customer analysis, sales profitability and sales forecast.

**Tags**

clustering and segmentation

customers analysis

enterprise sales

product analysis

**Security filters**

This dataset has row-level security applied

**Last updated**

September 9, 2020, 4:14:32 PM by **George Becker**

**Endorsement**

Certified by **Brian Arniston**

**Authors & Editors**

George Becker

Brian Arniston

Angie Blake

Finance

**Top users**

Angie Blake

Raymond Winters...

**Total usage**

678

If the dataset has row-level security applied, the corresponding icon appears on this tab.

The users who can edit the dataset can update the description and tags right in this pane and have the **Edit** button visible in the upper-right corner.

- **Data** – Explore the dataset's actual data values, evaluate the data from different perspectives, review the distribution of values, group, filter, and pivot the data columns.

EXPLORE DATASET
EDIT

Overview
Data
Columns
Calculations
Filters
Joins
Lineage

Drag here to set row groups

EQ Data

Region
12 unique values

Profile

Asia Pacific
Southeastern Europe
Africa
North America
South America
Central Europe
Eastern Europe
Central America
Northern Europe
Caribbean
Southern Europe
Western Europe

Pivot

Filters

Region	Sales Date	Items per Transacti...	No of Transactions
Asia Pacific	Feb 1 2017	33	5
Asia Pacific	Apr 1 2017	17	10
Asia Pacific	Jun 1 2017	41	10
Asia Pacific	Jul 1 2017	16	6
Asia Pacific	Oct 1 2017	11	10
Asia Pacific	Dec 1 2017	26	3
Asia Pacific	May 1 2018	24	10
Asia Pacific	Jul 1 2018	33	9
Asia Pacific	Aug 1 2018	10	7
Asia Pacific	Jan 1 2019	20	3
Asia Pacific	Apr 1 2019	25	10
Asia Pacific	May 1 2019	32	7
Asia Pacific	Nov 1 2017	42	9
Asia Pacific	Jul 1 2019	25	9
Southeastern Europe	Feb 1 2017	35	9
Southeastern Europe	Mar 1 2017	47	5
Southeastern Europe	Apr 1 2017	38	7

1 to 50 of 2,823
Page 1 of 57

- **Columns** – Get the technical details on each column in the dataset, the data role, data type, how popular it is (the number of views), and a business description.

EXPLORE DATASET						EDIT	×
Overview	Data	Columns	Calculations	Filters	Joins	Lineage	
Table ↓	Column	Role	Data type	Description	Views		
Store types (1)							
	Store Type	abc	STRING	Sales Store Type (i.e.: Mall, Standalone, Warehouse)	51		
Sales (14)							
	Sales Date		DATE_TIME	Date for the sales transaction.	0		
	Items per transaction	#	NUMERIC	Date for the sales transaction.	65		
	Sales per transaction	#	NUMERIC		65		
	No of customers	#	NUMERIC		65		
	Quantity	#	NUMERIC		22		
	Discount	#	NUMERIC		51		
	Gross Sales	#	NUMERIC		30		
	Manufacturing Cost	#	NUMERIC		65		
	Sales Cost	#	NUMERIC		65		
	Profit	#	NUMERIC		65		
	Planned Gross Sales	#	NUMERIC		51		
	Planned Profit	#	NUMERIC		22		
	Unit Price	#	NUMERIC		0		
	Variance	#	CALCULATION		51		
> Products (4)							
> Locations (3)							

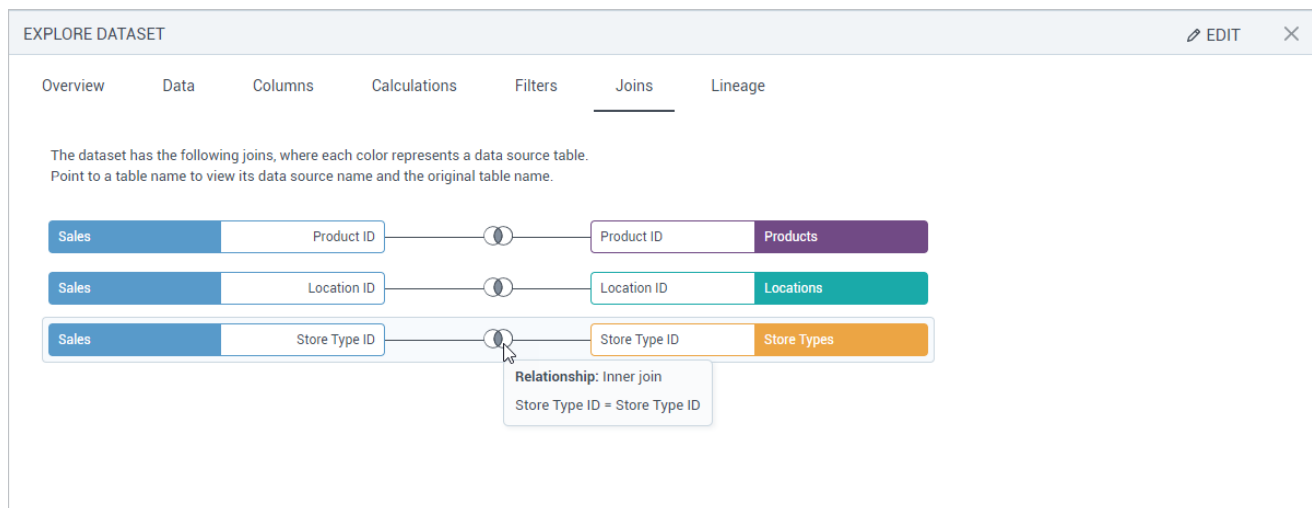
- **Calculations** – Review all the calculated columns in detail: the formulas, the columns used for calculations, the data role, the output data type of the calculated column, the description, and its popularity.

EXPLORE DATASET						EDIT	×
Overview	Data	Columns	Calculations	Filters	Joins	Lineage	
Table	Column	Formula	Role	Data type	Description	Views	
Sales	Variance	$\sum x$ [Gross Sales] - [Planned Gross Sales]	#	NUMERIC	Profit variance is the difference between the actual profit and ...	0	
Products	Departments	$\sum x$ UPPER([Department])	abc	STRING	Depa Profit variance is the difference between the actual profit and the budgeted profit.		

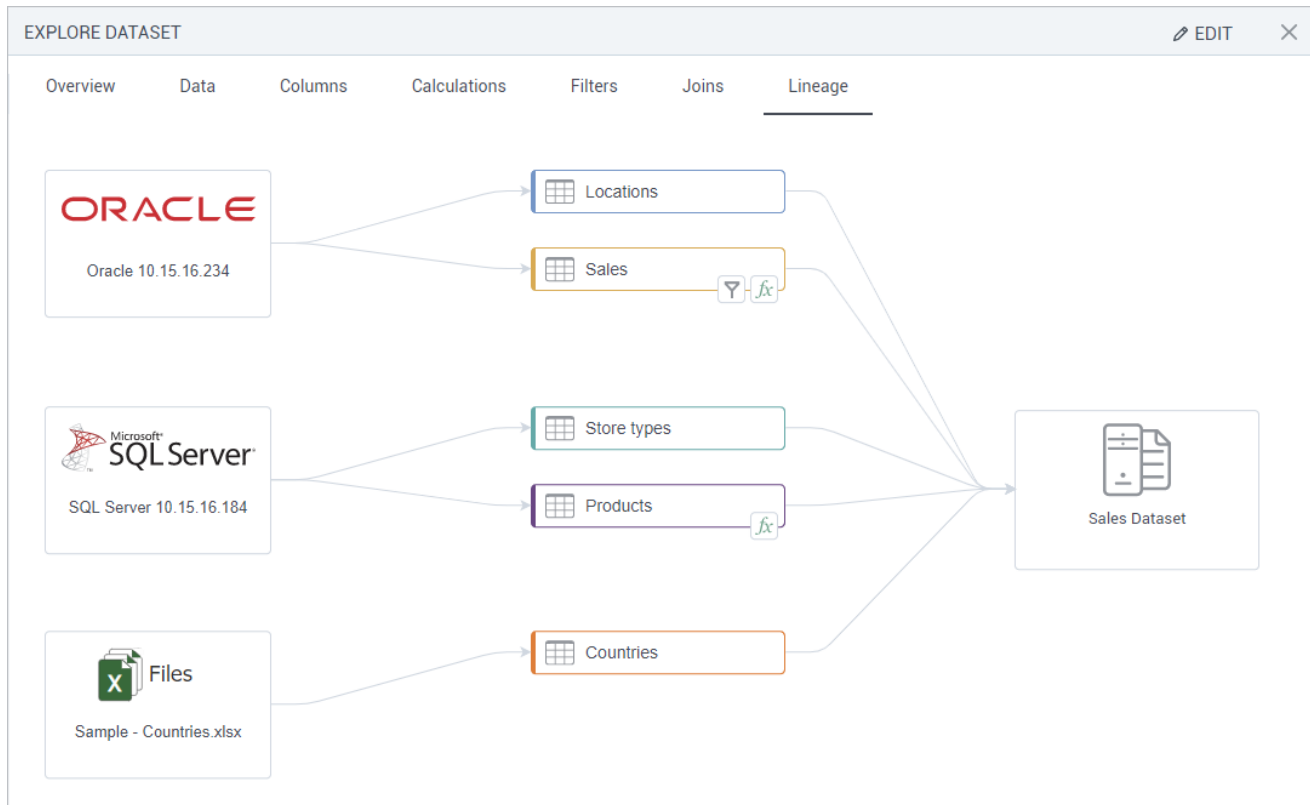
- **Filters** – Get insights on what filters are applied to the dataset. Review the columns used and filtering conditions in SQL.

EXPLORE DATASET <span>EDIT</span> <span>×</span>			
Overview	Data	Columns	Calculations
Table		Columns	Formula
Sales	🔍	Profit	Profit > 1000
Locations	🔍	Country	Country NOT IN ('Italy')

- **Joins** – For the datasets with more than one table, you can review all the joins used to connect the tables. If a join uses multiple columns, hover over the join icon to see the list of columns used for the join.



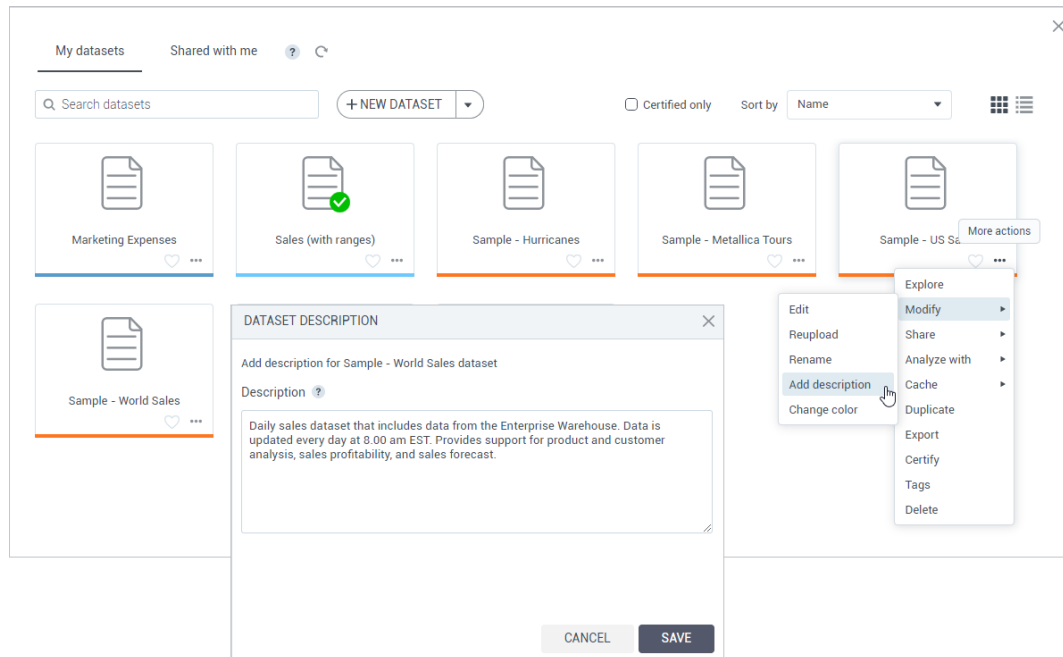
- **Lineage** – The lineage graph reveals from which data connection each table comes. You can also view where data transformations took place. The calculation and filter icons are shown over the respective tables.



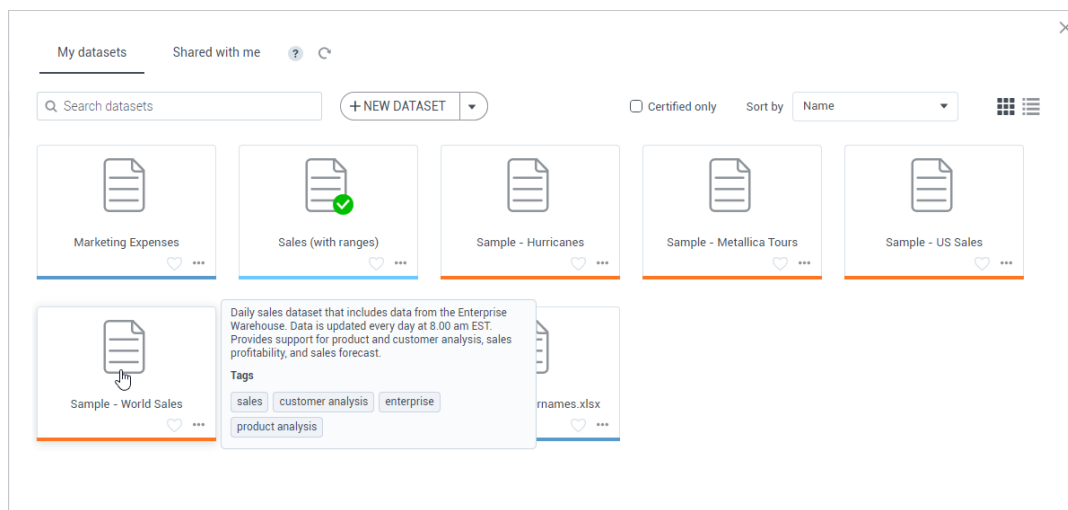
## Add dataset description

Dataset description is an important type of metadata that can educate users about the business aspects of the dataset, its specifics on usage, and any details to evaluate the dataset for any analytical purpose.

Dataset owners and users with the **Edit** permission can now provide the dataset description under the **More actions** menu by selecting **Modify > Add description** or directly in the **Explore dataset** pane, on the **Overview** tab.



The description and dataset tags are displayed in the tooltip when hovering over a dataset tile or row.





### Add column description

Adding a description or additional explanation for some columns, especially calculated columns, may facilitate understanding of the data and its analysis. In this release, dataset modelers can assign descriptions to individual dataset columns on the **Step 3 – Join and preview** page when editing a dataset with more than one data source table.

To add a column description, next to the column name, point to **More options**, and then click **Column info**.

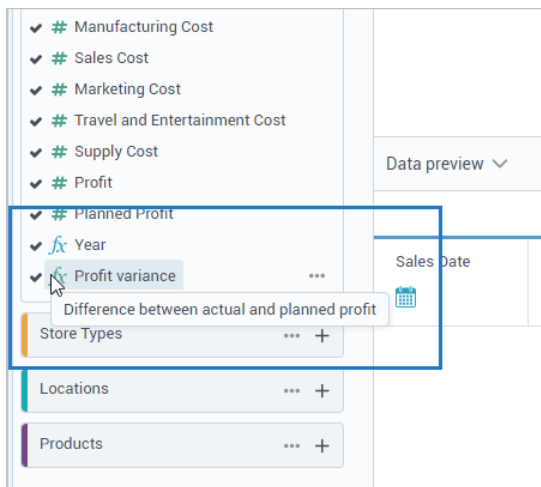
The screenshot shows the 'STEP 3 - JOIN AND PREVIEW' interface. On the left, under 'DATA SOURCES', a list of columns is shown. A context menu is open for the 'Profit variance' column, with 'Column info' selected. The main area displays 'APPROVED JOINS' and 'RECOMMENDED JOINS'. A 'COLUMN INFO' dialog is open, showing details for the 'Profit variance' column.

**Column Info Dialog Details:**

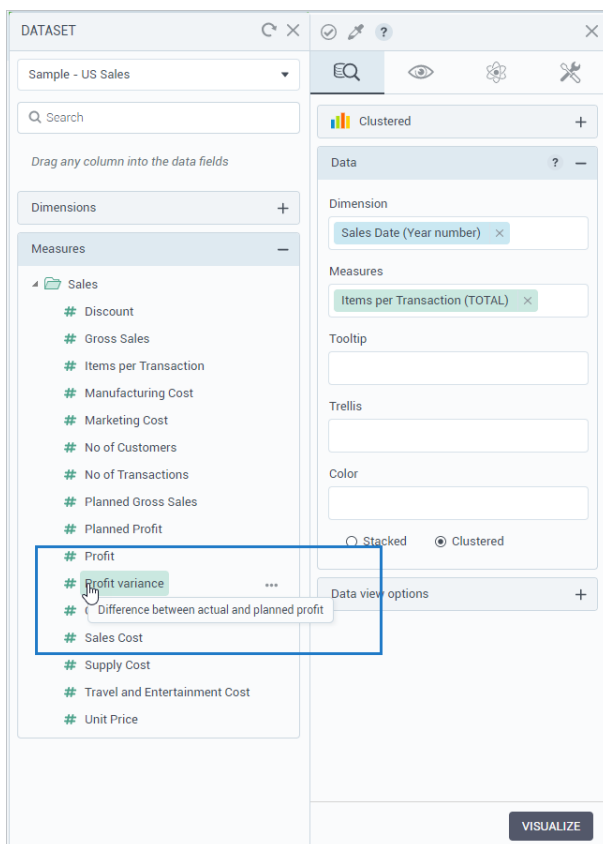
- Column name: Profit variance
- Default aggregation: total
- Data type: NUMERIC
- Role: Measure
- Calculation: Yes
- Used in calculations: No
- Used as filter: No
- Used as security filter: No
- Path: di\_ds\_15983703228544486\_tbl1.calc\_Profit variance
- Description: Difference between actual and planned profit

At the bottom of the dialog are 'CANCEL' and 'SAVE' buttons.

The description is displayed in a tooltip when hovering over the column name.



Moreover, the column description is displayed in a tooltip when using the dataset advanced options in the widget settings.



## Manage columns within the Preview table

In this release, users can manage columns right within the preview table on the last step (Step 3) of the dataset preparation process.

To access column options, hover over a column header and select the **Column options** menu.

STEP 3 - JOIN AND PREVIEW ?

DATA SOURCES [Add source](#) <

Search

**Sales** ...

- ✓ Sales Date
- abc Store Type ID
- abc Location ID
- abc Product ID
- ✓ # Items per Transaction
- ✓ # No of Transactions
- ✓ # No of Customers
- ✓ # Quantity
- ✓ # Unit Price
- ✓ # Discount
- ✓ # Gross Sales
- ✓ # Planned Gross Sales
- ✓ # Manufacturing Cost
- ✓ # Sales Cost
- ✓ # Marketing Cost
- ✓ # Travel Expenses
- ✓ # Entertainment Cost
- ✓ # Supply Cost
- ✓ # Profit
- ✓ # Planned Profit

**Store Types** ...

- abc Store Type ID
- ✓ abc Store Type

**Locations** ...

- abc Location ID
- ✓ Country
- ✓ abc State Code

Sample - World Sales

APPROVED JOINS [Add new join](#) [Delete all joins](#)

- Sales Product ID Product ID Products
- Sales Location ID Location ID Locations
- Sales Store Type ID Store Type ID Store Types
- Countries Multiple columns (2) Multiple columns (2) Locations

Data preview ▾

Sales Date	Items per Transaction	No of Transactions	No of Customers	Quantity	Unit Price
	#	#	#	#	#
Jun 1 2019	11	6	13	12	185
Jul 1 2019	10	0	67	90	310
Jul 1 2019	10	0	15	17	300
May 1 2019	3	3	21	10	220
Apr 1 2019	9	1	13	10	300
Apr 1 2019	11	8	31	25	220
Dec 1 2018	6	4	32	20	250
May 1 2019	5	6	18	10	220
Jan 1 2019	30	3	31	5	250
Dec 1 2017	15	6	35	9	250
Jun 1 2019	24	7	21	15	300

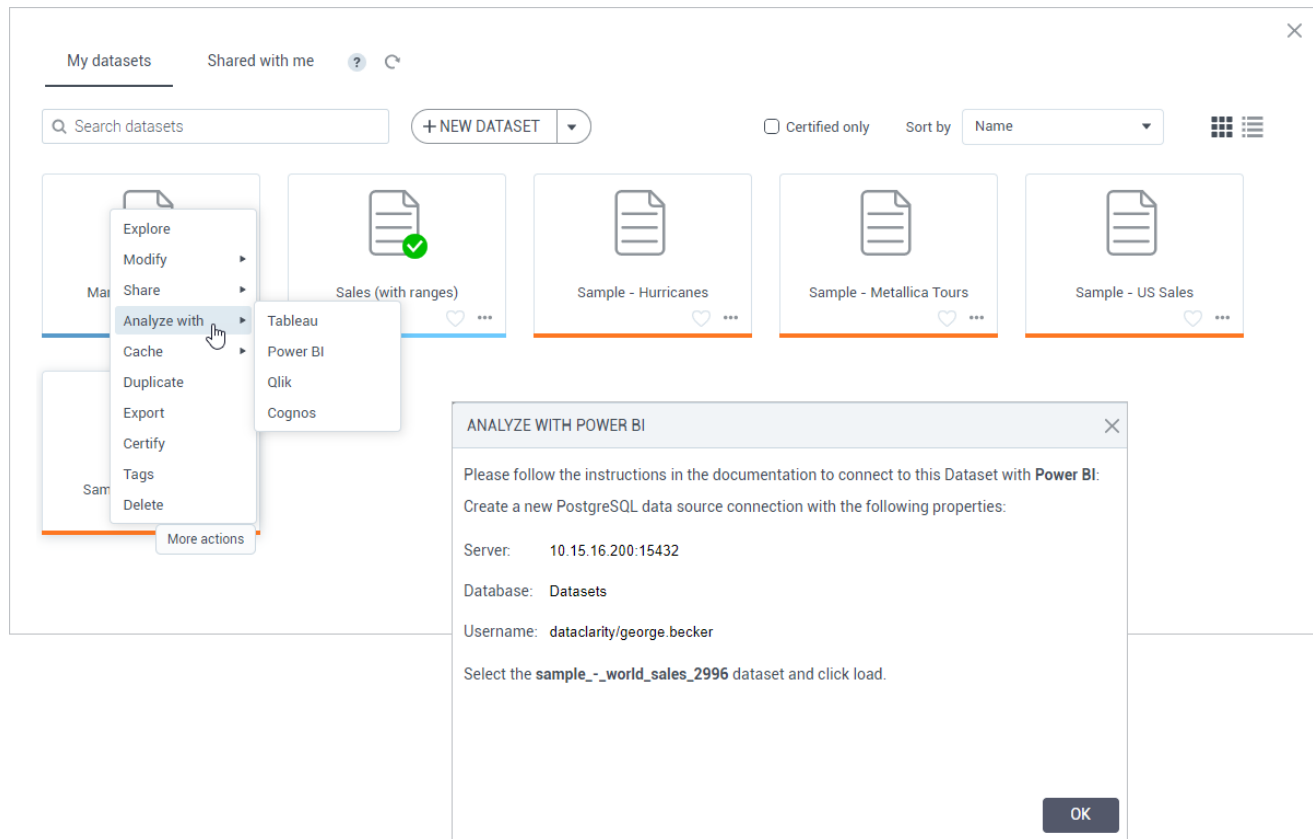
Column options menu for 'Items per Transaction':

- Rename
- Change role
- Change aggregation
- View info
- Exclude
- Hide
- Clean

### Connect to a dataset in Tableau, Power BI, Qlik, or Cognos

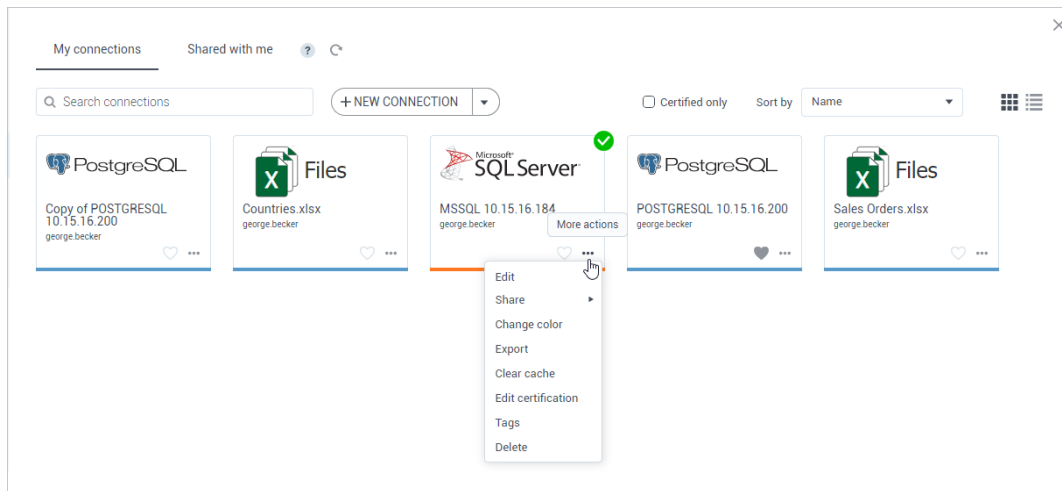
You can use DataClarity datasets in any BI tool by using the PostgreSQL connection. When creating this connection, you need to enter connection details to the dataset. For users' convenience, in this release, all these connection details are displayed in one place so that users can quickly copy and paste them.

For a dataset that you need, point to **More actions** > **Analyze with**, and select the tool where you want to open the dataset. In the dialog that appears, hover over a field and click **Copy** that appears to the right.

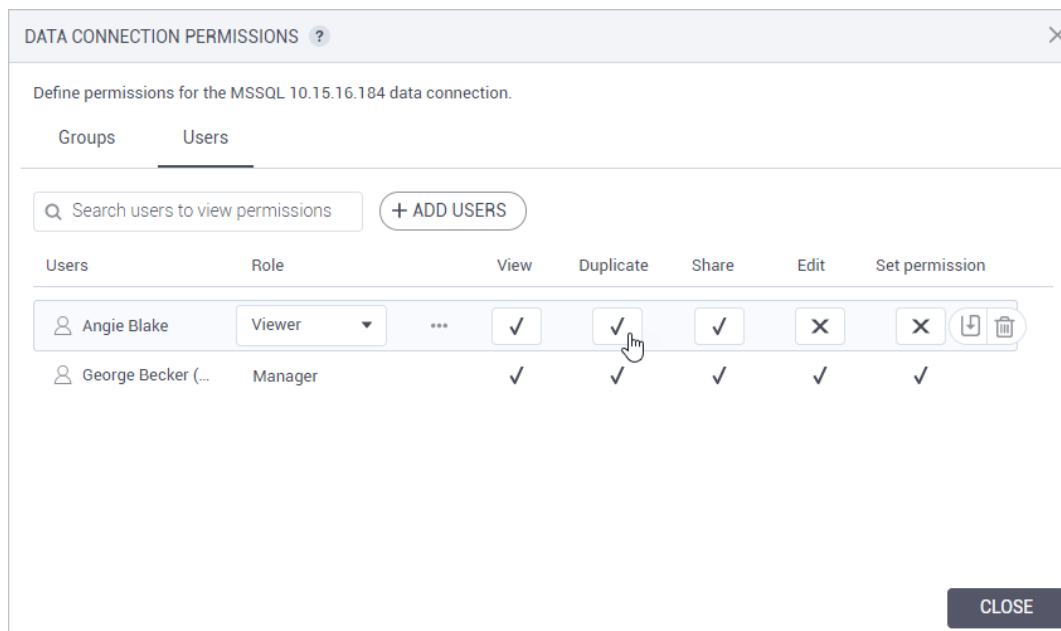


## Duplicate data connections

In this release, you can benefit from the new capability to duplicate data connections. No need to manually recreating connections, just click the **Duplicate** menu option under **More options** for any existing data connection to create its copy. Then, modify any details that you need. The duplicated data connection has the same structure and properties as the original one except for categorizing details like color, favorite, and tags.

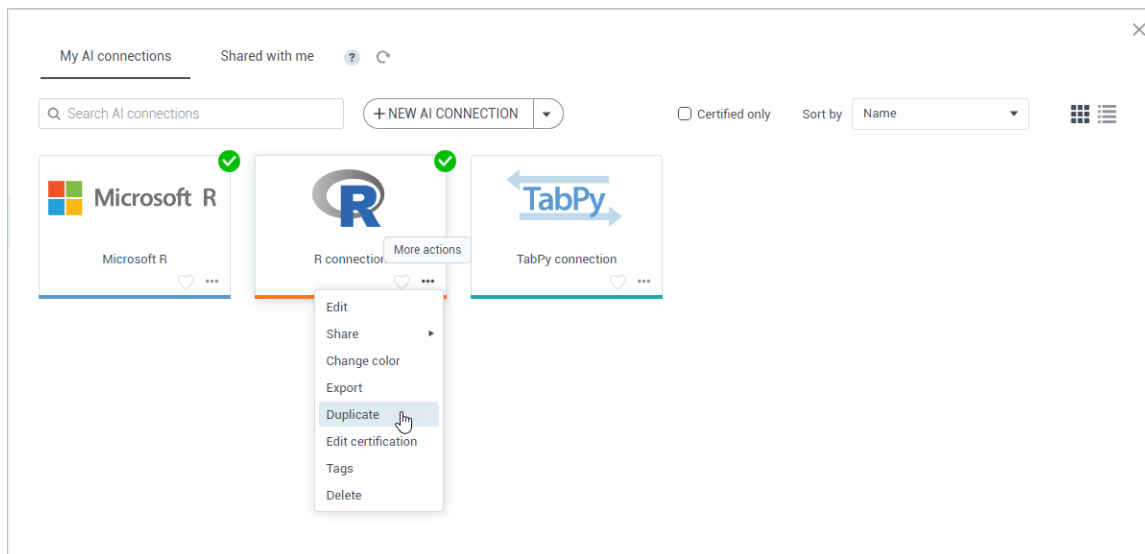


For the shared data connection, the new option appears only if the data connection owner or manager granted the **Duplicate** permission. The new permission is now included in the **Viewer** role in the **Data connection permissions** dialog.

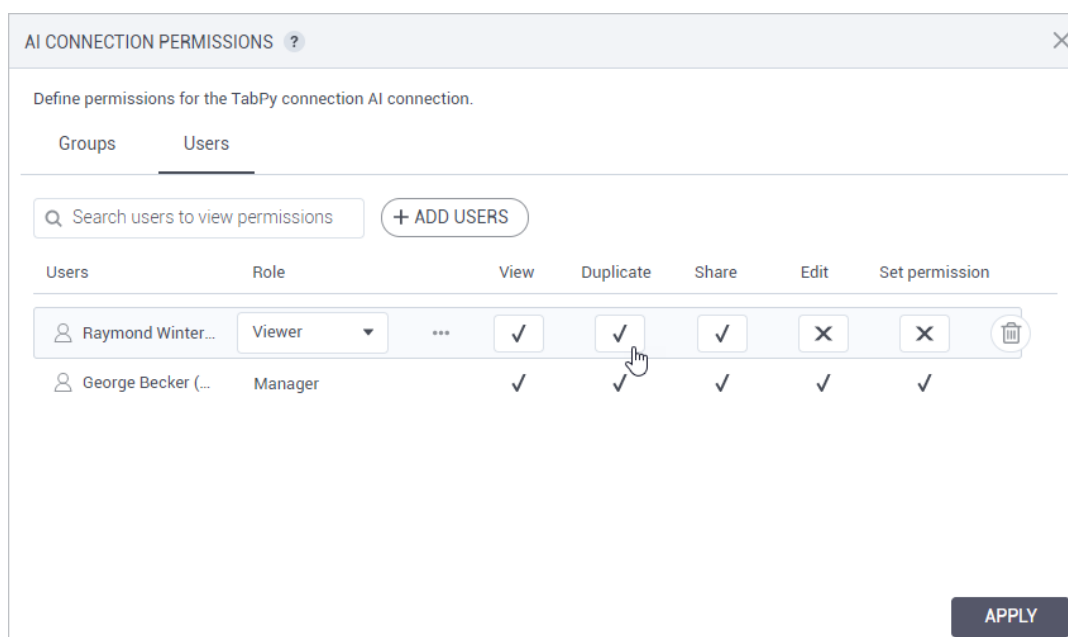


## Duplicate AI connections

New capability to duplicate a connection allows you to quickly create a copy of any existing AI connection without manually entering all the details. To do so, select a connection, and click **Duplicate** under **More options**. Then, you can modify any details as needed. The duplicated AI connection has the same structure and properties as the original one except for categorizing details like color, favorite, and tags.



For the shared AI connection, the new option appears only if the AI connection owner or manager granted the **Duplicate** permission. The new permission is now included in the **Viewer** role in the **AI connection permissions** dialog.

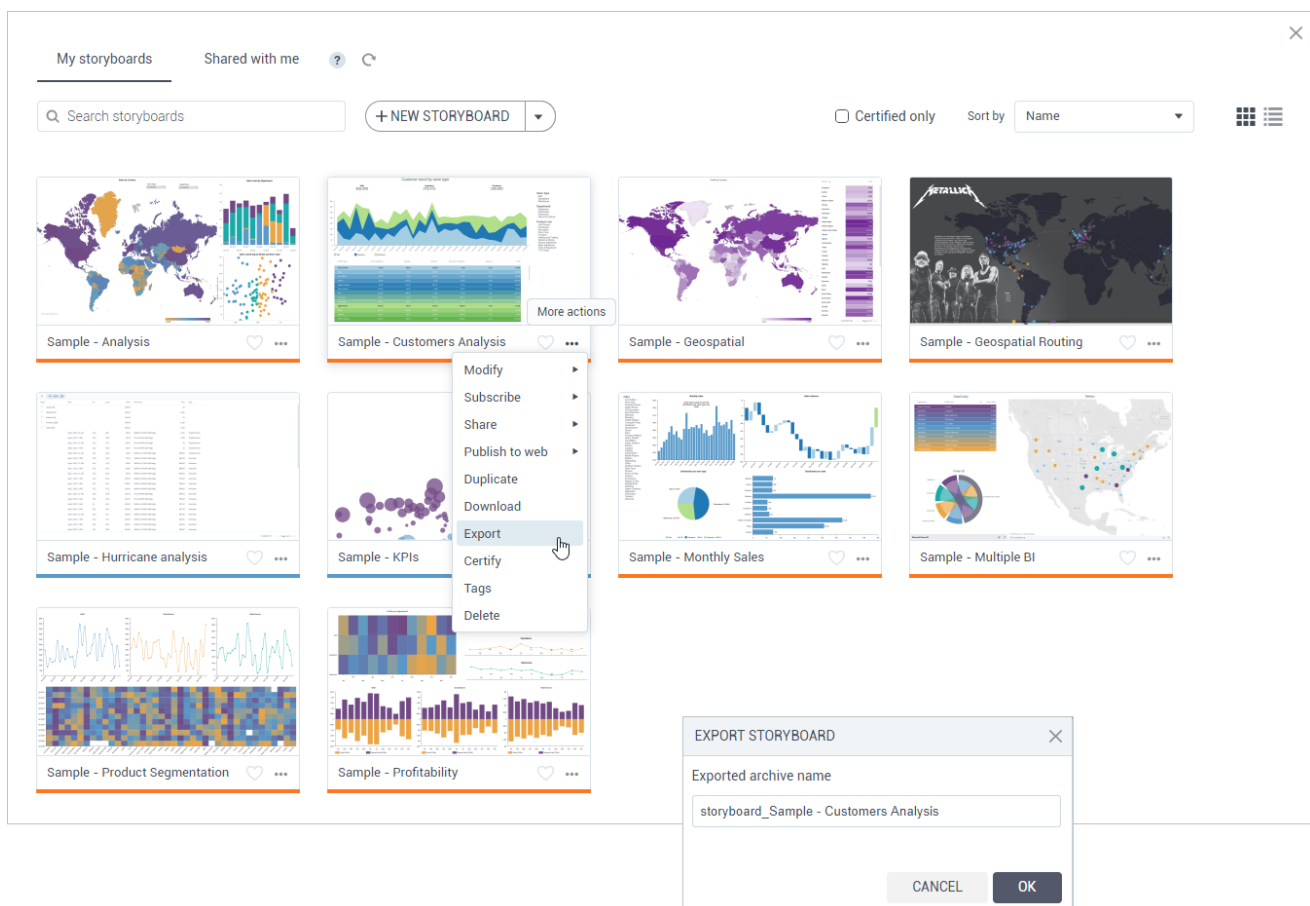


## STORYBOARDS

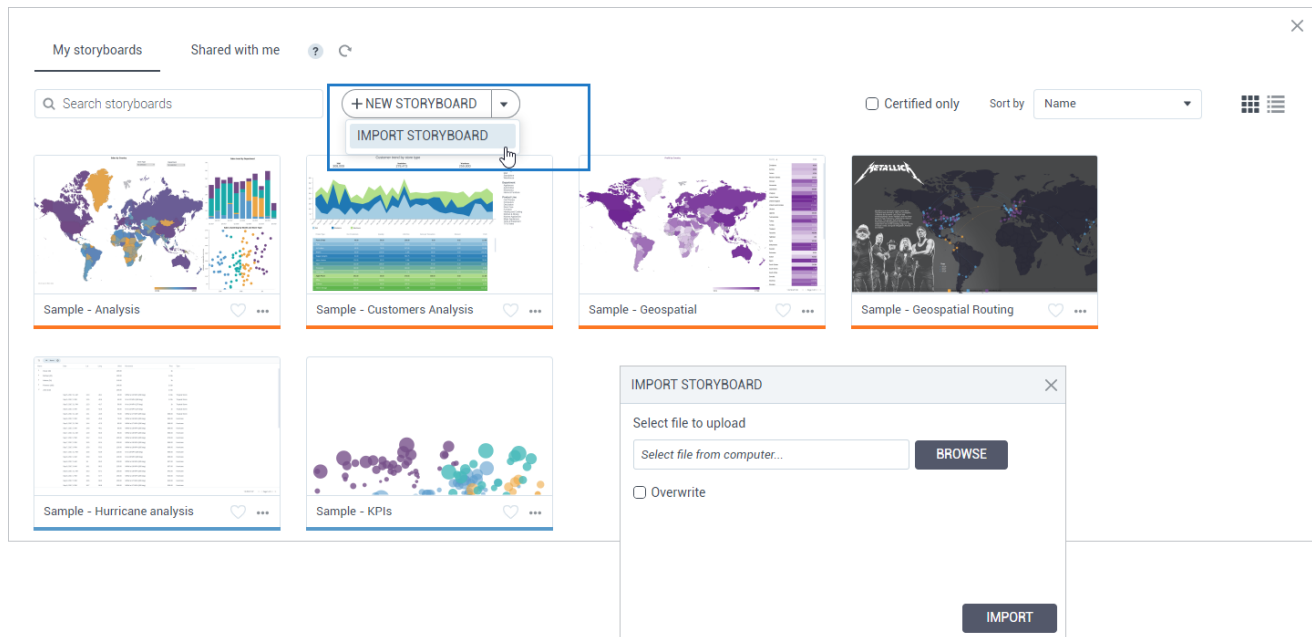
### Export and import storyboards

In this release, storyboard management capabilities include the options for storyboard export and import. This way, users can save time and reuse the storyboard in different environments.

To export a storyboard, in the **Storyboards** pane, select the storyboard, and under the **More actions** menu, click **Export**. The storyboard with all underlying datasets, data sources, connections, and AI connections will then be saved into a ZIP file.



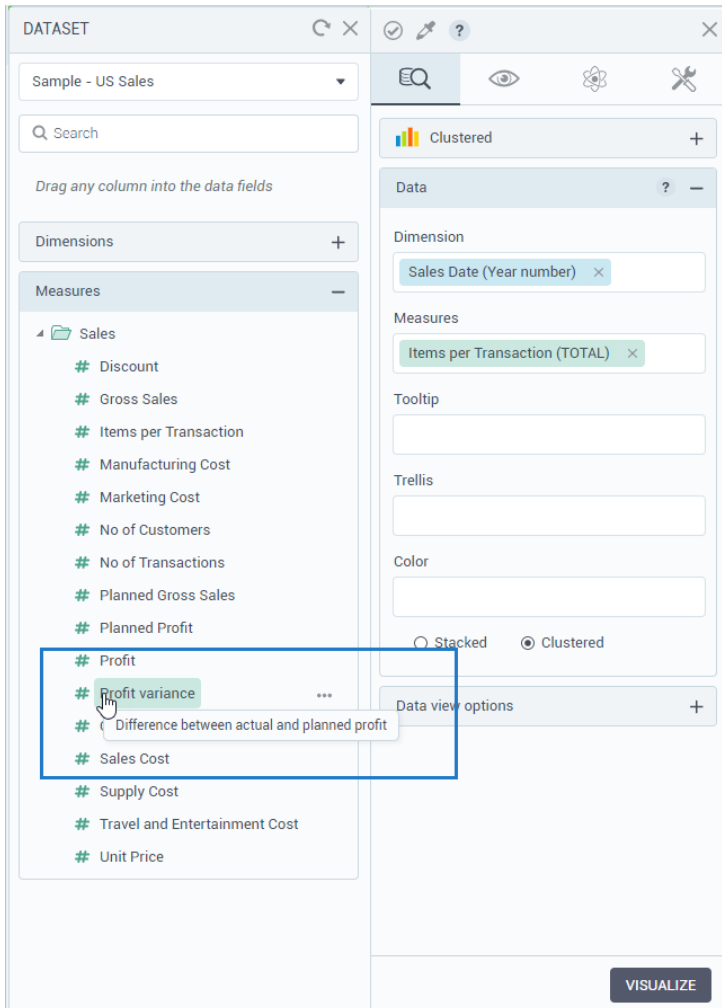
To import a storyboard, you will need to upload a corresponding ZIP file. In the **Storyboards** pane, clicking the **Import** button will open the dialog for the file import. You can specify whether to overwrite the storyboard if the same element has already been imported previously. If the same storyboard already exists, then the storyboard will not be imported.





### View column descriptions

If a dataset column or a calculation has a description assigned to it in **Data Preparation**, you can take advantage of it in **Storyboards**. In the widget settings, click **advanced options**, and in the **Datasets** pane that appears on the left, hover over the column name to view its description.

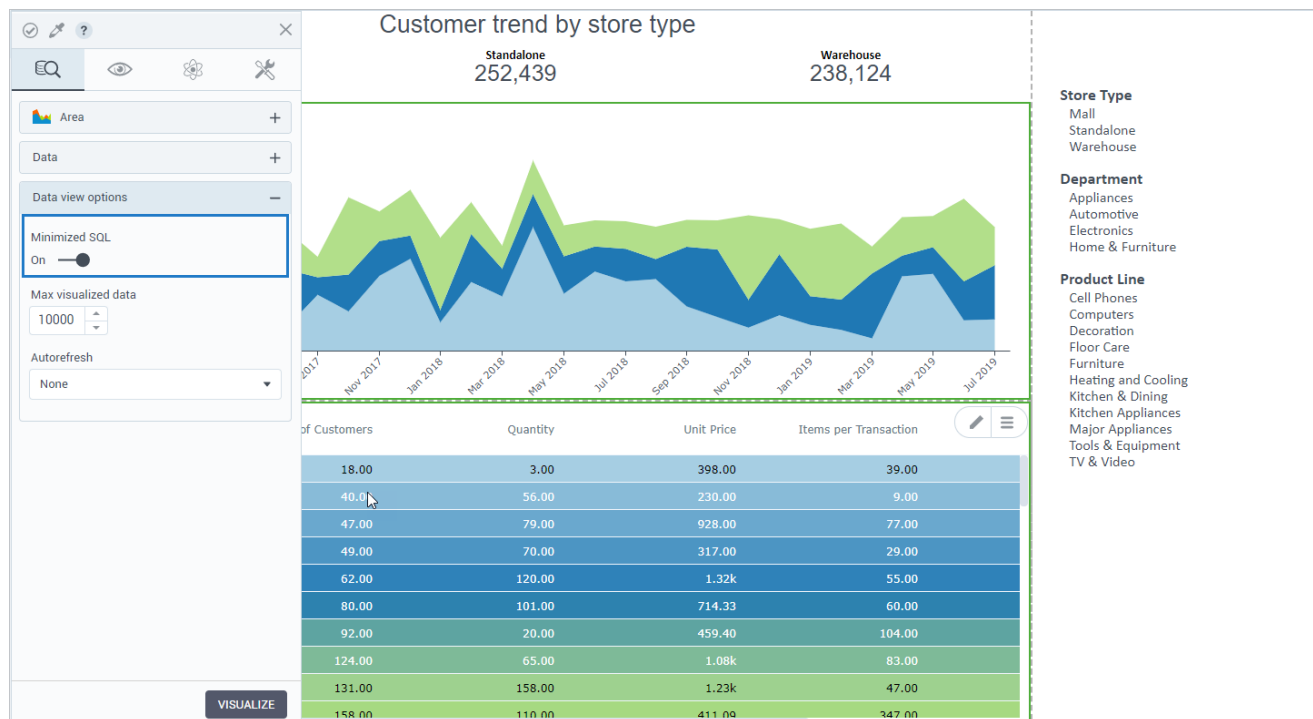


If the description is lengthy, go to **More options > Column info** and review the full description in the **Column info** dialog.

## Minimized SQL

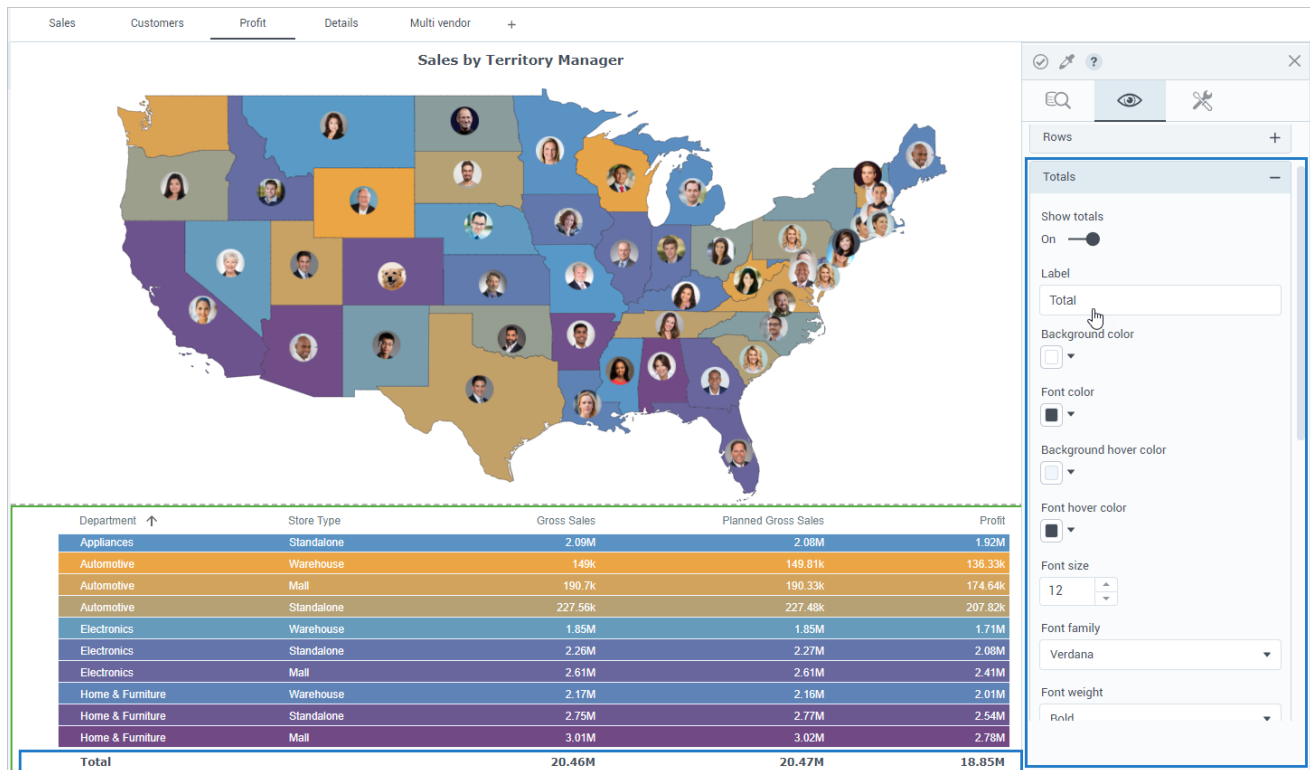
The visualization's performance has been improved with the new option called **Minimized SQL** added on the **data** tab of the widget settings, under the **Data view options** section. Users can now choose how to generate the SQL query when visualizing the data in a widget.

When **Minimized SQL** is turned on, the system generates SQL with the minimal set of tables and joins needed to obtain values for the selected columns. The new option is set to **ON** by default, ensuring optimized queries and faster data analysis. If the data structure requires to use all the tables and respective joins, turn this option off.



### Show Totals in the tabular visualization

Users can now display the row with the total values in the **Table** widget. The **Totals** section has been added to the **appearance** tab of the widget settings pane. Users can define the label for the totals row and its appearance settings.



### Refresh data in Table

The **Refresh** data option has been added under **More options** for the **Table** widget to quickly update the data if any changes occurred since the last data visualization.

The screenshot displays the DataClarity interface with a table widget. The table has columns: Sales Date, Country, State, Department, Product Line, and Store Type. The data is filtered for the year 2017. On the right side, there is a 'More options' menu. A blue box highlights the 'Refresh data' button in the top right corner of the table widget. The 'More options' menu includes a 'Pivot Mode' toggle, a 'Columns' list, a 'Rows' section, and a 'Values' section. The 'Columns' list includes: (Select All), Sales Date, Country, State, Department, Product Line, Store Type, Gross Sales, Planned Gross Sales, Profit, and Planned Profit. The 'Rows' section has a 'Drag here to set row groups' label. The 'Values' section has a 'total(Gross ...)' label. The bottom status bar shows '1 to 50 of 2,298' and 'Page 1 of 46'.

Sales Date	Country	State	Department	Product Line	Store Type
2017	Romania	Ilfov	Electronics	Cell Phones	V
2017	Paraguay	Paraguay	Electronics	TV & Video	F
2017	Peru	Peru	Home & Furniture	Kitchen & Dining	F
2017	Iraq	Iraq	Home & Furniture	Kitchen & Dining	F
2017	Uzbekistan	Uzbekistan	Home & Furniture	Decoration	F
2017	Guyana	Guyana	Home & Furniture	Furniture	F
2017	Brazil	Brazil	Electronics	TV & Video	S
2017	Guinea	Guinea	Electronics	Computers	F
2017	Bolivia	Bolivia	Home & Furniture	Kitchen & Dining	S
2017	Botswana	Botswana	Home & Furniture	Furniture	S
2017	Zimbabwe	Zimbabwe	Electronics	Computers	S
2017	Zambia	Zambia	Electronics	Computers	S
2017	Western Sahara	Western Sahara	Home & Furniture	Kitchen & Dining	S
2017	Chad	Chad	Electronics	TV & Video	S
2017	Tanzania	Tanzania	Appliances	Floor Care	F
2017	Papua New Guinea	Papua New Guinea	Electronics	Computers	V
2017	Niger	Niger	Appliances	Floor Care	V
2017	Nicaragua	Nicaragua	Electronics	Computers	V
2017	Nepal	Nepal	Electronics	TV & Video	V
2017	Namibia	Namibia	Electronics	TV & Video	S
2017	Myanmar	Myanmar	Appliances	Floor Care	S
2017	Mozambique	Mozambique	Electronics	TV & Video	V
2017	Morocco	Morocco	Appliances	Floor Care	V

## USER ACCESS

### *Customize the look & feel of the platform*

Administrators can now configure the logo and branding of the DataClarity platform in **Access Manager**, in the **Settings** pane, on the new **Look & Feel** tab.

To style the applications, you can customize for the following user interface elements:

- Application/platform name
- Application logo (upload an image)
- Top toolbar appearance (background, text, and icon colors)
- Sidebar appearance (background, text, and icon colors)

The screenshot shows the 'AccessManager' interface. On the left is a dark sidebar with navigation links: Configure (Settings, Clients, Authentication Providers, Local Authentication Settings, Identity Providers), Manage (Licenses, Roles, Groups, Users), Monitor (Sessions, Events), and Import/Export (Import, Export). The main content area is titled 'DATACLARITY' and has tabs for General, Login, Email, Cache, Tokens, Security Defenses, and Look & Feel. The 'Look & Feel' tab is active. It contains fields for 'Display name' (dataclarity), 'HTML Display name' (empty), and a 'Logo' section with a 'DataClarity' logo and 'UPLOAD LOGO'/'DELETE LOGO' buttons. Below are color pickers for 'Toolbar background color' (#444d58), 'Toolbar text and icon color' (#F1F4F7), 'Sidebar background color' (#F1F4F7), and 'Sidebar text and icon color' (#444d58). At the bottom are 'SAVE', 'CANCEL', and 'RESET TO DEFAULT' buttons. The top right shows the user 'George Becker'.

## GENERAL

### *UX improvements*

Previously, to get more storyboards, datasets, data connections, or AI connections, users needed to click the **Show more** button. The action is simplified—users just scroll down to automatically load the next set of items on the respective panes. Also, the system now loads 35 items instead of 20.