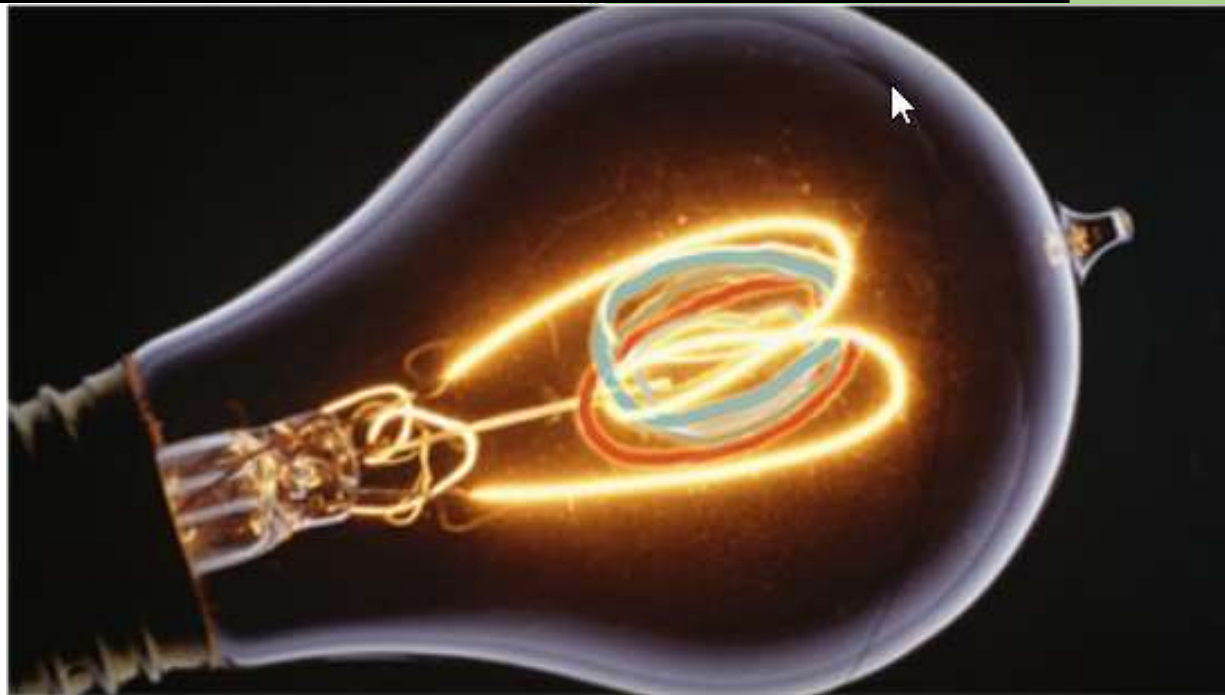




INSIGHTS-AI

2020

Insight-AI Operating Manual



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Insights-AI Pte. Ltd.

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1. Getting Started

Welcome to Insights-AI – the complete application from Market Research Experts for creating a powerpoint report from DP tables in a click.

Objective

The purpose of Insights-AI tool is to help free up market researchers' time from laborious tasks of creating charts manually, and to enable them to provide accurate business insights. The automation ensures **100% accuracy and no inconsistencies** in formatting and design.

Introduction

Insights-AI is an Artificial Intelligence application which leverages the power of Machine learning to create hundreds of charts and export it into PowerPoint slides using pre-defined templates in less than 30 minutes.

Insights-AI can read and analyze the Processed Survey Data Tables (herein known as DP Tables) using machine learning and let the artificial intelligence select the best data visualization for your survey data.

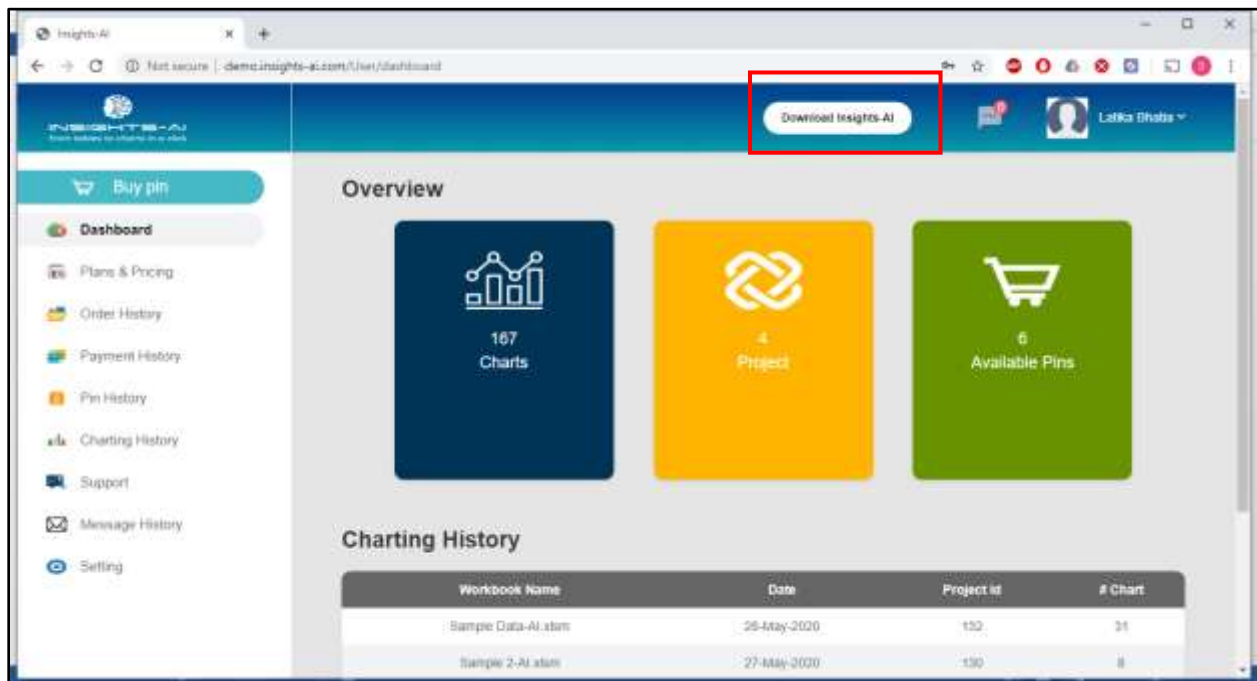
The application also offers tremendous flexibility with regards to interpreting reports from charts and DP tables.

Let us get started!

2. Installing Insights-AI application

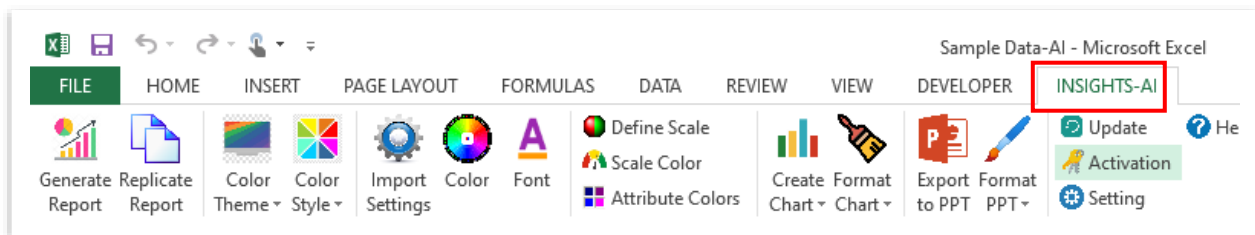
The installation of Insights-AI application is a simple process and it is like the installation of any other software. However, first one would need to create an account by signing up with <https://www.insights-ai.com/> portal. If you have already signed up, then simply login to start the installation process.

Once you are done with the sign up/ sign in, please click on the '**Download Insights-AI**' icon highlighted at the top right to download the Insight-AI. Now you can install the Excel Add-in Insights-AI just like any other software.

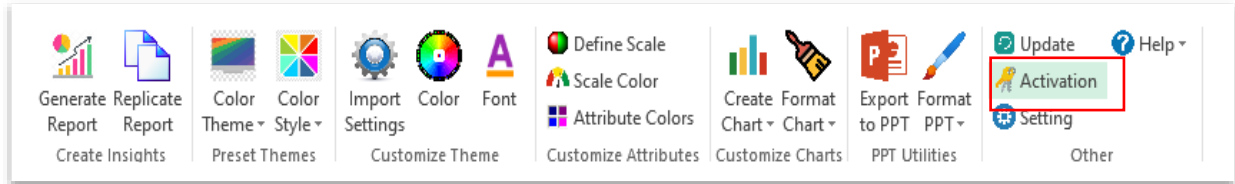


Activation & Activation Key

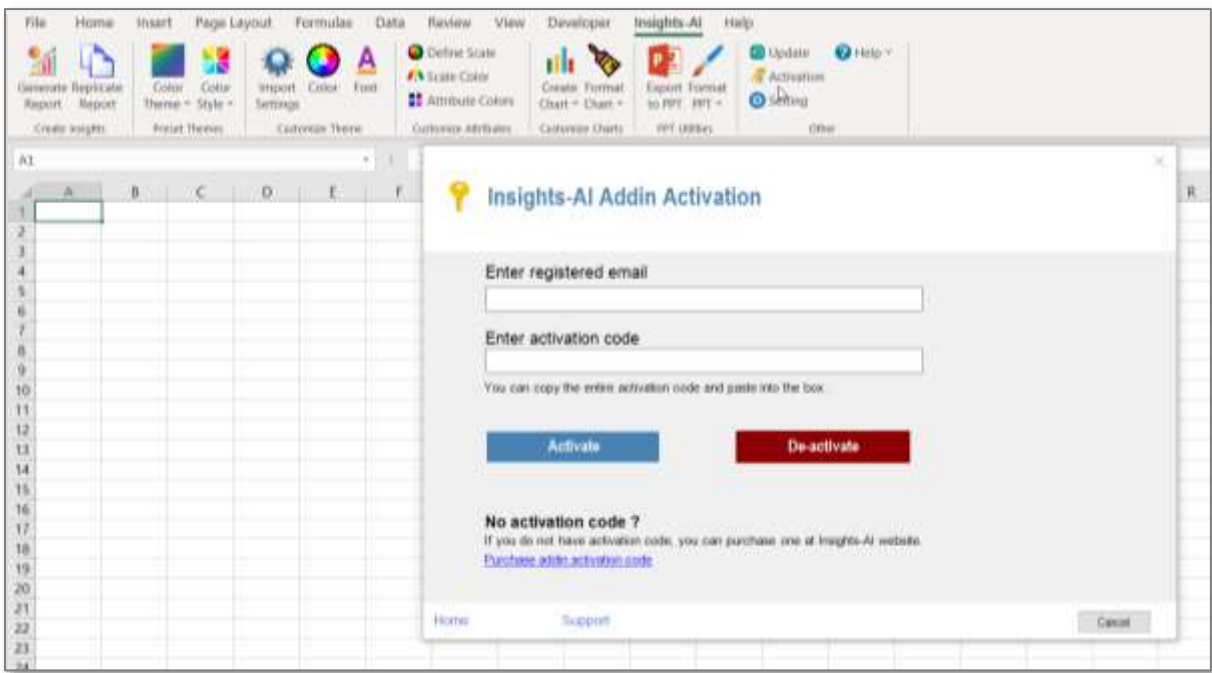
Once a user installs the application, the Insights-AI tab appears on the Excel ribbon as he/she opens any file. **If the Insight AI tab does not appear on the ribbon, please see the troubleshooting tip at the end of this section.**



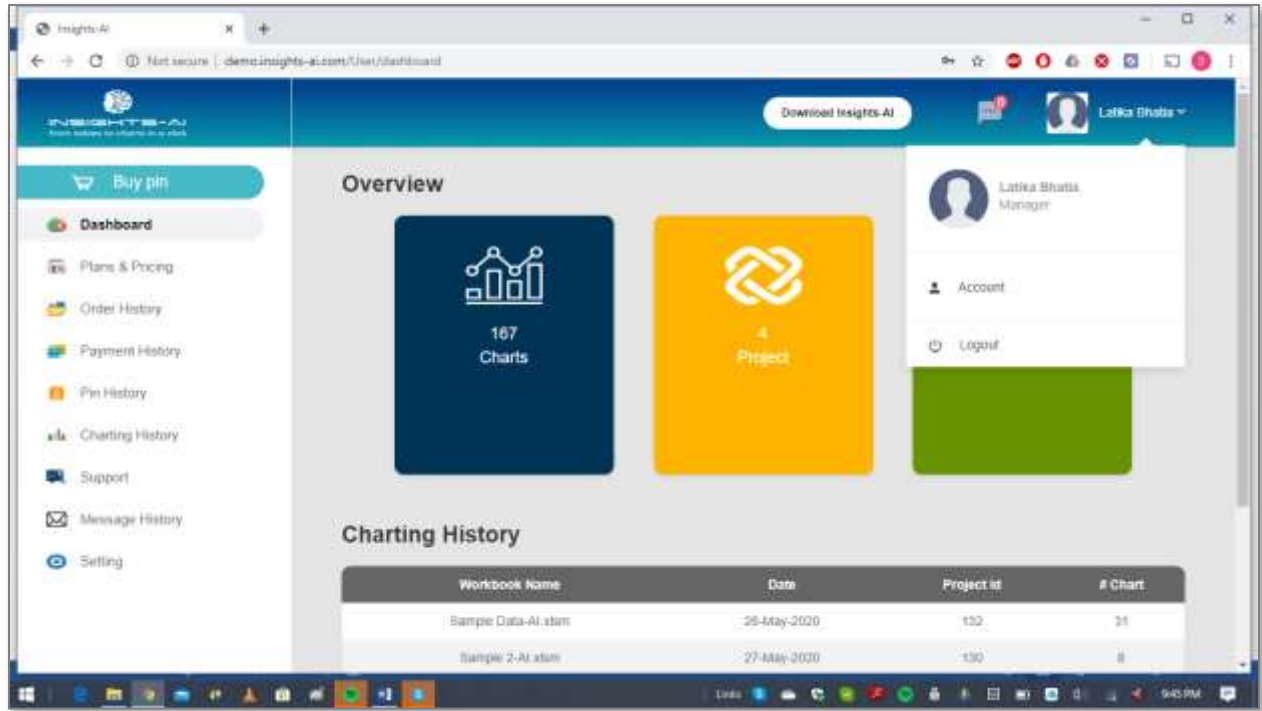
After installing the software for the first time, a user needs to activate the application on his/her computer system. To activate the application, please click on the '**Activation**' tab on the top right corner of the Insights-AI ribbon.



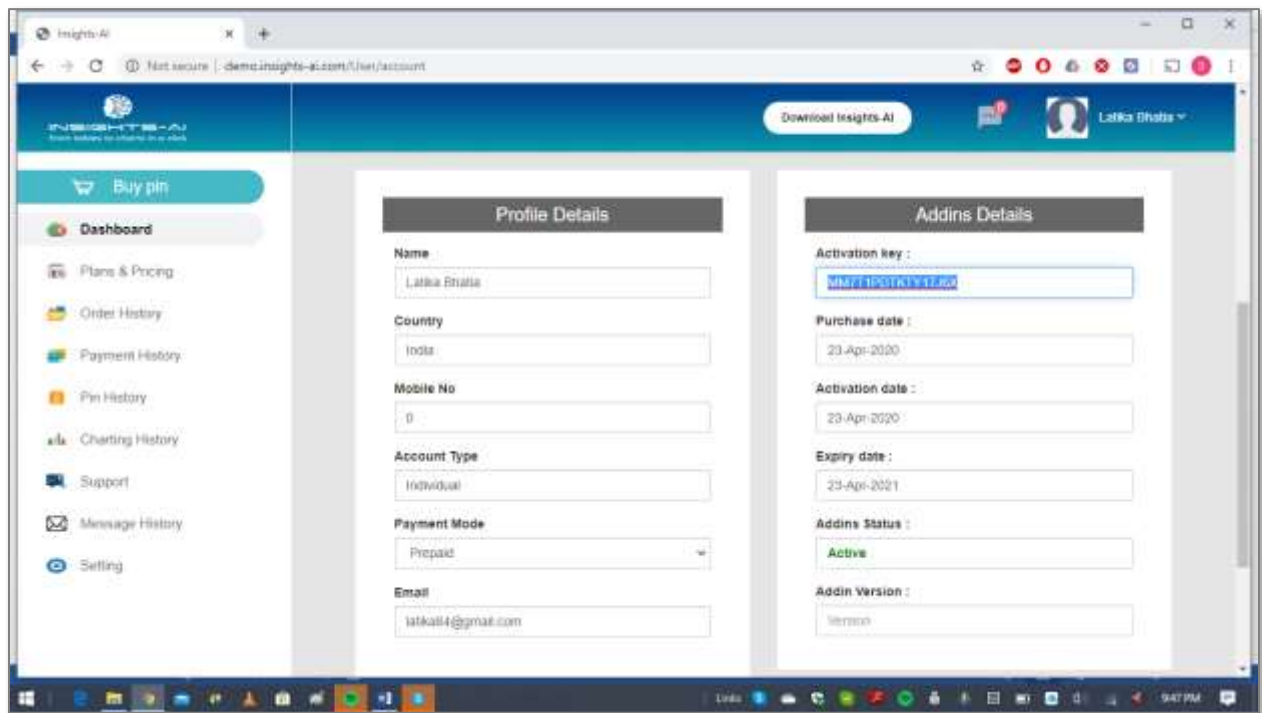
It will prompt you to enter your registered email id and activation code . Then click on the “Activate”.



You can find the activation code / activation key on the website in your login account. Please navigate under your profile name in Account >> Add in Details.



Activation Key:



Trouble shooting tip

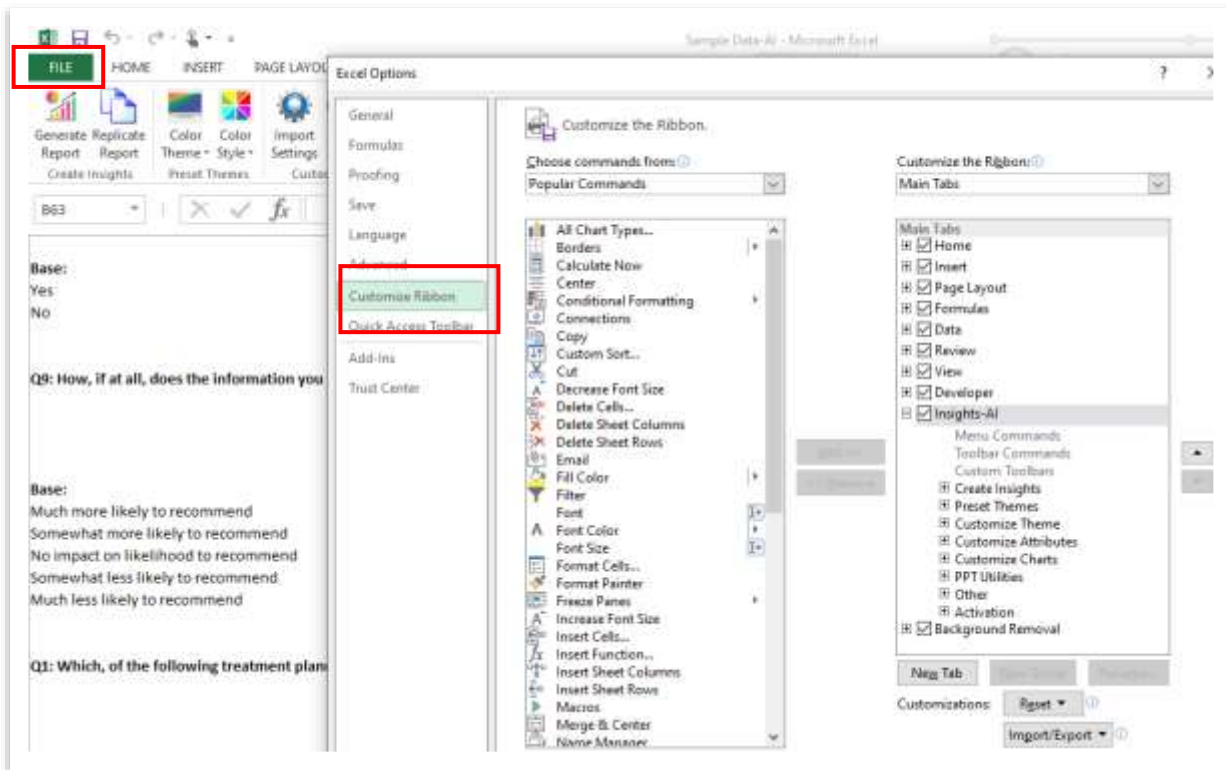
Sometimes MS Excel disables some of the Add-ins by its own algorithms. If, during usage or after installation, the Insight-AI tab does not reflect on the ribbon, there are two possible reason.

- MS Excel has hidden the Insights-AI Add-in
- MS Excel has disabled the Insights-AI Add-in

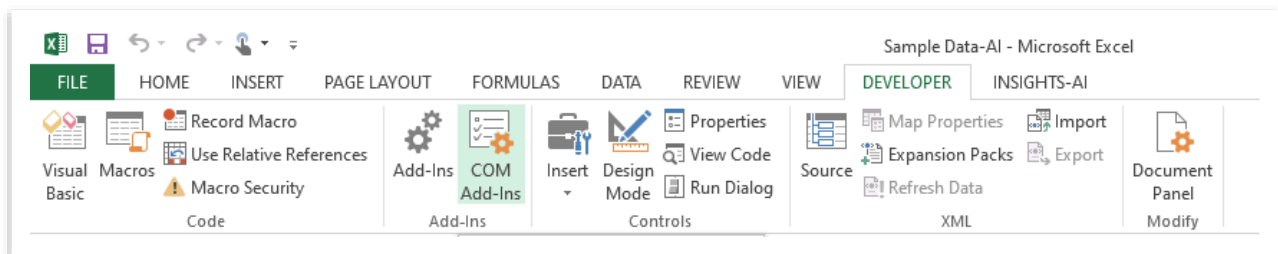
Unhiding Insights-AI Add-in

To unhide the Insights-AI Add-in, please follow the below listed steps.

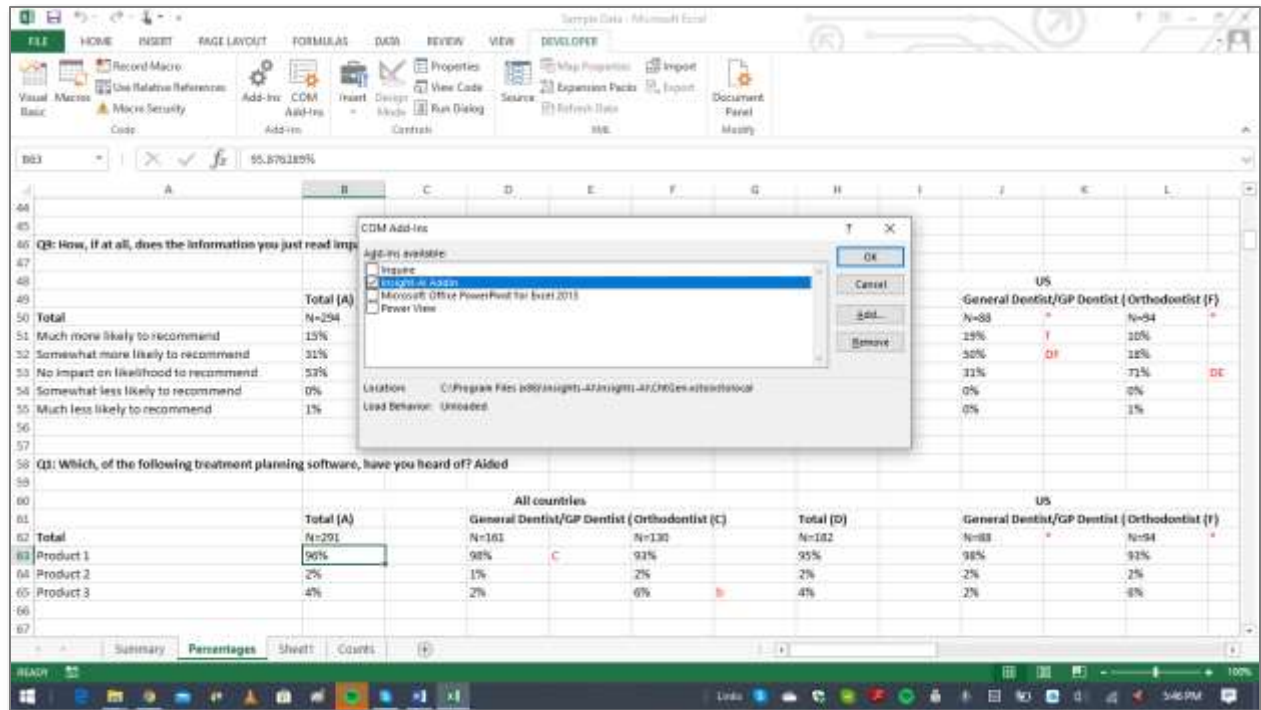
Go to FILE menu >> Options >> Customize Ribbon >> Main Tabs >> Check 'Developer'



Click 'OK'. The 'Developer' tab will appear on Ribbon. Then click on the 'Developer' tab. Next, Click on 'Com Add-ins'.



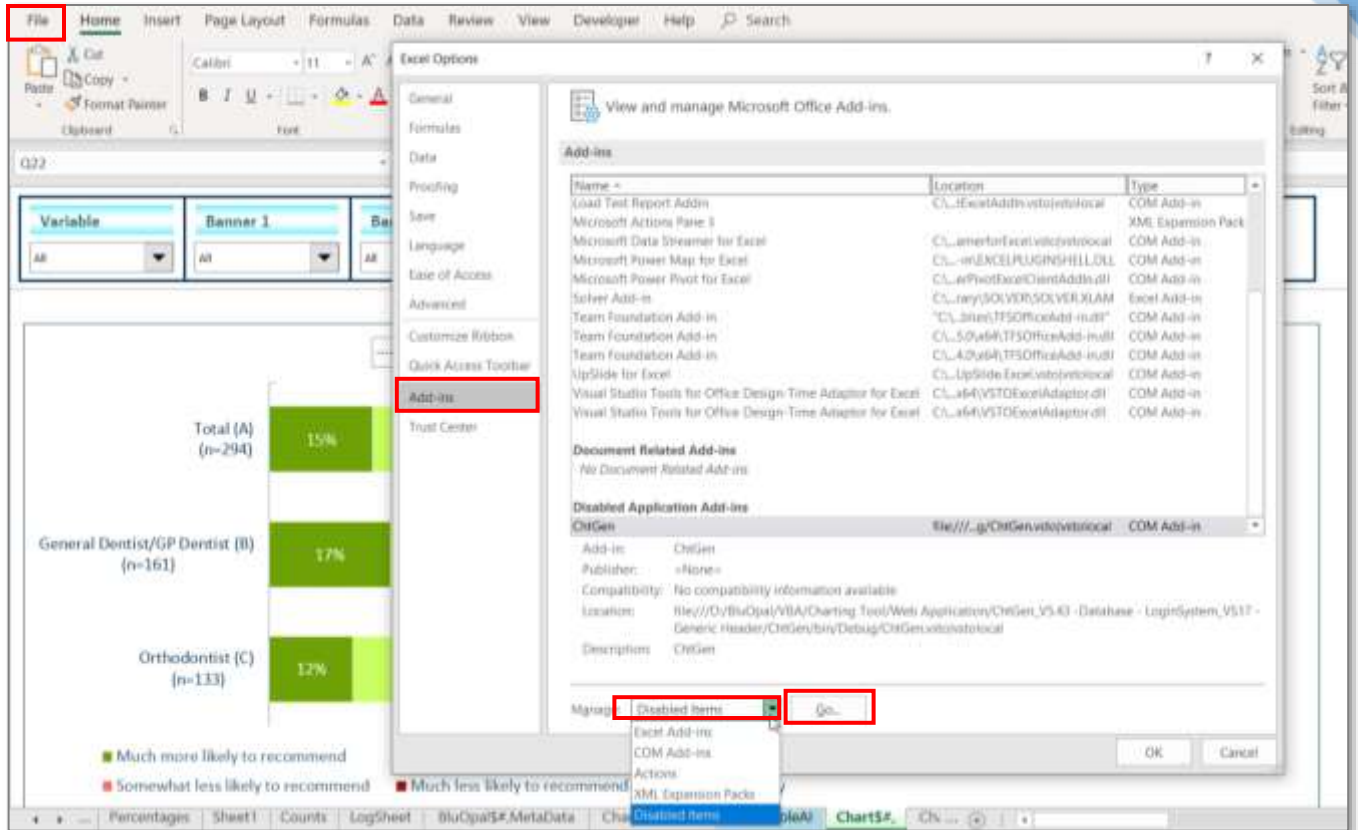
In the end Check the 'Insight-AI Add-in' to show it on the excel ribbon.



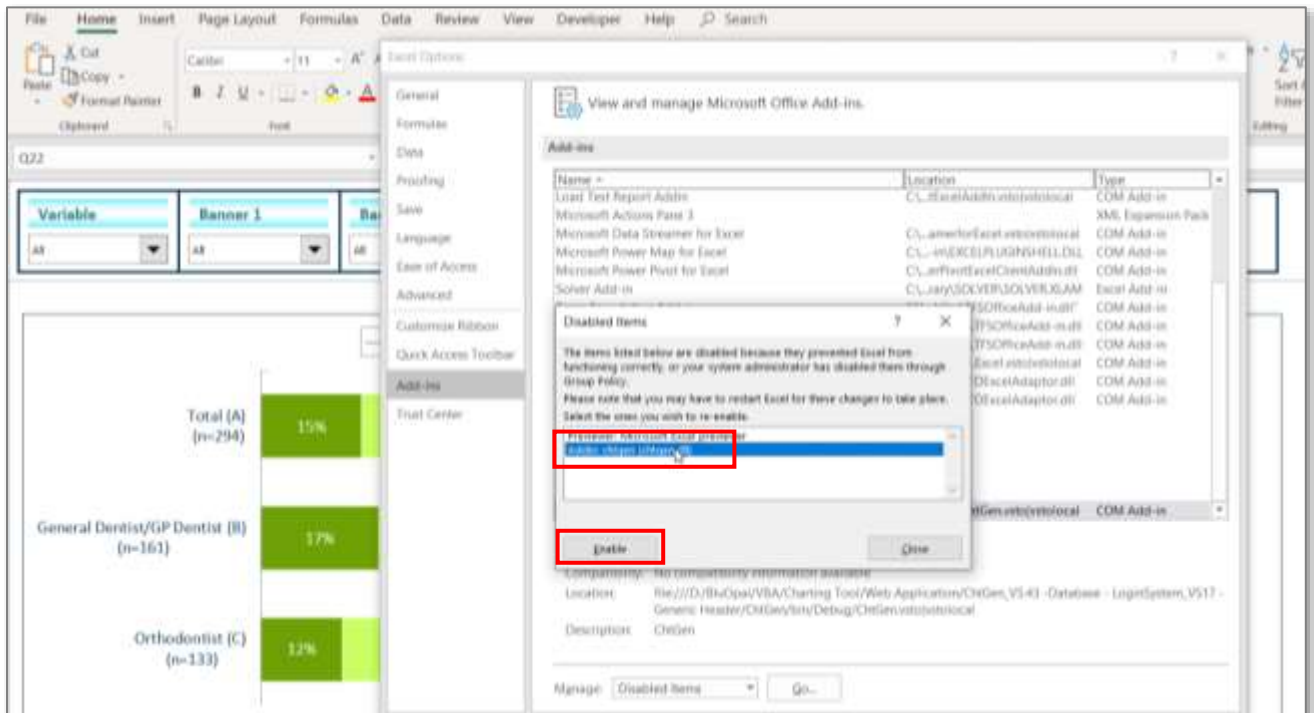
Enabling Insights-AI Add-in

If you are still not able to see the Insights-AI Add-in in the COM Add-in section, the MS Excel might have disabled it. Please follow the following steps to enable it.

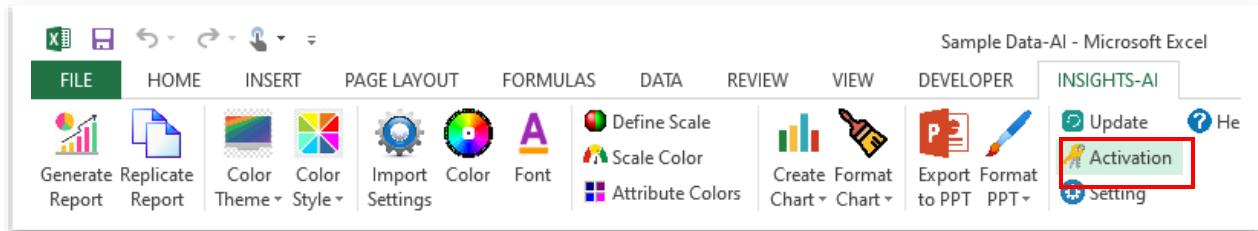
Go to FILE menu >> Options >> Add-ins >> Manage >> Disabled Items >> Go



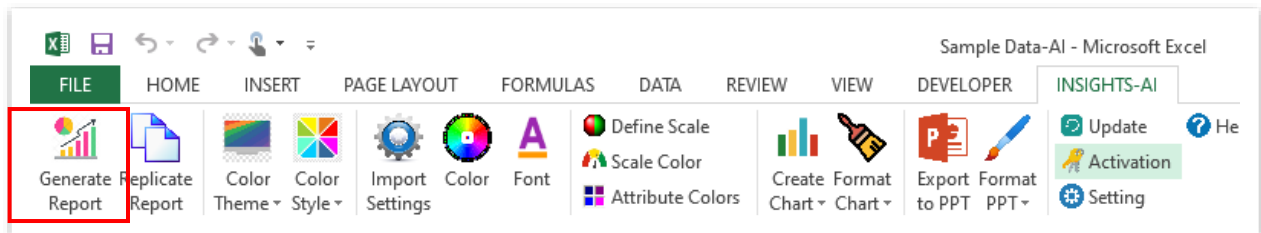
Once you click on the 'Go', the application shows you the list of all the disabled Add-ins. Please select the 'Insights-AI' and click 'Enable' to enable it.



If you were unable to activate the application because Insight-AI was missing on the excel ribbon, you can now go back to the activation steps mentioned at the start of this section.



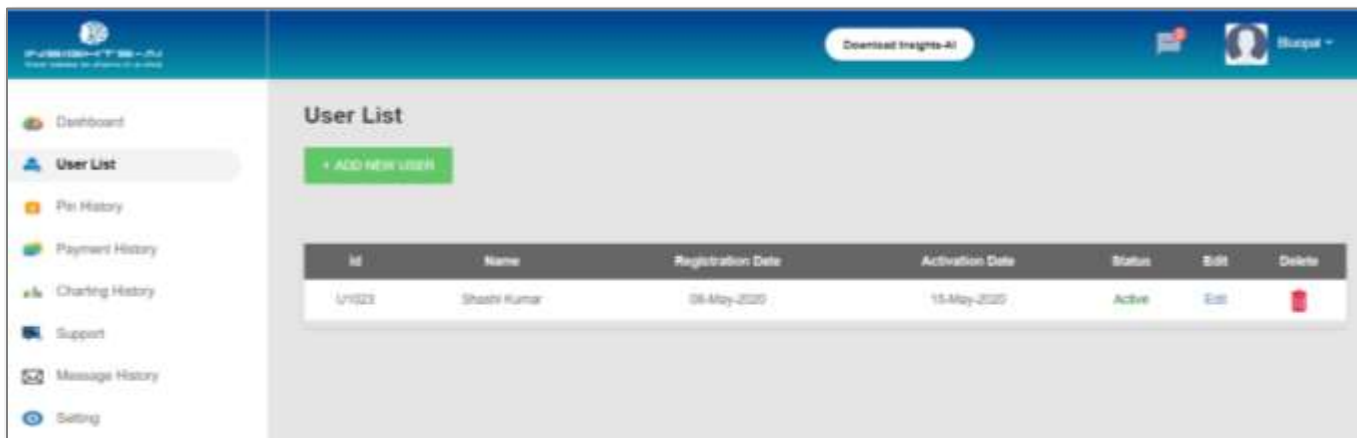
Upon successful Activation the '**Generate Report**' tab will become active.



You are now ready to create reports in PowerPoint. Please close all open files in MS Excel and open the intended data files again after activating the application for the first time.

3. Creating New Users in Corporates

In corporate accounts, a user is assigned administrator and he/she need to add all the researchers who are authorized to use the application. A corporate administrator can add the user by clicking on ADD NEW USER button.



A pop-up will guide the admin to add few details to facilitate the new user creation.



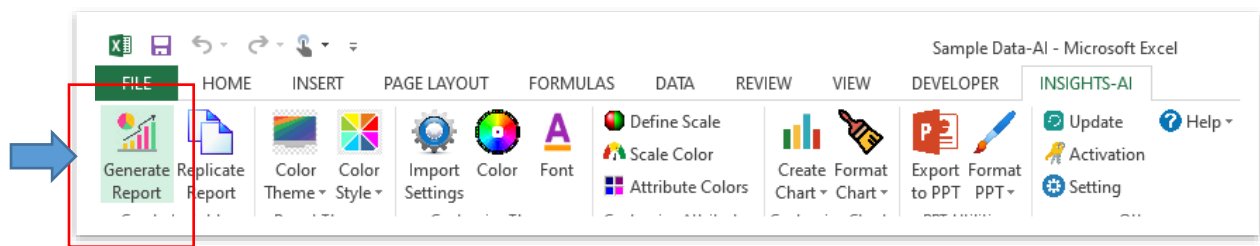
4. Creating Charts & Reports

Generating Reports

The generation of PowerPoint report for a DP table involves many steps like PIN input, PowerPoint template input etc. when it is being done for the first time for every new Project. This section would detail the steps involved in generating report from the DP table.

Let us start by opening the MS Excel data tables file. Next, we click on the Insights-AI tab on the top right corner of the Excel toolbar. If you do not see the Insights-AI tab, then you would first need to download and install the Insights-AI application. If you do not see the Insights-AI tab even after installation, please follow the Trouble shooting tip.

Next, you will need to go to your worksheet, which contains the data tables and click on 'Generate Report on the left top corner.

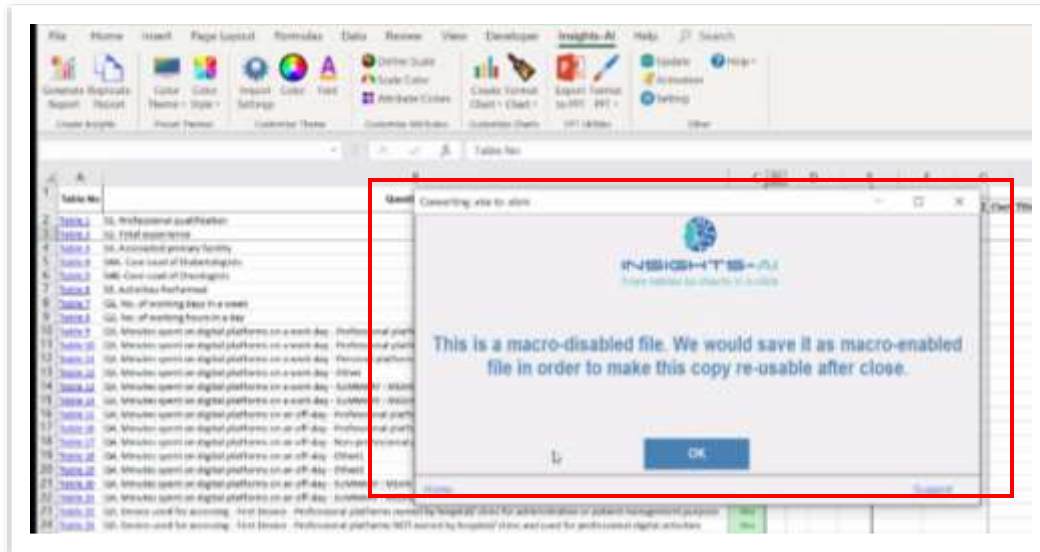


Saving a macro-enabled file

The Insights-AI application takes care of saving your original database without making any changes to it so that loss of even a fraction of original data is avoided.

This enables the user to work without caring too much to create multiple copies of dataset as the application creates a new macro enabled file for editing and creating charts.

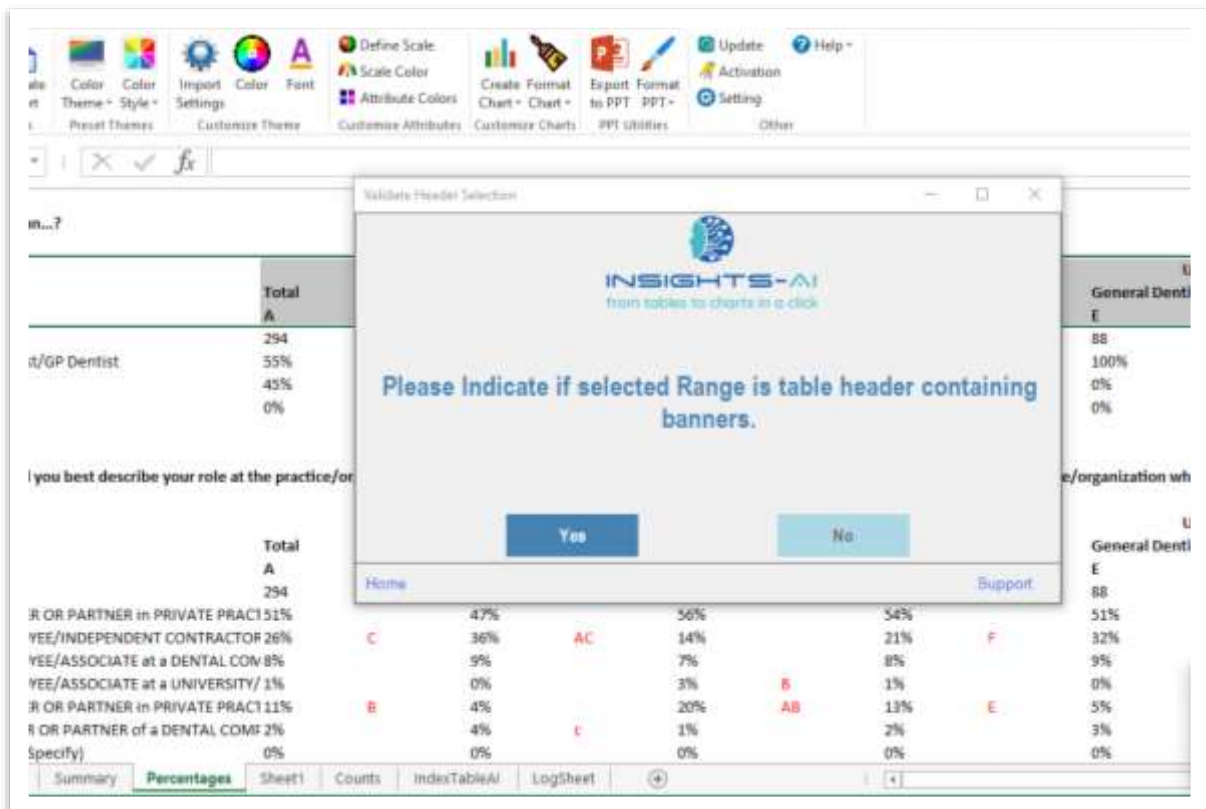
Click on 'Generate Report' to begin. A pop up will prompt to save a new macro enabled file to prevent any accidental and unwanted changes in the original data file. Click 'OK'



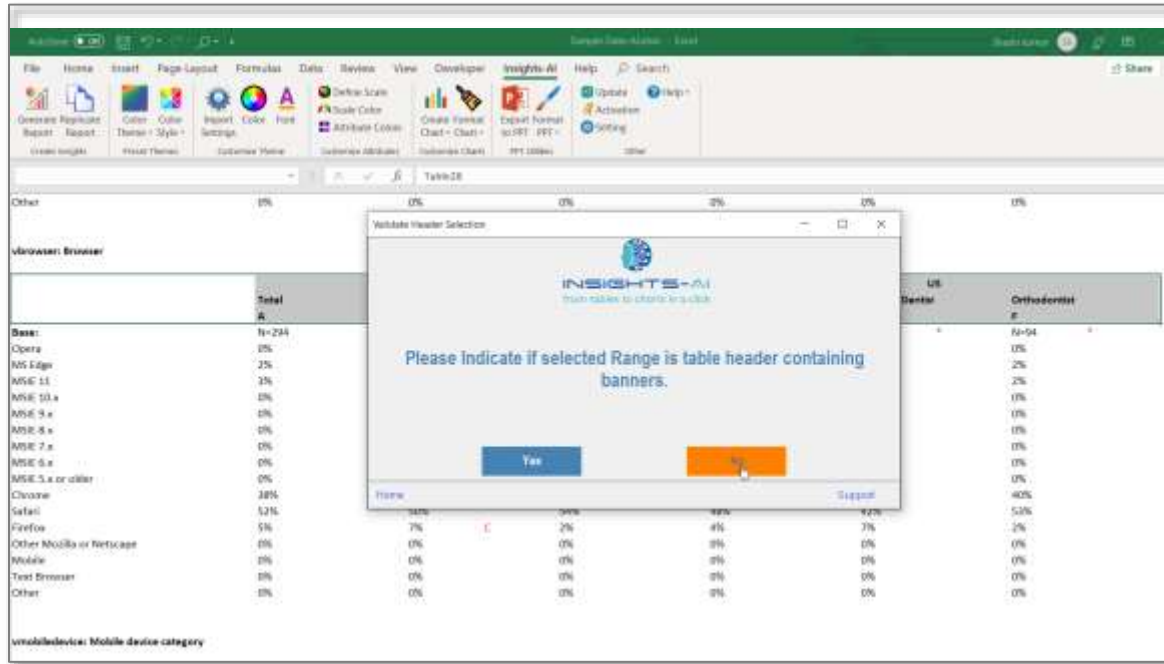
Header Selection

It is important to select the correct range of header i.e. columns to represent the respective data in charts. A pop-up box will appear asking if Selected Range represents correct header (columns/banners in this case).

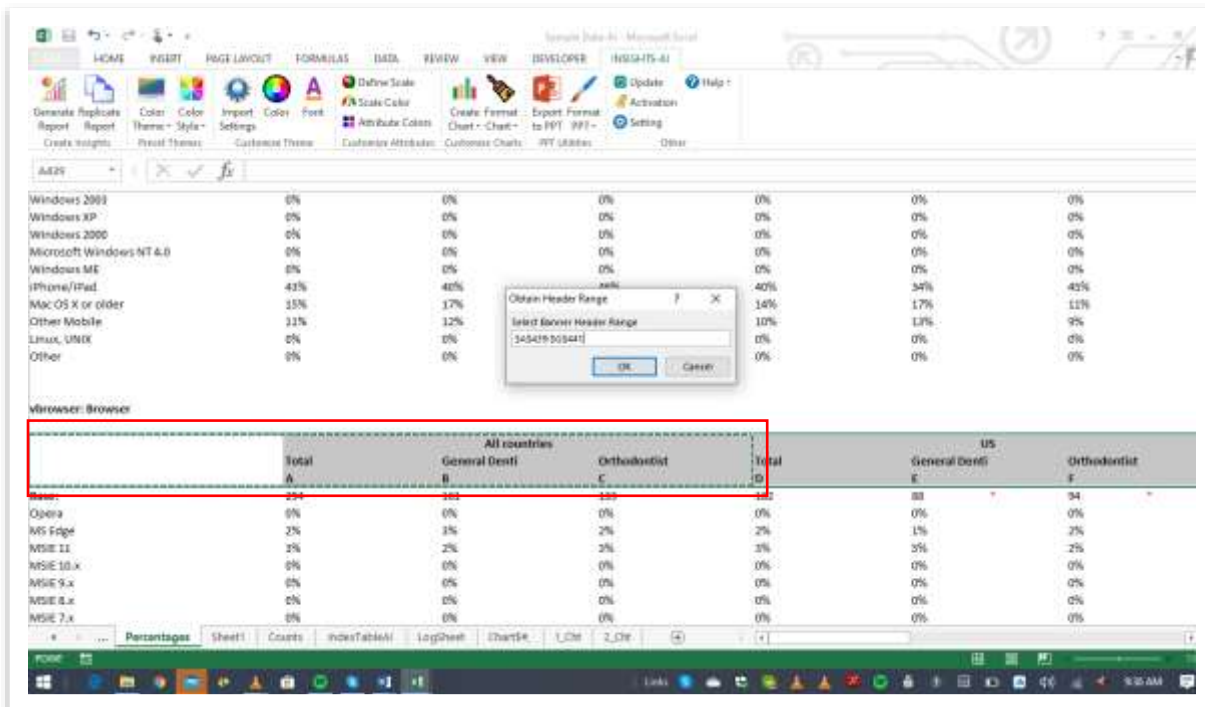
Click 'Yes' if correct.



If not, select the correct and complete range of headers by selecting “No” and dragging the cursor over the columns.



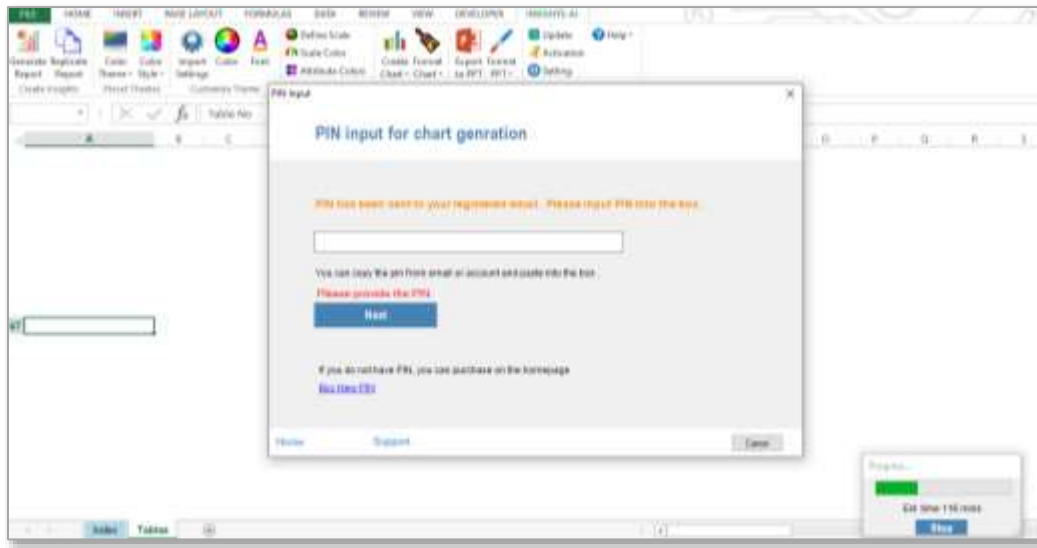
You can select the correct / partial range by dragging the cursor, as shown below in the example.



Please note that row containing alphabets for significance testing should be included in the header.

PIN Purchase

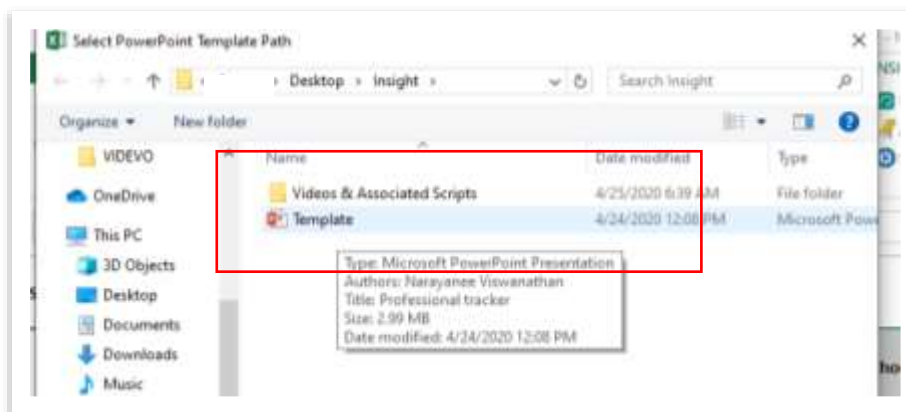
Every new project requires a PIN for execution which is like a One-Time Password. It is sent to your registered email id. You can also access it by logging into your account. If you do not have any PIN, you need to login and buy it (see details at PIN Purchase)



Selecting Template

Once a PIN is verified, the application will prompt you to provide template for PowerPoint report. Please select the path to your preferred template. This template can be your company template, your client's template, or simply just the default PowerPoint PPT template on your computer or network. Now the application is ready to start preparing and putting charts into the template.

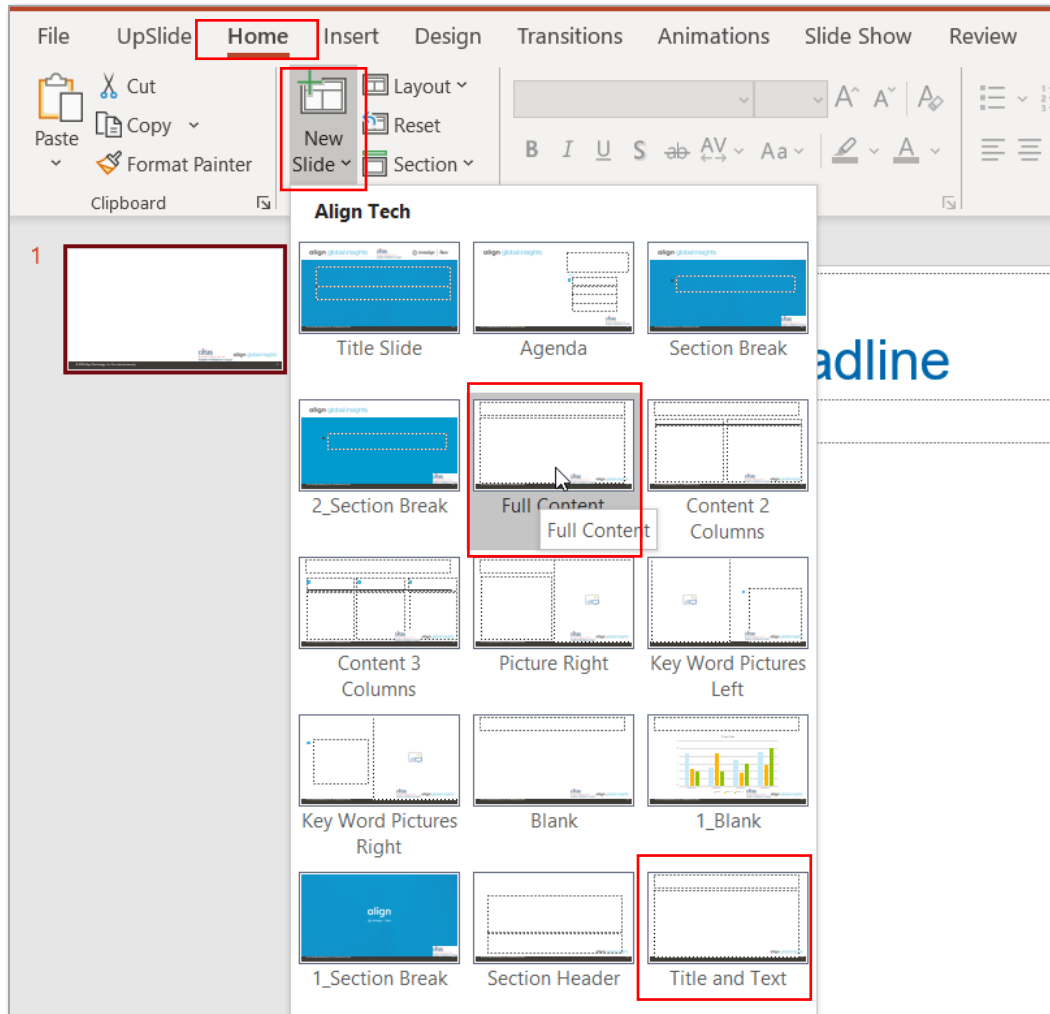
Select PowerPoint template file and click on 'Open' as shown the example below.



PowerPoint template requirements

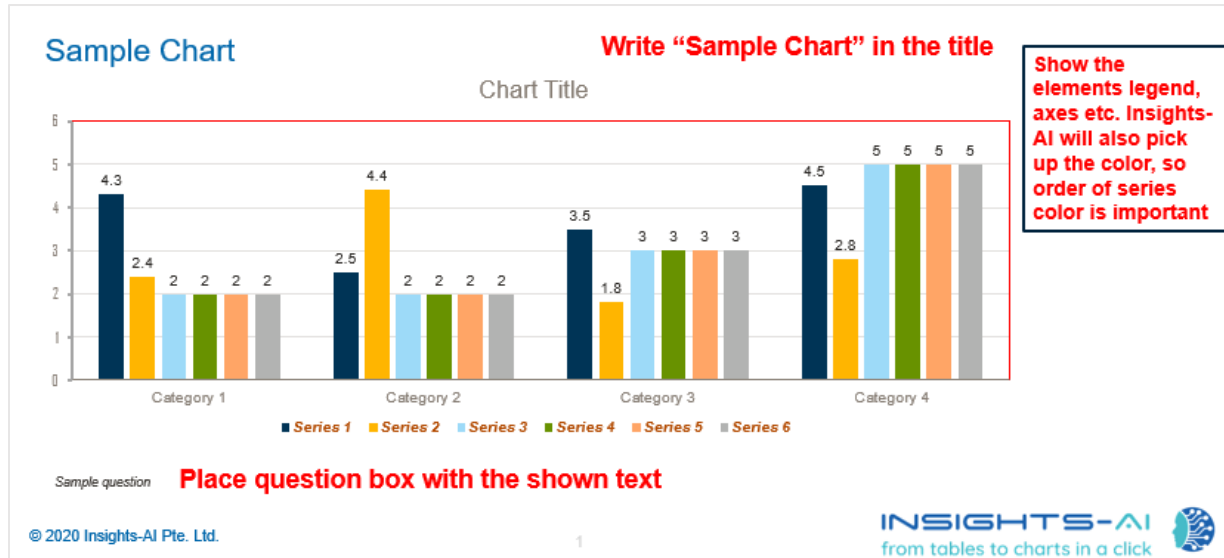
The tool copies the last slide of template and places the chart on that slide. Hence it is essential that the PPT should have at least one slide in it. Also, since the last slide is copied, the last slide should be “Title and Content” or “Full Content” layout so that maximum area of slide is available for the charts.

For adding a “Title and Content” or “Full Content” slide, go to Home > New Slide and then select the required layout.



Sample chart, table and scale

User may also insert a sample chart format in the PowerPoint presentation slide with the heading “Sample chart”. This chart will act as a reference point for all the charts generated by the tool in the report. The tool will then generate all the charts in the report using the exact font type, size, color, placement of legends, data labels etc. which were provided in the sample table.



Above snippet is an example of how a sample chart can be included in the PowerPoint presentation slide.

The tool is also capable of reading sample tables and scales too once the information is provided in the power point in the below manner which is similar to inclusion of sample chart.

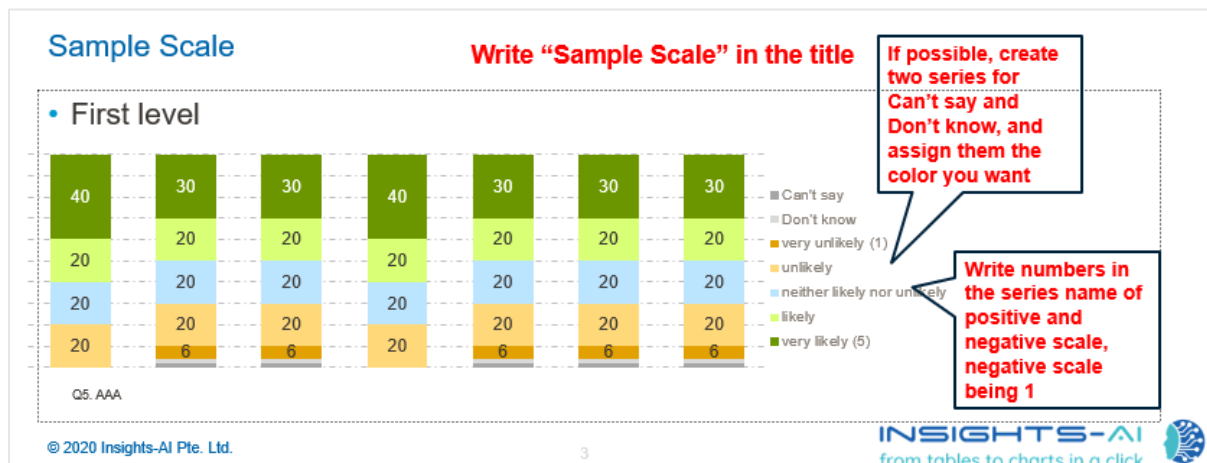
Sample table

Write "Sample table" in the title

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INSIGHTS-AI
from tables to charts in a click

2



Thus, the user has the liberty to impose tables in desired format at his/her choice by providing “Sample Table”. The tool via it’s text mining capabilities also facilitates scale specific formatting to match the “Sample Scale” chart provided.

Dashboard for progress and status update

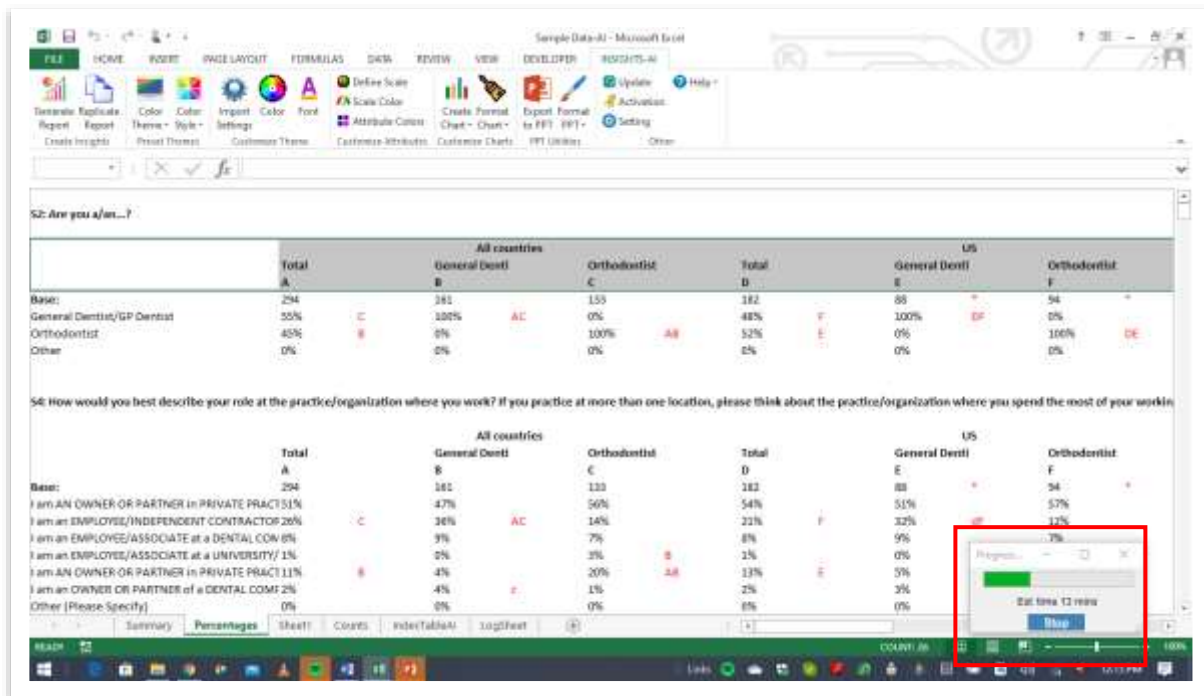
A small ‘Dashboard’ reflects on the right bottom right corner that shows estimated time and status of report generation. The dashboard will always be the top window that will update progress and status in ‘Green’.



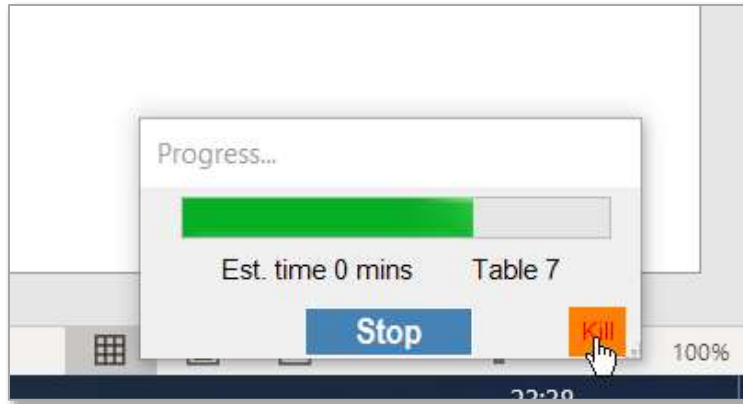
Occasionally, it will turn ‘Yellow’ in case any user input is required.

In case of error, the dashboard will turn ‘Red’ and message will pop up displaying the related error.

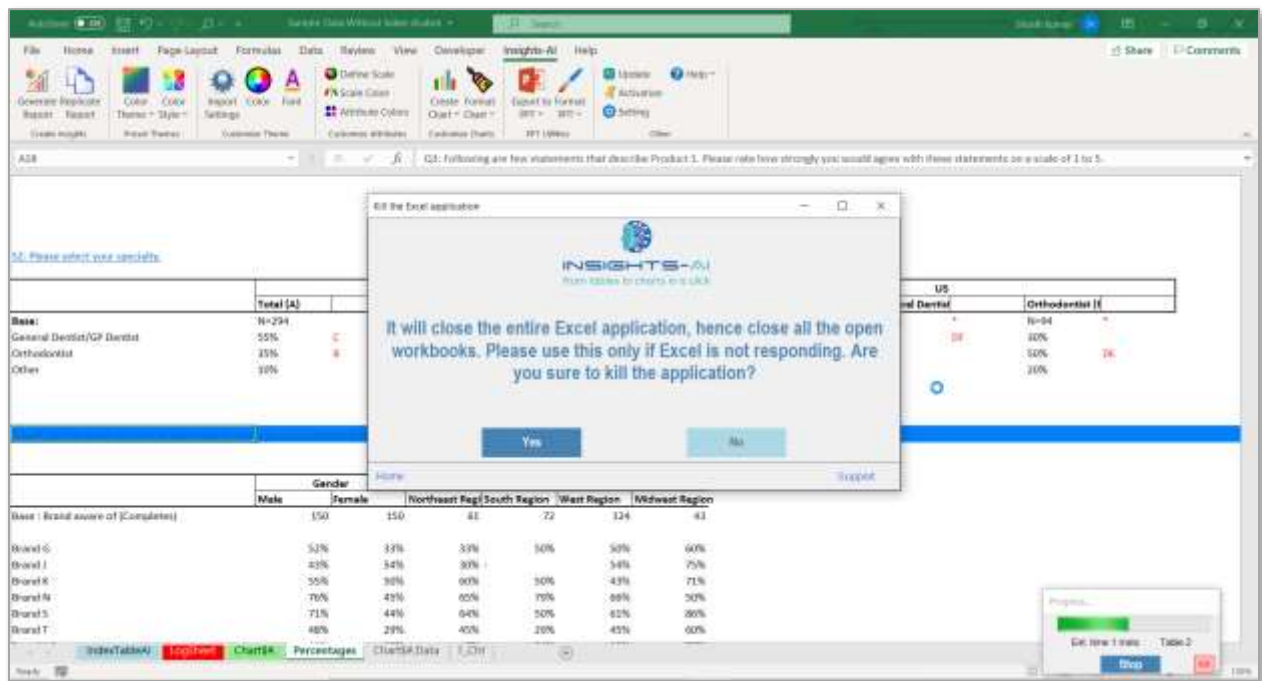
You may click on ‘Stop’ to stop the report generation anytime and see the charts created until that moment.



In the rare event of the Excel not responding, you may click on ‘Kill’ to close the Excel application.

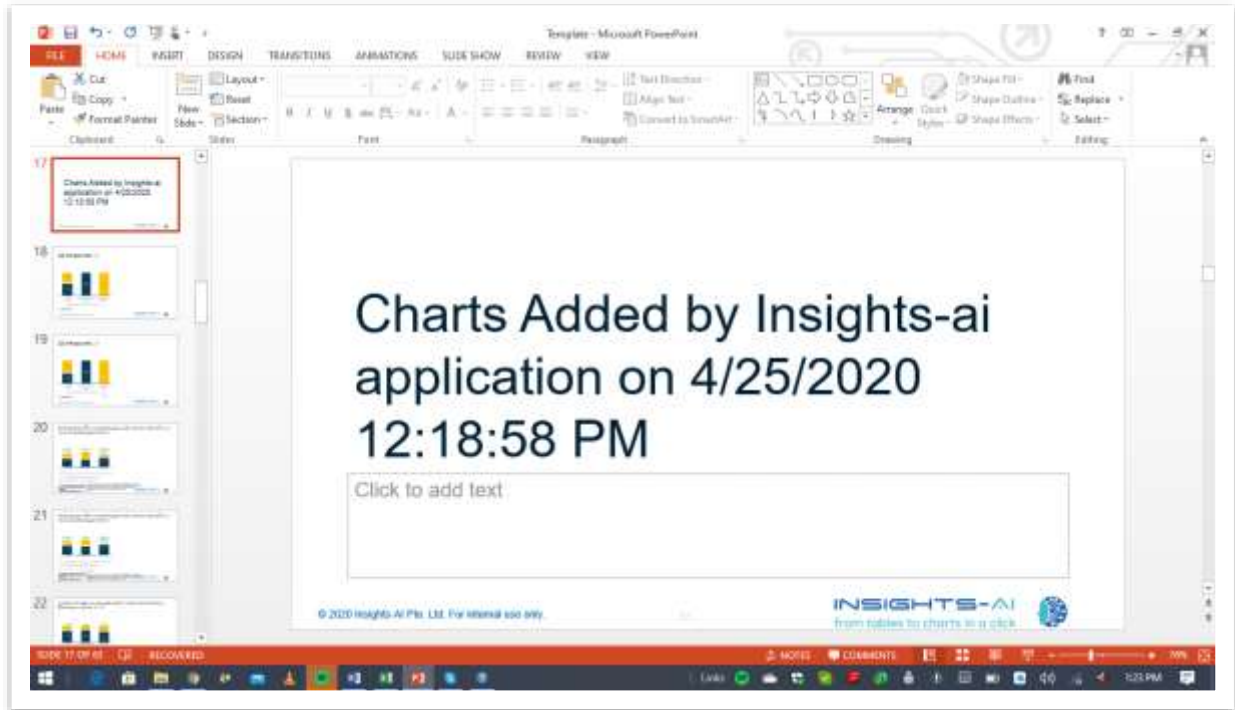


Since the Excel application itself is terminated, hence it closes all the open workbooks.



There is an outside chance of error while opening the PowerPoint report. In that case, please let PowerPoint repair the report and then delete the slides generated during the last run of the tool. Now save the report again and PowerPoint report would be fine.

The Insights-AI appends the charts created to the selected template and you can see it by clicking on the PowerPoint after stopping the chart generation process.



Since the application appends the charts, when you select a PowerPoint already containing slides, the application retains the original slides.

Index Table

An Index table is the consolidated list of all DP tables in the dataset. It enables a view of all tables immediately. Index table allows selecting and making changes in the individual DP tables as well as generating reports for the same.

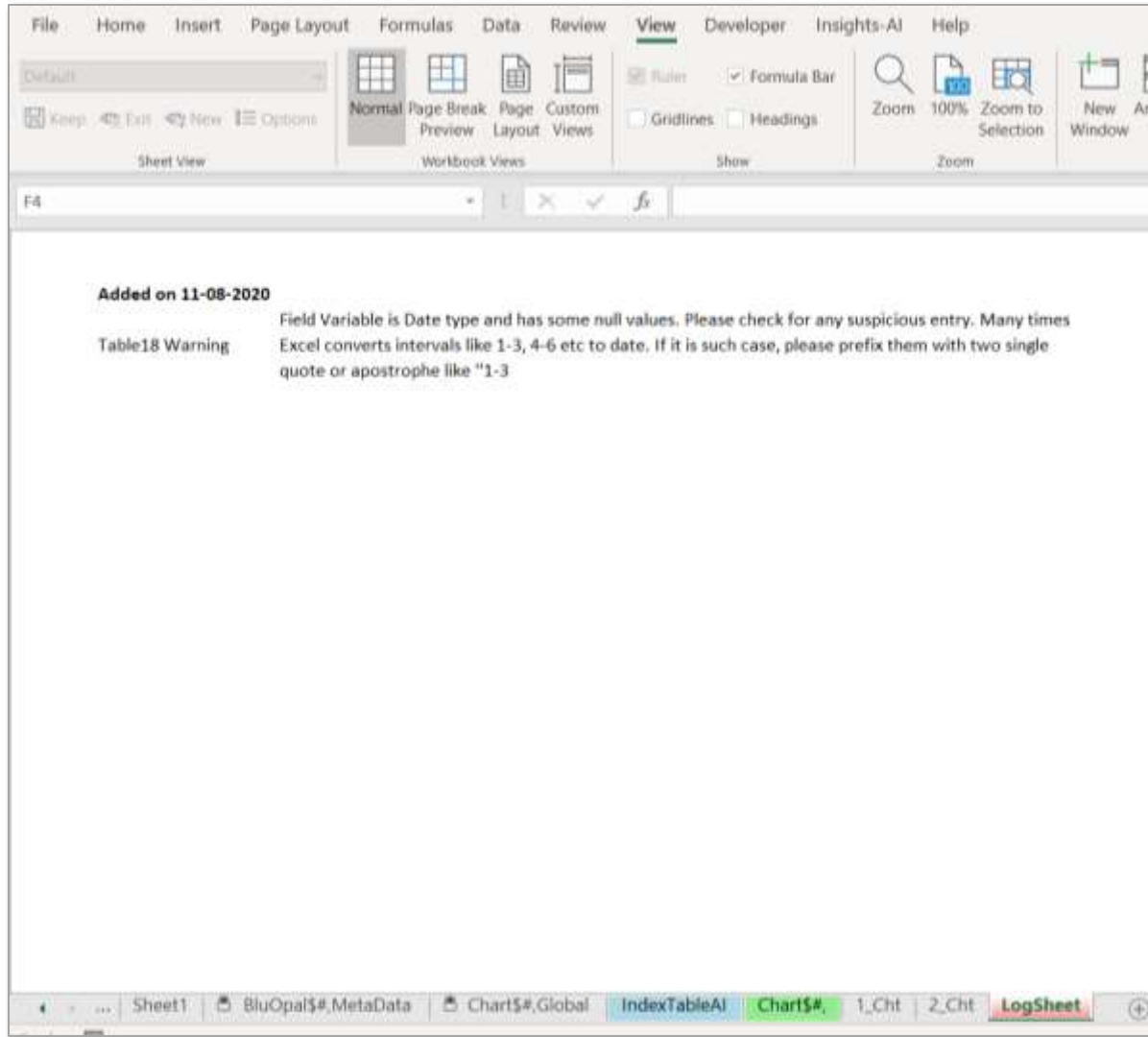
If the data-table contains an index table, then application will verify it. In case the index table is absent, the Insights-AI application creates an 'Index Table'.

Below is a sample Index Table that is generated by Insights-AI application.

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER		
<div> <div>Clipboard</div> <div>Font</div> <div>Alignment</div> <div>Number</div> <div>Conditional Formatting</div> </div>		
C9		
Table No	Question Text	Include
Table1	S2: Are you a/an...?	No
Table2	S4: How would you best describe your role at the practice/organization where you work?	No
Table3	If you practice at more than one location, please think about the practice/organization where you spend the most of your working time. This practice/organization will be referred to as 'main practice/organization'.	No
Table4	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately % of your total patients	No
Table5	Q7: Did you learn anything new from the information you just read?	No
Table6	Q9: How, if at all, does the information you just read impact your likelihood to recommend product to your patient	Yes
Table7	Q1: Which, of the following treatment planning software, have you heard of? Aided	No
Table8	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No
Table9	All countries - General Dentist/GP Dentist Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No
Table10	All countries - Orthodontist Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No
	US - Total	No

Error log

Insights-AI generates an error log at the end of the report generation. It lists all the error or warning during the report generation in "LogSheet" worksheet shaded in the red color.



Generating full report vs partial report generation

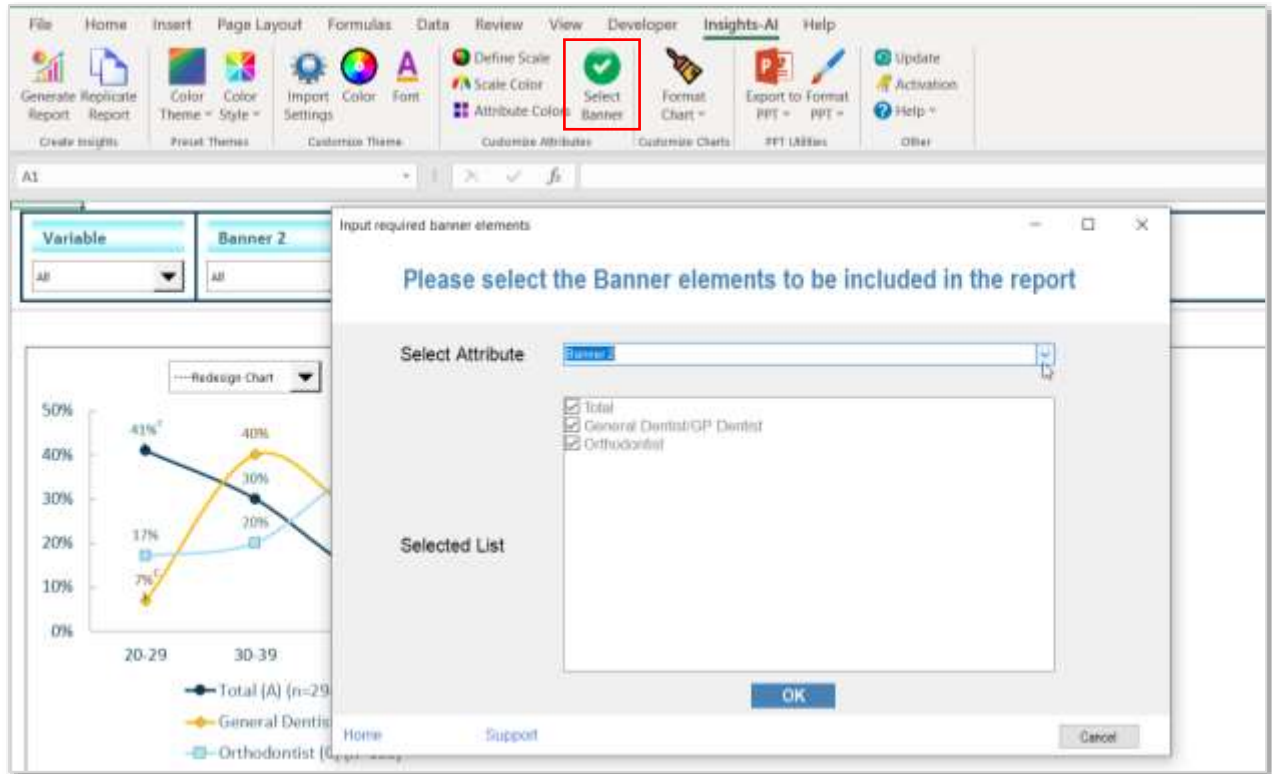
When Insights-AI application generates a report for the first time, it attempts to generate charts corresponding to all the tables. However, based on algorithm, it may leave some tables by indicating “No” in “Include” column in Index table. Also, the application may not generate all the charts for a table during full report generation to manage the number of charts generated. For example, if base size is small, it may leave that chart during full report generation. One can always generate excluded tables or chart by manually selecting “Yes” under include column. When you generate charts for only one table, the application generates all the charts corresponding to that table.

If anyone wants to stop the full chart generation anytime, they can do so by clicking on “Stop” button on the small dashboard.

Selecting banners for the report

When Insights-AI application generates a report for the first time, it attempts to generate charts corresponding to all the banners. However, a user may want to select only few banners for the report. The application facilitates the desired banner selection with “Select Banner” button in the ribbon.

First select any one table containing the banners in index table and generate charts. Then click on the “Select Banner” button.



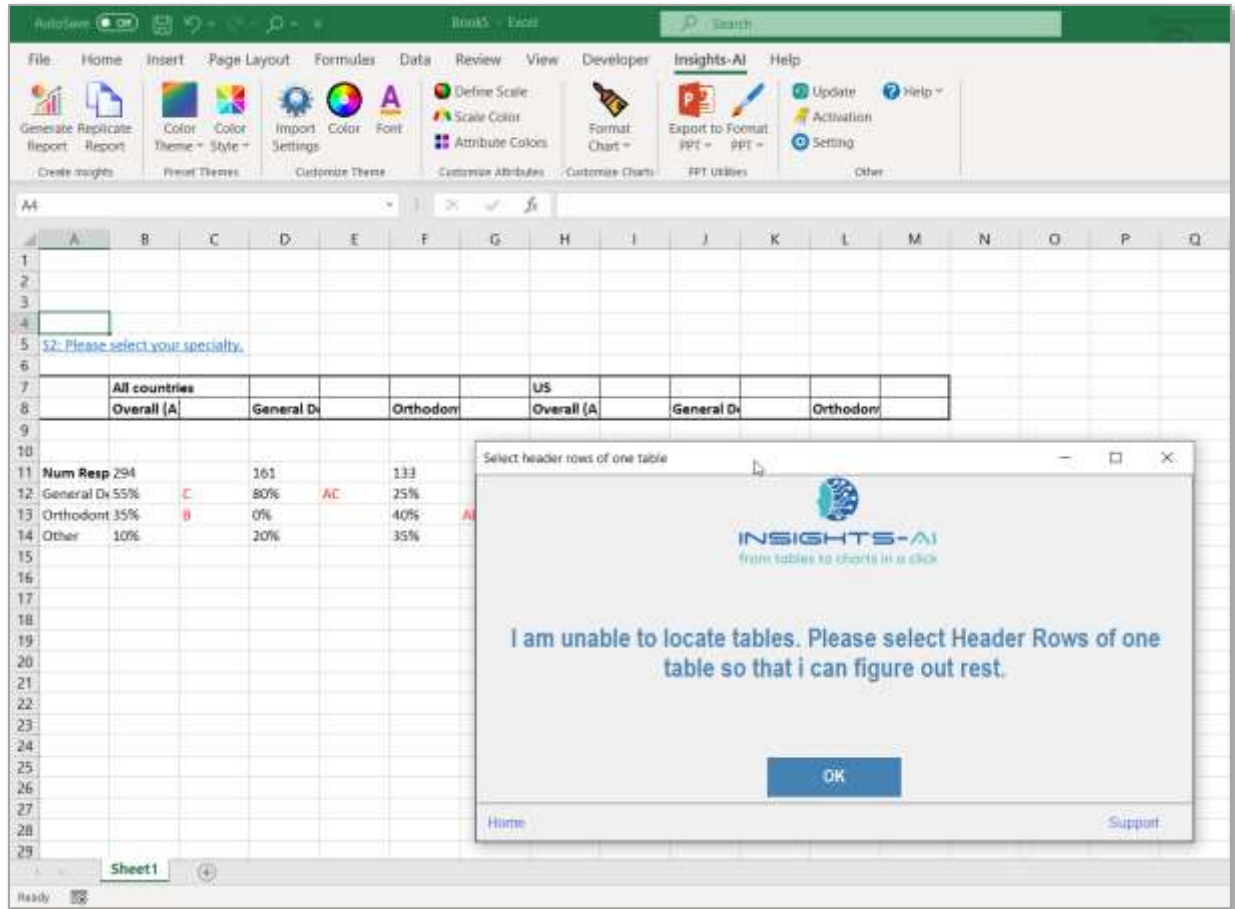
Then select the required banner to be included or excluded in the “Select Attribute”. It will list all the elements of the banner with checkbox and all the element checked. Please uncheck the element you want to exclude from the report generation.

Missing table element prompts

The Insights-AI smart AI engine attempts to identify all the elements of a table like number of respondents, banner header etc. However, in a few instances, the application might not be able to identify the element. In these instances, the application guides a user to provide the respective element.

Header prompt

If insights-AI is unable to locate the header in any of the tables during the first-time generation of report, a pop-up box will appear asking to select the header rows of any one of the tables.

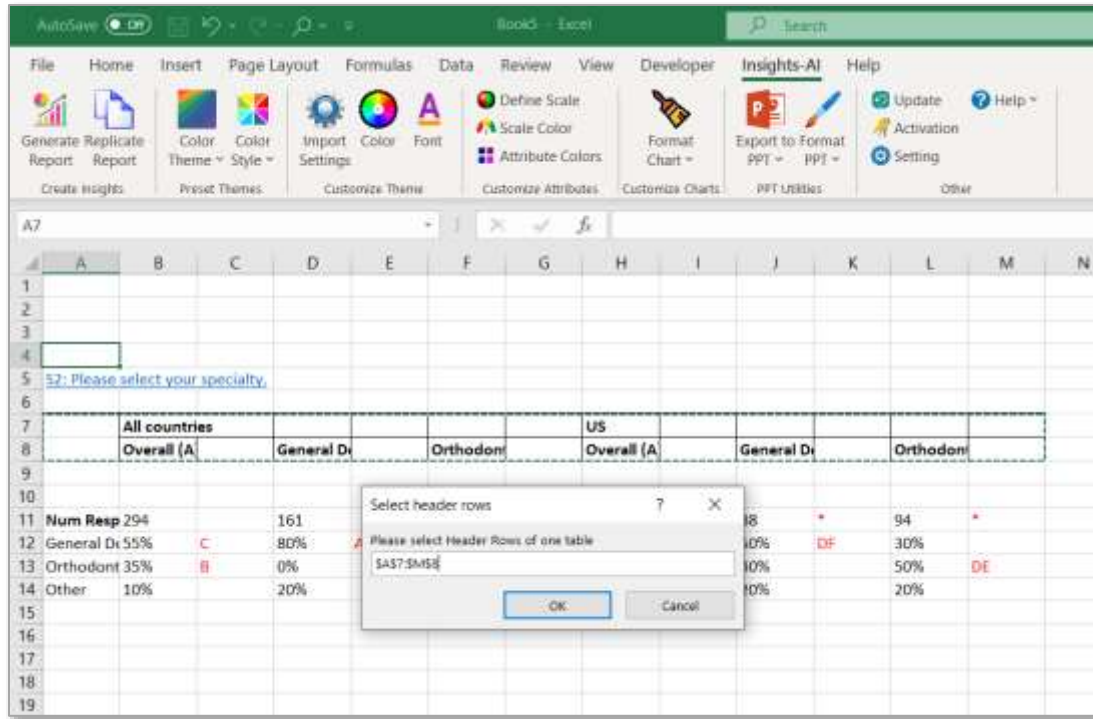


The screenshot shows the Insights-AI application interface. The top menu bar includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Insights-AI, and Help. The main workspace displays a data table with the following content:

	All countries			US			
Overall (A)	General D	Orthodont		Overall (A)	General D	Orthodont	
Num Resp	294	161	133				
General D	55%	80%	25%				
Orthodont	35%	0%	40%				
Other	10%	20%	35%				

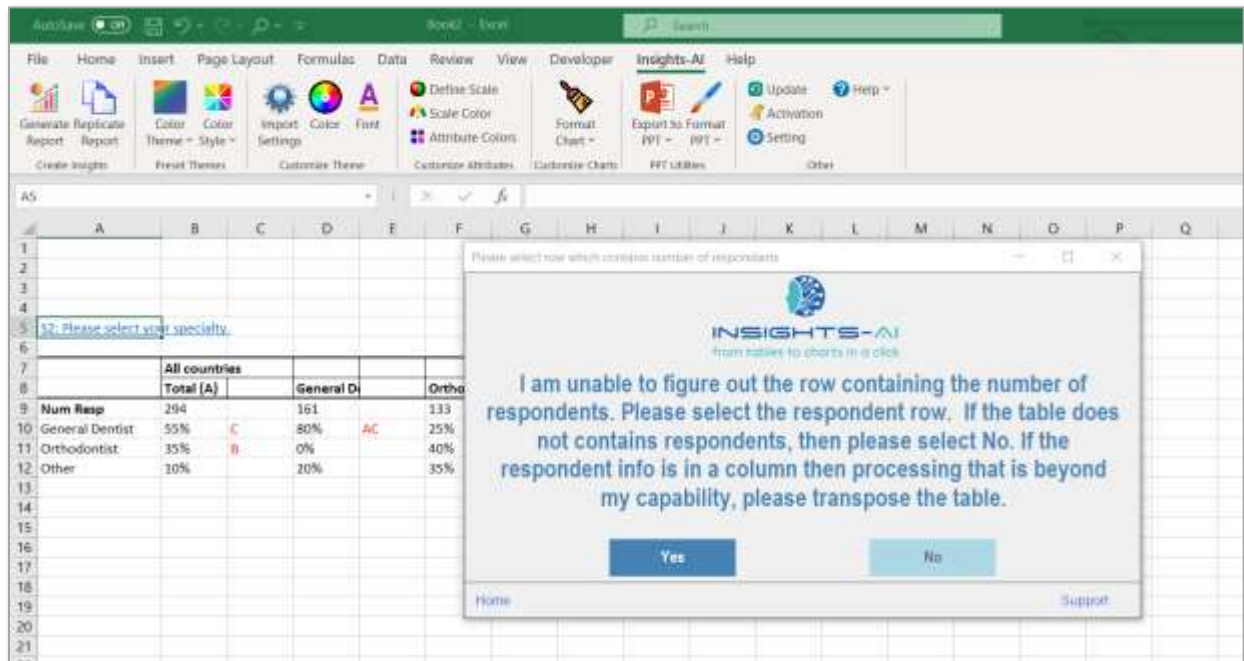
An error message dialog box is displayed in the foreground, stating: "I am unable to locate tables. Please select Header Rows of one table so that i can figure out rest." The dialog box includes an "OK" button and links for "Home" and "Support".

Once the researcher provides the header for any one table, the application can locate all the other tables with the same header.



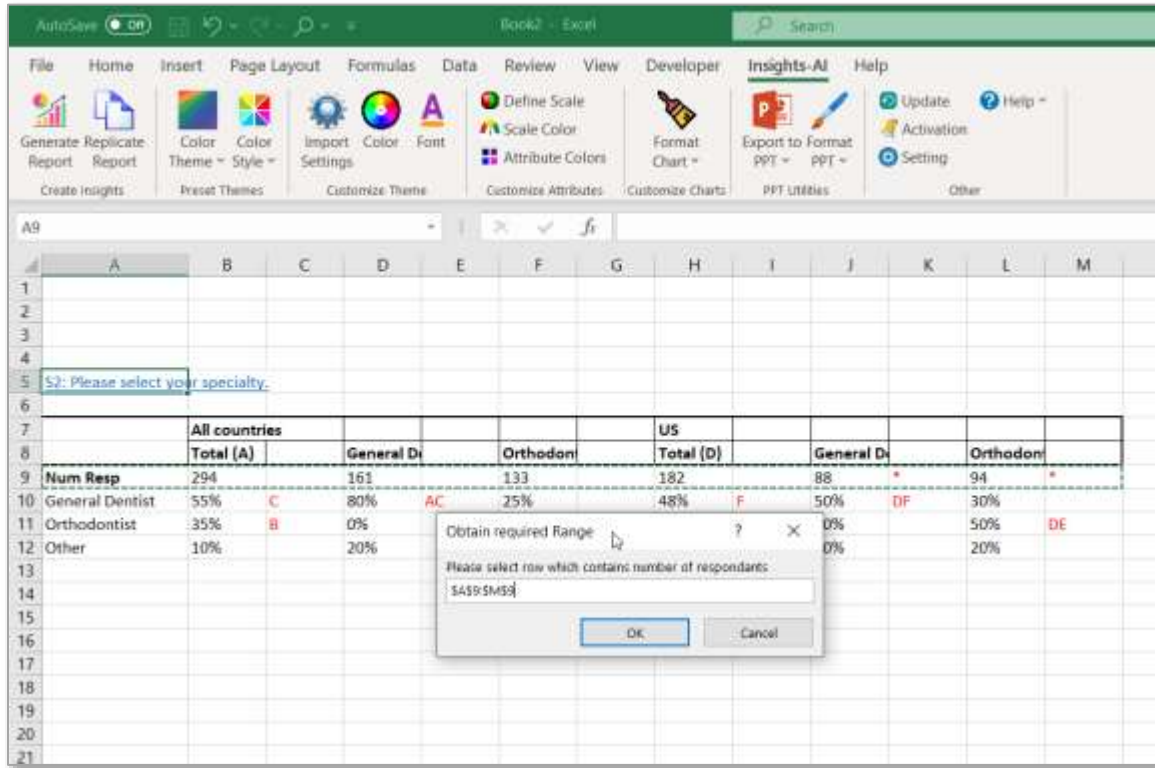
Prompt for number of respondents

The Insights-AI may not be able to locate the row containing the number of respondents in some of the tables. A pop-up box will appear asking to select the respondent row of the table.



Creating Charts & Reports

Once you provide the input, the application can locate the respondent rows in other tables, if other tables contain the respondent row in similar manner.



The screenshot shows the Insights-AI Excel interface. The ribbon includes tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Insights-AI, and Help. The Insights-AI tab is active, showing options like Generate Report, Replicate Report, Color Theme, Color Style, Import Settings, Color Font, Define Scale, Scale Color, Attribute Colors, Format Chart, Export to Format PPT, and PPT Utilities. A data table is visible in the worksheet, and a pop-up dialog box titled "Obtain required Range" is displayed, asking the user to select a row containing the number of respondents.

	All countries		US	
	Total (A)	General Di	Total (D)	General Di
Num Resp	294	161	182	88
General Dentist	55% C	80% AC	48% F	50% DF
Orthodontist	35% B	0%	0%	30% DE
Other	10%	20%	0%	20%

Obtain required Range

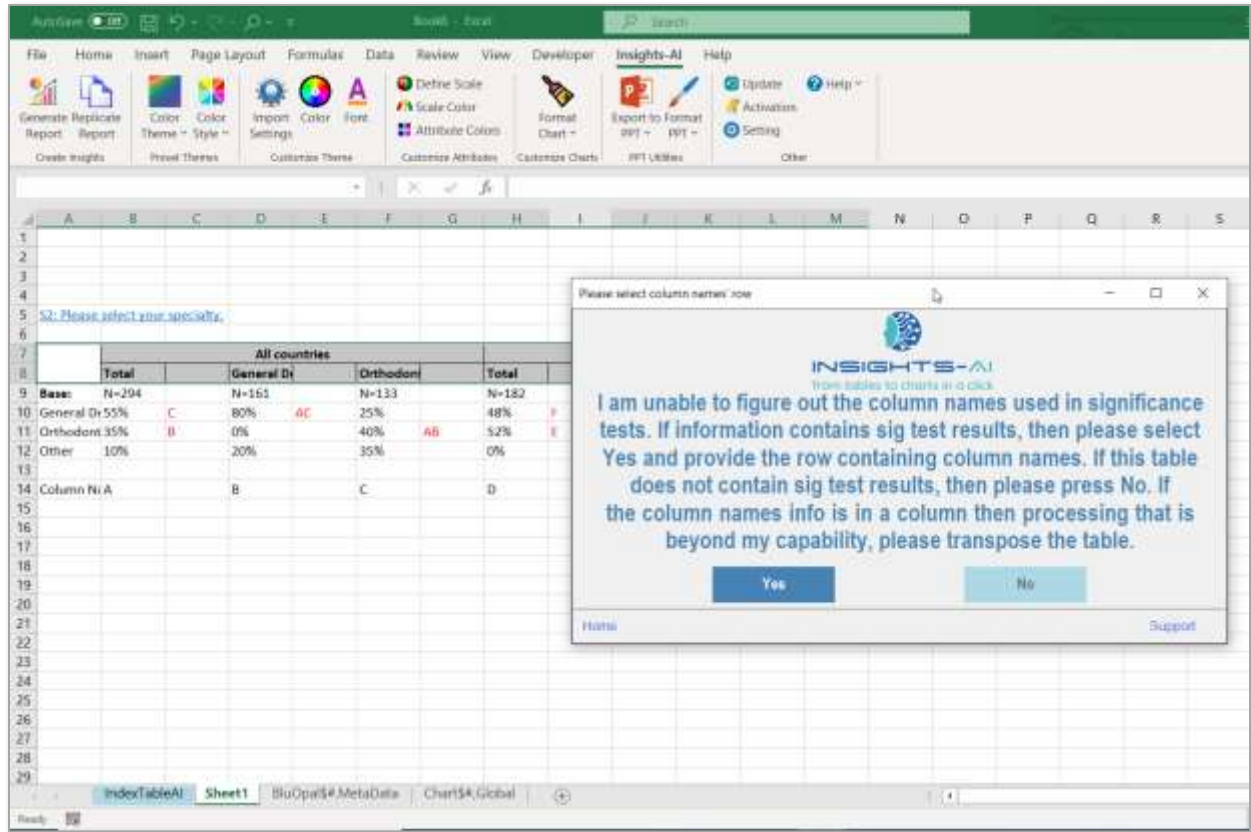
Please select row which contains number of respondents:

\$A\$9:\$M\$9

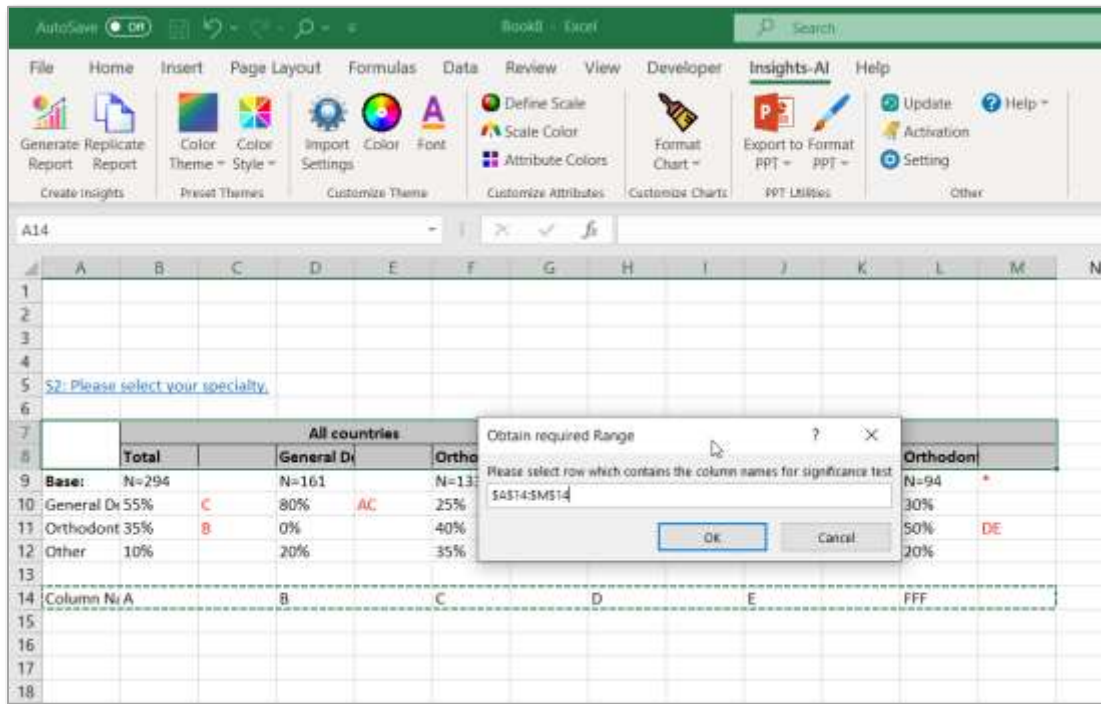
OK Cancel

Prompt for column names

The Insights-AI may not be able to locate the column names in some of the tables. A column name is an alias for the banners which are used to display the significance test results. A pop-up box will appear asking to select the row containing column names.



Once you provide the input, the application can locate the column names in other tables, if other tables contain the column names in similar manner.



Trouble shooting tip

The Insights-AI smart AI engine attempts to identify all the different presentation formats of data-tables. However, sometimes it may not be able to identify some of the formats. Hence, it is advisable to follow the best practices during data preparation for smooth report generation and avoid getting errors during report generation. To validate if the tables are in line with the best practices this application incorporates, please check the [best practices section](#).

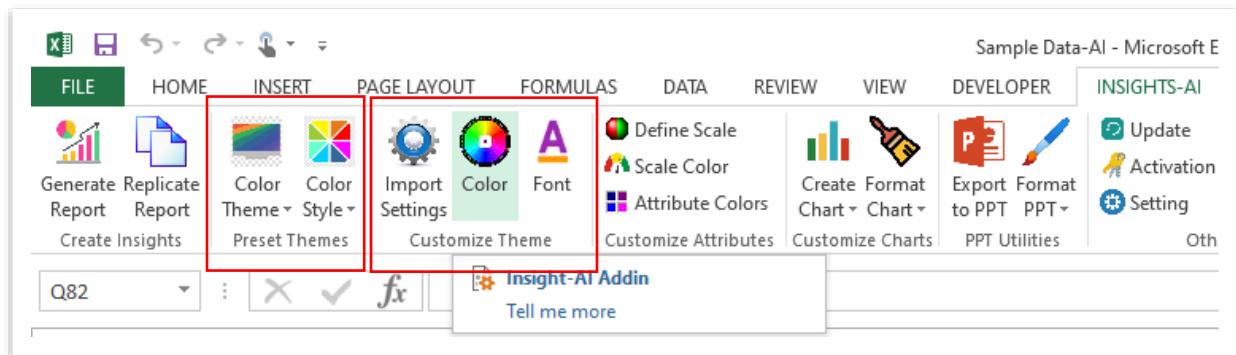
5. Color and Font Customization

The color combination and the fonts used are important elements of data visualization. The users prefer customizations in color and font according to their choice. The application offers wide variety of customizations through a simple user interface to facilitate this need.

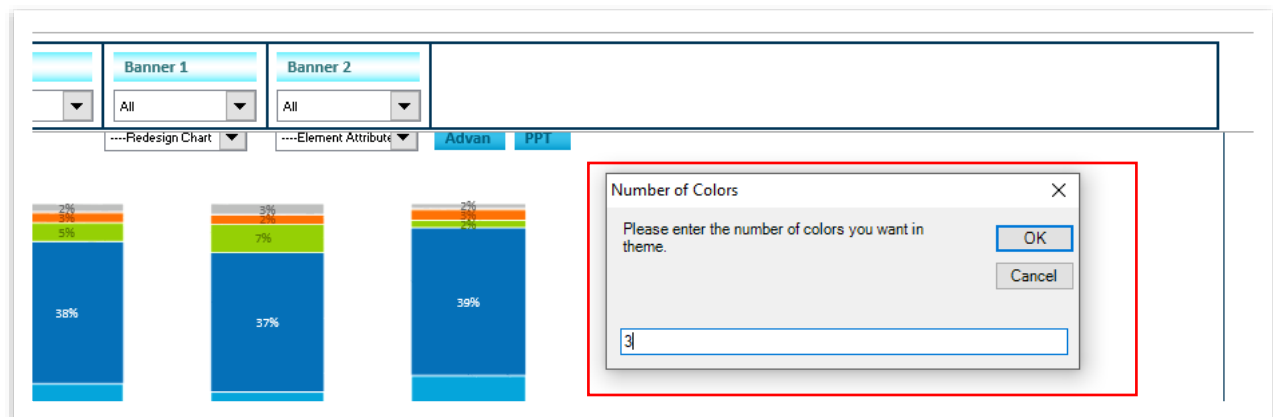
Color theme

The application offers a wide variety of preset themes from in-built option in the Insights-AI Excel ribbon. You can use “Color Theme” and “Color Style” buttons to use preset styles.

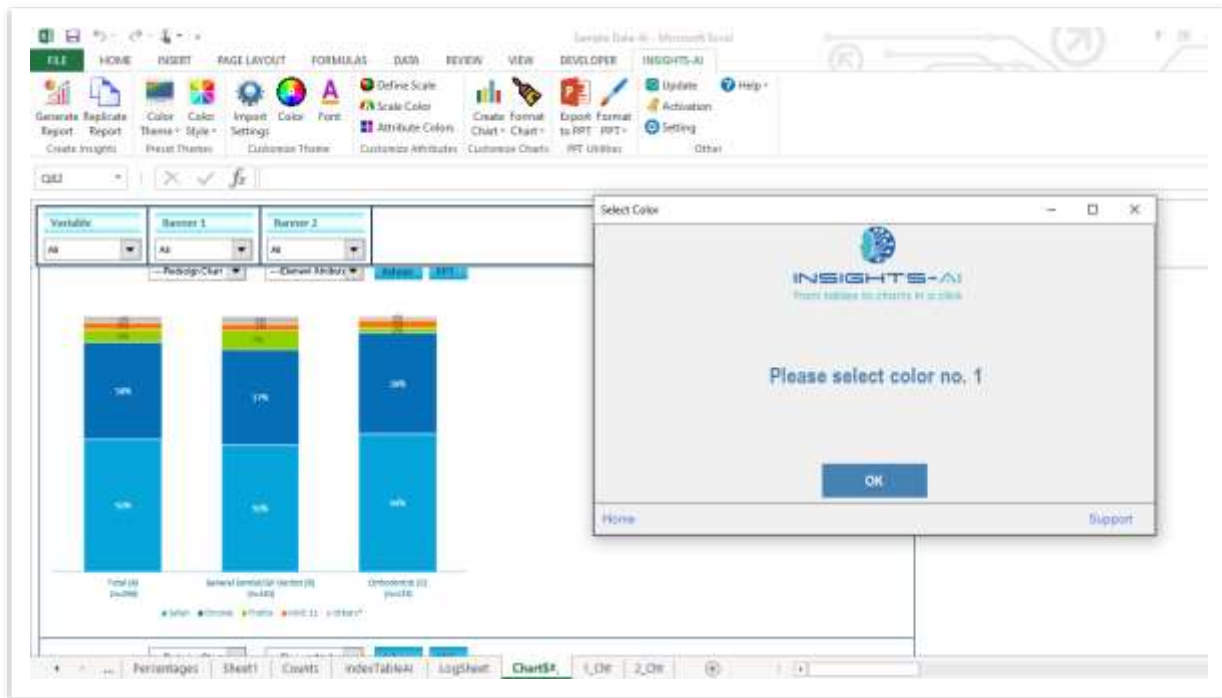
The “Customize Theme” tab enables users to set custom colors and fonts. The “Color” option allows users to select one or more number of colors in the output report. The user can choose the required color either from the default Excel theme or provide the custom Red, Green and Blue (RGB) component.



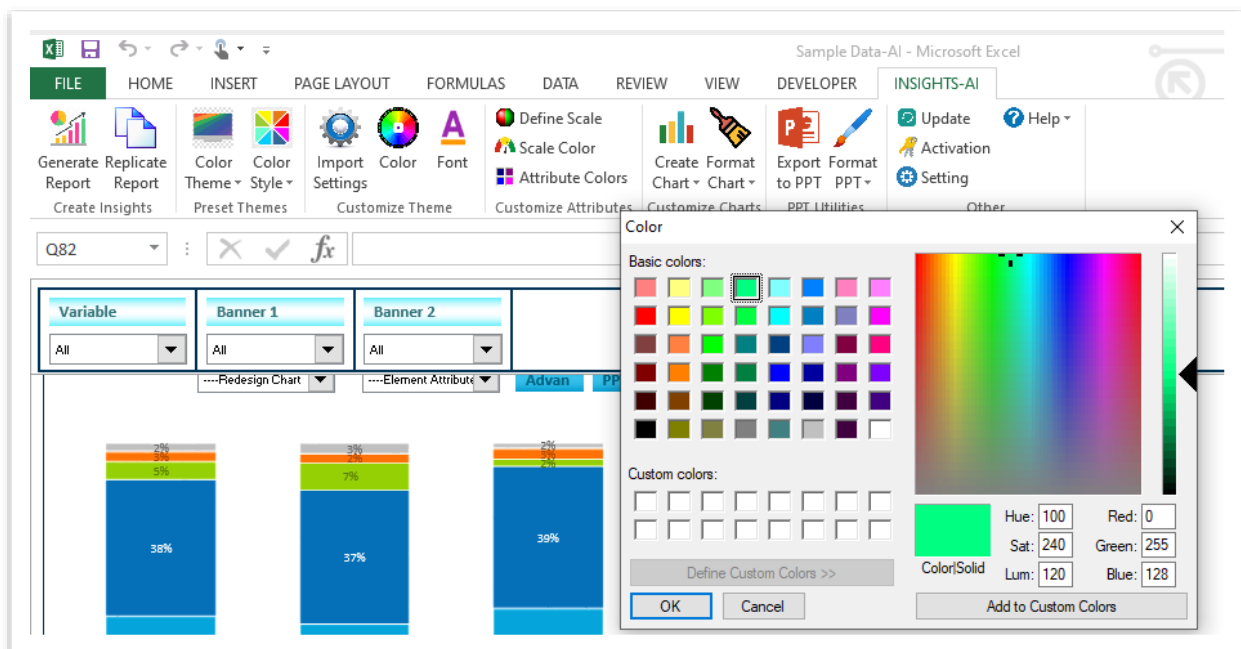
After you click on the “Color” tab, the pop up will prompt for the number of colors you prefer in the customized color theme. For example, let us say we want to show 3 colors in the output charts.



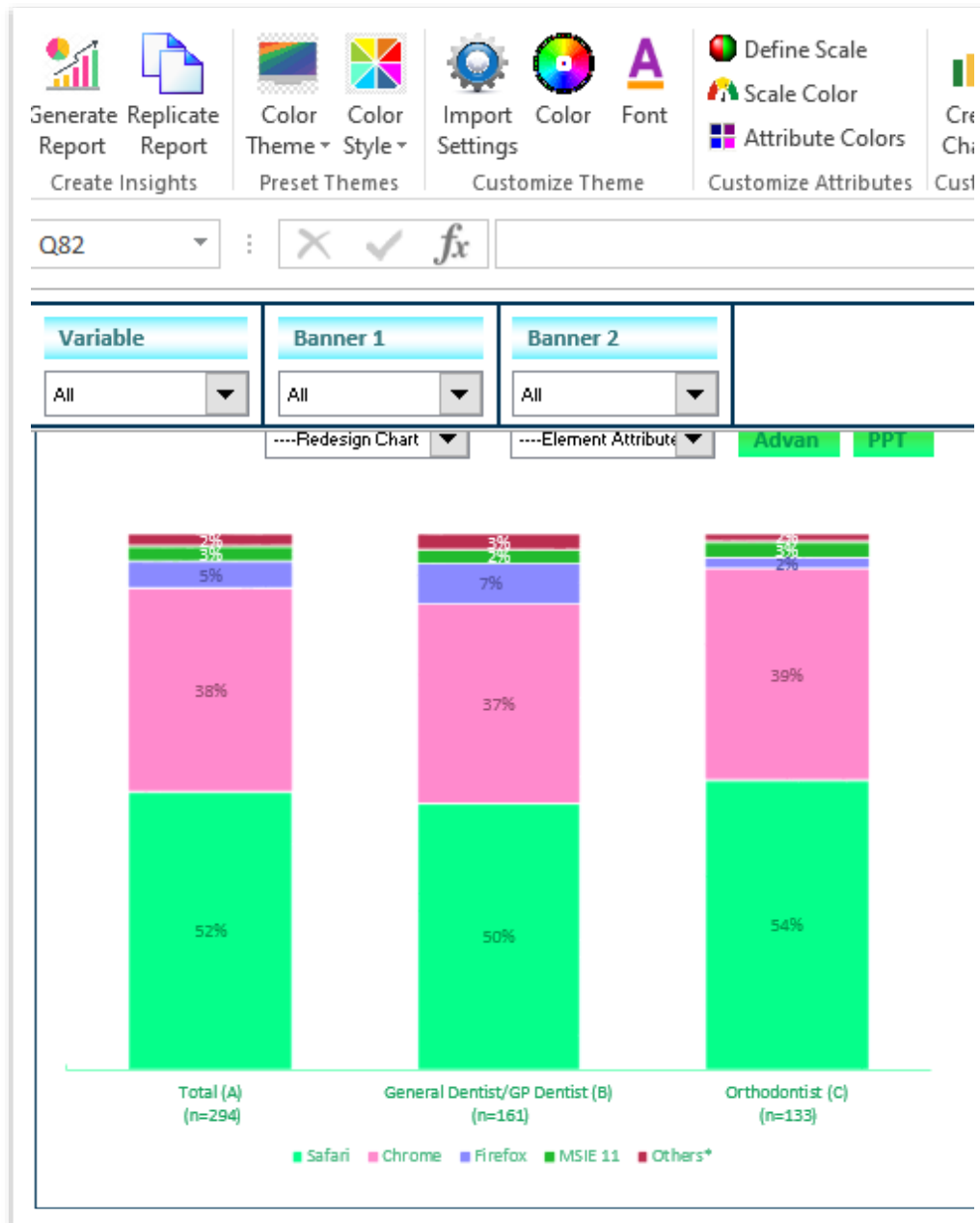
Next, the new pop-ups will ask for the input for all the 3 colors as shown below:



We can select color from default Excel theme or by providing Red, Green and Blue (RGB) components.



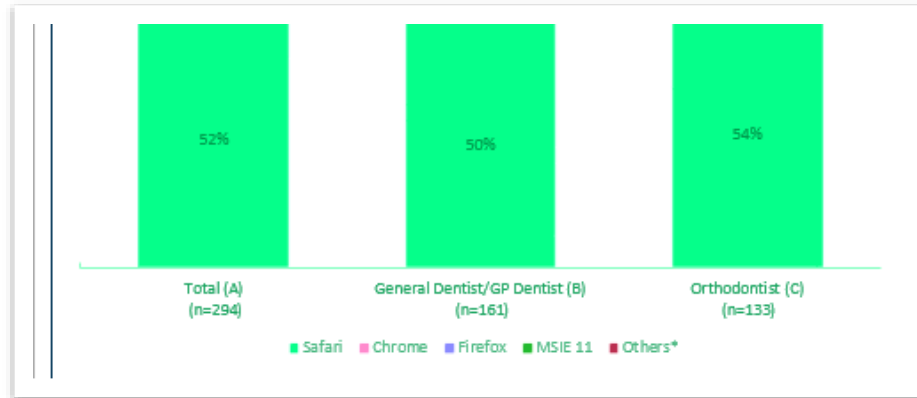
Provide color preferences for all three options. Thus, from your customized color pallet you could get newer colors for your charts, as shown below:



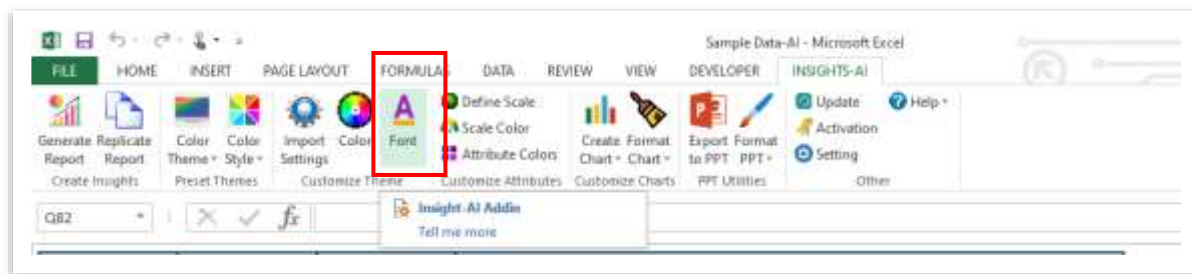
Font theme

The application, by default, sets the 'Color Option 1' as primary color and sets the font in the same color.

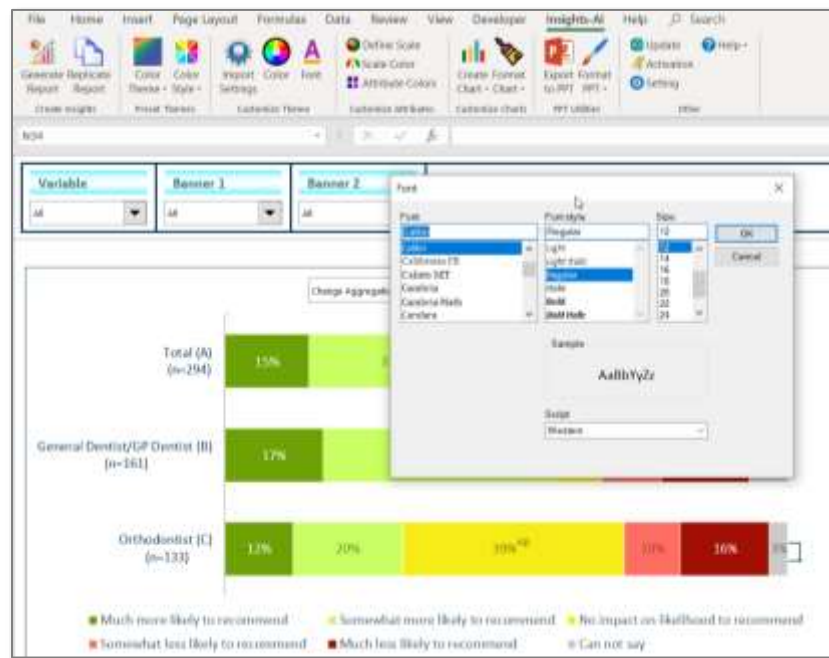
Color and Font Customization



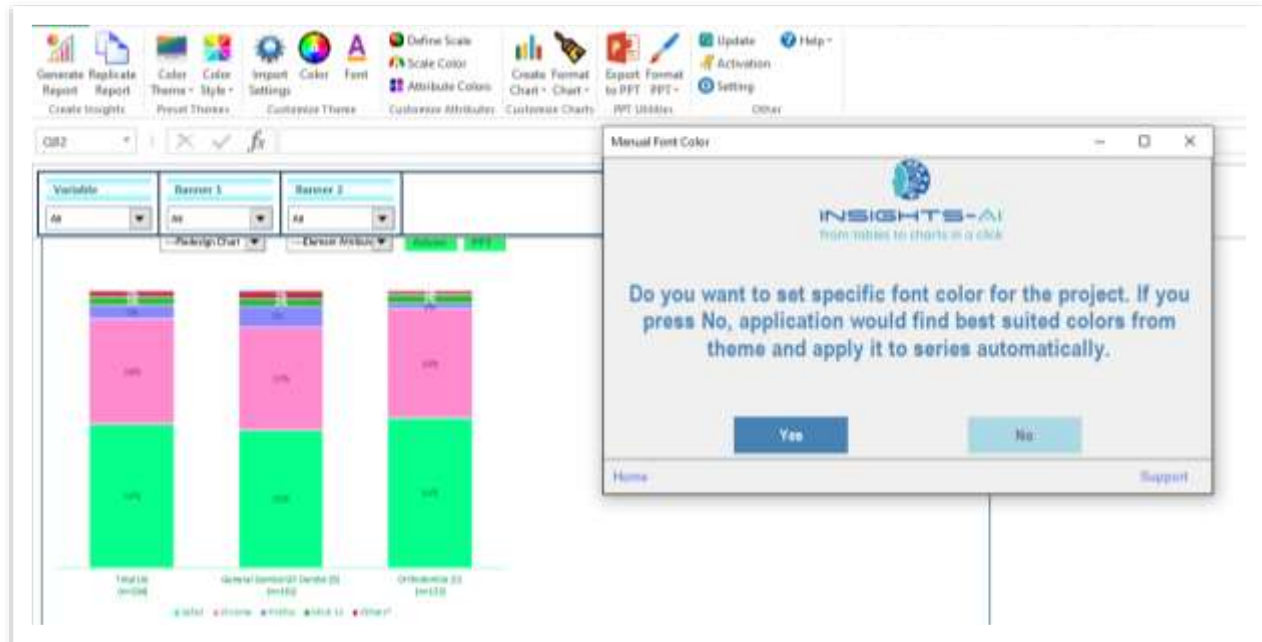
The Font option in the ribbon enables customization of the font color and style.



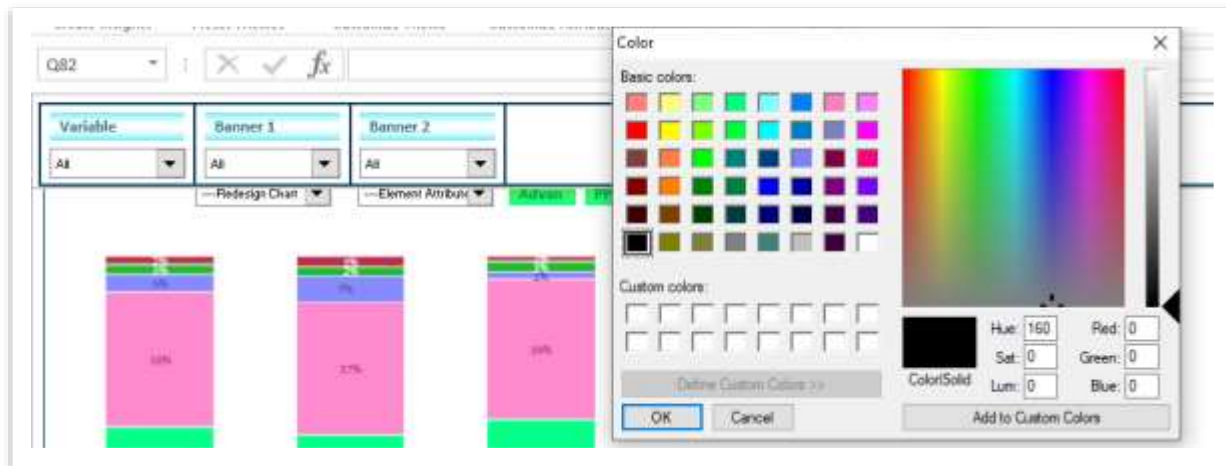
You can simply select the desired font and the corresponding size from the pop-up.



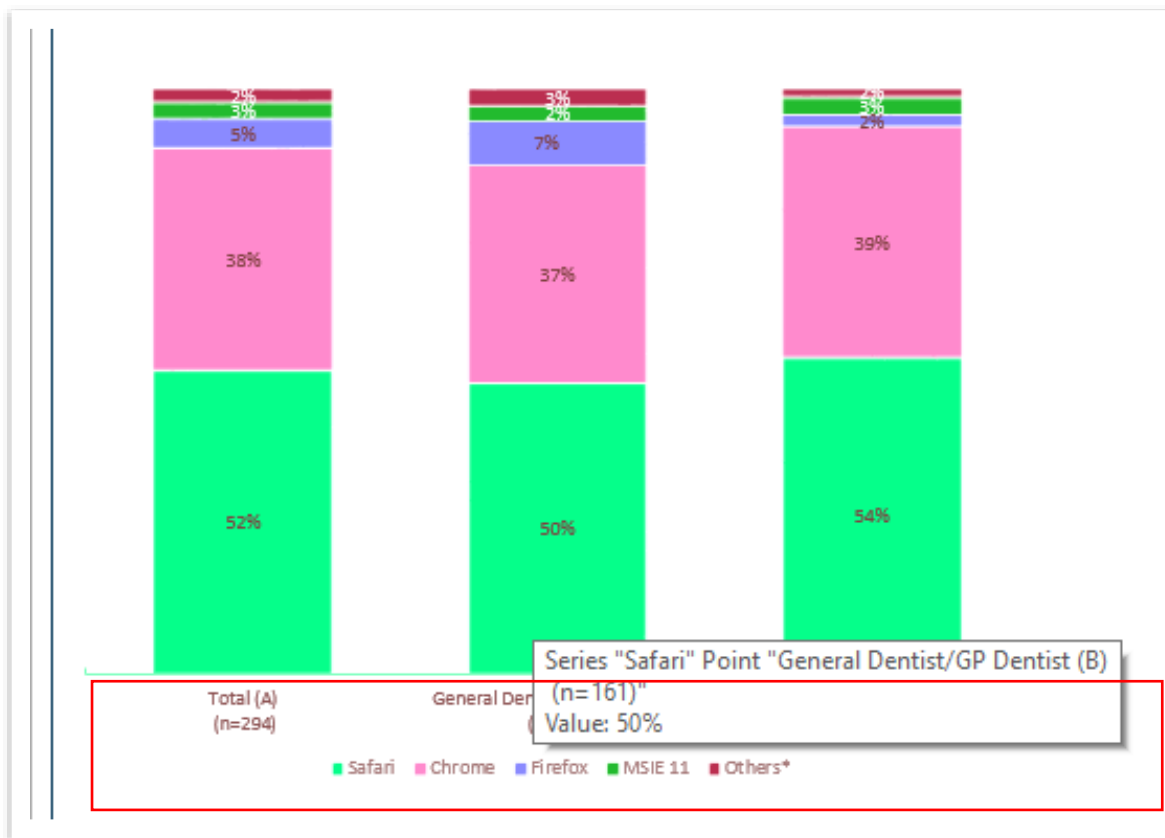
Usually, the application renders the primary color of the theme as the font color. However, the it also enables the user to select a specific font color.



Select the desired font color from the color input prompt.



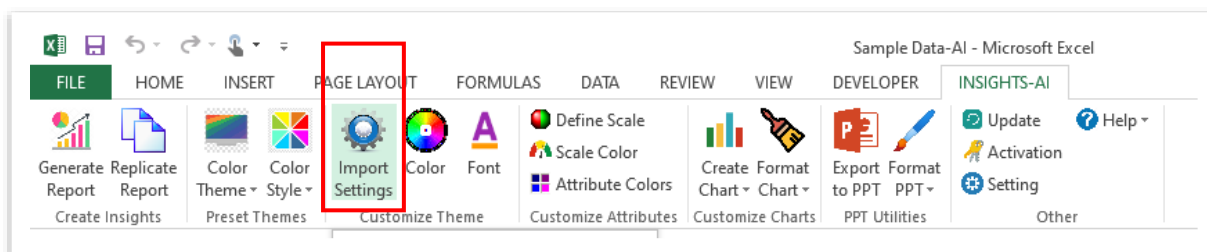
The preferred color will result into the new font color as shown below:



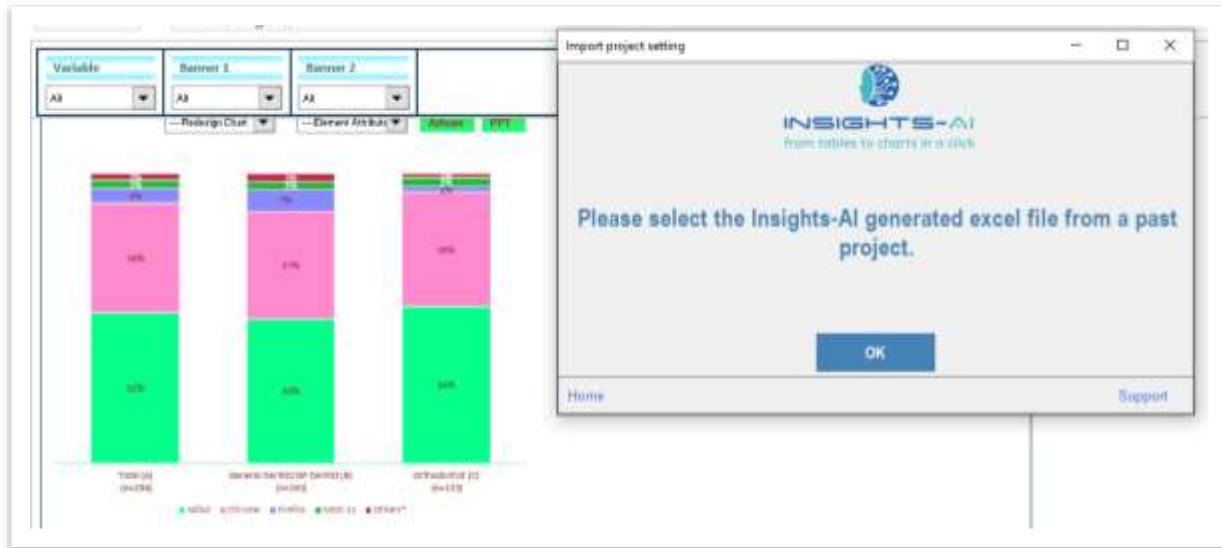
Import Settings

The Insights-AI application offers many advanced settings in terms of custom colors and fonts, custom rating scale colors etc. To keep a consistent theme across projects, Insights-AI offers feature to import previously saved settings-.

To apply the settings from a past document or project, click on "Import settings".

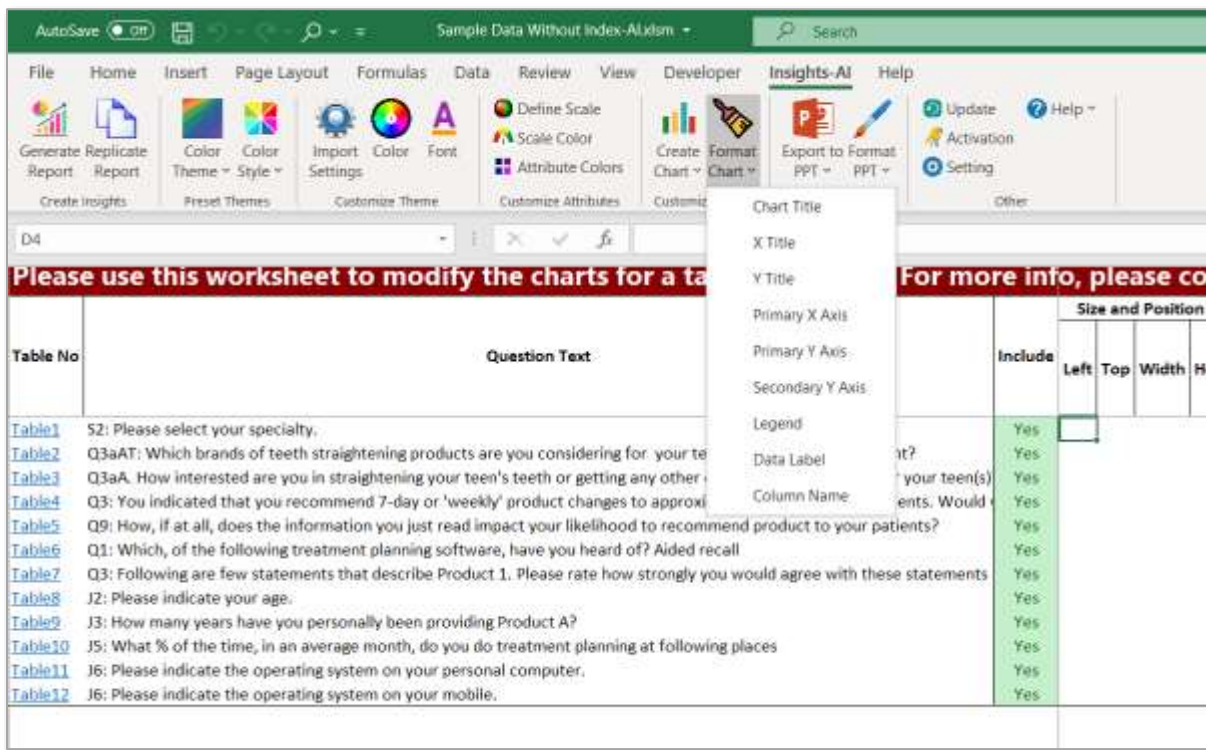


Select the Insights-AI generated file from your computer system to incorporate the settings into the current report.



Color and font of chart elements

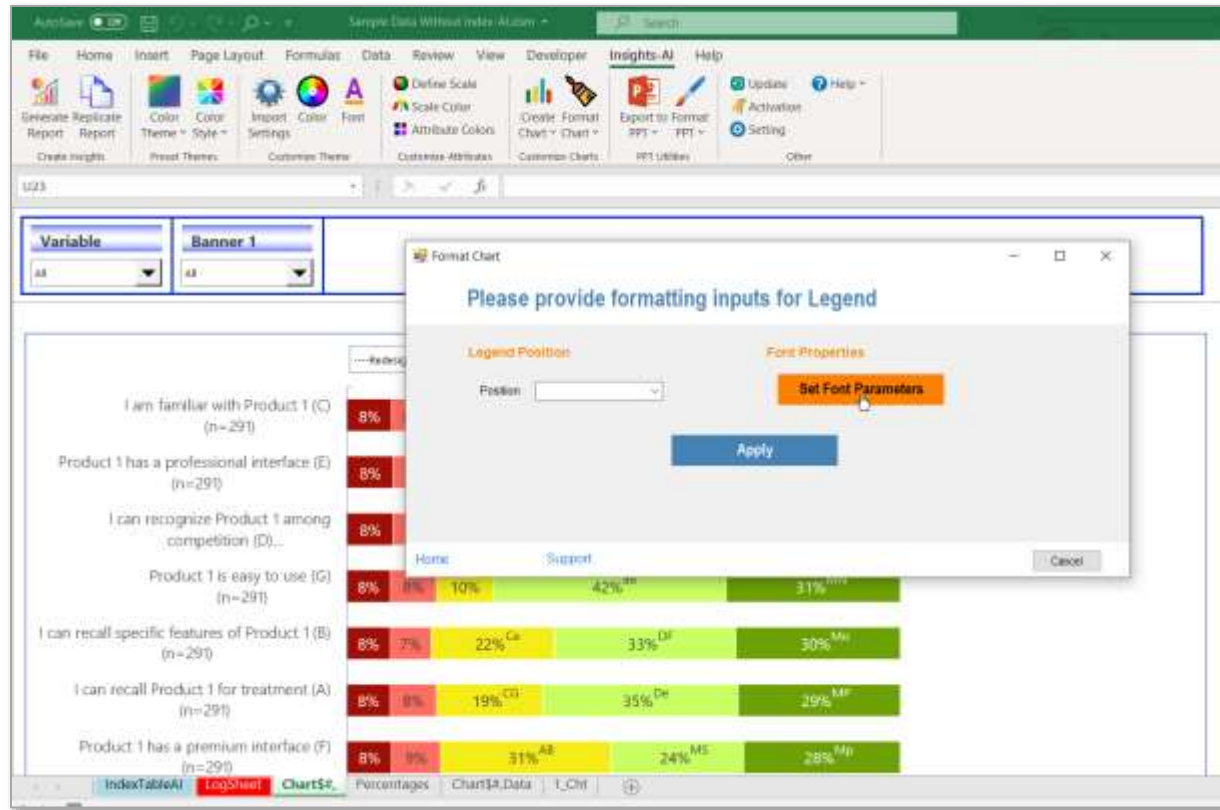
The application offers capability to set the color and font of a chart element like legend, title through the report in the Insights-AI Excel ribbon. You can use “Format Chart” buttons to set the desired style to the required chart element.



The screenshot shows the Insights-AI Excel ribbon with the 'Format Chart' dropdown menu open. The menu options are: Chart Title, X Title, Y Title, Primary X Axis, Primary Y Axis, Secondary Y Axis, Legend, Data Label, and Column Name. The background shows a table with 12 columns and 12 rows, with the first column labeled 'Table No' and the second column labeled 'Question Text'. The table contains various questions and their corresponding 'Yes' or 'No' answers.

Table No	Question Text	Include	Left	Top	Width	Height
Table1	S2: Please select your specialty.	Yes				
Table2	Q3aAT: Which brands of teeth straightening products are you considering for your teen(s)?	Yes				
Table3	Q3aA: How interested are you in straightening your teen's teeth or getting any other treatment?	Yes				
Table4	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately 70% of your teen(s). Would you recommend product changes to your patients?	Yes				
Table5	Q9: How, if at all, does the information you just read impact your likelihood to recommend product to your patients?	Yes				
Table6	Q1: Which, of the following treatment planning software, have you heard of? Aided recall	Yes				
Table7	Q3: Following are few statements that describe Product 1. Please rate how strongly you would agree with these statements	Yes				
Table8	J2: Please indicate your age.	Yes				
Table9	J3: How many years have you personally been providing Product A?	Yes				
Table10	J5: What % of the time, in an average month, do you do treatment planning at following places	Yes				
Table11	J6: Please indicate the operating system on your personal computer.	Yes				
Table12	J6: Please indicate the operating system on your mobile.	Yes				

For example, the “Legend” button enables users to set custom colors and fonts of the chart legend. The “Set Font Parameters” option allows users to set the font and color of the legend in the output report. The user can also set a fixed position of the legend by providing the desired position in “Position” dropdown.



The one important point to remember here is that once you apply the formatting inputs, changes do not reflect on the currently displayed charts. Once you set all the elements as desired and then generate new set of charts, then the new formatting is applied to the generated charts.

6. Customization of Chart Elements

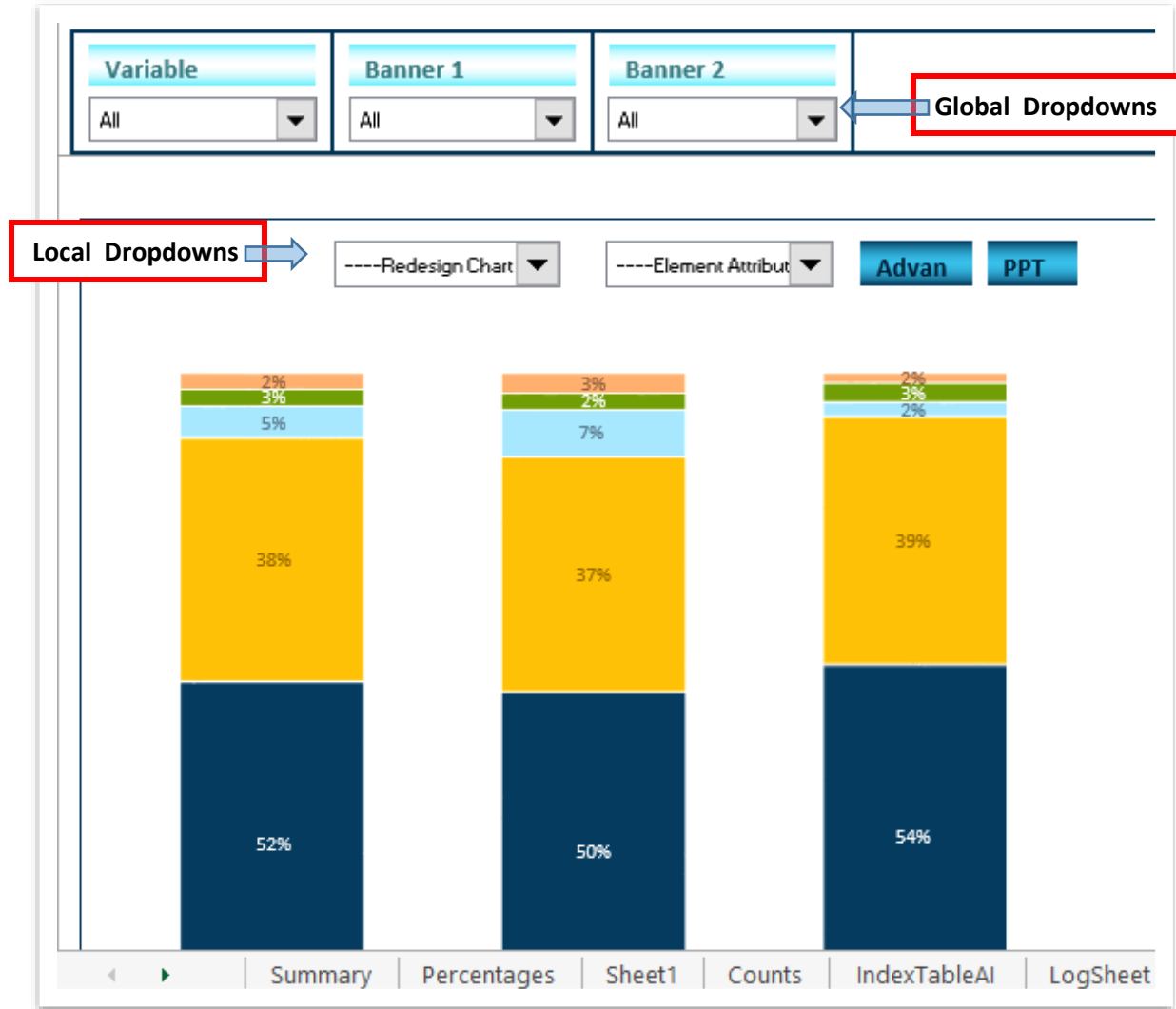
Insights-AI provides a simple user interface to customize different elements of the chart such as axes, chart type etc.

First things first, let us be on the same page - we have named rows in a data-table as Variables, while the columns are called Banners. As shown in the example, the 'All Countries' & 'US' are 'Banner 1' and 'Total, General Dentist, Orthodontists are 'Banner 2'. The different web browsers are Variables.

	All countries			US		
	Total	General Dentist	Orthodontist	Total	General Dentist	Orthodontist
Apple	10%	10%	10%	10%	10%	10%
Chrome	10%	10%	10%	10%	10%	10%
Firefox	10%	10%	10%	10%	10%	10%
Internet Explorer	10%	10%	10%	10%	10%	10%
Safari	10%	10%	10%	10%	10%	10%
Opera	10%	10%	10%	10%	10%	10%
Edge	10%	10%	10%	10%	10%	10%
Android	10%	10%	10%	10%	10%	10%
iOS	10%	10%	10%	10%	10%	10%
Windows	10%	10%	10%	10%	10%	10%
Mac OS	10%	10%	10%	10%	10%	10%
Linux	10%	10%	10%	10%	10%	10%
Other	10%	10%	10%	10%	10%	10%
Total	100%	100%	100%	100%	100%	100%

The Insights-AI offers the chart elements' customization capability through simple dropdowns. There are two types of Dropdowns

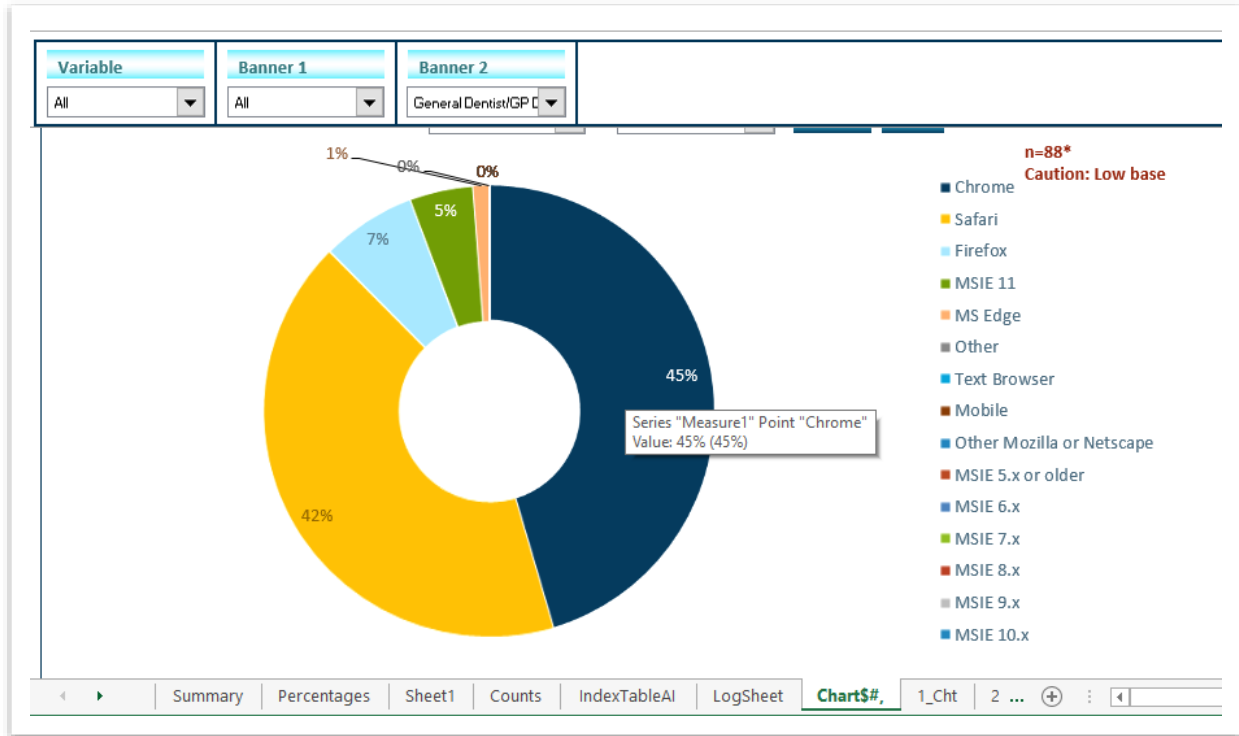
- a) Global Dropdown
- b) Local Dropdown



Global Dropdown

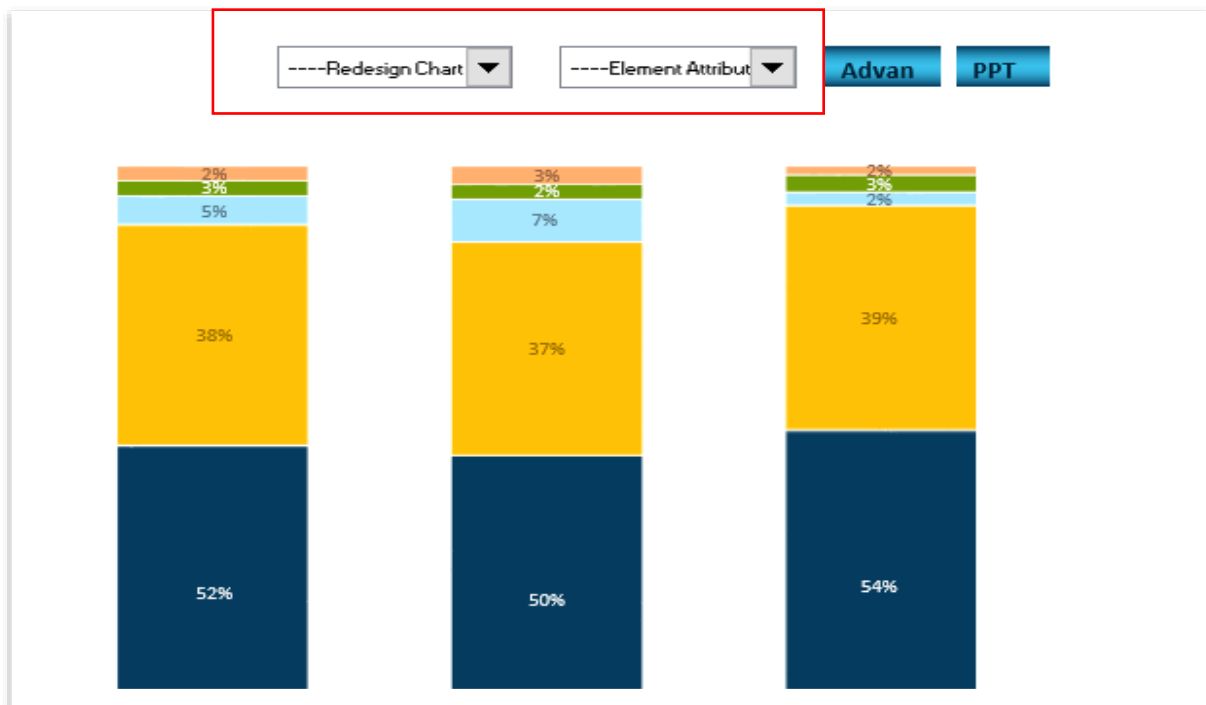
Global dropdown provides slice and dice, drill down, roll up, and pivot capability across variables and Banners. Changes in global dropdown apply to all the charts on the page.

In the following example, the application creates a dropdown for Variable, Banner 1 and Banner 2. You can either select all or any value to roll up or drill down further.

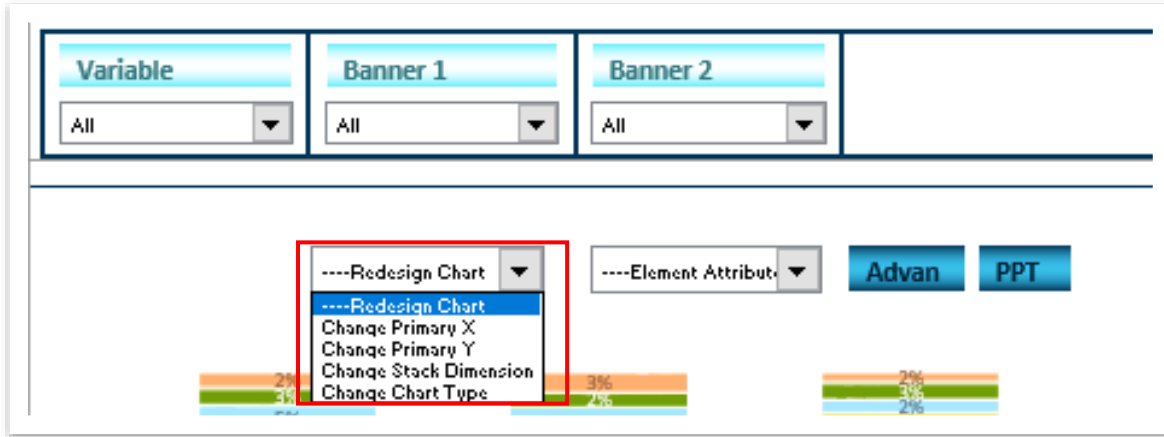


Local Dropdown

Local dropdowns are a pair of dropdowns as shown in the figure. The first dropdown lists the actions one can do. Once any one of action is selected, the second dropdown populates the different alternatives available for the action.



Local dropdown allows the adaptation of elements like X & Y axis, stack dimension and chart type in the respective individual chart.

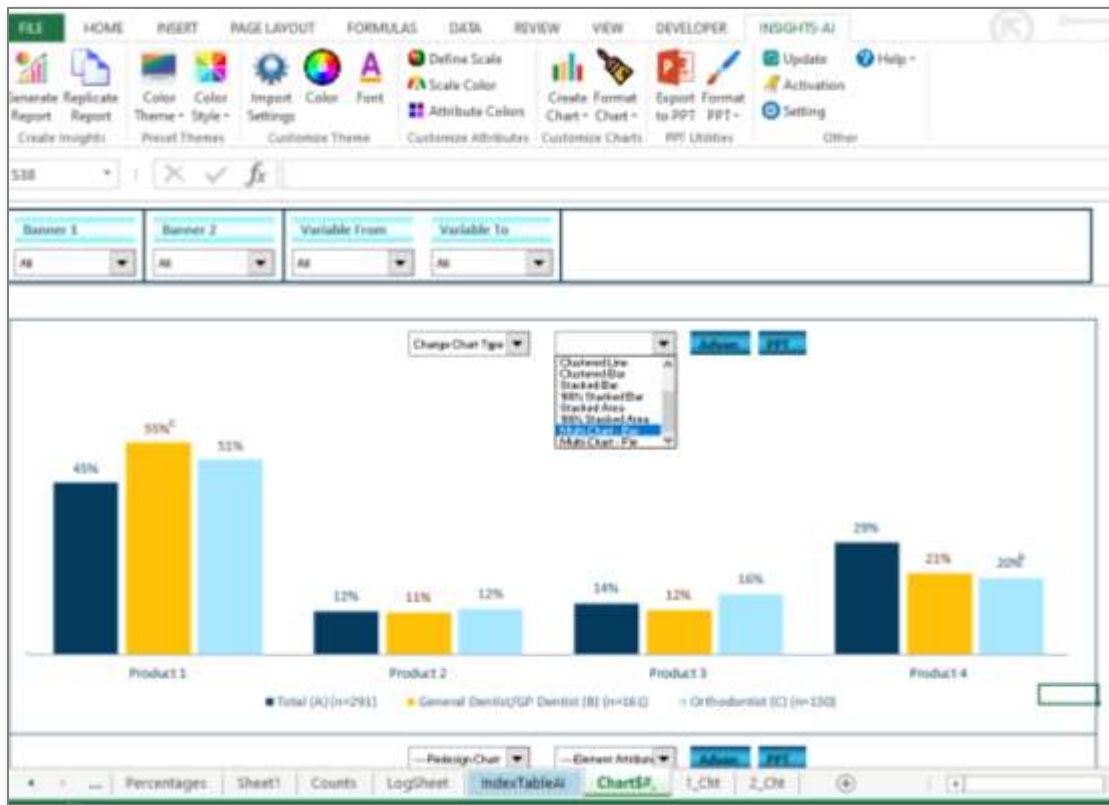


The dropdown offers many options for modifications in chart type, e.g. clustered column chart, stacked column, stacked bar chart and more, as shown in the example below.

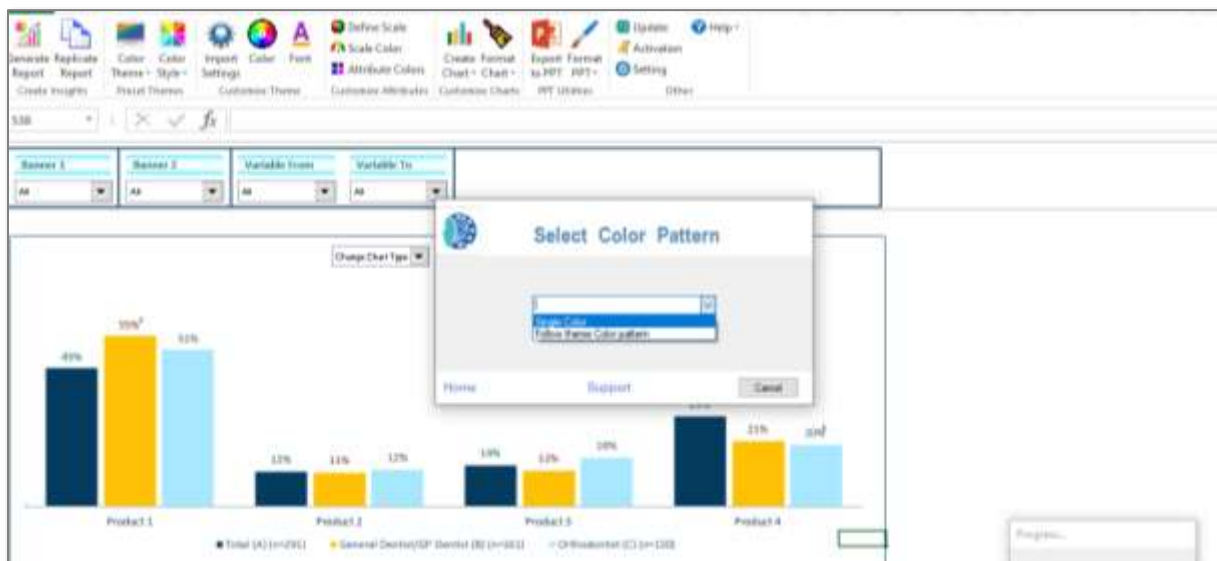


Multi-chart Bar

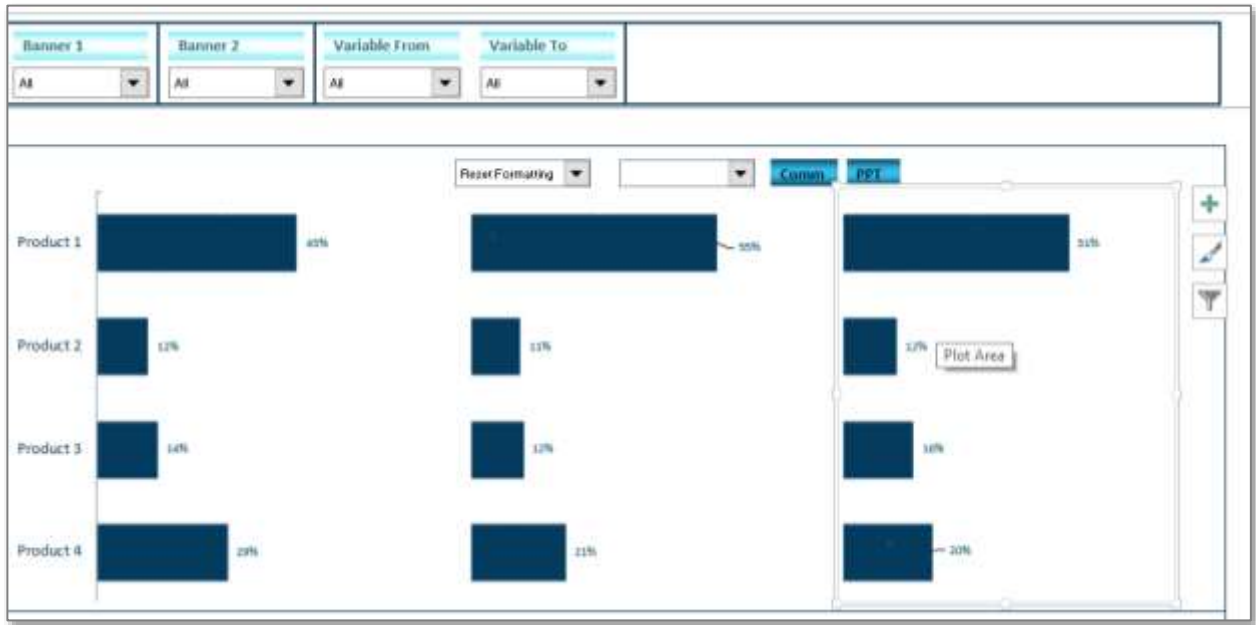
Multi chart bar type is an advanced type of chart and it creates multiple parallel charts with common axis to facilitate easy comparison in case of abundant data; for e.g. you could show difference in attributes rating across multiple brands.



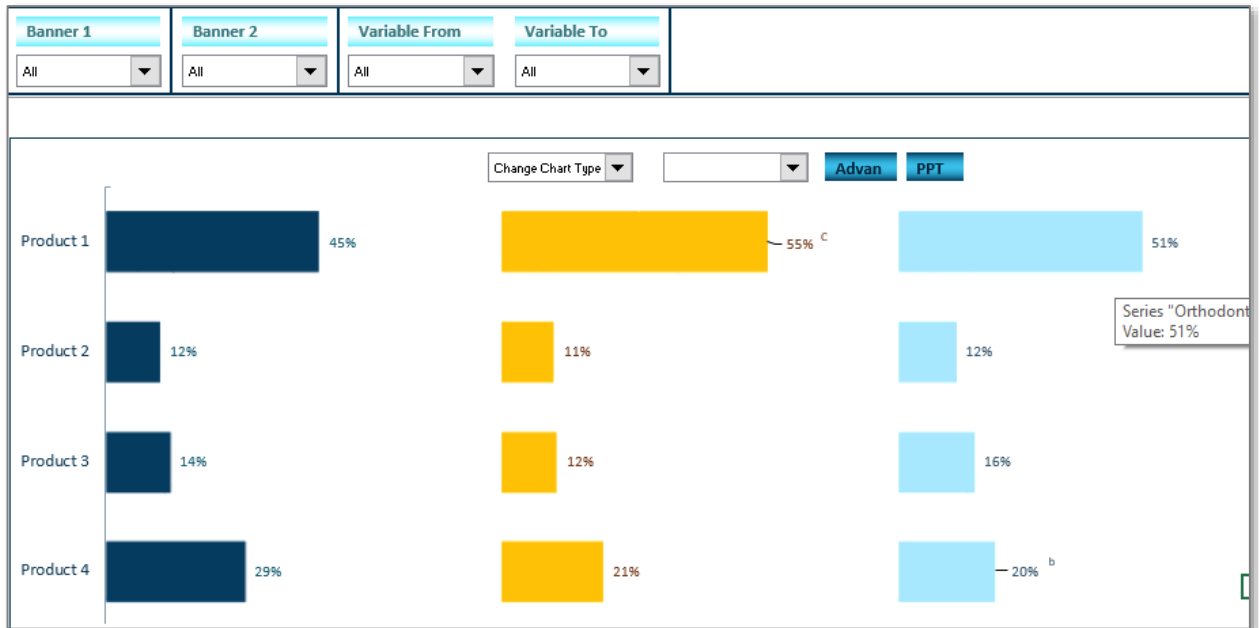
The application allows you to set the single-color for multiple charts or to follow the color theme of the project.



If you select “Single Color”, you get the following visuals in the shade of the first color.

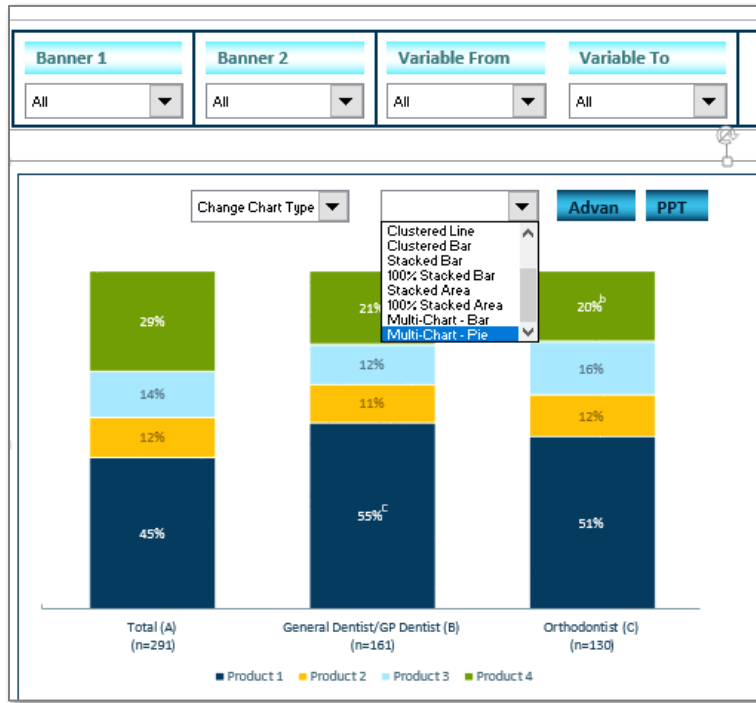


When you select ‘Follow theme color pattern’, the application applies different colors from color theme to different charts.



Multi-chart Pie

Multi-chart Pie is another advanced type of chart and it creates multiple parallel pie charts to facilitate easy comparison in case of abundant data; for e.g. you could show difference in brand-wise composition of sales across different specialty.

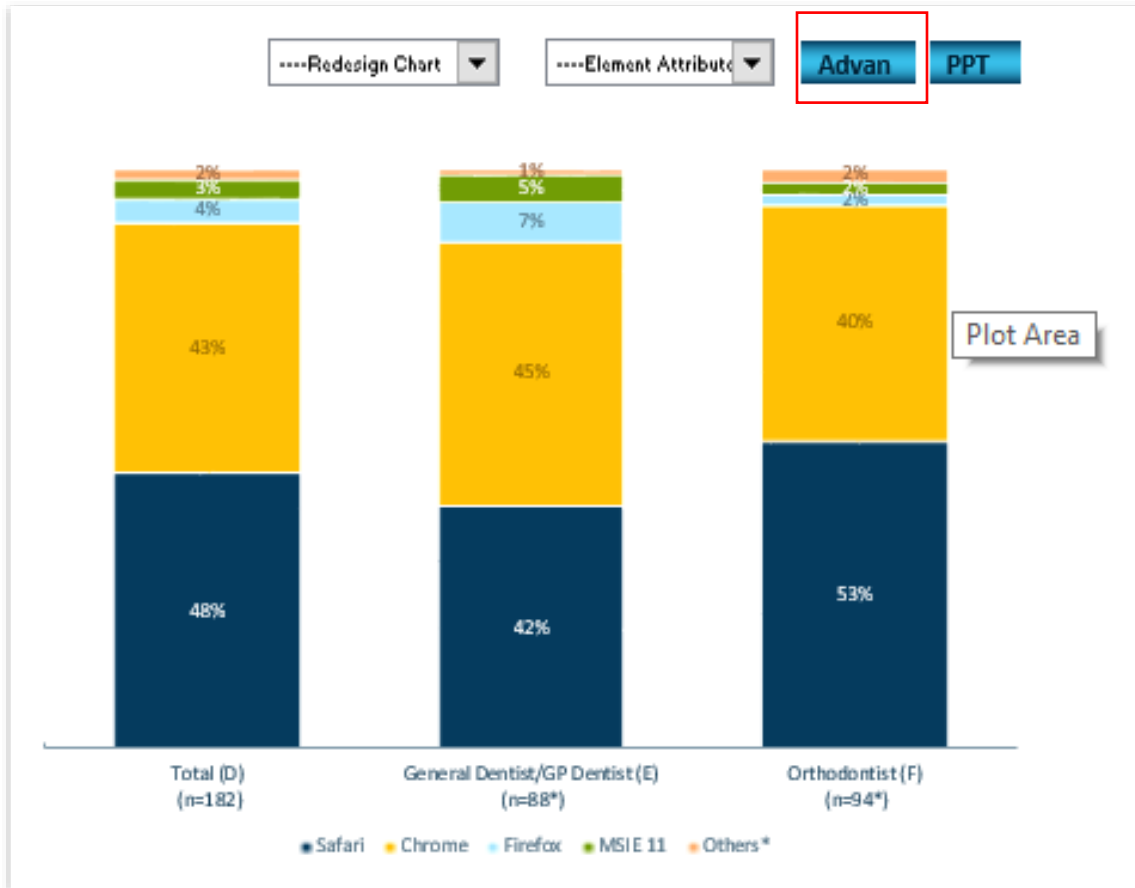


Once you select the “Multi-Chart-Pie”, Insights-AI would create parallel pie charts as shown.

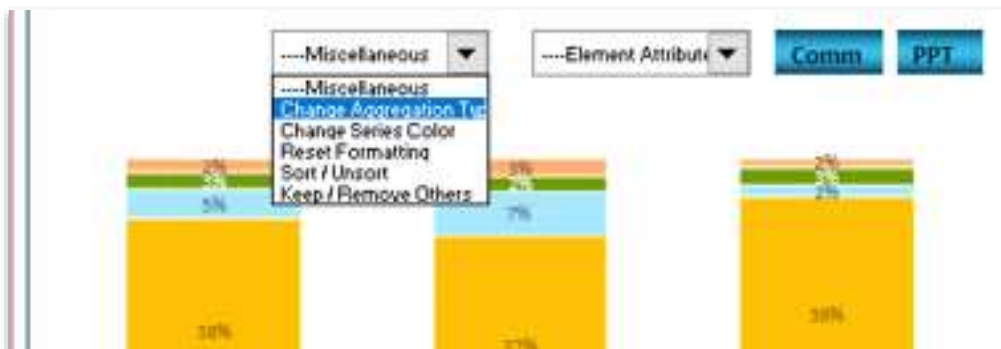


Advanced Customization options

The application shows most widely used options in default mode. However, one can access advanced options by clicking on advanced options button as shown below. This “Advanced Options” button is used to toggle the local dropdown options between common option and advanced options



The list of advanced options depends upon the chart type. An indicative list is shown below for stack chart.

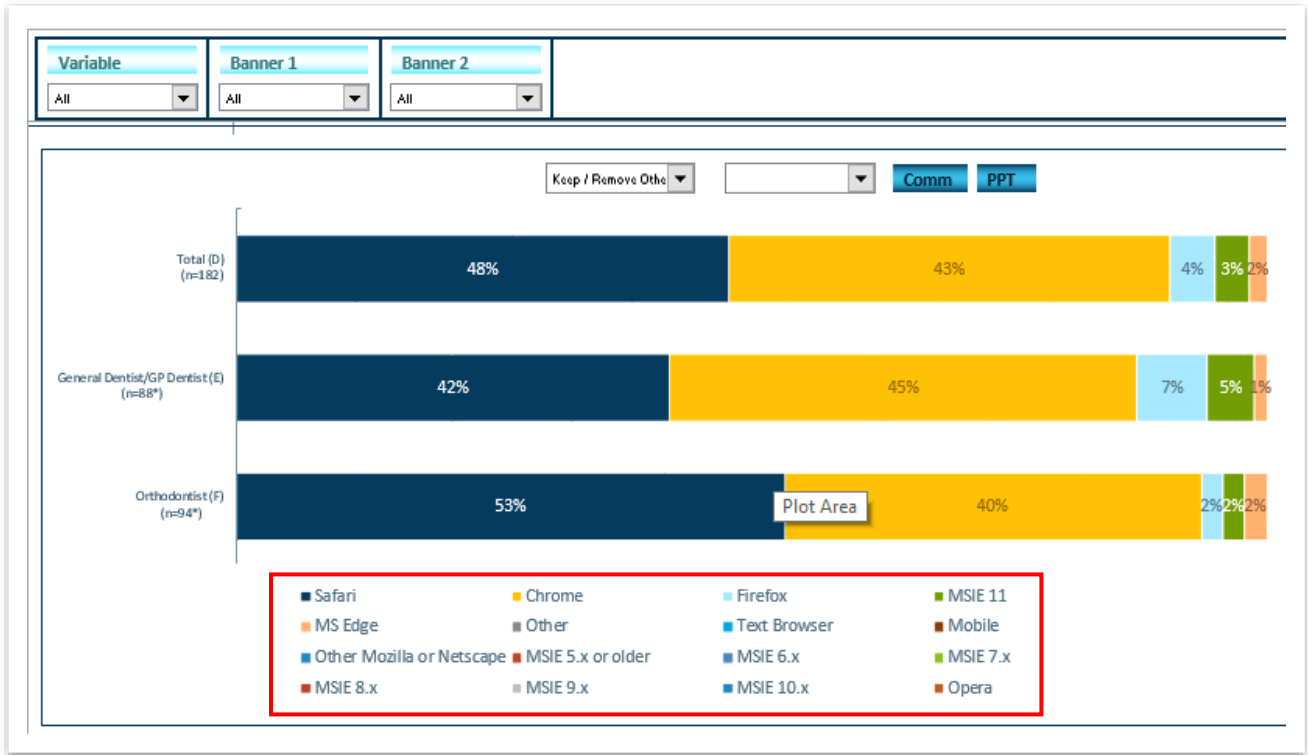


Keep / Remove Others

In cases where you have a long tail (e.g. too many brands mentioned at very low frequencies), the artificial intelligence engine intuitively clubs these data points into “others*”. If required, you can remove others by simply clicking on Keep / Remove Others option. In the following example, the application has clubbed all the web browsers contributing small percentage in usage into Others.

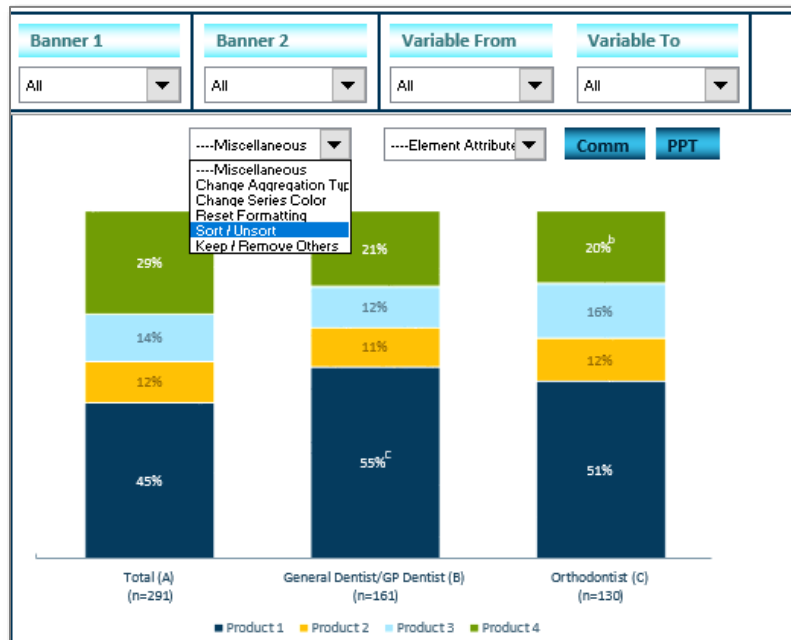


However if one want to display all the web browsers, please choose “Keep / Remove Others” in first dropdown and “Variable” in second dropdown and Insights-AI would remove the Others as shown below.



Sort & Unsort

The Insights-AI application also smartly determines whether data need to be sorted along X-Axis or stack dimension. If required, you can remove sort or sort data along any variable by clicking on Sort /Unsort option and defining required input.



Customization of Chart Elements

In the following example, the application has not sorted along the Variable i.e. products.



Once you click on the “Sort / Unsort” >> Variable, the application sorts the products in descending order as shown.



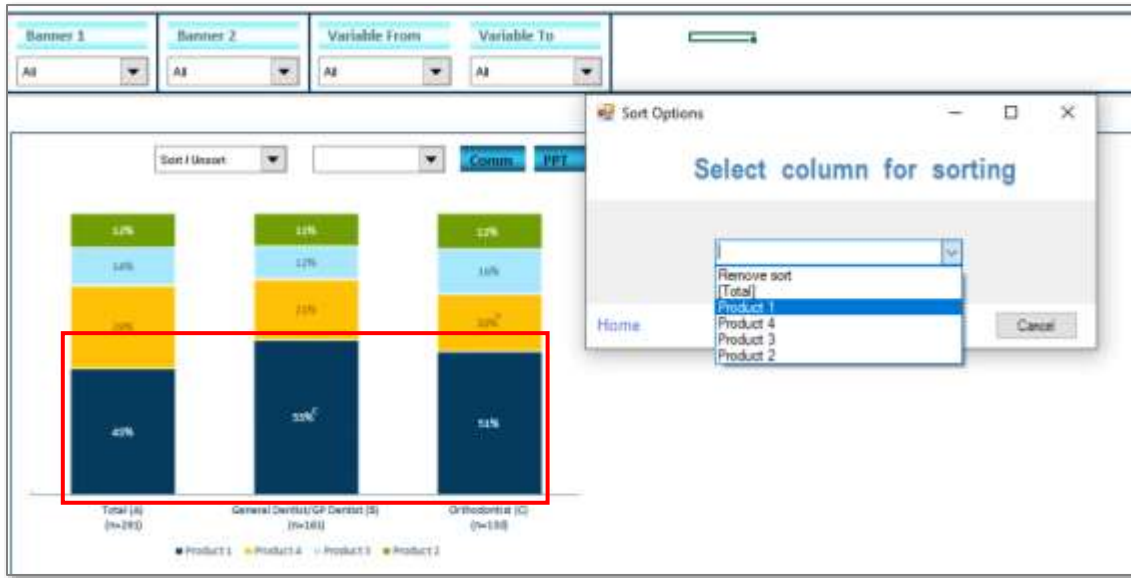
In the case of stack bar / column charts, Insights-AI facilitates sorting along banners as well.



In case of banner, the application provides further flexibility to sort along any individual product or along total as shown in the figure below.



Suppose we want to sort along “Product 1” in this example.



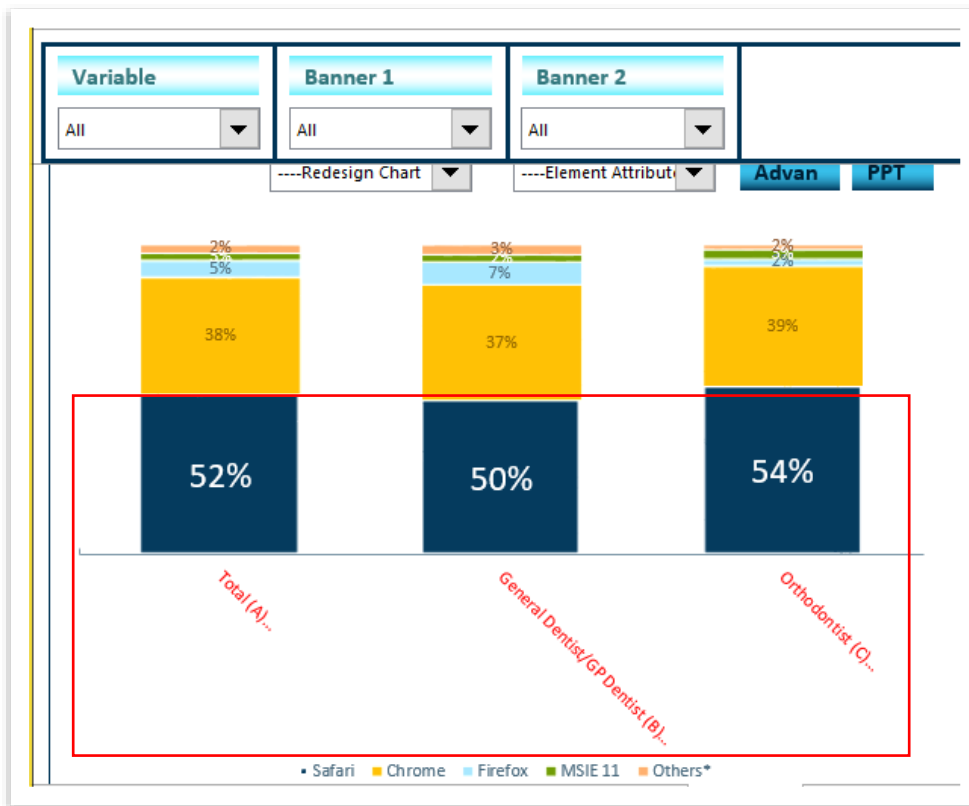
Then please select on the “Product 1” in “Sort Options” prompt and the application would perform the desired sorting.



Reset Formatting

Insights-AI offer many functionality and flexibility. Since the application is new, sometimes the chart formatting is disturbed after many operations. Reset formatting offers restoration of formatting in case there is any undesirable changes.

For example, In this case the X-axis labels as well as the datalabel for one series should be modified for better aesthetics. The “Reset Formatting” helps in restoring the formatting options.



Under first local dropdown select ‘Reset Formatting’ and ‘Apply Factory Settings’. This operation will undo those undesired chart formatting.



7. Table Specific Formatting

Exclusion and Inclusion of specific DP Table

The Insights-AI application provides user-friendly interface to analyze individual tables.

The excel workbook generated by Insights-AI contains a Master Sheet based on the Excel data table's Index. This Master Sheet is always colored light blue. This Sheet provides users the flexibility to customize the charts for a specific question or a specific data table.

The user can choose to include or exclude a table from the report by selecting the desired option under 'Include.' One can also work on a single question/table at a time by selecting the "Yes" option for that question/table and selecting the "No" for the remaining questions/tables.

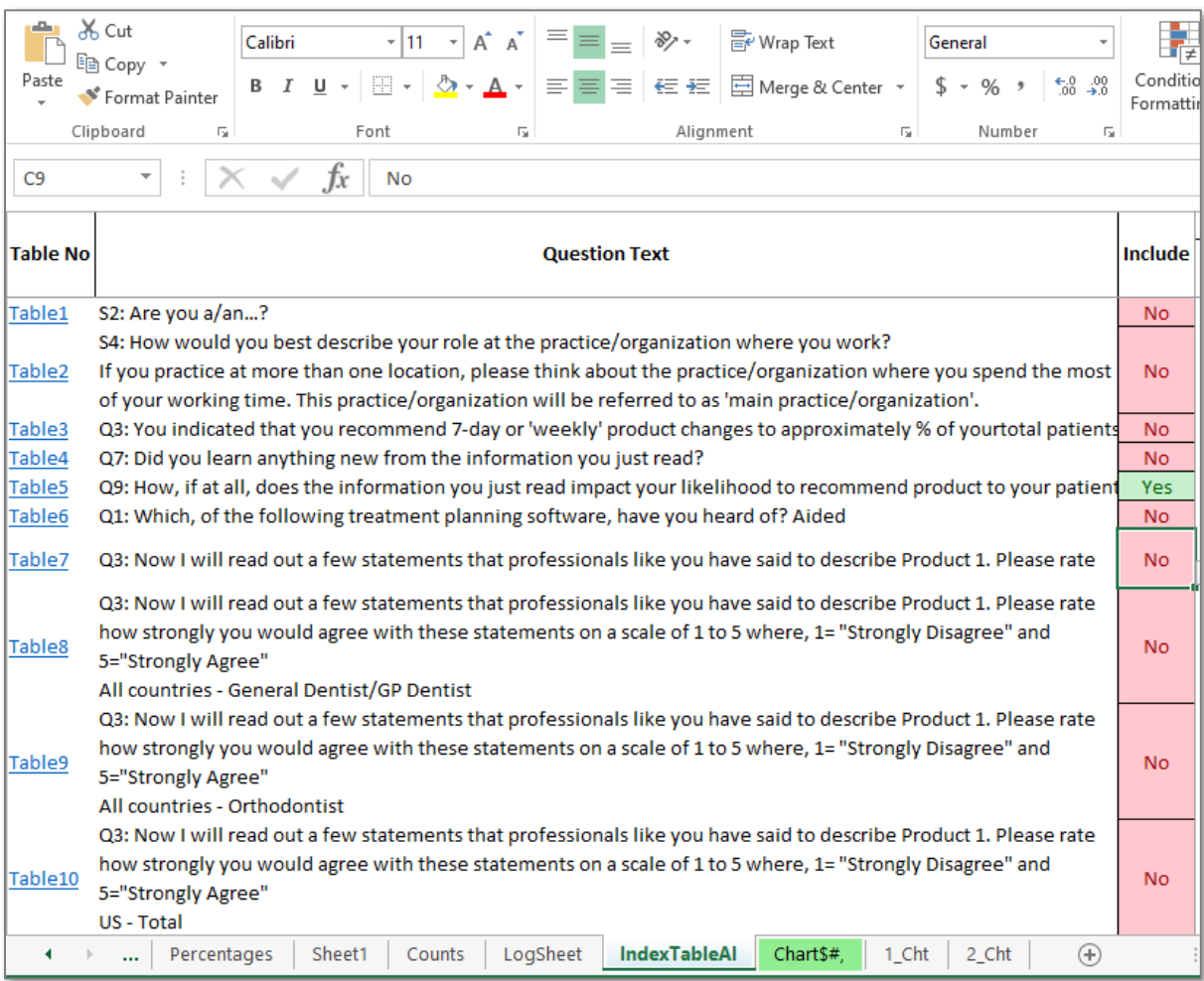


Table No	Question Text	Include
Table1	S2: Are you a/an...? S4: How would you best describe your role at the practice/organization where you work?	No
Table2	If you practice at more than one location, please think about the practice/organization where you spend the most of your working time. This practice/organization will be referred to as 'main practice/organization'.	No
Table3	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately % of yourtotal patients	No
Table4	Q7: Did you learn anything new from the information you just read?	No
Table5	Q9: How, if at all, does the information you just read impact your likelihood to recommend product to your patient	Yes
Table6	Q1: Which, of the following treatment planning software, have you heard of? Aided	No
Table7	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate	No
Table8	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No
Table9	All countries - General Dentist/GP Dentist Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No
Table10	All countries - Orthodontist Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No
	US - Total	No

After you select table/s, you can make the chart related formatting in the Index table itself. If you select only one table to include in report, the application allows you to customize charts in excel through global and local dropdowns without sending it to PowerPoint.

Size and Position

The application determines the ideal place to position the chart in the PowerPoint. Typically, you can change the size and position of chart in PowerPoint itself. However, there are few other elements like results of significance test, which need placement on slide in alignment with the chart. So, after resizing the chart on slide, aligning all these elements becomes little cumbersome.

Absolute Size Method

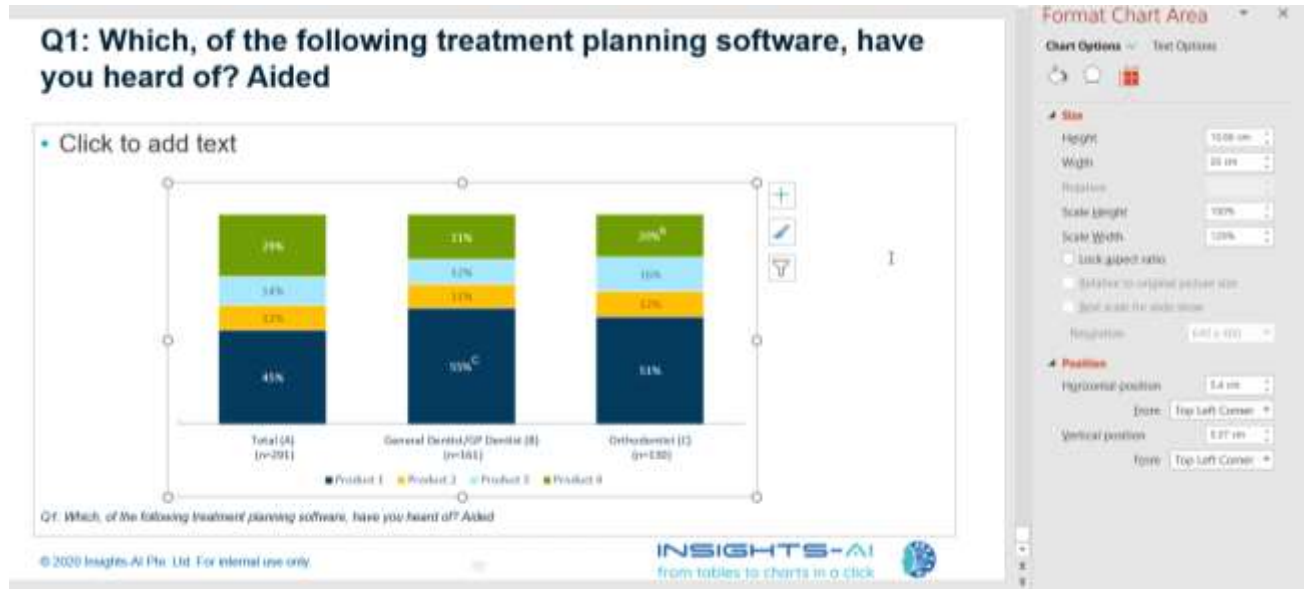
The Insights-AI application can help you in placing the chart at slide exactly where you want by proving size and position inputs in the Index table. First, find the size and position of chart on the slide by right clicking on the chart, navigate to “Format Chart Area” >> “Chart Options”.



Put these size and position parameters in Size and Position columns in index table for the required table.

Table No	Question Text	Include	Size and Position (in)			
			Left	Top	Width	Height
Table1	S2: Are you a/an...?	No				
Table2	S4: How would you best describe your role at the practice/organization where you work?	No				
Table3	If you practice at more than one location, please think about the practice/organization where you spend the most of your working time. This practice/organization will be referred to as 'main practice/organization'.	No				
Table4	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately % of your total patients. Would	No				
Table5	Q7: Did you learn anything new from the information you just read?	No				
Table6	Q9: How, if at all, does the information you just read impact your likelihood to recommend product to your patients?	No				
Table7	Q1: Which, of the following treatment planning software, have you heard of? Aided	Yes	5.4		20	
Table8	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5="Strongly Agree"	No				
Table9	All countries - Total					

You can provide all or few of the parameters for Left, Top, Width and Height of the chart. The application would then place the chart of desired size at the required position in the slide. The application would also place the supporting items like result of significance testing, text box for question etc. in alignment with the new position.



Relative Size Method

Often researchers have a clear idea of the relative position and size of a chart on the PowerPoint slide like they want to place a chart in bottom half of the slide with half height and full width. The Insights-AI has a provision to input size ratio like half of the height etc.

For the above example, we know that the chart should start at half of the height from top and it should be of half of the height. So, we put in 0.5 in the Top parameter and 0.5 in the Height parameter.

Table No	Question Text	Include	Size and Position (in)			
			Left	Top	Width	Height
Table1	S2: Are you a/an...?	No				
Table2	S4: How would you best describe your role at the practice/organization where you work?	No				
Table3	If you practice at more than one location, please think about the practice/organization where you spend the most of your working time. This practice/organization will be referred to as 'main practice/organization'.	No				
Table4	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately % of your total patients	No				
Table5	Q7: Did you learn anything new from the information you just read?	No				
Table6	Q9: How, if at all, does the information you just read impact your likelihood to recommend product to your patient	No				
Table7	Q1: Which, of the following treatment planning software, have you heard of? Aided	No				
Table8	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree"	Yes		0.5		0.5

The application would now place the chart into bottom half space of the slide main body as shown.



Changing Chart Type

The next important feature is changing chart parameters such as chart type and variable position on Axis. Based on its artificial intelligence algorithm, the Insights-AI application automatically decides the

Table No	Question Text	Include	Chart Parameters	
			Chart Type	Variable X vs Y
Table22	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable1: Quotas: Country Quota	No		
Table23	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable2: Quotas: Professional Type	No		
Table24	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable3: Quotas: Overall	No		
Table25	J5: What % of the time, in an average month, do you do treatment planning at.. vterm: Terminates	No		
Table26	Term S5 vdecLang: language tracker	No		
Table27	Term S5 vos: Operating System	No		
Table28	Term S5 vbrowse: Browser	Yes	Horizontal Bars	
Table29	Term S5 vmobiledevice: Mobile device category	No	Pie	
Table30	Term S5 vmobileos: Mobile OS	No	Horizontal Bars	
Table31	Term S5 status: Respondent status	No	Vertical Columns	
Table32	Term S5 vdropout: Last seen question	No	Line Chart	
		No	Area Chart	

best fit chart type for your data. However, if you want to customize the chart type, you have the choice to do so by selecting the option under Chart Type.

Select the chart type from the dropdown, as shown in the example. The application applies your preference and creates the chart as horizontal bars.



Changing Variable Position on Chart Axis

The rows corresponding to options of a questions are called 'Variable'. Here product 1, product 2 etc. are variables.

Q1: Which, of the following treatment planning softwares, have you heard of? Aided

	Total	All countries			US	
	A	General Dentist B	Orthodontist C	Total D	General Dentist E	Orthodontist F
Base	291	161	130	182	88	94
Product A	50%	50%	53%	55%	58%	53%
Product B	22%	21%	22%	22%	22%	22%
Product C	4%	2%	6%	4%	2%	6%
Product D	19%	19%	18%	18%	18%	19%

Table Specific Formatting

The applications' smart AI engine determines whether this variable should be the X-Axis of the chart or should it be the stack dimension. However, a user may also want to interchange the X-Axis and stack dimensions. In the index table sheet, under the "Variable X versus Z" column, one can select how we want to show the Variable, and then the charts will get updated accordingly.

Table No	Question Text	Include	Chart Parameters	
			Chart Type	Variable X vs Z
Table22	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable1: Quotas: Country Quota	No		
Table23	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable2: Quotas: Professional Type	No		
Table24	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable3: Quotas: Overall	No		
Table25	J5: What % of the time, in an average month, do you do treatment planning at.. vterm: Terminates	No		
Table26	Term 55 vdeclang: language tracker	No		
Table27	Term 55 vos: Operating System	No		
Table28	Term 55 vbrowse: Browser	Yes	Horizontal Bars	X
Table29	Term 55	No		

For example, in the current chart, Insight-AI determined that it is a composition chart. The banner specialty was charted at X-Axis and products were placed on stack dimension.

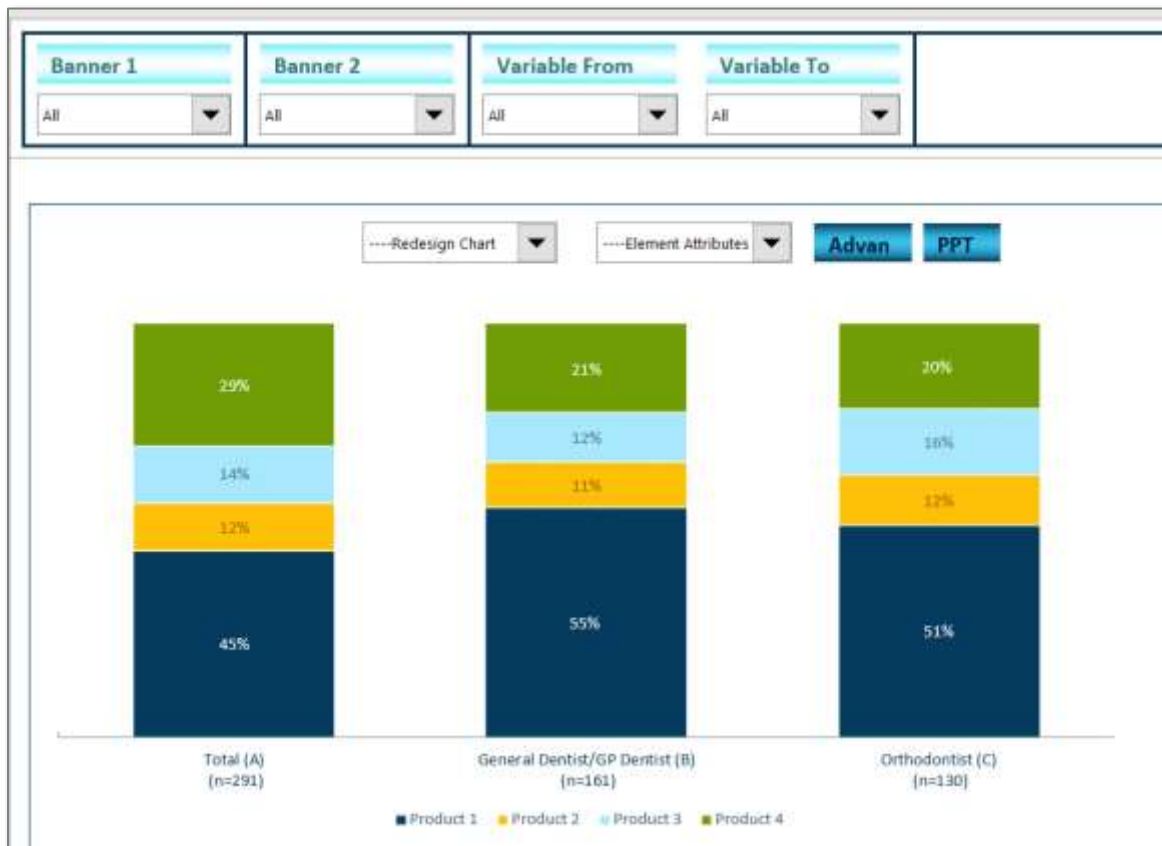


Table Specific Formatting

Let us say that we want to customize it so that variables are shown at the X-axis. Then select “x” in “Variable X Vs Z” column.

Table No	Question Text	Include	Chart Parameters		
			Chart Type	Variable X vs Z	Chart Title
Table1	S2: Are you a/an...?	No			
Table2	S4: How would you best describe your role at the practice/organization where you work? If you practice at more than one location, please think about the practice/organization where you spend the most of your working time. This practice/organization will be referred to as 'main practice/organization'.	No			
Table3	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately % of your total patients. Would you recommend 7-day or 'weekly' product changes to approximately % of your total patients?	No			
Table4	Q7: Did you learn anything new from the information you just read?	No			
Table5	Q9: Now, if at all, does the information you just read impact your likelihood to recommend product to your patients?	No			
Table6	Q1: Which, of the following treatment planning software, have you heard of? Aided	Yes		X	
Table7	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree" All countries - Total	No			
Table8	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree" All countries - General Dentist/GP Dentist	No			
Table9	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree" All countries - Orthodontist	No			
Table10	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree" US - Total	No			
Table11	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree"	No			

Once we add in X as the variable, the application creates charts wherein products have been placed in the X-Axis in the new charts.

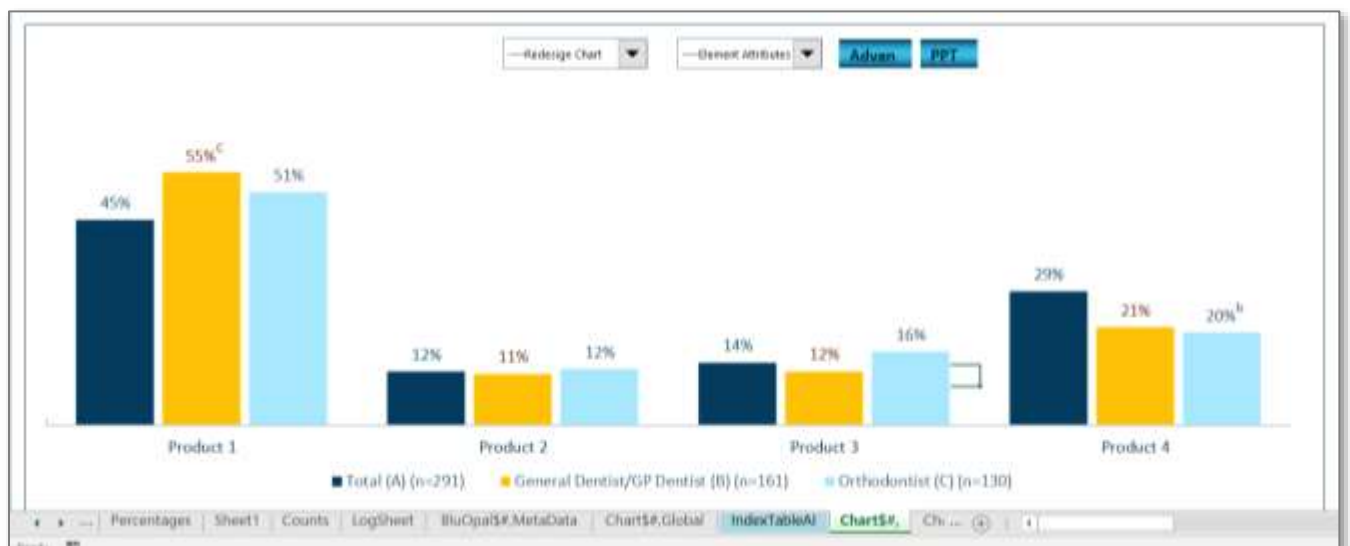


Chart Formatting

Under 'Chart Formatting', a user can redesign chart elements according to his preference. Chart elements include Chart title, Y-Axis, X-Axis, titles of axes, Legend, Datalabel, Marker and shadow.

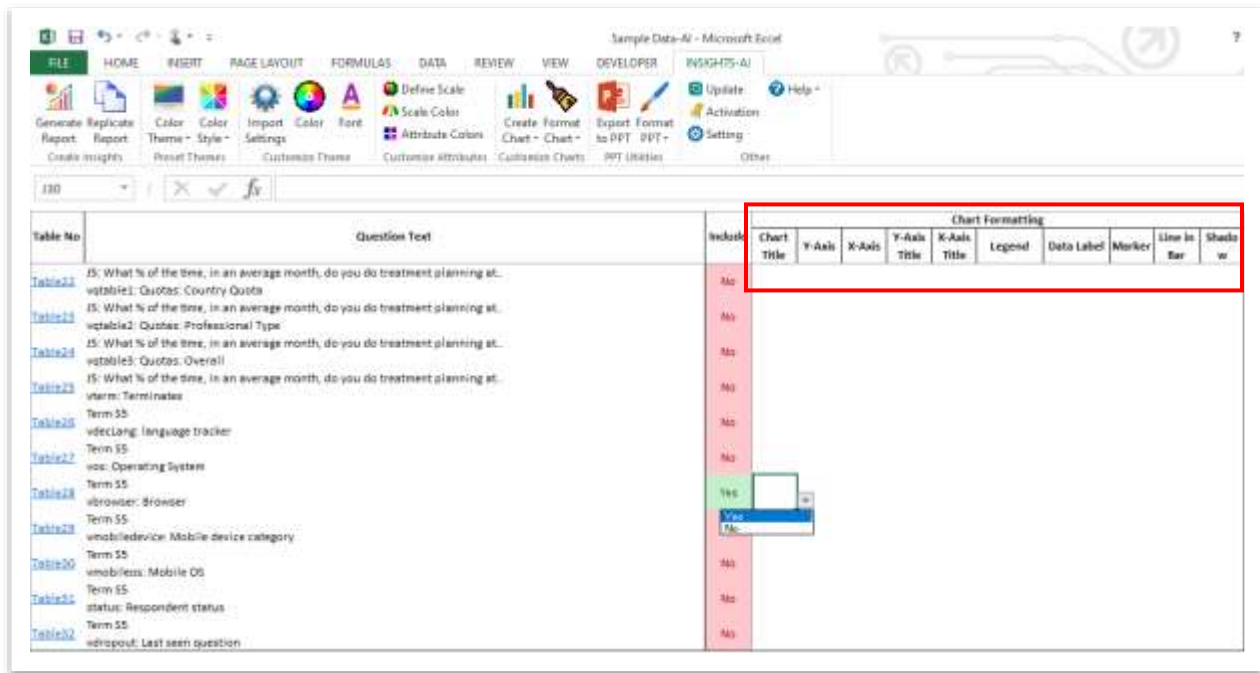


Table No	Question Text	Include
Table22	JS: What % of the time, in an average month, do you do treatment planning at... vqtable1: Quotas: Country Quota	No
Table23	JS: What % of the time, in an average month, do you do treatment planning at... vqtable2: Quotas: Professional Type	No
Table24	JS: What % of the time, in an average month, do you do treatment planning at... vqtable3: Quotas: Overall	No
Table25	JS: What % of the time, in an average month, do you do treatment planning at... vterm: Terminates	No
Table26	Term S5 vdecLang: language tracker	No
Table27	Term S5 vos: Operating System	No
Table28	Term S5 vbrowser: Browser	Yes
Table29	Term S5 vmobiledevice: Mobile device category	No
Table30	Term S5 vmobileos: Mobile OS	No
Table31	Term S5 status: Respondent status	No
Table32	Term S5 wdropout: Last seen question	No

Like in the given example, you can change the position of the legend by clicking the preferred option.

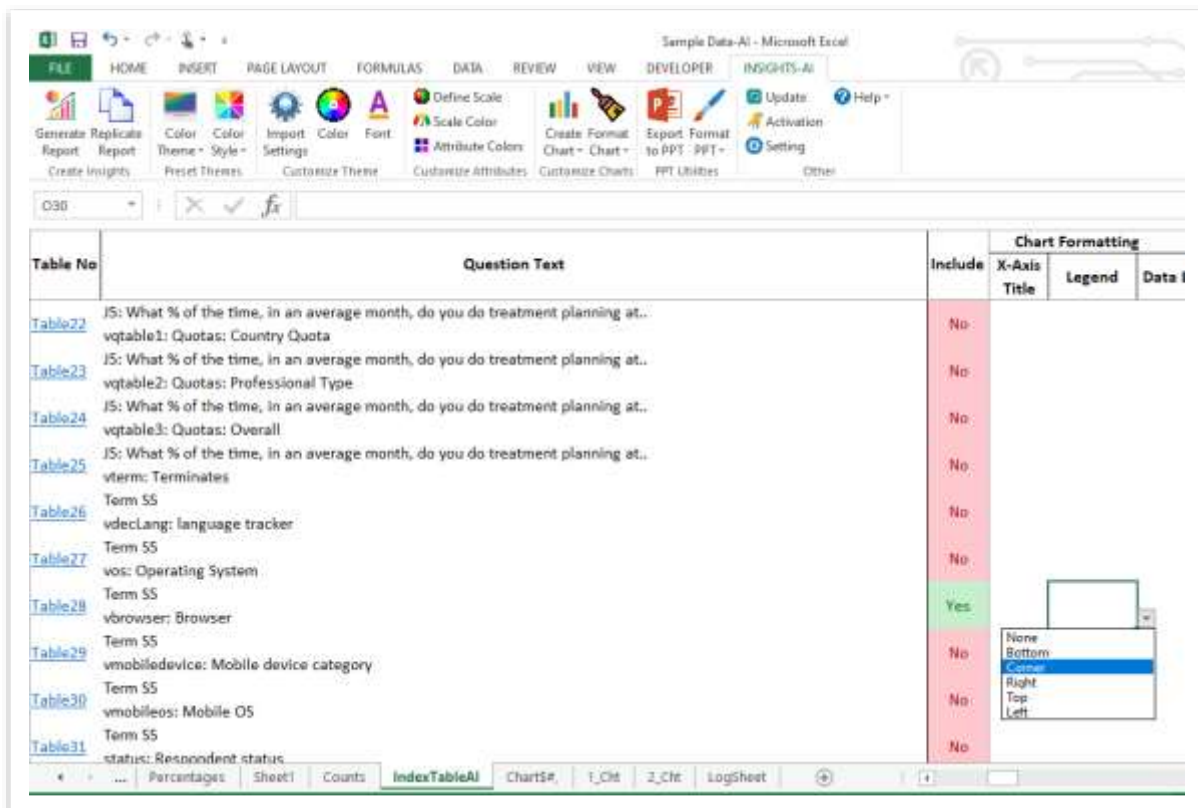


Table No	Question Text	Include
Table22	JS: What % of the time, in an average month, do you do treatment planning at... vqtable1: Quotas: Country Quota	No
Table23	JS: What % of the time, in an average month, do you do treatment planning at... vqtable2: Quotas: Professional Type	No
Table24	JS: What % of the time, in an average month, do you do treatment planning at... vqtable3: Quotas: Overall	No
Table25	JS: What % of the time, in an average month, do you do treatment planning at... vterm: Terminates	No
Table26	Term S5 vdecLang: language tracker	No
Table27	Term S5 vos: Operating System	No
Table28	Term S5 vbrowser: Browser	Yes
Table29	Term S5 vmobiledevice: Mobile device category	No
Table30	Term S5 vmobileos: Mobile OS	No
Table31	Term S5 status: Respondent status	No

The legend shows at the left top corner, as selected.



Other Options

Single Color

Single Color column provides an important feature of coloring a series of charts in different shades of the same color. A user can select any color based on the template and the charts would reflect different shades of that same color.

Usually the charts are shown in multiple color scheme, whether you selected the preset theme or customized your color theme. But in case you prefer that the charts be shown in the different shades of any single color then select that color and application would create charts for that table in different shades of same color. Here we select color no 2 i.e. brown.

Table No	Question Text	Include	Other Options		
			Single Color	Sort X	Sort Z
Table22	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable1: Quotas: Country Quota	No			
Table23	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable2: Quotas: Professional Type	No			
Table24	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable3: Quotas: Overall	No			
Table25	J5: What % of the time, in an average month, do you do treatment planning at.. vterm: Terminates	No			
Table26	Term S5 vdecLang: language tracker	No			
Table27	Term S5 vos: Operating System	No			
Table28	Term S5 vbrowse: Browser	Yes			
Table29	Term S5 vmobiledevice: Mobile device category				
Table30	Term S5 vmobileos: Mobile OS				
Table31	Term S5 status: Respondent status				

Once you select the color number, the cell is shaded in the respective color.

Table No	Question Text	Include	Other Options		
			Single Color	Sort X	Sort Z
Table22	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable1: Quotas: Country Quota	No			
Table23	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable2: Quotas: Professional Type	No			
Table24	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable3: Quotas: Overall	No			
Table25	J5: What % of the time, in an average month, do you do treatment planning at.. vterm: Terminates	No			
Table26	Term S5 vdecLang: language tracker	No			
Table27	Term S5 vos: Operating System	No			
Table28	Term S5 vbrowse: Browser	Yes	2		
Table29	Term S5 vmobiledevice: Mobile device category	No			
Table30	Term S5 vmobileos: Mobile OS	No			
Table31	Term S5 status: Respondent status	No			

Now, once you generate the charts, all the series would be in different shades of selected color i.e brown color here.



Sort X & Sort Z

The Sort / Unsort option is available in 'Local Dropdown' that it will sort or unsort the data in the specific individual chart. However, including sort or unsort option in the Index table will apply changes in all the charts of the selected table.

Table No	Question Text	Include	Other Options		
			Single Color	Sort X	Sort Z
Table22	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable1: Quotas: Country Quota	No			
Table23	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable2: Quotas: Professional Type	No			
Table24	J5: What % of the time, in an average month, do you do treatment planning at.. vqtable3: Quotas: Overall	No			
Table25	J5: What % of the time, in an average month, do you do treatment planning at.. vterm: Terminates	No			
Table26	Term SS vdeclang: language tracker	No			
Table27	Term SS vos: Operating System	No			
Table28	Term SS vbrowsers: Browser	Yes	2	Yes	
Table29	Term SS vmobiledevice: Mobile device category	No			
Table30	Term SS vmobileos: Mobile OS	No			
Table31	Term SS vstatus: Respondent status	No			

8. Customizing Brand / Scale Colors

The Insights-AI application provides a platform to define brand or country specific colors as well as color for rating scales.

Let us start with rating scales. Rating scale questions are quite common in the market survey questionnaire. The components of scale include number of points and respective text.

For example, a three-point questionnaire's responses may read as a) I am Much More likely to recommend, b) I am somewhat likely to recommend, and c) I am Much Less likely to recommend.

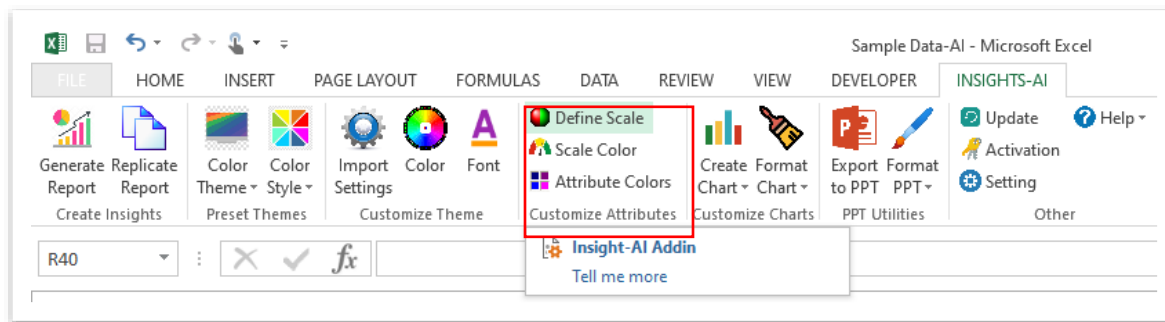
Another variation may read as a) I Strongly Agree, b) I neither agree nor disagree, and c) I Strongly Disagree.

In the following example which is a five-point questionnaire where the points on the scale read as:

- a) Much more likely to recommend
- b) Somewhat more likely to recommend
- c) No impact on likelihood to recommend
- d) Somewhat less likely to recommend
- e) Much less likely to recommend
- f) Can't Say

In general, the application identifies a rating scale question and renders default colors. However, sometimes the it may not identify a scale question correctly, or you may want to color the rating scales differently. You can customize the colors through Customize Attributes section in the Insights-AI ribbon.

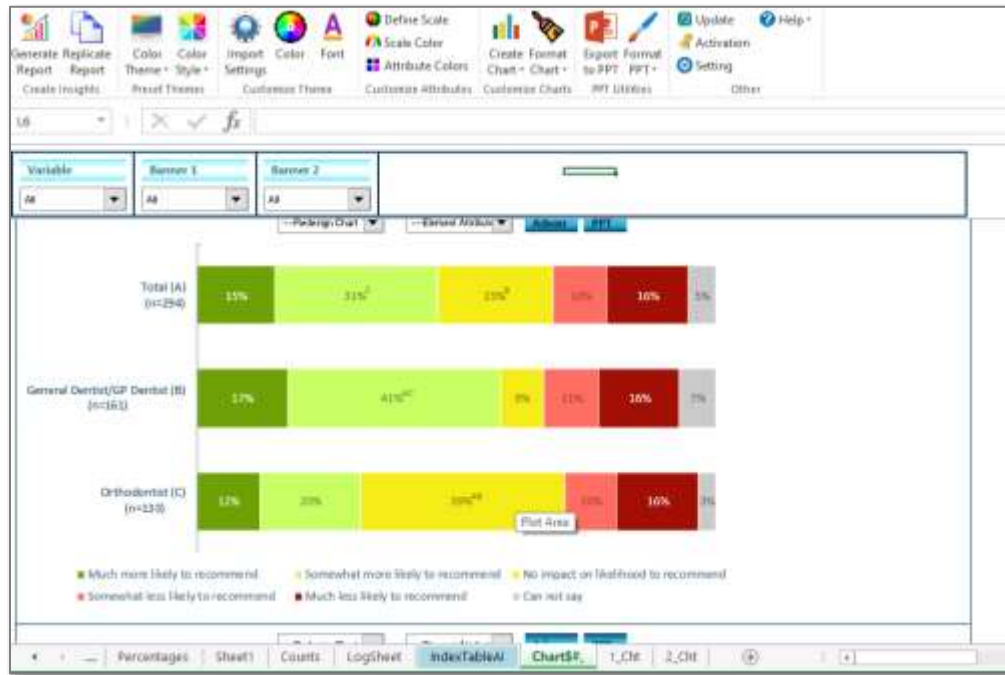
The Insights AI addresses this issue in two steps i.e. a) Define Scale and b) Scale Color.



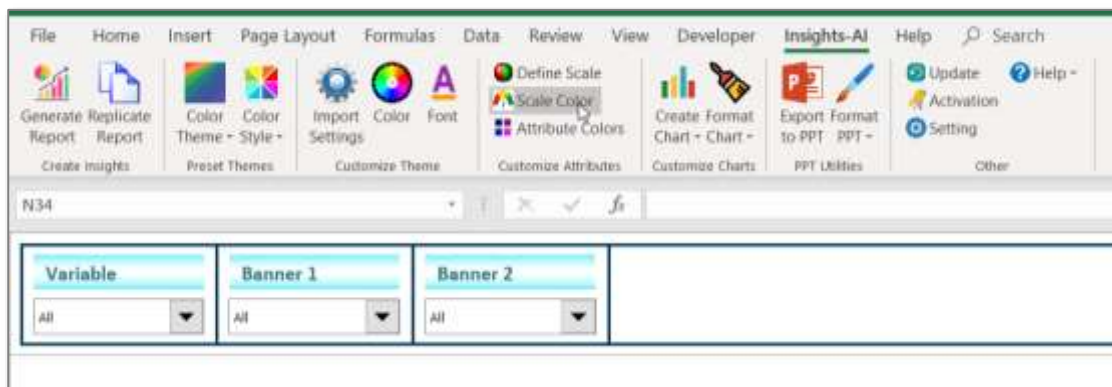
Scale Color

In the Scale Color, we can define the number of points in the scale and apply colors for each rating point.

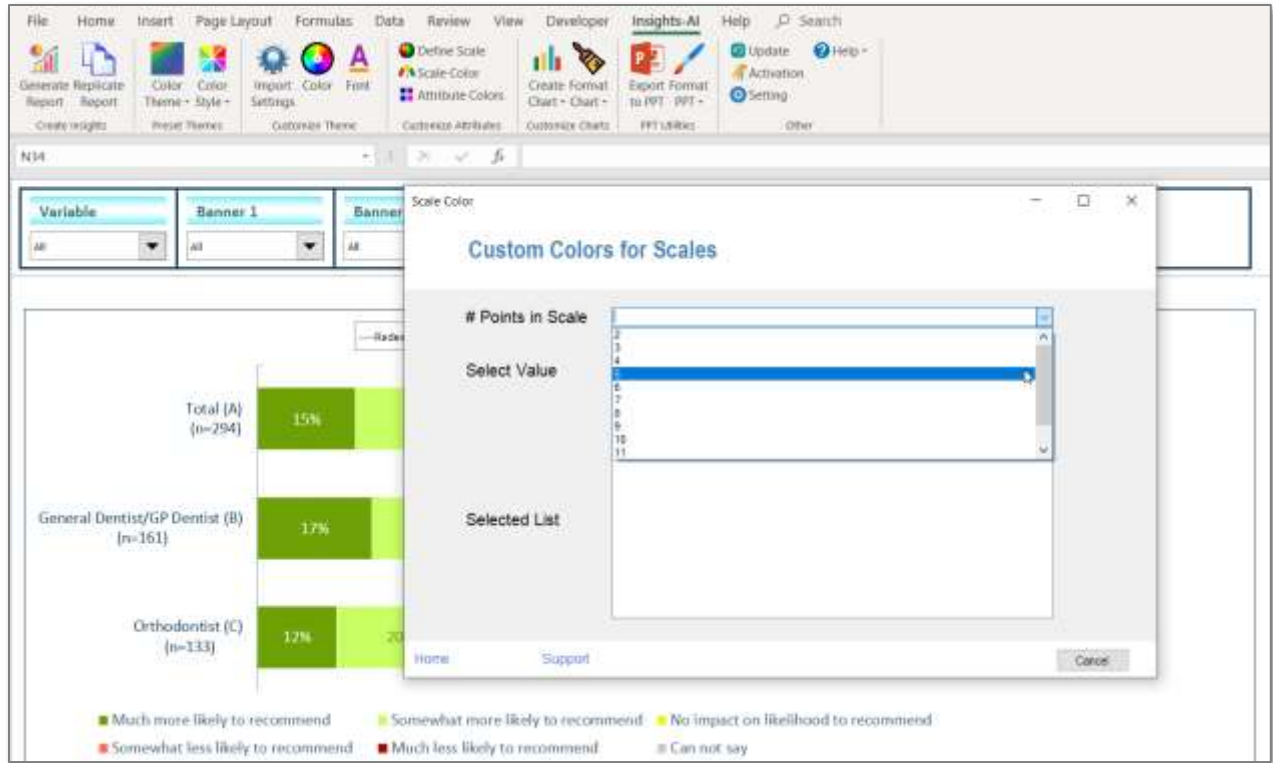
This illustrative example has a 5-point scale. The application identifies this rating scale question and creates a default color scheme. However, if you want to change the color scheme, you can easily do so.



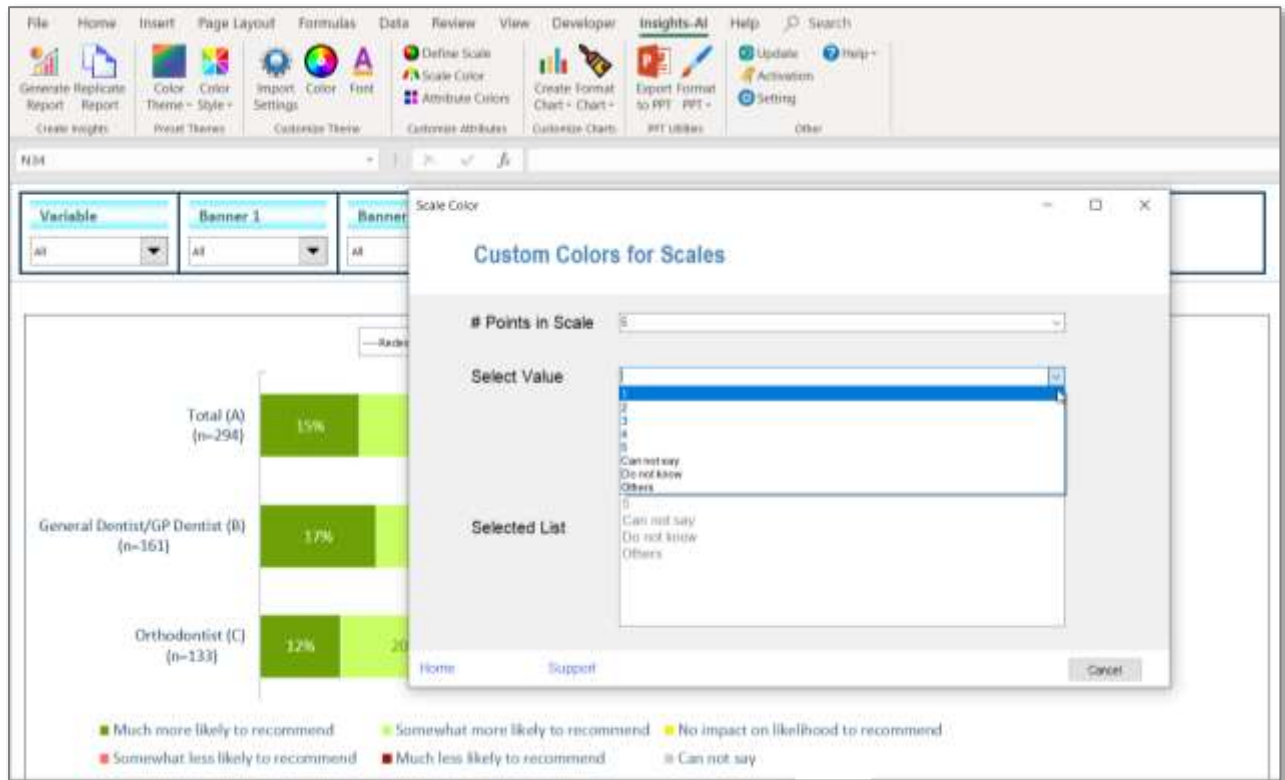
First click on the “Scale Color”.



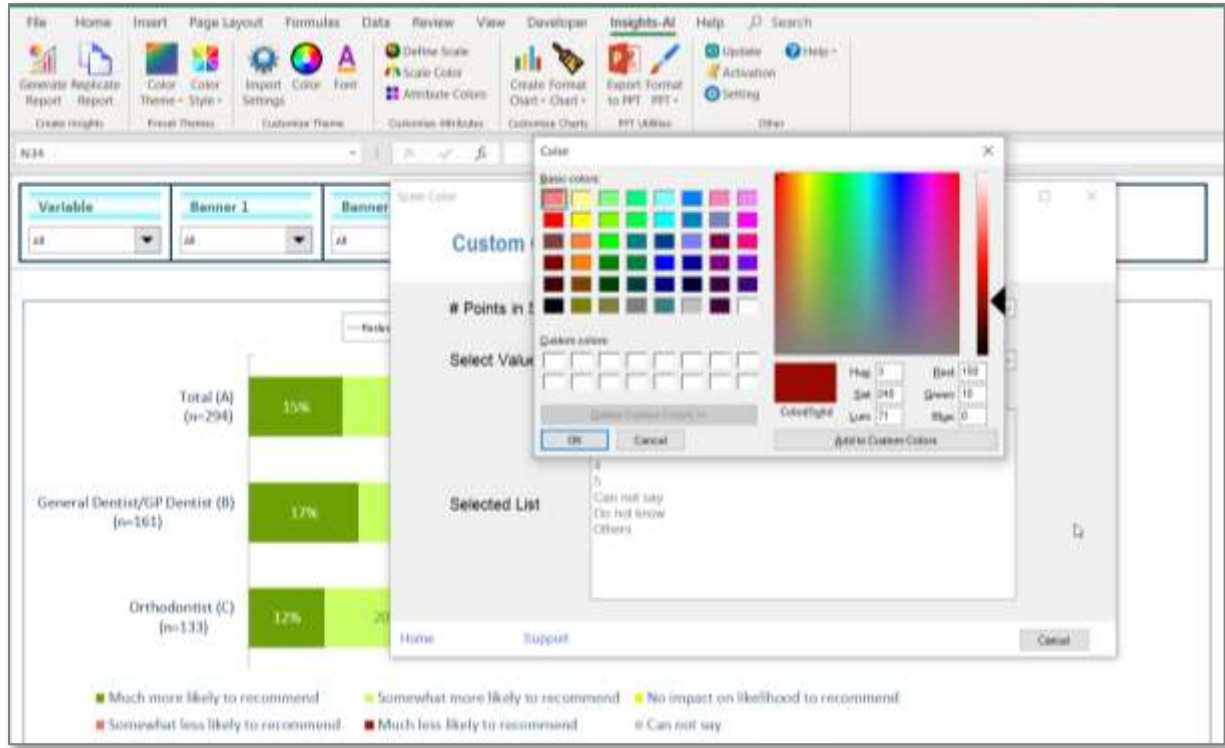
Then select 5 in “# Points in Scale” as this rating scale has 5 points.



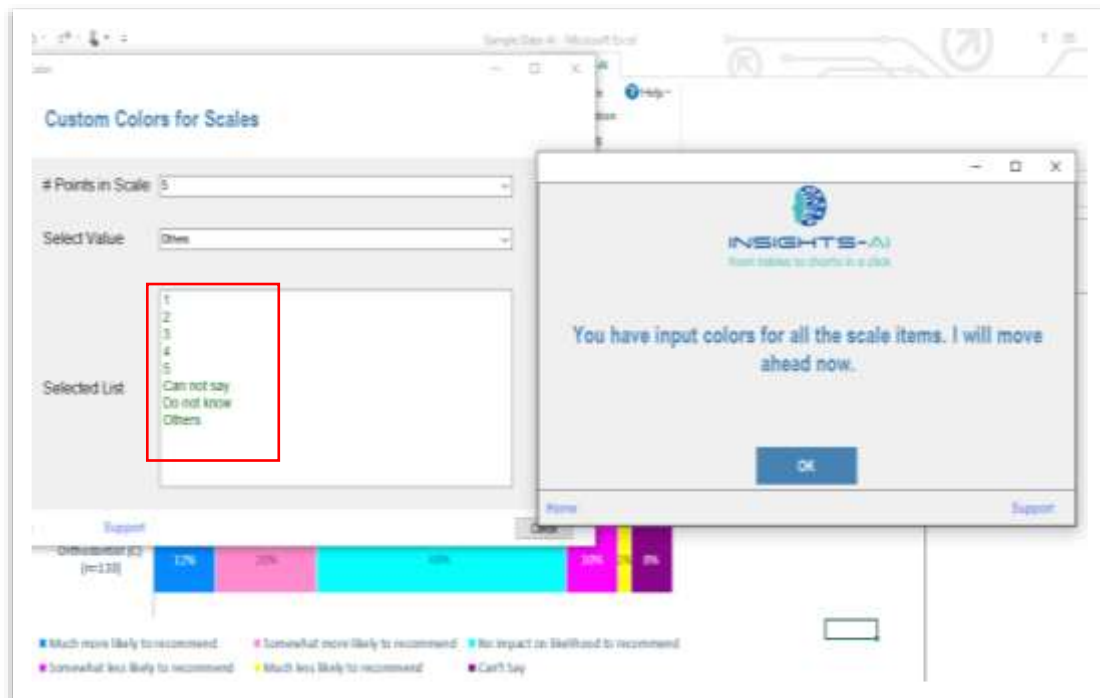
Now select each point in the “Select Value”.



Then the application will ask to map the color corresponding to the selected point.



One by one, we select colors for all the 5 ratings. As we keep on customizing the color shades, you can see that the mapped options turn green.



The important thing to remember here is that one must also customize the colors of Can't say, Don't know and Others as well.

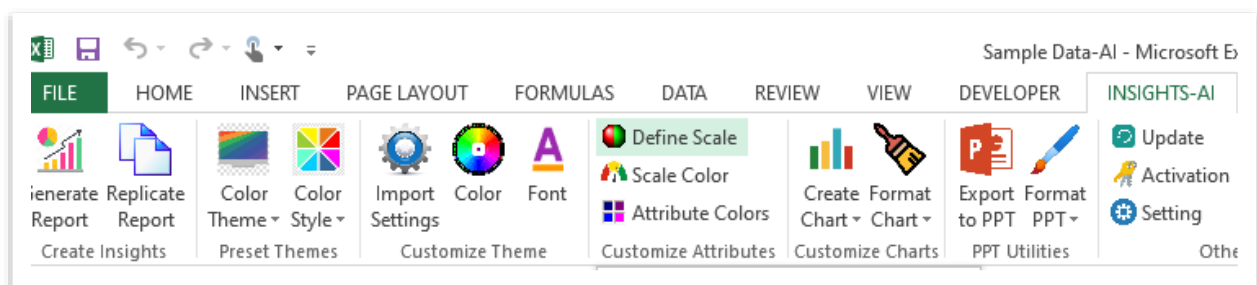
Once we have mapped all the points on the rating scale, the application renders the newly selected colors to all the 5-point rating scale questions in this project.



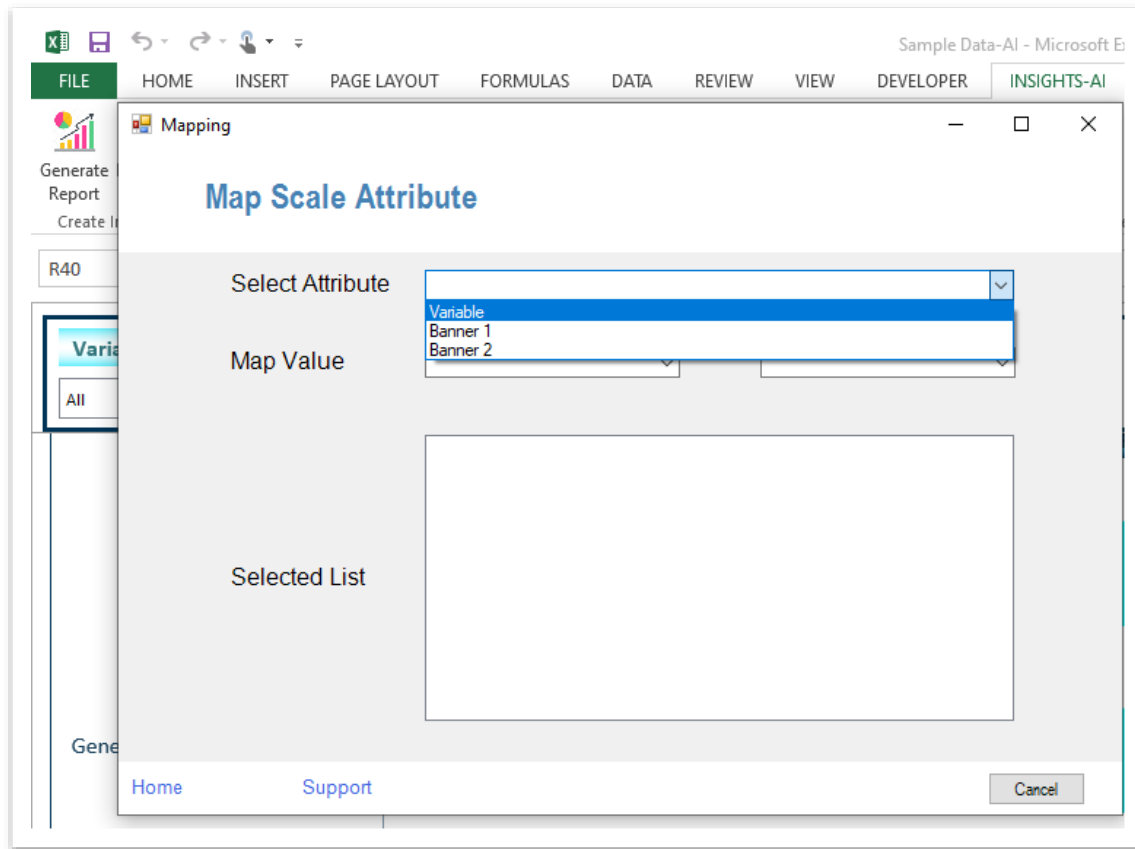
Define Scale

Now let us move to Define Scale, where we map the response text, like completely agree, completely disagree, with the rating points.

First click on the "Define Scale".



The pop up asks whether we need to map the variable or banner to the scale; let us select 'Variable'.



Select the response from the dropdown and its associated point on the scale. For example: Much More Likely to Recommend is mapped to point 5

Generate Report
Create It

R40
Variable
All

Map Scale Attribute

Select Attribute
Variable

Map Value
Much more likely to recommend
5

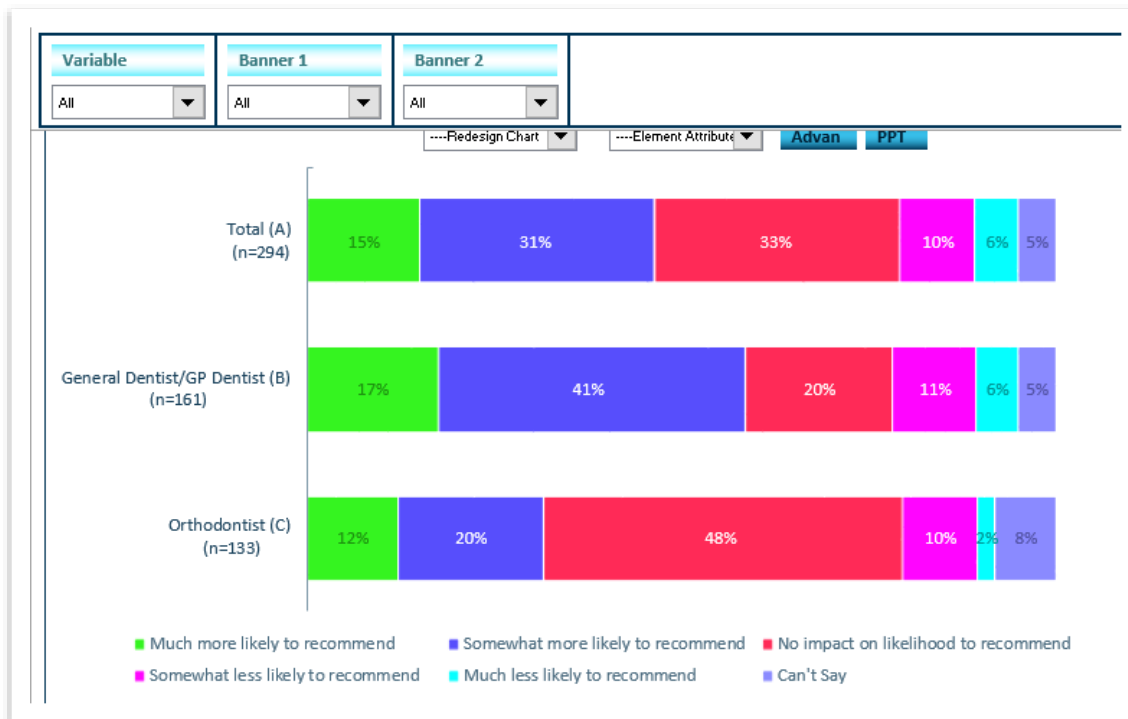
Selected List

Much more likely to recommend
Somewhat more likely to recommend
No impact on likelihood to recommend
Somewhat less likely to recommend
Much less likely to recommend
Can't Say

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Cancel

The selected value i.e. 'Much More likely to recommend' has now turned green.

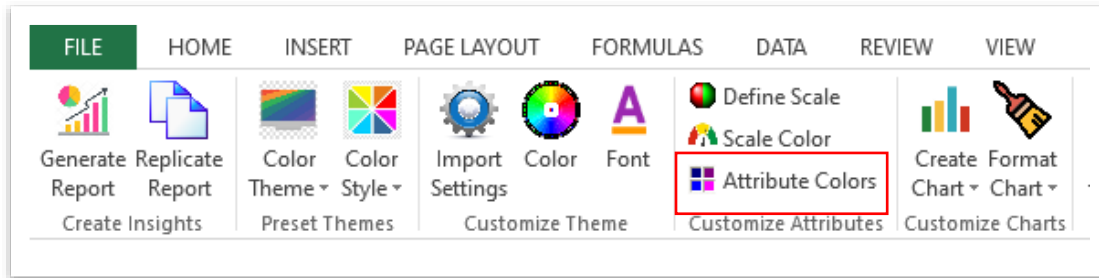
As we map all the values, the pop-up confirms the same and reflect new colors in all subsequent charts.



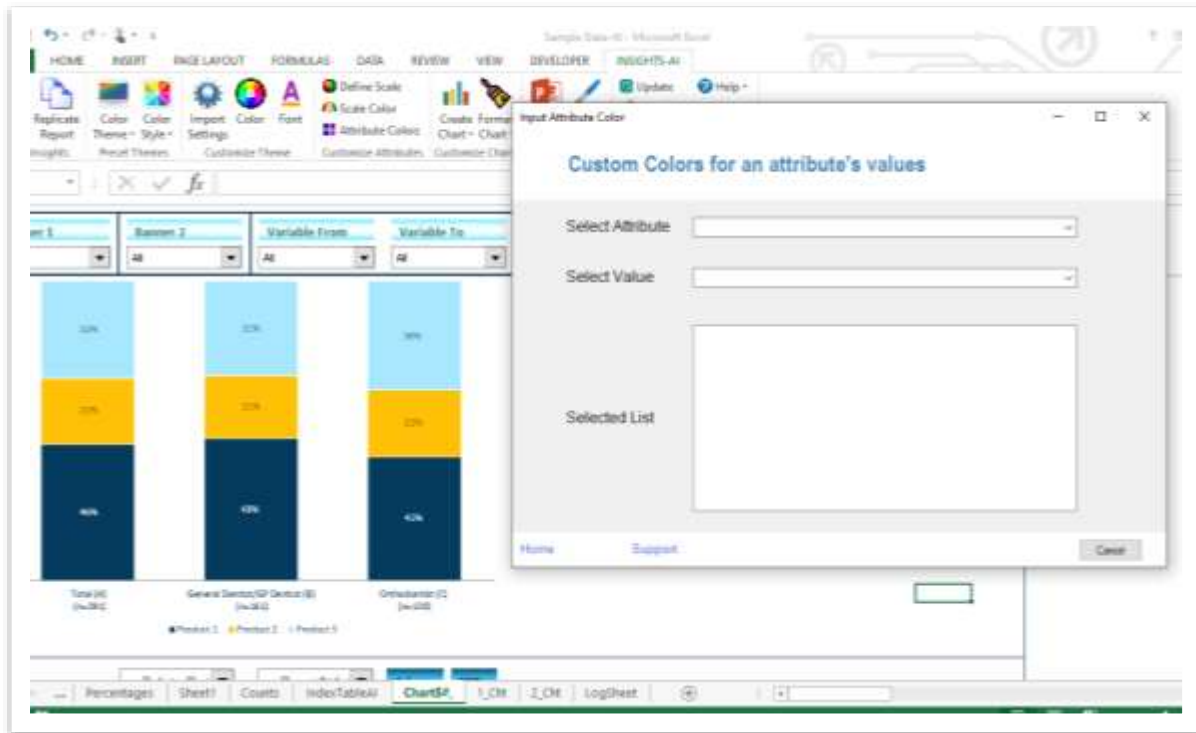
Attribute Colors

Now let us look at how to define brand or country specific colors in Insights-AI application.

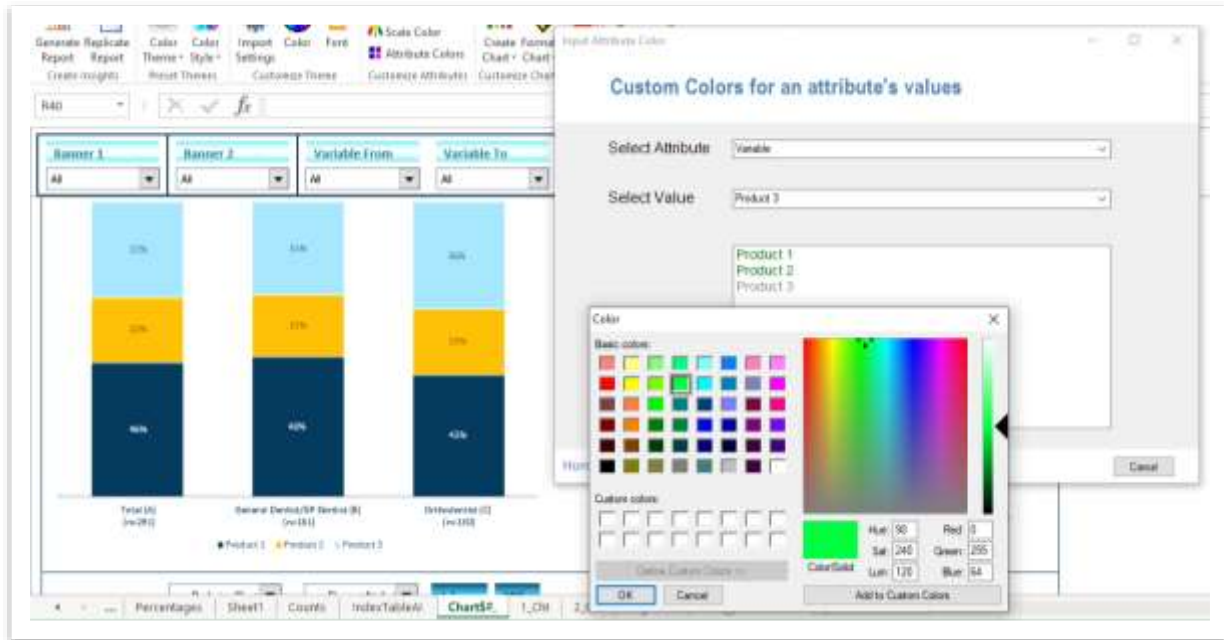
First, click on the 'Attribute Colors'.



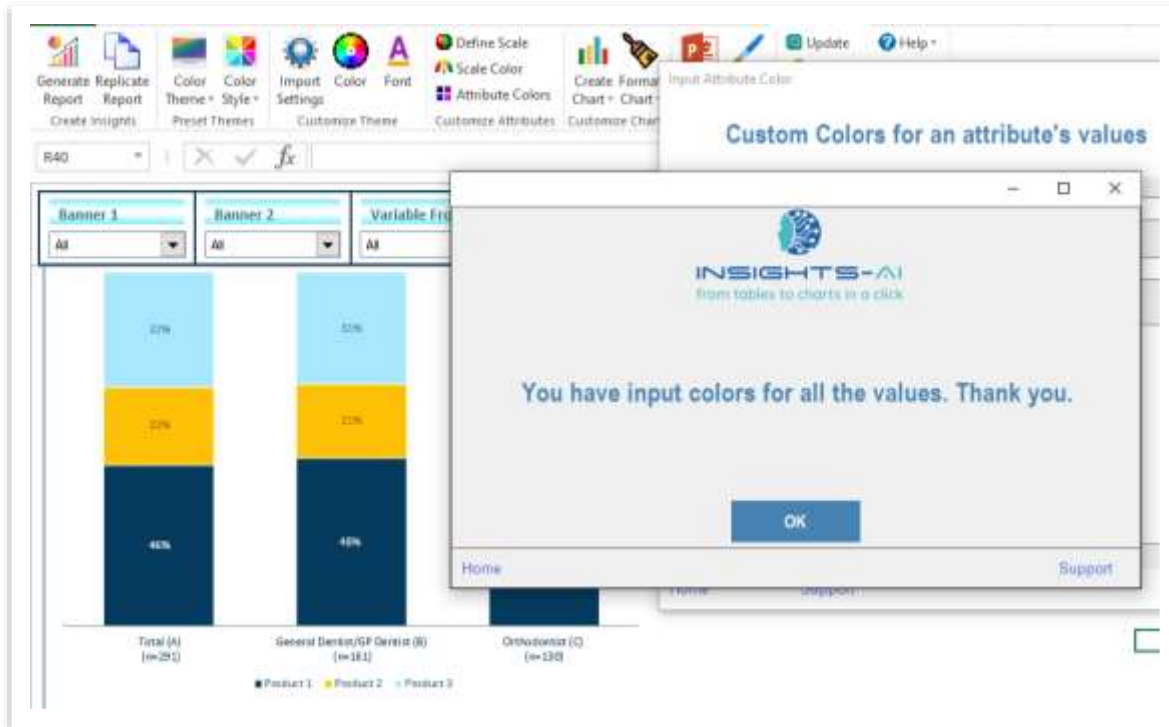
It will prompt you for option selection as shown in the image shown below. Select Variable in the "Select Attribute".



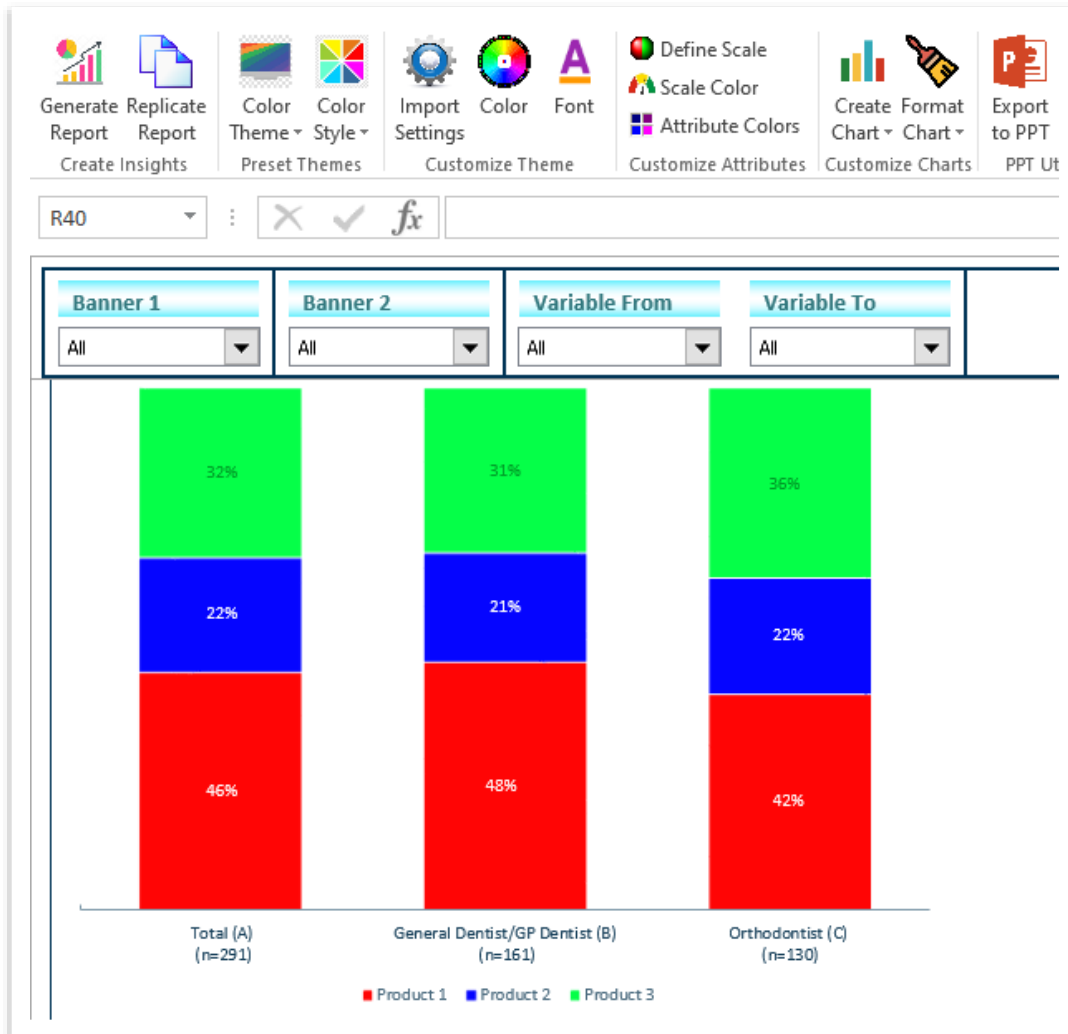
Then go to "Select Value" and map each of the products with their respective colors. After all products are mapped, all in the dropdown turn Green.



The pop confirms your selection and the mapping as shown in the example below:



Once the color system for the products is set, the application will apply this color system in all the charts generated after that which contains these products.



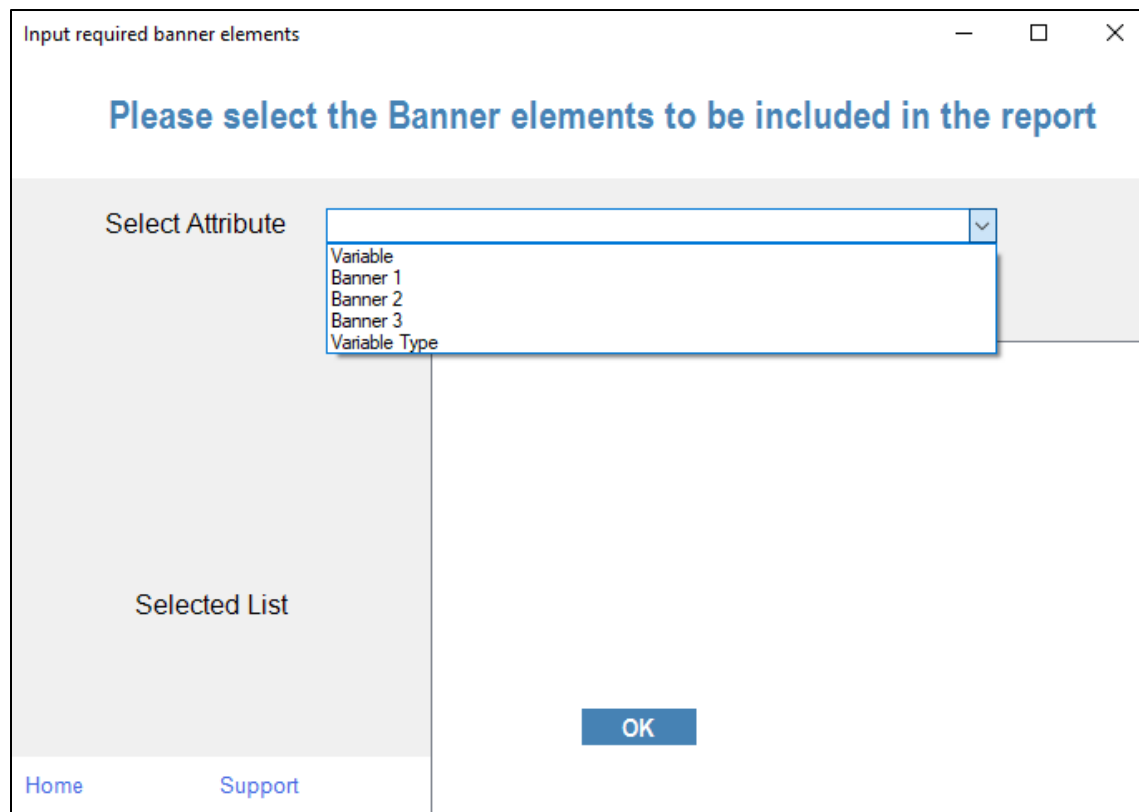
9. Select Banner

Banner plays the most important role in determining the data type and the suitable chart for each data/table set. In simple terms, Banner refers to row and column heading. The row headings are termed as Variables and column headings are termed as Banner1. In case of multiple column headings, each heading is named along with its serial number such as Banner1, Banner2, Banner3 and so on.



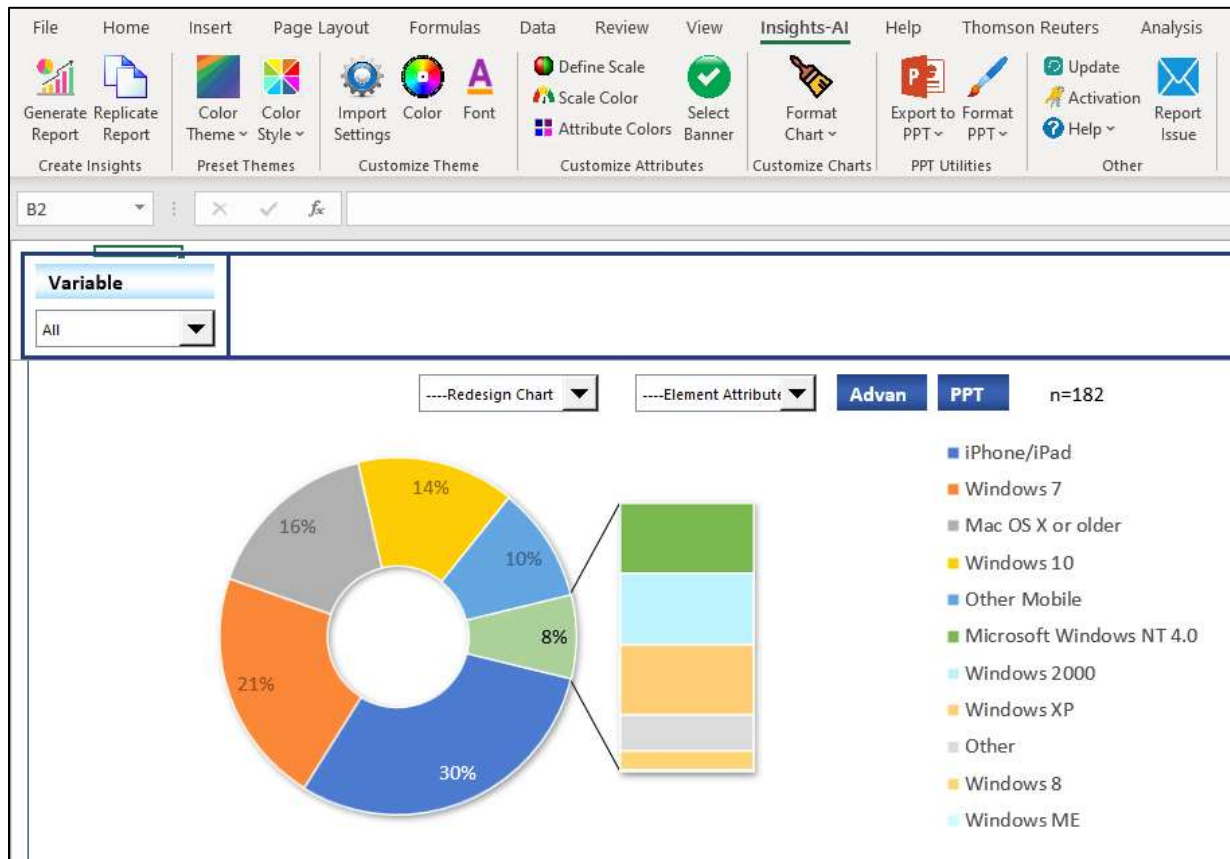
The “Select banner” utility can be used to include or exclude specific elements of the row and columns from the chart. This gives flexibility to modify the data set as per user demand and requirement.

A new pop window will appear upon clicking the “Select Banner” utility as displayed in screenshot above. The window shall ask user to select the Banner elements to be included in the report. Select the Attribute from the dropdown to view the Variable, Variable Type and Banner items in the space below.



All the banner elements from the row and column appear in the “Selected List” box at the bottom. Click on the check box appearing at the front of each item to select or unselect the banner element from the chart.

For Example: The chart below presents the operating system used by the selected population on their personal computer.



In case user wants to display only the percentage of users having different versions of Microsoft Windows Operating Systems in their personal computers, then just unselect all the other OS versions from the selected list by unchecking the box in front of them and select “OK”.

Input required banner elements

Please select the Banner elements to be included in the report

Select Attribute

Variable

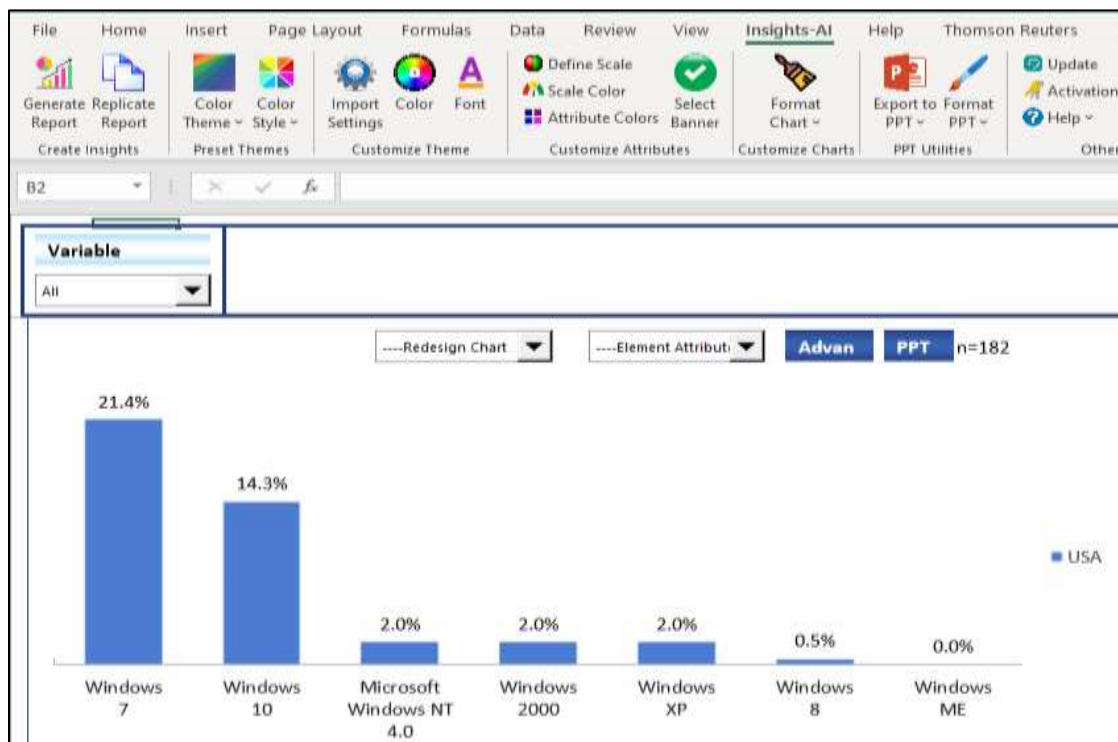
Selected List

☒ Windows 8
☒ Windows 10
☒ Windows 7
☒ Windows XP
☒ Windows 2000
☒ Microsoft Windows NT 4.0
☒ Windows ME
☐ iPhone/iPad
☐ Mac OS X or older
☐ Other Mobile
☐ Other

OK

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The applications' smart AI engine shall determine the best suited chart type based on the banner elements selected and revise the existing chart.

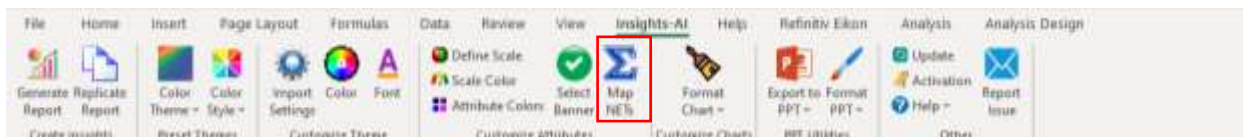


10. Map NETs

At many occasions, the data tables include subtotals under row and column heading (banners & variables). For example, in the table below the % of total answering from 1 to 500 are summed up as Net: SMB (Small and Medium Business), highlighted in red, and total answering above 500 are summed up as Net: Enterprise, highlighted in blue..

	Which of the following best describes your industry?							
	Total	Healthcare	Higher Educ	K-12	Govt	Comm Real Estate	Mft Industrial	Other
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(I)
Total Answering	404	73	74	72	59	22	74	30
Under 50	10%	9%	-	-	-	23%	4%	47%
51 to 100	11%	18%	11%	21%	8%	27%	9%	10%
101 to 250	14%	12%	15%	24%	14%	5%	8%	13%
251 to 500	14%	11%	14%	18%	12%	23%	15%	3%
Net: SMB	49%	51%	39%	63%	34%	77%	36%	73%
501 to 1000	18%	16%	25%	24%	17%	18%	22%	13%
More than 1000	33%	33%	36%	14%	49%	5%	42%	13%
Net: Enterprise	51%	49%	61%	38%	66%	23%	64%	27%
No Answer	-	-	-	-	-	-	-	-

Insights-AI provides users with the option to map these subtotals as NETs or aggregates into a separate chart, to do this first click on “Map NETs” option as show in the screenshot below:



A new pop up window will appear where user can specify the banner in which NETs are to be separated by choosing the variable or banner option from the “Select Attribute” dropdown. The list of all the elements under the selected banner shall appear on the “Selected List” box in the middle of window as appearing in the screenshot below:

Input required for aggregates

Please select the elements to be classified as NETs or aggregates

Select Attribute

Variable

☐ Under 50
☐ 51 to 100
☐ 101 to 250
☐ 251 to 500
☒ SMB (1-500)
☐ 501 to 1000
☐ More than 1000
☒ Enterprise (>501)

Selected List

OK

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User can identify the aggregates to be mapped separately as NETs from the list and click on “Ok” to proceed. After clicking on “Ok” the tool shall further instruct you to generate the charts again by clicking the Generate Report button in the ribbon to incorporate the updated aggregation mappings. Click on the “Generate Report” button and select the banner and location of the PPT where you require the charts to be updated for aggregated NETs.

Please Generate the charts again



INSIGHTS-AI

from tables to charts in a click

Please generate the charts again by clicking the Generate Report button in the ribbon to incorporate updated aggregation mappings.

OK

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The result of the above activity can be demonstrated by the before and after screenshot of the resulting charts output:

Exhibit A: Before using Map NETs option

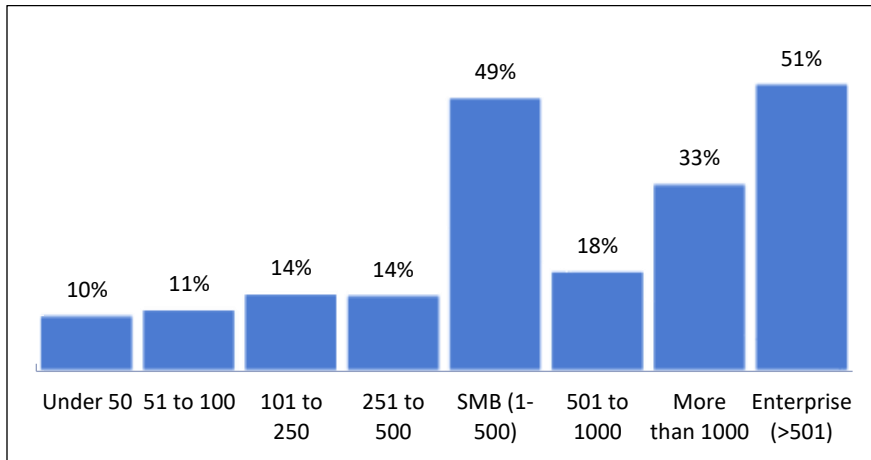
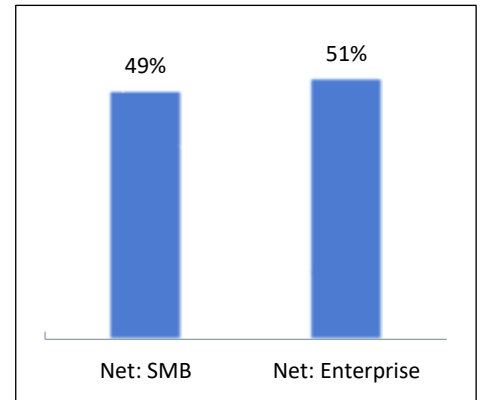
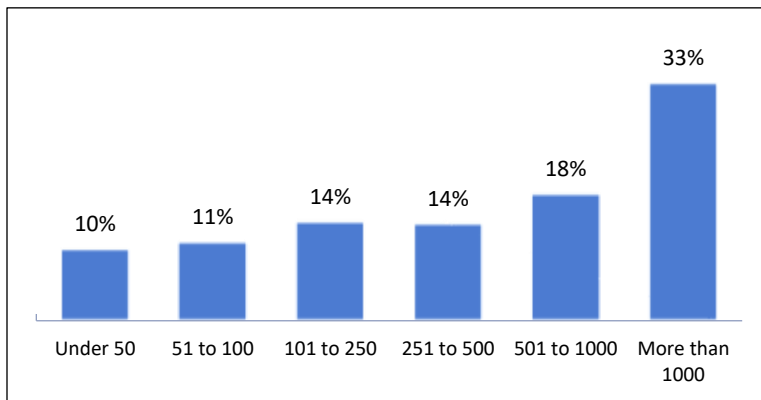


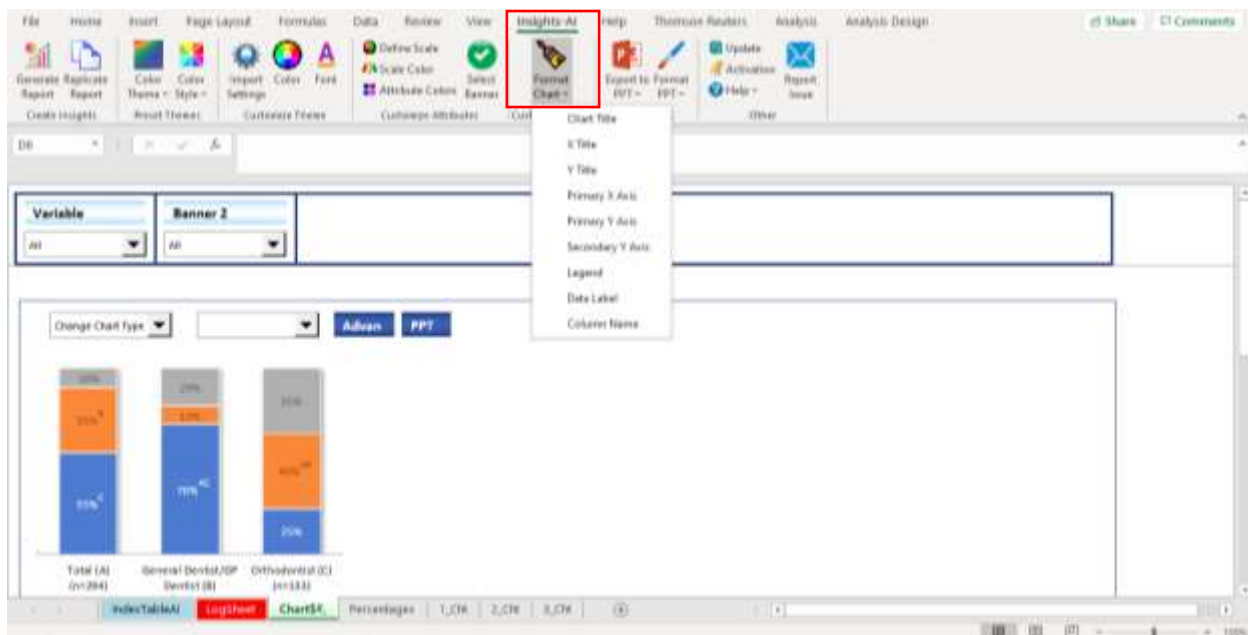
Exhibit B: After using Map NETs option



11. Chart Formatting

Insights AI also provides user the option to format the chart elements by using **“Format Chart”** utility available on the Insights AI ribbon. This option helps user to add, remove, modify or style various chart elements for the data tables selected as “Yes” in the “IndexTableAI” Sheet.

Thus, if all the data tables are selected, then any formatting done through this option will be applied automatically across all the charts in Power Point Report. This helps user to standardize their chart formats through single utility.

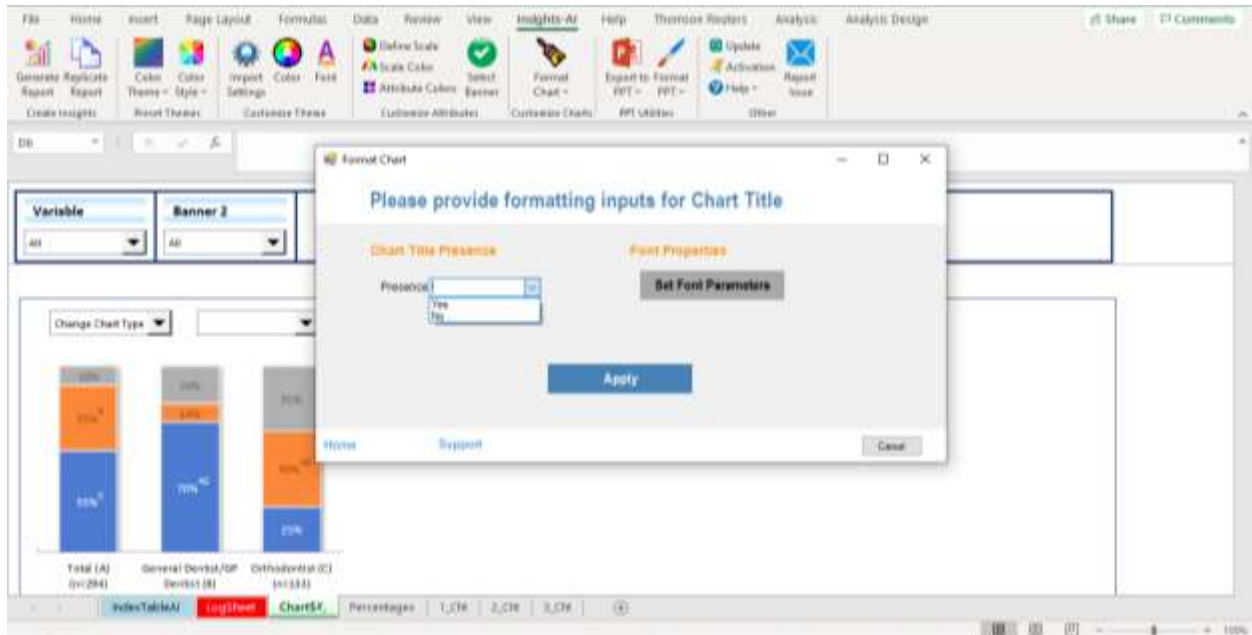


The **“Format Chart”** button offers users to easily change the following chart elements across all the charts generated in the report:

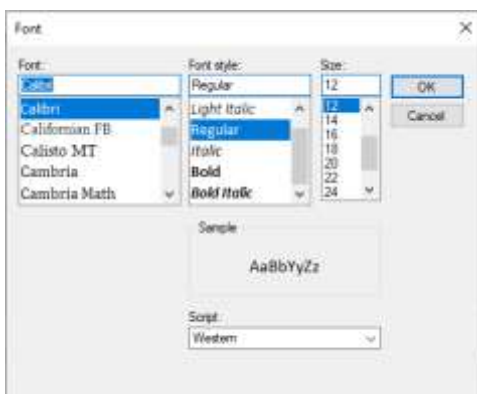
- Chart Title
- X Title
- Y Title
- Primary X Axis
- Primary Y Axis
- Secondary Y Axis
- Legend
- Data Label
- Significance Test Result

Example 1: Chart & Axis Titles

To include/remove the presence of chart title, select the Presence dropdown to either Yes/No. Also, user can change the font style and size of the chart title by clicking on “Set Font Parameters” button on the popup window.



Font type, style, size and color can be selected from the dropdown as displayed in the below image, further user may set specific font color for the chart title after clicking “Yes”, otherwise select “No” and the Add-in will use the best suited colors from theme and apply it.



Similarly, user may format **X axis Title** and **Y axis Title** using the same process as detailed above.

Example 2: Primary & Secondary Axis

To include/remove the presence of Primary or Secondary Axis, select the Presence dropdown to either Yes/No. Also, user can change the font style and size of the Axis by clicking on “Set Font Parameters” button on the popup window.

For few chart types such as xxx, yyy etc user can also adjust the position and size of the Secondary Y Axis by specifying the Min, Max, Gap and Decimal places of the Y axis data



Example 3: Legend and Data Labels

User can change the presence as well as position of the Legends and Data Labels, to remove the presence of data labels select the “None” option under Position dropdown. Further users may choose the desired direction such as Left, Right, Bottom, Top or Corner or can either select Automatic option through which AI will choose the best position for Data Labels. User can change the font style and size of the labels by clicking on “Set Font Parameters” button on the popup window.



Similarly, user may format **Data Labels** of the chart using the same process as detailed above.

12. PPT Utilities

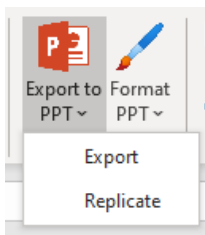
Insights AI Add-In ribbon also helps user to export the selected charts and modifications performed in the data sheet directly into the PPT using “**PPT Utilities**” option. This option provides user with two features:

1. **Export to PPT**
2. **Format PPT**



1. Export to PPT

Export to PPT button allows users to easily export the selected chart to any Presentation file, user may either export or replicate the chart after working on it. The modifications made in the excel sheet could be easily exported to PPT.



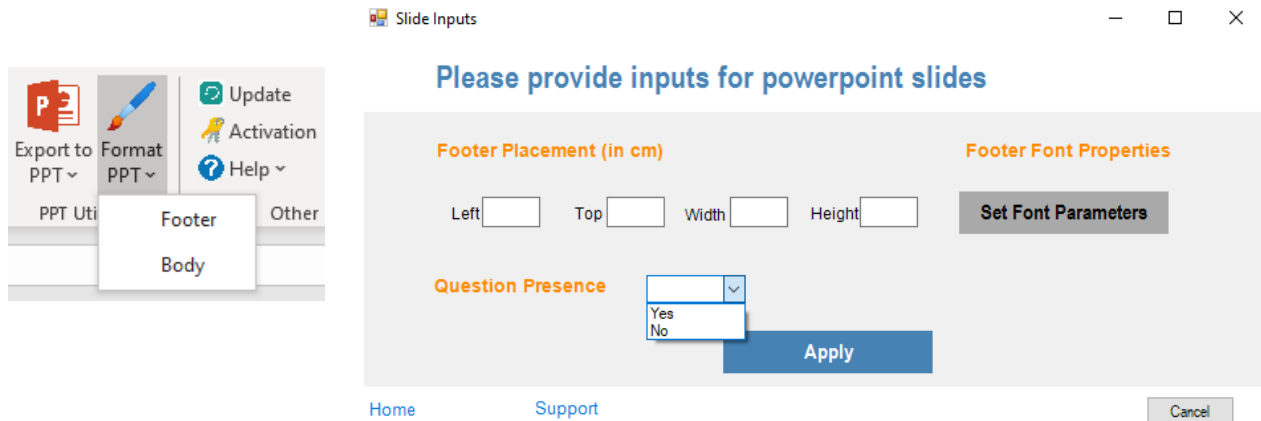
2. Format PPT

Format PPT button shall be used to format the header and footer of the PPT. Simply click on Format PPT button, then select either header or footer to edit.

A new pop-up window will appear asking to “Please provide inputs for PowerPoint slides”. User can change Header/Footer’s Placement, Font Properties and Question Presence.

- a. **Placement:** User can modify the position of the header/footer by specifying its distance from the Left, Top and Width, Height in centi-meters (cm)

- b. Font Properties: Click on “Set Font Parameter” button and then select the Font type, style, size from the dropdown, further user may set specific font color for the chart title after clicking “Yes”, otherwise select “No” and the Add-in will use the best suited colors from theme and apply it.
- c. Question Presence: User can decide to add/remove question from header/footer by selecting Yes/No in the dropdown.



Similarly, user may also format **Body** of the PPT using the same process as detailed above.

13. Replicate Reports

There is a need to refresh the chart(s) with updated data on many occasions. Below are typical scenarios where report needs to be refreshed: -

a. **Replicating interim report to create final report**– Many times user creates an interim report template with partial data and then replicates the same specifications/template for final data.

b. **Replicating a report for multiple countries** – In multi-country projects, the template for one country is created and then replicated for as many countries as required

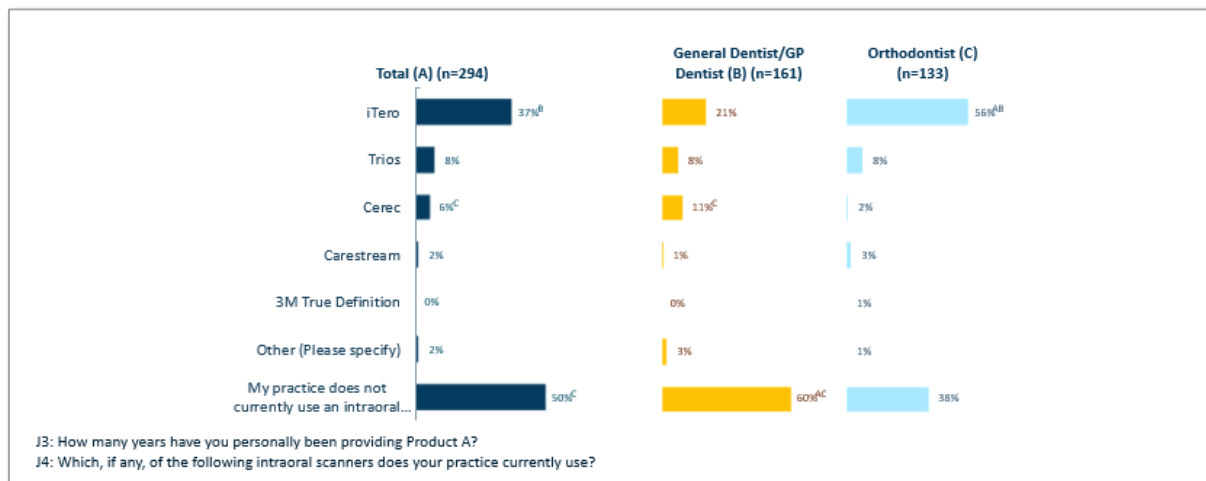
c. **Replicating a report for different waves of a tracker study** – In a tracker study, the template report for one wave is created and then replicated for as many waves/ timeframes as required

The Insights-AI makes replication as easy as a click of button. Surprised? Let us explain.

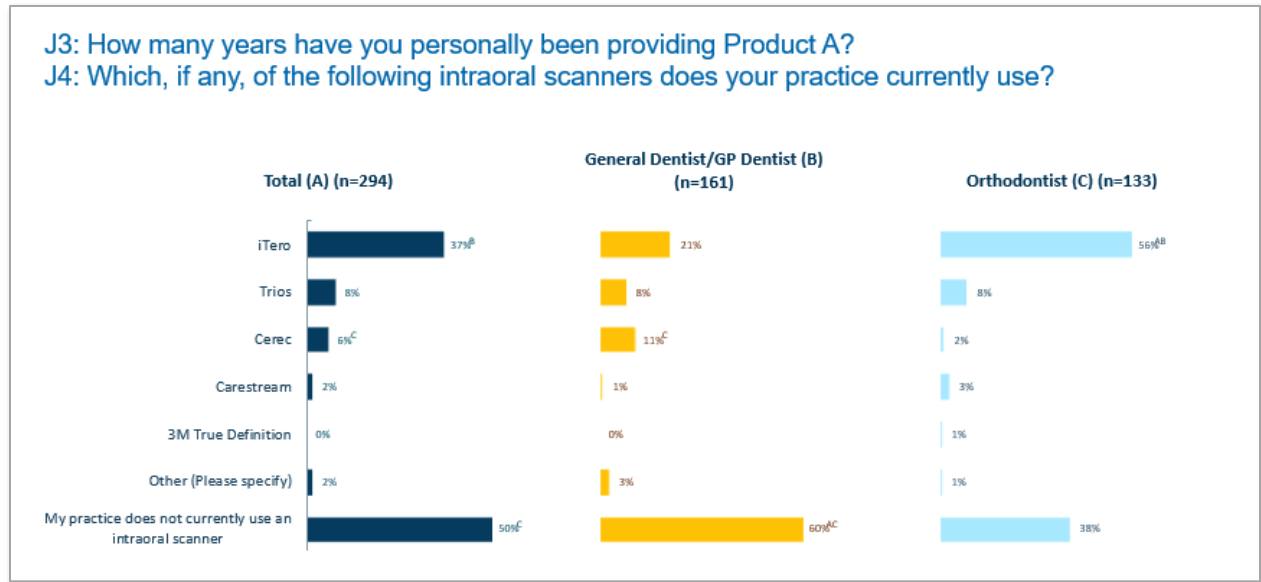
Let's assume the user is working on different reports based on geography – Global level and US level. User can first generate the output on Global level and adjust the chart format, size position and shape as he/she needs.

Now, when the user wishes to generate the US report, he/she need not worry about doing the adjustments all over again. The tool will automatically detect the size, position, and chart format to create new/updated charts with same specifications. All the user needs to do is click the 'Replicate' function in the new/updated data tables and select the first report or its copy as the template.

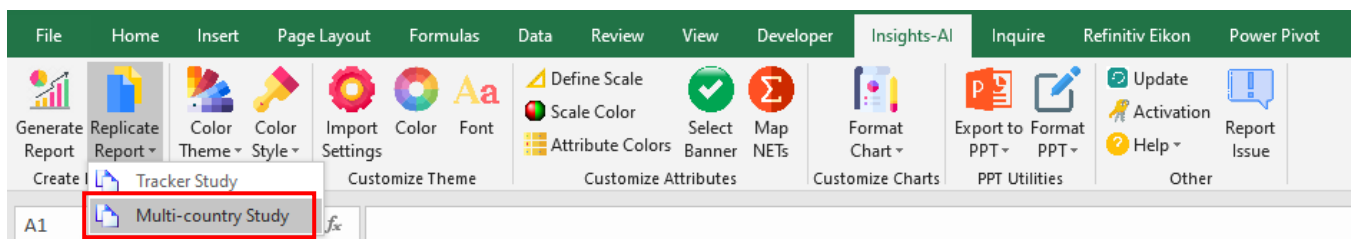
Let us take below snippet as an example of original output that the user derived after running it for the first time on 'Overall' level.



Now, the user needs to adjust the size and position of the charts and question box according to the template and analysis.

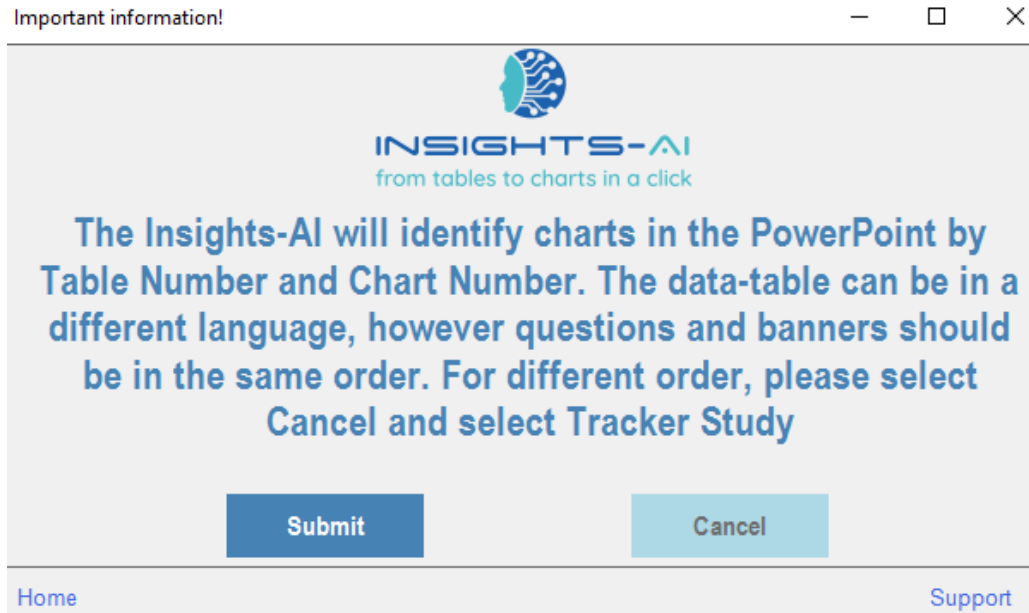


The user can replicate the 'Overall' results on the US level with the help of 'replicate reports' function. He/she needs click on the 'Replicate Report' function in the new/updated data tables (for the US) and then select 'Multi-country study'. The template report for one country can be replicated for as many countries as required. The tool will automatically identify and interpret the data in multiple languages and replicate the charts based on the original report.

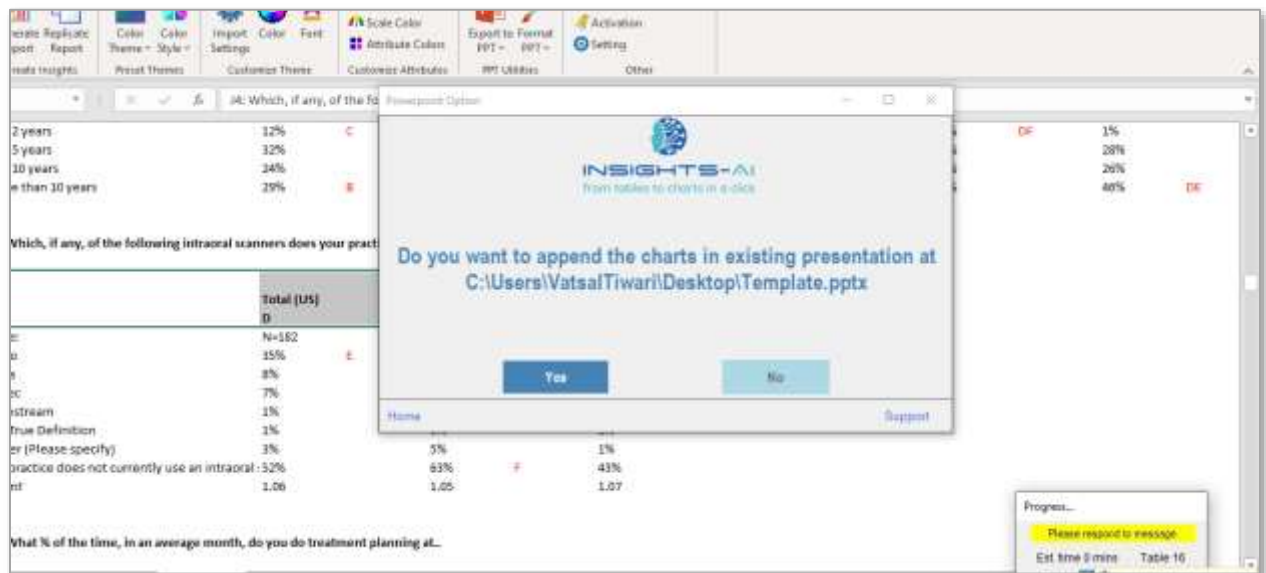


The Multi-country Study option allows user to add new questions, however the tool will identify charts in the PowerPoint by Table Number and Chart Number, which means that questions and banners should be in the same order. In case the order of questions has been changed then first replicate the reports using tracker study option and then replicate it through multiple country study option for different languages.

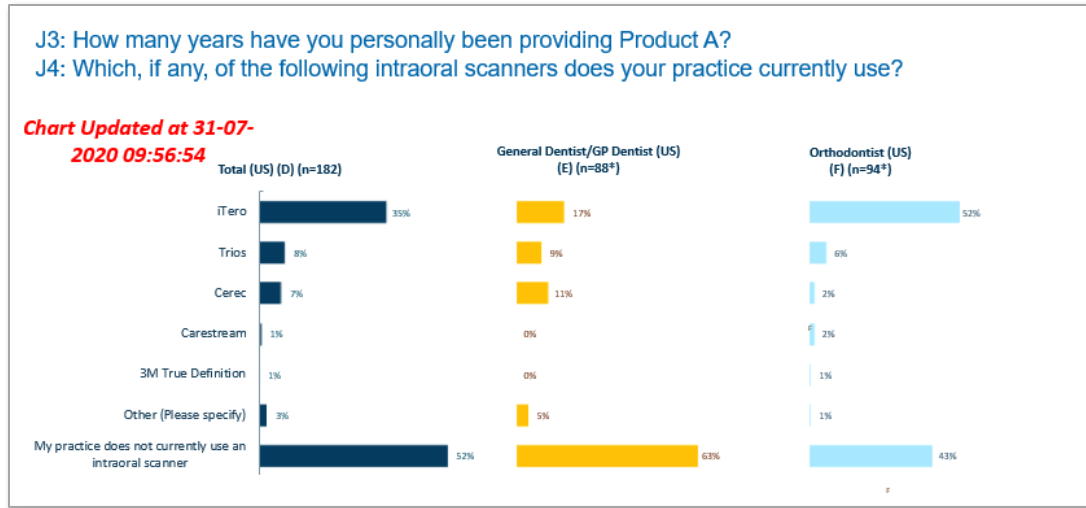
Replicate Reports



Tool will then ask user to select the path of the original template that he/she had saved for 'Overall' report



The Insights-AI tool will first create a backup of the Overall template and then automatically read the modified chart specifications from the Overall template and replace it with US charts.



The above snippet depicts that the tool has replaced the Overall charts with those of the US.

If there is a change in order of the variables from Overall to the US, tool will automatically re-arrange the variables in the decreasing order on 'Total' level. If the users wish to set it in order of some other data cut – he/she can change it through the excel application as explained earlier in [Advanced Customization options](#).

Insights AI tool also provides the user flexibility to replicate the report for as many or as few tables as he/she wishes. For example, if the user does not want to replicate the entire data table set but just a few selected ones, he/she can select "Yes" in the include column of the Index Table sheet and just replicate the selected tables. Refer [Exclusion and Inclusion of specific DP Table](#) to read more.

Table No	Question Text	Include	Size and Position (in)				Chart Pa
			Left	Top	Width	Height	
table3	Q3: You indicated that you recommend 7-day or 'weekly' product changes to approximately % of your total patients	No					
table4	Q7: Did you learn anything new from the information you just read?	Yes					
table5	Q9: How, if at all, does the information you just read impact your likelihood to recommend product to your patient?	No					
table6	Q1: Which, of the following treatment planning software, have you heard of? Aided	Yes					
table7	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree"	No					
	All countries - Total						
table8	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree"	Yes					
	All countries - General Dentist/GP Dentist						
table9	Q3: Now I will read out a few statements that professionals like you have said to describe Product 1. Please rate how strongly you would agree with these statements on a scale of 1 to 5 where, 1= "Strongly Disagree" and 5= "Strongly Agree"	Yes					
	All countries - Orthodontist						

Similarly, in case of time-series projects where the similar set of data is collected periodically, the tool will help the user to replicate the charts for subsequent waves of data sets.

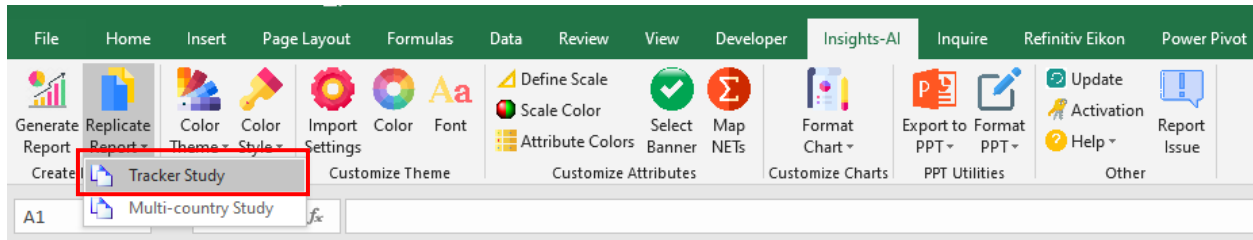
Now let's see an illustration where the user is working on the data table below which contains the career group of the total respondents during each quarter. The responses are available starting from the first quarter of year 2019 till first quarter of the year 2020. The user can first generate the chart output (report) on below data table and adjust the chart format, size position and shape as he/she needs.

S1: 'Career Group by Year					
Column % Column Comparisons	2019_Q1	2019_Q2	2019_Q3	2019_Q4	2020_Q1
Total Respondents	7228	5795	2938	4434	514
Student	20% c d f	19%	18%	18%	16%
DIT	17%	19% a	21% a	22% A b	24% a
Primary Care Specialists (PCP)	52%	52%	51%	51%	53%
Column Population	64542	67212	71210	74487	77984
Column Names	A	B	C	D	E
Filter: Members; Weight: Weight (Combined); base n = 22094					



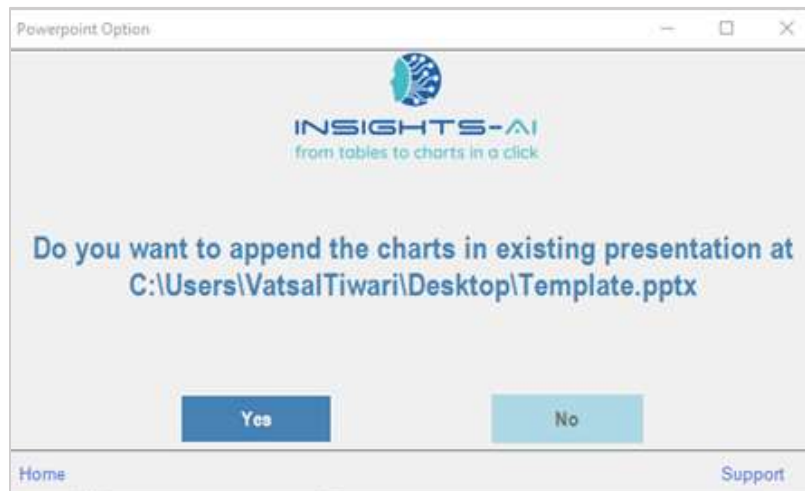
Now, when the user wishes to generate the same report for the data updated during the second quarter of 2020, as shown in the table below, he/she need not worry about doing the adjustments all over again. The tool will automatically detect the size, position, and chart format to create new/updated

charts with same specifications. User just needs to click on the Replicate Reports option below and select 'Tracker Study' button.

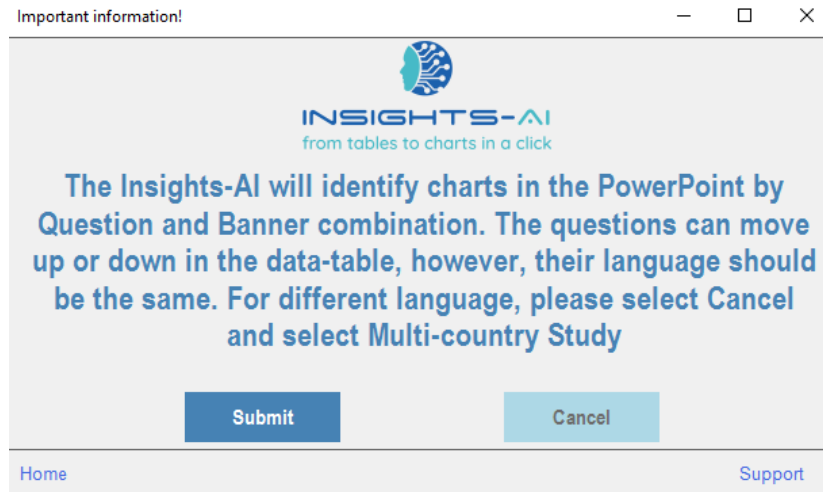


S1: 'Career Group' by Year

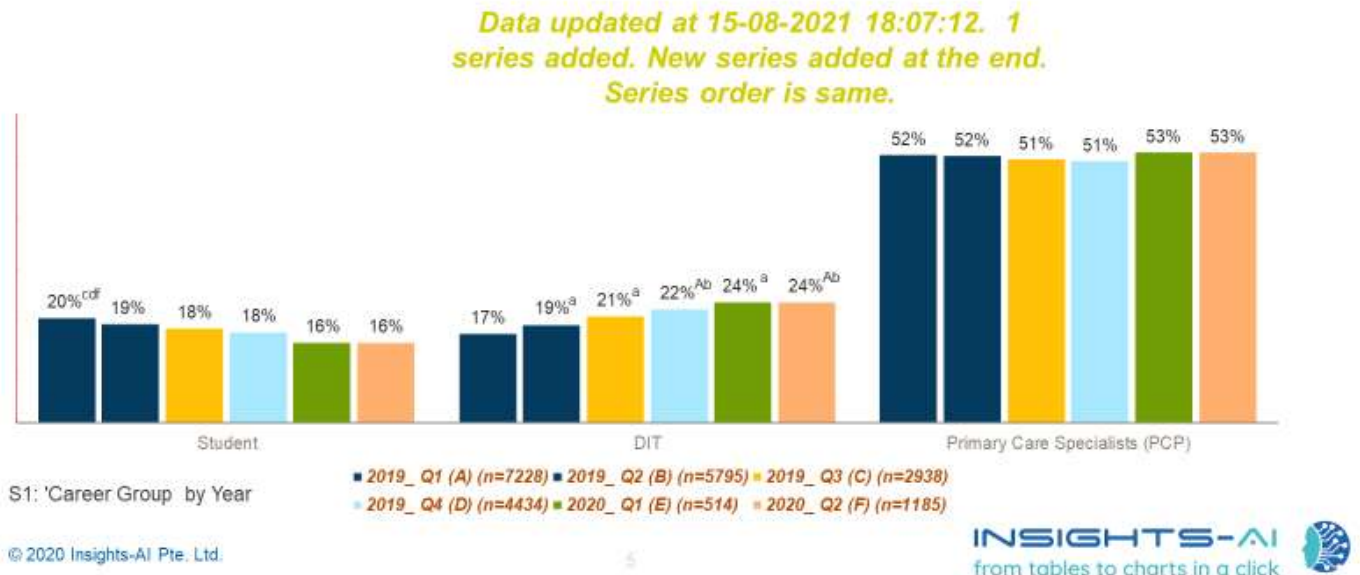
Column % Column Comparisons	2019_Q1	2019_Q2	2019_Q3	2019_Q4	2020_Q1	2020_Q2
Total Respondents	7228	5795	2938	4434	514	1185
Student	20%	19%	18%	18%	16%	16%
	c d f					
DIT	17%	19%	21%	22%	24%	24%
		a	a	A b	a	A b
Primary Care Speci	52%	52%	51%	51%	53%	53%
Column Populatio	64542	67212	71210	74487	77984	77984
Column Names	A	B	C	D	E	F
Filter: Members; Weight: Weight (Combined); base n = 22094						



The tracker study option even allows user to add or delete or move the questions up or down in the data-table, however their language should be the same.

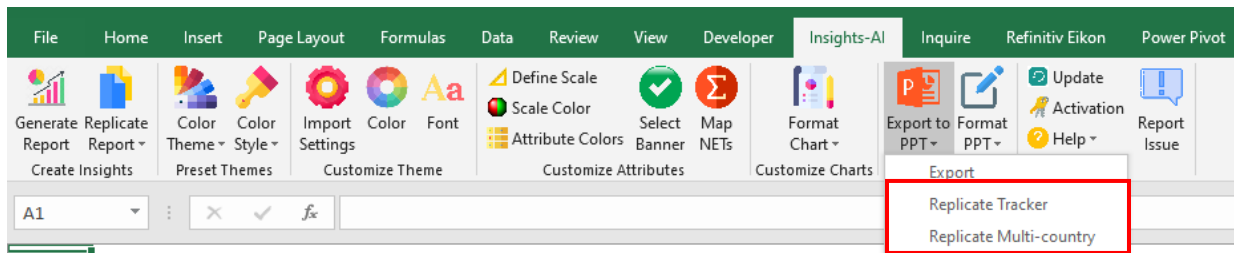


Below snippet is the output generated for the second quarter data for the year 2020, similarly all the subsequent data sets in a time series or wave study could be replicated in the existing report using the tracker study option.



Replicate charts for one table

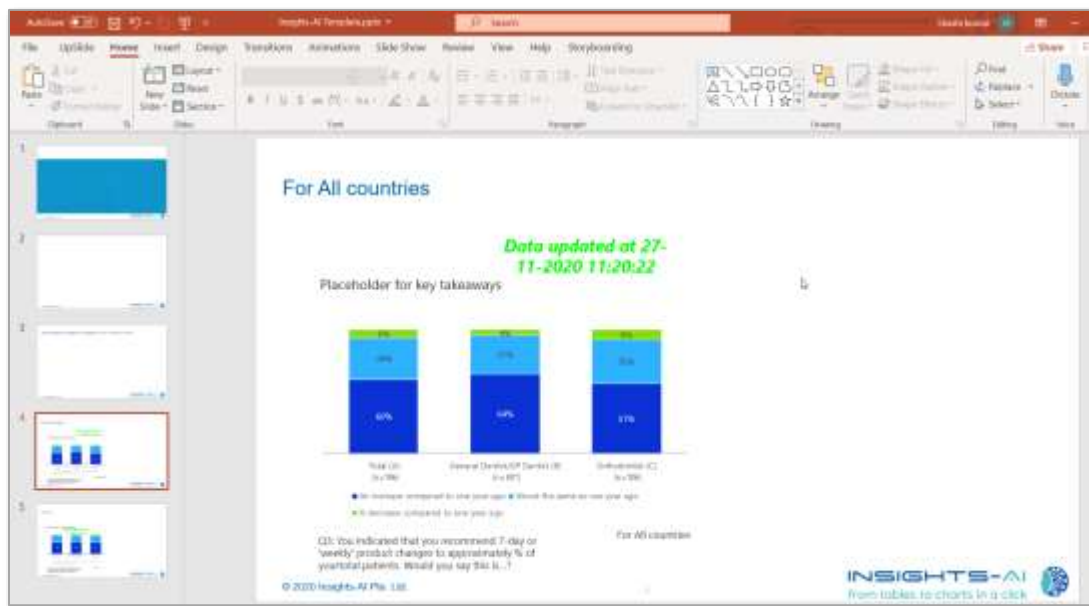
If the user needs to replicate the charts shown within the excel sheet (i.e. corresponding to only one table), he/she can simply click on “Export to PPT” and then select ‘Replicate Tracker’ or ‘Replicate Multi-country’ accordingly.



Replace data vs recreate chart

The Insights-AI applies a lot of intelligence while creating charts. This sometimes changes the structure of the table. Hence, the application decides to whether just replace the data in the chart or to replace the entire chart.

In case just the chart data is replaced, all the formatting enhancements done by the user is preserved. In this case, the application flags the chart in green with “Data updated” message.



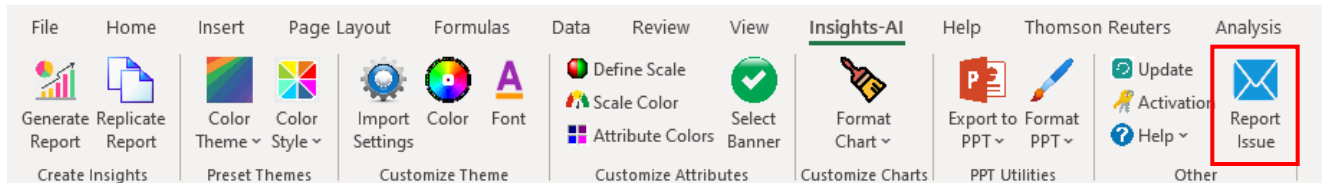
In case the entire chart is replaced, position and size are maintained however some formatting changes done by the user may be lost. The application flags the chart in blue with “Chart updated” message.



14. Reporting Issue with Data

The application's Artificial Intelligence engine and machine learning capabilities enables it to process a wide variety of DP tables. However, it may not be able to process few datasets or some tables within a dataset. The tool enables a user to send such data directly from the application to Insights-AI support team.

The "Report issue" utility is available at the right most part of the Insights-AI ribbon as shown below:



Before sharing the data, the application prompts the user to confirm whether he/she really want to transmit data over internet, making the user cognizant about security challenges. **If the user doesn't want to send the actual info, he/she can anonymize it by changing/randomizing the information.** Once the user is prepared to send the information, click "Yes".



The application will then prompt the user to describe the issue in detail as well as mention which part of the data you are facing trouble with. First, the user needs to add comments under "Description of Issue".

Next, the application provides two options to send the information. The user can send either the entire worksheet containing the tables or he/she can send a selection of data on any one worksheet.

Reporting issue with entire worksheet

If the user wants to send the entire worksheet, he/she needs to First select the “Email Sheets” and then check the required worksheet as shown below. Then click ‘Send’ to transfer the information to Insights-AI support team.

Send Excel Sheet

Description of Issue

Need help with 'Percentages' data.

Attach Data

☒ Email Sheets

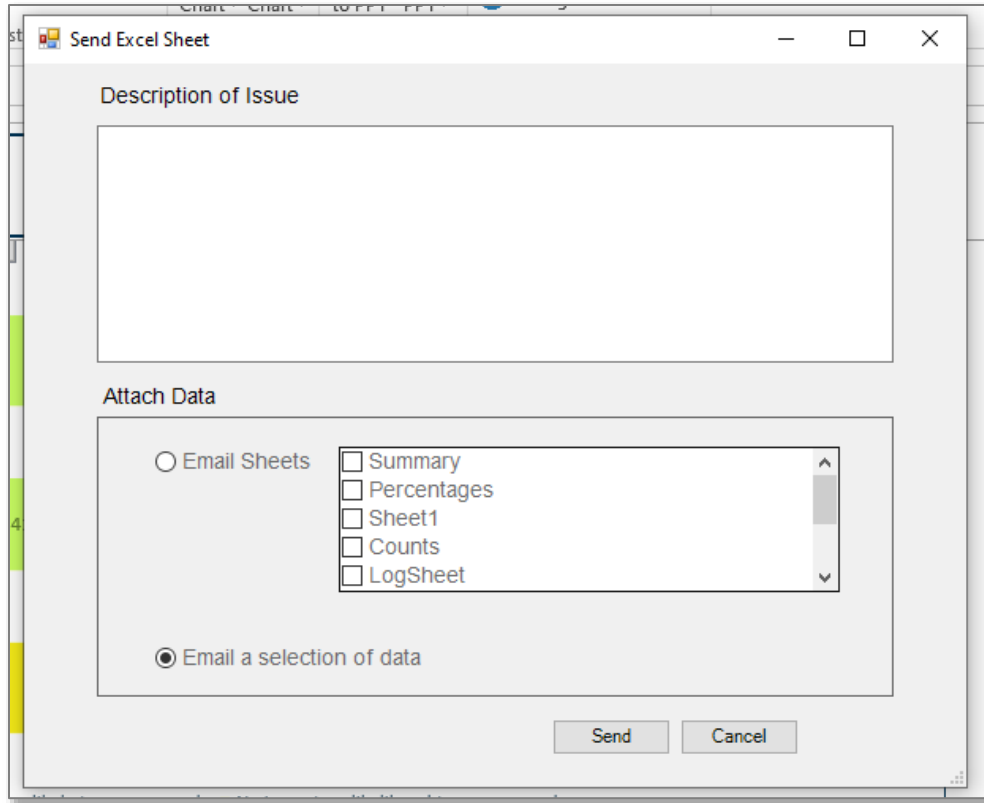
- ☐ Summary
- ☒ Percentages
- ☐ Sheet1
- ☐ Counts
- ☐ LogSheet

☐ Email a selection of data

Send Cancel

Reporting issue with selection of data

If the user wants to send a selection of data, he/she needs to select the ‘Email a selection of data’ and then click on ‘Send’ button.



Send Excel Sheet

Description of Issue

Attach Data

☐ Email Sheets

- ☐ Summary
- ☐ Percentages
- ☐ Sheet1
- ☐ Counts
- ☐ LogSheet

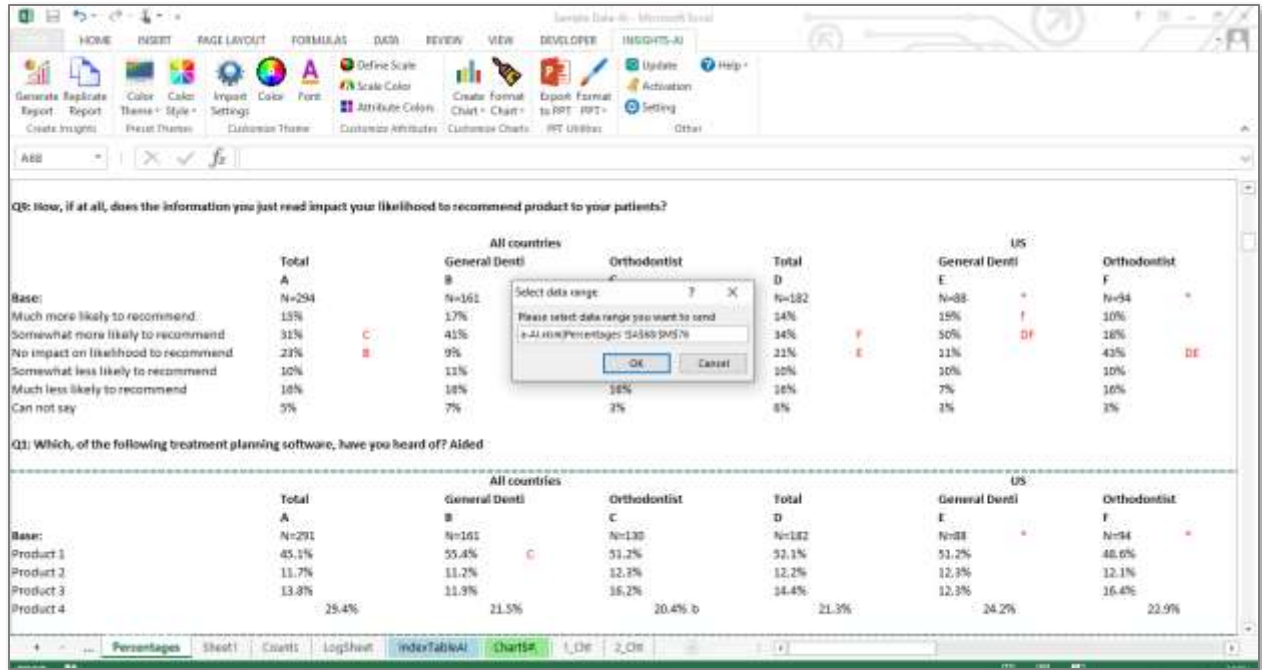
☒ Email a selection of data

Send Cancel

The application will prompt the user to provide a range selection for the related data. Drag and drop as shown in the below image.



Reporting Issue with Data

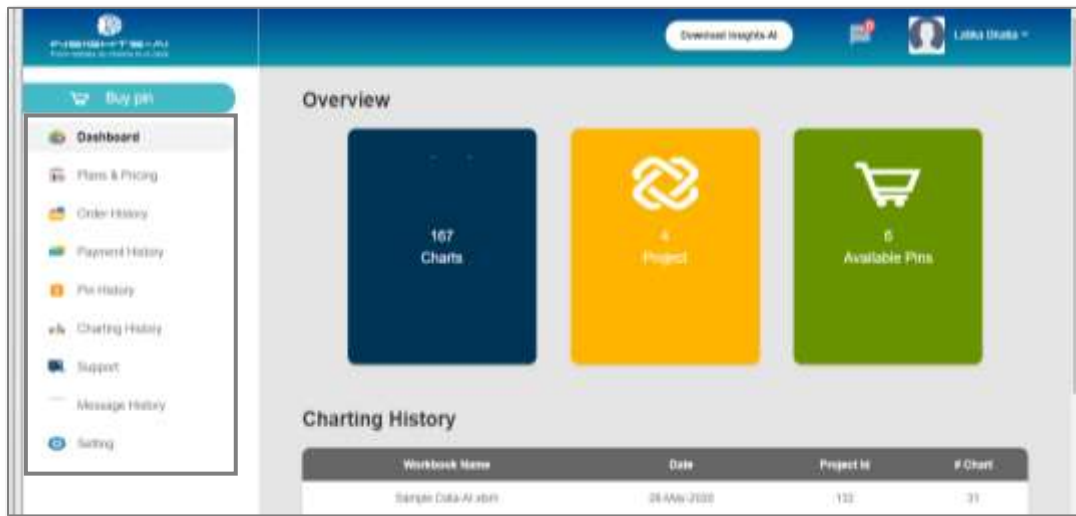


15. Managing PIN and Online Account

The application requires an access key (PIN) for processing the new project. The PINs can be purchased and managed through online account at <https://insights-ai.com/login>

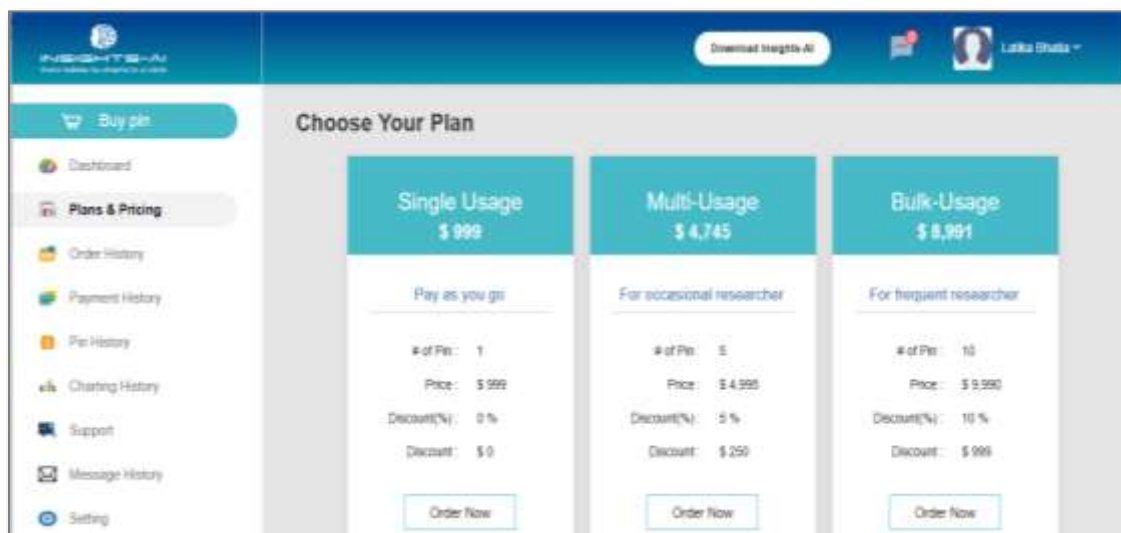
Dashboard

Dashboard of login portal is a visual representation of key metrics briefly.



Plans & Pricing

The 'Plans & Pricing' provides you an option to buy PINs according to the need and financial constraints. Select plans according to your preference and pay as guided to receive the PINs.



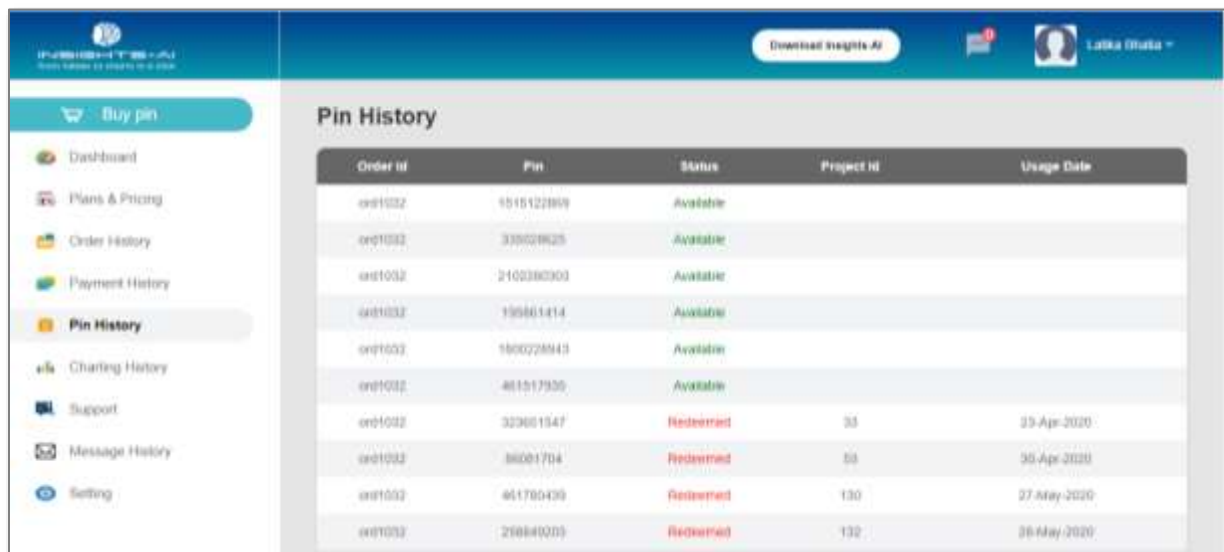
PIN Purchase

A PIN is a necessary requirement for any report generation. It is like a one-time password that enables using the Insight AI application. The PIN comes with certain time validity. You can purchase according to the need and financial constraints. Please select the desired plan under “Plan and Pricing” and click on “Order Now” to initiate the transaction. Upon completing the transaction, the PIN(s) is / are shared to your registered email and reflect under PIN history.

To Access PINs check your email or the dashboard>> Check PIN History.

PIN History

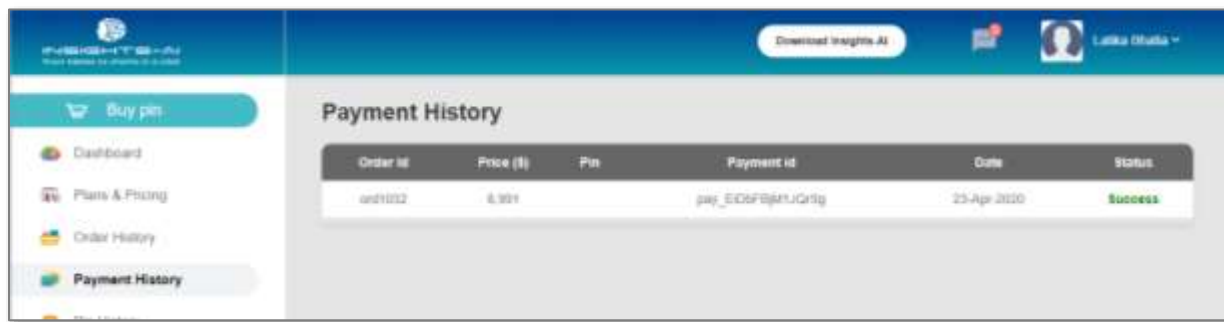
The statement of PIN availability and usage reflects as shown in the following example:



Order id	Pin	Status	Project id	Usage Date
ord1032	1515122859	Available		
ord1032	335029625	Available		
ord1032	2100380303	Available		
ord1032	195861414	Available		
ord1032	1800228943	Available		
ord1032	461517935	Available		
ord1032	323651547	Redeemed	33	29-Apr-2020
ord1032	38081704	Redeemed	33	30-Apr-2020
ord1032	461780439	Redeemed	130	27-May-2020
ord1032	258840205	Redeemed	132	28-May-2020

Payment History

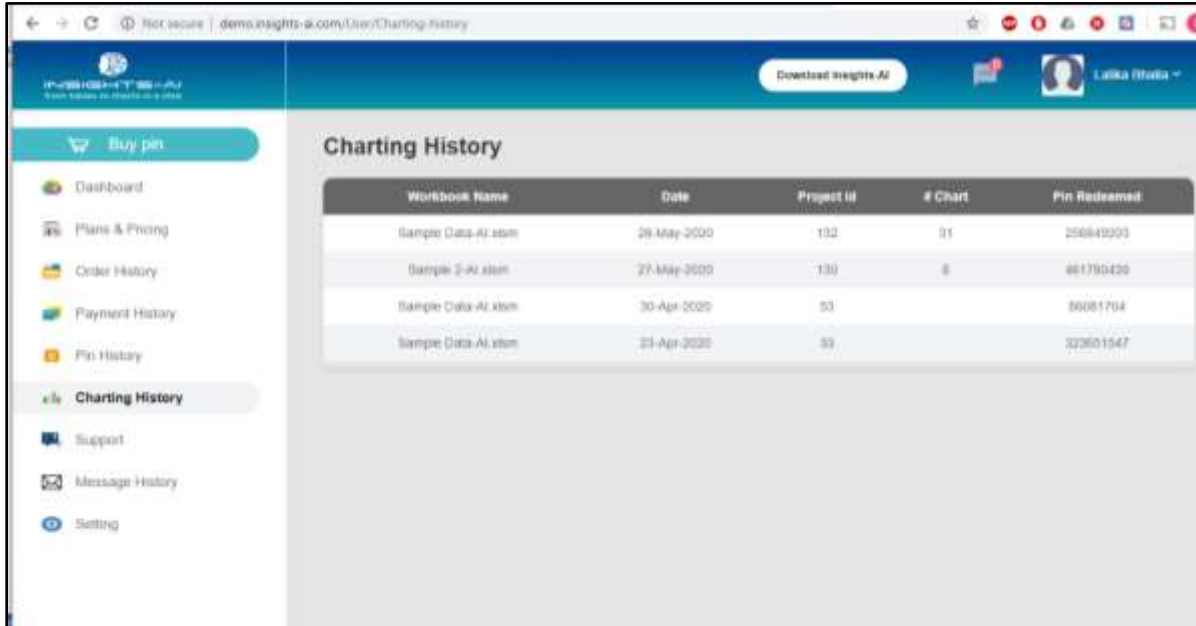
Payment history reflects all the successful/ unsuccessful/ pending transactions of PIN purchase.



Order id	Price (\$)	Pin	Payment id	Date	Status
ord1032	6.999		pay_E05F8j8mJGrtg	29-Apr-2020	Success

Charting History

The table on the “Charting History” tab displays the consolidated summary of DP tables processed as shown in the image below.



Workbook Name	Date	Project Id	# Chart	Pin Redeemed
Sample Data-AI.xlsm	29-May-2020	132	31	258840200
Sample 2-AI.xlsm	27-May-2020	130	8	461790428
Sample Data-AI.xlsm	30-Apr-2020	53		86081704
Sample Data-AI.xlsm	23-Apr-2020	53		323601547

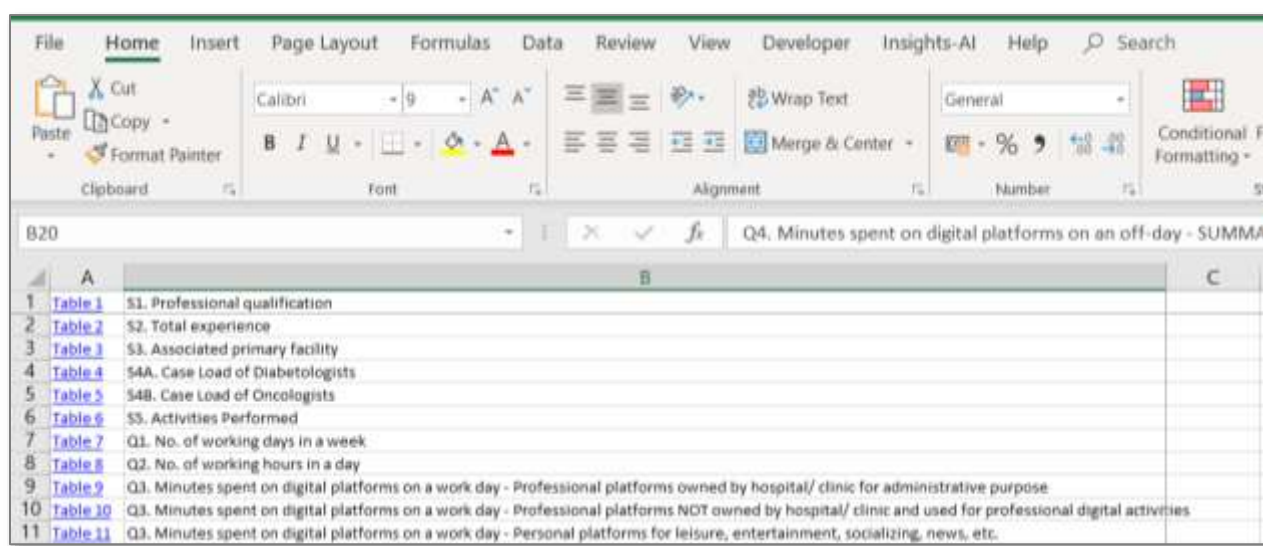
16. Data-tables' Best Practices

The Insights-AI smart AI engine attempts to identify all the different presentation formats of data-tables. However, sometimes it may not be able to identify some of the formats. Hence, it is advisable to follow the best practices during data preparation for smooth report generation.

Index table

If your DP table contains an index, it should follow following guidelines:

- A. The first column of Index should have hyperlink to the actual data-table.
- B. The second column should have the question text.
- C. There should not be blank rows between the tables.



	A	B	C
1	Table 1	S1. Professional qualification	
2	Table 2	S2. Total experience	
3	Table 3	S3. Associated primary facility	
4	Table 4	S4A. Case Load of Diabetologists	
5	Table 5	S4B. Case Load of Oncologists	
6	Table 6	S5. Activities Performed	
7	Table 7	Q1. No. of working days in a week	
8	Table 8	Q2. No. of working hours in a day	
9	Table 9	Q3. Minutes spent on digital platforms on a work day - Professional platforms owned by hospital/ clinic for administrative purpose	
10	Table 10	Q3. Minutes spent on digital platforms on a work day - Professional platforms NOT owned by hospital/ clinic and used for professional digital activities	
11	Table 11	Q3. Minutes spent on digital platforms on a work day - Personal platforms for leisure, entertainment, socializing, news, etc.	

Data-tables

The tables, in general, should follow these guidelines:

- A. The first cell of the table (first row, first column) should be merged. It helps the application determine how many rows a tables banner header has.
- B. In general, merge the cells wherever required to reduce ambiguity of interpretation.

Table 3
Oncologist and Diabetologists
S3. Associated primary facility

Merged Column

Merged first cell

Merged Rows

	Total	Overall		S.Korea	
		Professional		Professional	
		Diabetologi	Oncologist	Diabetologi	Oncologist
	A	B	C	N	O
Base : All Respondents	361	180	181	30	30
Academic / University Hospital	58	33	25	15	6
	16%	18%	14%	50%	20%
Public / Government Hospital	103	40	63	7	17
	29%	22%	35%	23%	57%
Private Hospital	89	44	45	6	4
	25%	24%	25%	20%	13%
Other	-	-	-	-	-
	-	-	-	-	-
Sigma	361	180	181	30	30
	100%	100%	100%	100%	100%

Proportions/Mean: Columns Tested (10% risk level) - B/C - D/E - F/G - H/I - J/K - L/M - N/O

C. The Number of respondents must be entered as a row.

	Total	Top 3 box
Wire/Cable management (A)	N=66 *	61%
High time investment (B)	N=76 *	51%
Probe dislodging (C)	N=56	71%

Application cannot handle # of respondents entered as a column

D. A table must have only one row corresponding to the # of respondents. Sometimes, a researcher has two rows of respondents, weighted and Unweighted. The application will show error in case table contains two rows. So, please keep only one row which you would like to use in the charts.

S2: Are you a/an...?

	All countries			
	Total (A)		General Dentist/GP (B)	Orthodontist (C)
Base (Unweighted)	N=294		N=161	N=133
Base (Weighted)	N=204		N=121	N=101
General Dentist/GP Dent	55%	C	80%	25%
Orthodontist	35%	B	0%	40%
Other	10%		20%	35%

- E. The respondent row should come just below the banner headers.

S2: Are you a/an...?

	All countries			
	Total (A)		General Dentist/GP (B)	Orthodontist (C)
Base	N=294		N=161	N=133
General Dentist/GP Dent	55%	C	80%	25%
Orthodontist	35%	B	0%	40%
Other	10%		20%	35%

The gap between banner and Respondent row should be avoided

- F. If the application is facing problem in figuring out the respondent row, please change the row qualifier to "Base : All Respondents"
- G. The banner information used for significance testing must be entered in rows.

	Total	Top 3 box
Wire/Cable management (A)	N=66	61%
High time investment (B)	N=76	51%
Probe dislodging (C)	N=56	71%

Application cannot handle banner with significance test info entered as a column

- H. If the table is showing summary information like "Count", "Mean" etc., please put them at the end of the variable data. The tool treats these key words as indicator of end of variable data. So, if they are kept at the start of the table, then tool will not read any useful data.

✚ S2: Are you a/an...?

	All countries		
	Total (A)	General Dentist/GP (B)	Orthodontist (C)
Base	N=294	N=161	N=133
Count	1.5	1.8	2.1
General Dentist/GP Dent	55% C	80% AC	25%
Orthodontist	35% B	0%	40% AB
Other	10%	20%	35%
Mean	40%	35%	55%

Problematic place to list "Count" or "Mean" etc.

Tool reads them correctly at the end of the table

I. A blank row should be avoided in the banner headers.

✚ S2: Are you a/an...?

	All countries		
	Total (A)	General Dentist/GP (B)	Orthodontist (C)
Base	N=294	N=161	N=133
Count	1.5	1.8	2.1
General Dentist/GP Dent	55% C	80% AC	25%
Orthodontist	35% B	0%	40% AB
Other	10%	20%	35%
Mean	40%	35%	55%

A blank row should be avoided in the banner headers

J. If the table is showing multiple information like count, proportion, and significance testing result, then please do not suppress the rows/ column containing no information i.e. all the entries are blank.

Table 3
Oncologist and Diabetologists
S3. Associated primary facility

	Total	Overall		S.Korea	
		Professional		Professional	
		Diabetologi	Oncologist	Diabetologi	Oncologist
	A	B	C	N	O
Base : All Respondents	361	180	181	30	30
Academic / University Hospital	58 16%	33 18%	25 14%	15 50%	6 20%
Public / Government Hospital	103 29%	40 22%	63 35%	7 23%	17 57%
Private Hospital	89 25%	44 24%	45 25%	6 20%	4 13%
Other	-	-	-	-	-

Please do not suppress this row