New Analytics Pages Help

The newer Analytics pages add in-memory analysis for pivots, variance, data quality, ranking, regression, time summaries, outliers, chart recommendations, audit summaries, map readiness, cohorts, funnels, Pareto classes, drift checks, KPI calculations, and data dictionaries. Results can be reviewed, linked back to source records, sent to AI, and exported where supported.

Page	Main input	Main output
Analytics Dashboard	Current report data	Tiles and previews
Pivot	Row, column, value, aggregation	Cross-tab report
Variance	Base, compare, group, value	Change and contribution
Comparison Reports	Periods, groups, queries, or files	Base vs compare
Profiling	Every field	Type/count/blanks/distinct/min/max
Data Quality	Report data	Missing, duplicate, invalid, suspicious rows
Ranking	Category/group and value	Top/bottom/average ranks
Regression	X and Y fields	Equation and predictions
Trends	Equation and X value	Interactive prediction chart
Time Based Summaries	Date and value fields	Day/week/month/quarter/year summaries
Time Series	Date, value, window	Moving averages and rolling totals
Outlier Flagging	Row and value fields, method, threshold	Flagged unusual records
Correlation Threshold	Numeric fields and threshold	Filtered correlation pairs
Chart Recommendations	Category/date/value fields	Recommended charts and dashboards
Audit Summaries	Fields, filters, thresholds, aggregations	Result lineage
Map Readiness	Possible coordinate fields	Map quality and KML readiness
Cohort Analysis	Entity, date, value, period	Cohort retention and activity
Funnel Analysis	Stage, order, value	Drop-off and conversion
ABC Pareto Analysis	Dimension, value, aggregate	A/B/C contribution classes
Data Drift Analysis	Compare field and two segments	Distribution shift
KPI Builder	Dimension, numerator, denominator	Calculated KPI by group
Data Dictionary	Field group and examples	Field documentation and recommended use

Analytics Dashboard

A dashboard is a navigation and preview screen that summarizes available analysis choices for the current report.

Typical screen area

Current report data | Browser size | Selected report | AI | Help | Export

Terms used.

Dashboard = a compact control center with tiles; Tile = one small preview of an analysis page; Current report data = the in-memory rows available for analysis.

Input entries.

The selected report supplies the data. Browser size controls how many tiles fit on each page. AI, Help, and Export buttons open explanation, documentation, or supported output.

Model / algorithm functions.

Builds small preview datasets from current report fields, checks which analytics are meaningful for available field types, and pages tiles responsively.

Meaning of output.

Each tile shows analysis name, miniature preview, and Open link. The preview helps users choose the next analytical page.

Sample result.

Tile	Preview	Open
Pivot	Cross-tab sample	Open
Regression	Equation sample	Open

Shortcut.

Start here when unsure which analysis fits the report.

Pivot / Cross Tab

Builds matrix-style cross-tab reports with row fields, column fields, value fields, and aggregation options.

Typical screen area

Row field | Column field | Value field | Aggregation | AI | Help | Export

Terms used.

Row field = category down the left side; Column field = category across the top; Value field = number summarized; Aggregation = sum, count, average, min, or max.

Input entries.

Choose row and column categories. Choose numeric value for totals/averages, or count when the goal is record counts.

Model / algorithm functions.

Groups records by row/column combination, applies the selected aggregation, and creates dynamic columns for column-field values.

Meaning of output.

The grid shows row labels, dynamic columns, calculated cell values, empty intersections, and totals when available.

Sample result.

Region	Online	Retail	Total
West	12000	8200	20200
East	9400	10100	19500

Shortcut.

Use Pivot when you need matrix totals by two dimensions.

Variance Analysis

Compares base and compare values and explains amount change, percentage change, and contribution to total change.

Typical screen area

Row field | Compare field | Value field | Base/compare selections | AI | Help | Export

Terms used.

Base = starting period/group; Compare = selected comparison period/group; Variance = Compare minus Base; Contribution = row share of total change.

Input entries.

Row field defines groups. Compare field supplies base/compare values such as year, status, region, or scenario. Value field is the numeric amount.

Model / algorithm functions.

Calculates base and compare totals, subtracts variance, divides by base for percent change, and compares row variance to total variance.

Meaning of output.

Base/Compare show the two values. Variance is absolute difference. % Change is relative movement. Contribution identifies drivers.

Sample result.

Group	Base	Compare	Variance	% Change
West	10000	12500	2500	25%
East	8000	7600	-400	-5%

Shortcut.

Click record links to inspect source rows behind base or compare values.

Comparison Reports

Compares two periods, groups, locations, SQL queries, or imported files using the same group/value logic.

Typical screen area

Comparison type | Base selector/query/file | Compare selector/query/file | Group/value fields | AI | Help | Export

Terms used.

Base set = first dataset/filter; Compare set = second dataset/filter; Match key = group field used to align results.

Input entries.

Comparison type controls where data comes from. Two Queries uses two SQL statements. Two Imported Files uses two comparable files.

Model / algorithm functions.

Builds base and compare tables, groups both by selected group field, aligns matching groups, and calculates counts, totals, variance, and percent change.

Meaning of output.

Base/Compare Records are row counts. Base/Compare Values are aggregated numbers. Links open corresponding filtered records when available.

Sample result.

Group	Base Records	Compare Records	Variance
Product A	45	51	1200
Product B	28	20	-850

Shortcut.

Use comparable columns in both imported files so results can be matched reliably.

Data Profiling

Profiles every field in the report or imported dataset to reveal type, completeness, uniqueness, and numeric range.

Typical screen area

Current report data or imported data | AI | Help | Export

Terms used.

Profile = field-level summary; Blank = missing value; Distinct = count of different values; Standard deviation = numeric spread around average.

Input entries.

Uses the current report dataset or imported data. Search/filter options can narrow the field list.

Model / algorithm functions.

Scans every column, detects likely data type, counts records/blanks/distinct values, and calculates min, max, average, and standard deviation where applicable.

Meaning of output.

Each row describes one field. Blanks show completeness issues. Distinct values reveal IDs/categories. Numeric statistics show range and spread.

Sample result.

Field	Type	Count	Blanks	Distinct
Sales	Number	1000	0	923
OrderDate	Date	1000	2	356

Shortcut.

Use profiling before deeper analytics to choose good category, date, and value fields.

Data Quality

Finds common data-quality problems that can distort reports, analytics, maps, charts, and exports.

Typical screen area

Current report data | Optional selected fields/rules | AI | Help | Export

Terms used.

Duplicate = repeated record/key; Invalid date = not usable as date; Suspicious text = unusually long, mixed, or inconsistent text.

Input entries.

Uses report data and optional field/rule choices. Numeric ranges identify business-limit problems. Category checks find spelling/casing inconsistency.

Model / algorithm functions.

Runs checks for blanks, duplicates, invalid dates, out-of-range numbers, inconsistent categories, and suspicious text patterns.

Meaning of output.

Count shows records failing a check. Severity indicates likely impact. Count links open affected records for review.

Sample result.

Check	Field	Count	Severity
Missing values	Customer	12	Medium
Invalid dates	ShipDate	3	High

Shortcut.

Review high-severity rows before relying on statistics or models.

Ranking Analysis

Ranks categories, customers, products, departments, locations, or other dimensions by top, bottom, or average values.

Typical screen area

Category/group field | Value field | Rank type | Group field optional | AI | Help | Export

Terms used.

Rank = ordered position; Top = largest; Bottom = smallest; Average = typical value; Group Value = rank value inside optional group.

Input entries.

Category/group defines what is ranked. Value is the numeric measure. Rank type controls largest, smallest, or average emphasis.

Model / algorithm functions.

Groups records, calculates selected rank measure, sorts according to rank type, optionally ranks inside each group, and builds record links.

Meaning of output.

Rank shows position. Category identifies item. Value columns show Top, Bottom, or Average Value. Records link to source rows.

Sample result.

Rank	Category	Top Value	Records
1	West	124000	88
2	East	118000	79

Shortcut.

Use Average to compare typical behavior instead of volume.

Regression Analysis

Explains and predicts how one value changes when another value changes, including nonlinear and logistic options.

Typical screen area

X field(s) | Y field | Equation type | Predict Y when X is | AI | Help | Export

Terms used.

X = independent/input value; Y = dependent/output value; Prediction = estimated Y; R-squared = fit strength; Logistic probability = yes/no likelihood from 0 to 1.

Input entries.

X fields provide explanatory values. Y is predicted value. Equation type controls model shape. Predict Y when X is supplies the X used for prediction.

Model / algorithm functions.

Fits selected equation to numeric data, evaluates fit, removes zero coefficient terms, calculates predicted Y, and prepares Trends links.

Meaning of output.

Equation describes relationship. Predicted Y is estimate for chosen X. Fit notes judge reliability. Records links show rows used.

Sample result.

Group	Equation	Predicted Y	Records
All	Y = 4.851 * pow(X,0.8333)	8.64	120
Yes/No	P = 1/(1+exp(...))	0.72	95

Shortcut.

Use Trends to inspect whether the fitted curve makes business sense.

Trends

Shows an interactive equation chart with selected X and predicted Y values, including nonlinear functions.

Typical screen area

Equation | X value | Optional subtitle values from Regression | AI | Help | Export

Terms used.

Equation = formula for Y; Active X = selected input; Curve = generated Y values; Zoom = change visible range without changing equation.

Input entries.

Equation can include pow, exp, ln, and log. X value controls highlighted prediction. Subtitle identifies group/fields from Regression.

Model / algorithm functions.

Parses equation, samples X values across chart range, calculates finite Y values, draws curve, and updates active point on click/scroll.

Meaning of output.

Chart shows X/Y relationship. Highlighted point shows prediction. Exports capture chart. Record links appear when source rows exist.

Sample result.

Equation	X	Y
Y = 10 + 2 * X * X	2	18
Y = 4 + 2 * e^X	1	9.44

Shortcut.

Use zoom and scroll bars to inspect local detail or wider trend shape.

Time Based Summaries

Summarizes values by day, week, month, quarter, or year when date fields exist.

Typical screen area

Date field | Value field | Date aggregation | AI | Help | Export

Terms used.

Date aggregation = grouping dates into periods; Quarter = three-month period; Period record link = source rows inside that time bucket.

Input entries.

Date field must contain usable dates. Value field supplies numeric amount. Date aggregation sets daily, weekly, monthly, quarterly, or yearly grain.

Model / algorithm functions.

Converts each date to selected period, groups records by period, and calculates record count, total, average, minimum, and maximum.

Meaning of output.

Period identifies time bucket. Records is row count. Total/Average summarize value. Links open records for each period.

Sample result.

Period	Records	Total	Average
2026-Q1	220	450000	2045
2026-Q2	180	390000	2167

Shortcut.

Use quarter/year for management views and day/week for operational detail.

Time Series

Calculates moving averages and rolling totals for time-series style reports.

Typical screen area

Date field | Value field | Date aggregation | Number of time periods | AI | Help | Export

Terms used.

Moving average = average over recent periods; Rolling total = sum over recent periods; Window = number of periods included.

Input entries.

Date orders the series. Value is summarized. Date aggregation sets grain. Number of time periods controls moving/rolling window size.

Model / algorithm functions.

Groups values by period, sorts chronologically, and calculates value, moving average, and rolling total for each period using the window.

Meaning of output.

Value is period amount. Moving Avg smooths noise. Rolling Total shows accumulated recent value. Links open period rows.

Sample result.

Period	Value	Moving Avg	Rolling Total
Jan	100	100	100
Feb	120	110	220

Shortcut.

Increase window for smoother trends; decrease it for faster reaction.

Outlier Flagging

Flags unusual records or groups based on standard deviation, percentage difference, or business rules.

Typical screen area

Row field | Value field | Outlier method | Threshold | AI | Help | Export

Terms used.

Outlier = unusually high/low value; Threshold = flagging limit; Standard deviation method = far from average; Business rule = user-defined limit.

Input entries.

Row identifies records/groups. Value is numeric measure. Method chooses statistical or rule-based detection. Threshold controls sensitivity.

Model / algorithm functions.

Calculates expected range, compares each value to range or rule, assigns high/low notes, and prepares source-record links.

Meaning of output.

Row identifies affected item. Value is observed amount. Method shows why checked. Outlier Note explains high/low or rule violation.

Sample result.

Row	Value	Method	Outlier Note
Order 1001	9999	Std Dev	High outlier
Order 1044	1	Percent Diff	Low outlier

Shortcut.

Outliers are signals for review, not automatic errors.

Correlation Threshold

Filters correlations to focus only on numeric field pairs above or below a selected threshold.

Typical screen area

Numeric fields | Threshold | Direction/filter | AI | Help | Export

Terms used.

Correlation = strength/direction of numeric relationship; Positive = move together; Negative = move opposite; Threshold = minimum strength to show.

Input entries.

Numeric fields define possible pairs. Threshold controls required strength. Direction/filter focuses on positive, negative, high, or low relationships.

Model / algorithm functions.

Calculates correlations for numeric field pairs, compares values to threshold, labels strength, and hides weak/noisy pairs.

Meaning of output.

Field 1/2 identify pair. Correlation ranges -1 to 1. Strength describes size. Note helps interpret direction.

Sample result.

Field 1	Field 2	Correlation	Strength
Sales	Profit	0.88	Strong
Discount	Margin	-0.63	Moderate negative

Shortcut.

Use threshold filtering when the full correlation grid is too noisy.

Chart Recommendations

Builds recommended charts from category, date, and value fields and can create dashboards from selected recommendations.

Typical screen area

Category field(s) | Value field(s) | Date field | Search/filter/check boxes | AI | Help | Export

Terms used.

Category = grouping field; Value = numeric measure; Multi-value chart = more than one Y measure; Highest priority = useful unique field combination.

Input entries.

Selections restrict recommendations. If blank, page searches eligible fields. Checkboxes choose charts for dashboard creation.

Model / algorithm functions.

Generates field combinations, filters unsupported chart/value combinations, limits duplicates, assigns priority, validates dashboard-safe chart types, and builds links.

Meaning of output.

Recommended Chart is chart type. Fields show X/category and Y/value choices. Priority ranks usefulness. Add to Dashboard controls dashboard creation.

Sample result.

Chart	Fields	Priority	Dashboard
Column	Region / Sales	Highest	Checked
Line	OrderDate / Revenue	High	Checked

Shortcut.

Use Reset to clear search and selections; Create Dashboard uses current page selections.

Audit Summaries

Shows which report fields, filters, thresholds, and aggregation options produced each analytical result.

Typical screen area

Selected analytical page options | Report fields | Thresholds/aggregation settings | AI | Help | Export

Terms used.

Audit summary = explanation of result production; Lineage = source fields/settings behind a number; Threshold = cutoff or rule value.

Input entries.

Uses current analytical settings, selected fields, filters, thresholds, aggregation choices, and other options that affect results.

Model / algorithm functions.

Collects selected settings, maps each setting to analytical effect, and builds readable lineage explaining what produced the result.

Meaning of output.

Item identifies setting. Setting/Value show selection. Effect explains how it influenced calculation or filtering.

Sample result.

Item	Setting	Value	Effect
Value Field	Sales	Selected	Used for totals
Threshold	2 Std Dev	Selected	Outlier rule

Shortcut.

Use Audit Summaries when results need to be explained or reviewed.

Map Readiness

Checks whether report data is ready for map use and suggests possible coordinate fields.

Typical screen area

Current report data | Detected latitude/longitude fields | Location/category fields | AI | Help | Export

Terms used.

Latitude/Longitude = coordinates; KML-ready = suitable for map/KML output; Invalid range = latitude outside -90..90 or longitude outside -180..180.

Input entries.

Uses report fields and searches coordinate-like names/values. It ignores index/ID-like fields and suggests latitude/longitude pairs.

Model / algorithm functions.

Detects coordinate candidates, validates missing, duplicate, and out-of-range coordinates, and estimates rows usable for map output.

Meaning of output.

Suggested Fields identify likely coordinates. Records shows affected/ready rows. Status explains good, warning, or review result.

Sample result.

Check	Suggested Fields	Records	Status
Latitude/Longitude	Lat, Long	980	Good
Invalid range	Lat, Long	2	Review

Shortcut.

Run Map Readiness before Map Report to avoid map crashes and bad coordinates.

Cohort Analysis

Groups records by first activity period and measures later-period activity, retention, record counts, and value.

Typical screen area

Entity field | Date field | Value field | Period | Search | AI | Help | Export

Terms used.

Cohort = entities that started in same period; Retention = percent still active later; Activity period = measured period after first appearance.

Input entries.

Entity identifies customers/users/products/cases. Date determines first and later periods. Value summarizes activity. Period sets month/quarter/year grain.

Model / algorithm functions.

Finds each entity first period, assigns cohort, groups later activity by cohort/activity period, counts entities/records, summarizes value, and calculates retention.

Meaning of output.

Cohort Period is start group. Activity Period is measured period. Period Number is distance from start. Retention % is active/original cohort size.

Sample result.

Cohort Period	Activity Period	Entities	Records	Retention %
2026-01	2026-01	120	310	100%
2026-01	2026-02	84	190	70%

Shortcut.

Use Cohort to study customer, member, product, or case retention over time.

Funnel Analysis

Analyzes ordered statuses or process stages and shows counts, drop-off, conversion percentage, and optional value by stage.

Typical screen area

Stage field | Value field | Stage order | Search | AI | Help | Export

Terms used.

Funnel = ordered process; Stage = one step; Drop-off = records lost since prior step; Conversion % = percent remaining from first step.

Input entries.

Stage contains statuses/steps. Stage order defines sequence when alphabetical order is wrong. Value optionally totals money, quantity, or score.

Model / algorithm functions.

Counts records by stage, applies custom order, calculates drop-off from previous stage, conversion from first stage, and optional value by stage.

Meaning of output.

Step is sequence. Records is count at each stage. Drop Off is loss from previous step. Conversion % shows population remaining.

Sample result.

Step	Stage	Records	Drop Off	Conversion %
1	Lead	500	0	100%
2	Qualified	320	180	64%

Shortcut.

Use Funnel to find bottlenecks in sales, service, approval, or operations.

ABC Pareto Analysis

Classifies dimensions into A, B, and C groups by cumulative contribution to total value.

Typical screen area

Dimension field | Value field | Aggregate | Search | AI | Help | Export

Terms used.

Pareto = few items drive most value; A class = largest contribution; B = middle; C = long tail; Share = percent of total.

Input entries.

Dimension identifies items such as products/customers/regions. Value is measure to rank. Aggregate controls sum, count, or average behavior.

Model / algorithm functions.

Aggregates value by dimension, sorts descending, calculates share and cumulative share, then classifies A/B/C around 80% and 95% cumulative thresholds.

Meaning of output.

Value is aggregated amount. Share % is item portion of total. Cumulative % adds shares in rank order. ABC Class marks major/middle/tail contributors.

Sample result.

Dimension	Records	Value	Cumulative %	ABC Class
Product A	140	450000	62%	A
Product B	88	135000	81%	B

Shortcut.

Use ABC/Pareto to focus on items driving most of the result.

Data Drift Analysis

Compares field distributions between two selected segments such as periods, groups, locations, or categories.

Typical screen area

Compare field | Segment field | Base value | Compare value | Search | AI | Help | Export

Terms used.

Drift = distribution change; Segment = subset such as period or region; Percentage-point drift = compare share minus base share.

Input entries.

Compare field contains values checked. Segment divides data into groups. Base and Compare values choose the two groups.

Model / algorithm functions.

Counts compare-field values in base and compare segments, converts counts to shares, subtracts base share from compare share, and highlights changed representation.

Meaning of output.

Base/Compare Records are counts. Base/Compare Share % are distributions. Drift Points show percentage-point change.

Sample result.

Field Value	Base Records	Compare Records	Base Share %	Drift Points
Online	210	280	42%	8.5
Retail	190	150	38%	-6.2

Shortcut.

Use Data Drift when report population may have changed between periods or groups.

KPI Builder

Creates simple calculated business indicators from numeric fields and groups them by a selected dimension.

Typical screen area

Dimension field | Operation | Numerator field | Denominator field | Search | AI | Help | Export

Terms used.

KPI = key performance indicator; Numerator = top value in ratio; Denominator = bottom value; Ratio = numerator divided by denominator.

Input entries.

Dimension groups the KPI. Numerator and denominator supply numeric totals. Operation chooses ratio, difference, sum, or product. Search filters rows.

Model / algorithm functions.

Sums numerator and denominator by dimension, applies selected operation, handles divide-by-zero safely, and builds KPI value for each group.

Meaning of output.

Numerator/Denominator show aggregated inputs. Operation explains formula. KPI Value is calculated indicator. Records link to rows behind group.

Sample result.

Dimension	Records	Numerator	Denominator	KPI Value
West	120	240000	8000	30
East	95	171000	5700	30

Shortcut.

Use KPI Builder for revenue per unit, cost per case, margin rate, or productivity.

Data Dictionary

Generates field-level documentation with detected type, examples, blanks, distinct values, summaries, and recommended analytical use.

Typical screen area

Field group | Examples | Search | AI | Help | Export

Terms used.

Data dictionary = field documentation; Detected type = inferred numeric/date/text behavior; Recommended use = suggested role such as category, date, measure, or ID.

Input entries.

Field group filters all/numeric/date/text fields. Examples controls sample values. Search narrows fields by name.

Model / algorithm functions.

Scans fields, detects likely type, counts blanks/distinct values, collects examples, calculates numeric statistics, and suggests analytical roles.

Meaning of output.

Field identifies column. Detected Type explains usage. Blanks/Distinct describe completeness and uniqueness. Recommended Use helps choose fields.

Sample result.

Field	Detected Type	Blanks	Distinct Values	Recommended Use
Sales	Numeric	0	923	Measure / KPI
OrderDate	Date	2	356	Time grouping

Shortcut.

Use Data Dictionary before sharing reports or sending context to AI.

Data Readiness Scanner

Scans the current report or imported dataset and recommends useful analytics, market models, charts, maps, and quality checks by readiness score.

Typical screen area

Search | Build | Reset | AI | CSV | Excel | Recommended Analytics Grid | Open | Records

Terms used.

Readiness score = algorithm-assigned fit of an analysis to detected fields; Suggested Fields = guidance for the dropdowns and input controls on the recommended page.

Input entries.

Uses the current report result or imported dataset in memory. No manual field selection is required. Search optionally narrows recommended analysis rows.

Model / algorithm functions.

Detects numeric, date, category, ID, customer, order, product, location, price, quantity, revenue, and status fields; counts missing values and duplicate records; then assigns readiness scores.

Meaning of output.

Analysis identifies the suggested page. Readiness and Score show relative fit. Why Useful explains the recommendation. Suggested Fields tells what fields make sense in that page's dropdowns and controls.

Sample result.

Analysis	Readiness	Score	Suggested Fields	Open
Detail Analytics	High	95	Groups: Region, Product; Value: Sales	open
Overall Statistics	High	95	Numeric: Sales; Text: Region	open
Fields Correlation	High	90	Numeric pairs: Sales, Profit	open
Market Pricing	Possible	82	Price: UnitPrice; Response: Quantity	open

Shortcut.

Open Data Readiness Scanner first when a dataset is unfamiliar, then begin with High readiness recommendations.