DataArts Insight

# Getting Started

**Issue** 01

**Date** 2025-02-24

HUAWEI CLOUD COMPUTING TECHNOLOGIES CO., LTD.

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# Contents



# 1 Signing Up for a HUAWEI ID and Completing Real-Name Authentication

To use DataArts Insight on Huawei Cloud, you must first sign up for a HUAWEI ID and enable Huawei Cloud services. For details about an ID, see **Account Center**. This section guides you through how to sign up for a HUAWEI ID. If you already have one, you may skip over this section.

## Signing Up for a Huawei Cloud Account

Skip over this procedure if you already have registered one.

1. Log in to the **Huawei Cloud official website**.
2. Click **Sign Up** in the upper right corner of the page.
3. Complete the registration process as instructed.

# 2 Subscribing to DataArts Insight

Subscribe to DataArts Insight and authorize it before you can perform data analysis. When using DataArts Insight for the first time, follow the instructions on the console to subscribe to the service and complete the agency authorization process. If you need to adjust or update the agency permissions, change them on the **Agency Management** page. This section walks you through how to subscribe to DataArts Insight and authorize it.

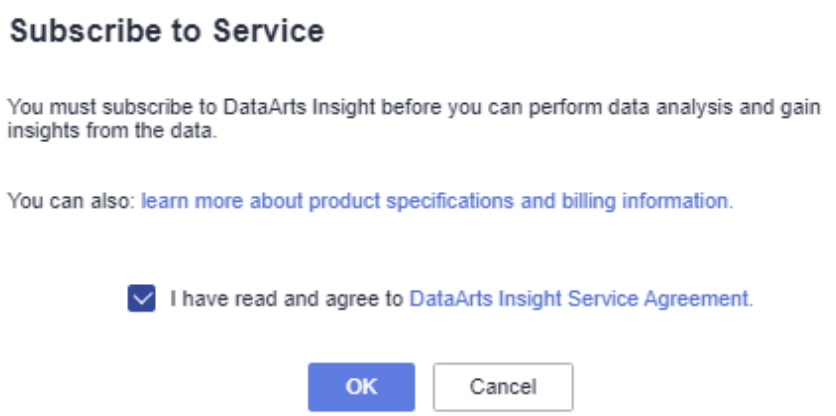
NOTE

Only the tenant account or a member account of user group **Admin** can authorize the service.

## Procedure

1. Click **Subscribe**.
2. Read and agree to the service agreement, and click **OK**. The DataArts Insight console is displayed.

**Figure 2-1** Subscribing to DataArts Insight




3. Choose your package specifications, number of general users, number of large screens, number of dashboards, and required duration based on your needs. Once you have made your selection, click **Next: Confirm**.

4. Confirm your order configuration and click **Buy Now**. On the displayed page, select your preferred payment method and complete the payment.
5. Choose **System Settings** > **Agency Management** page. On the displayed page, authorize the service.
   - Once being authorized, DataArts Insight will have permission to use the selected cloud services. To authorize or cancel the authorization, choose **System Settings** > **Authorization** on the management console.
   - Once being authorized, DataArts Insight will create an agency. Go to the agency list to view details.

   **Table 2-1** Agency permissions

| Permission | Description | Remarks |
| --- | --- | --- |
| IAM ReadOnlyAccess | Read-only permissions for IAM. DataArts Insight uses these permissions for collaborative authorization in reports and user tagging functions. | Cloud service caching takes time, so authorization will only be effective approximately 3 minutes after the completion of the operation. |
| DataArts Insight Cross-Domain Authorization | This permission is required for authorizing DataArts Insight across accounts. | |
| DataArts Insight Datasource VPC Mgmt | This permission is required for connecting DataArts Insight to a data source in a VPC. | |

6. Click **OK**. Once the authorization is complete, you can use DataArts Insight.

# 3 Setting Up a Dashboard

## Scenario

Dashboards, as powerful data analysis tools, are widely used in various fields such as operations monitoring, market analysis, and project management. They help management quickly grasp the business status and timely identify and resolve issues by displaying key indicators and data trends in real-time. This section guides you on how to connect DataArts Insight to a GaussDB(DWS) data source to set up dashboards for data analysis and visualization.

## Procedure

**Figure 3-1** Process of setting up a dashboard

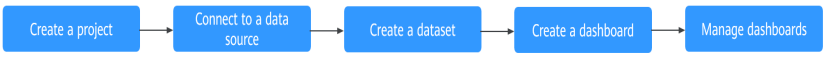



**Table 3-1** Process of setting up a dashboard

| No. | Step | Description |
| --- | --- | --- |
| 1 | Create a Project | Establish a project where all subsequent data analysis activities will occur, facilitating streamlined data management. |
| 2 | Connect to a Data Source | Data sources form the backbone of data analysis. Ensuring successful connections to data sources is essential before commencing any data analysis. |
| 3 | Create a Dataset | Datasets serve as an intermediary between data sources and the visual displays, receiving input from data sources and providing input for the visual displays. |
| 4 | Create a Dashboard | You can create a dashboard by adding various charts to display data from different dimensions and perform visual data analysis. |

| No. | Step | Description |
| --- | --- | --- |
| 5 | Manage Dashboards | After analyzing data, you can publish the dashboard or share it with others for collaborative editing. |

## Data Description

To protect user privacy and data security, all data has been sampled and anonymized. In this example, there are three data tables: **order_info_demo_01** (order table), **product_info_demo_02** (product information table), and **user_info_demo_03** (user data table). For details, see **Table 3-2**.

**Table 3-2** Product sales data example

| Data Table | Field | Type | Description |
| --- | --- | --- | --- |
| order_info_demo_01 | id | int | ID |
| | sale_price | int | Sales price |
| | profit | int | Profit |
| | pay_time | int | Payment time |
| | create_time | int | Order creation time |
| product_info_demo_02 | product_id | int | ID |
| | product_name | string | Product name |
| | product_type | string | Product type |
| | product_color | string | Product color |
| | product_price | string | Product price |
| user_info_demo_03 | id | int | ID |
| | user_name | int | Username |
| | age | int | Age |
| | gender | int | Gender |

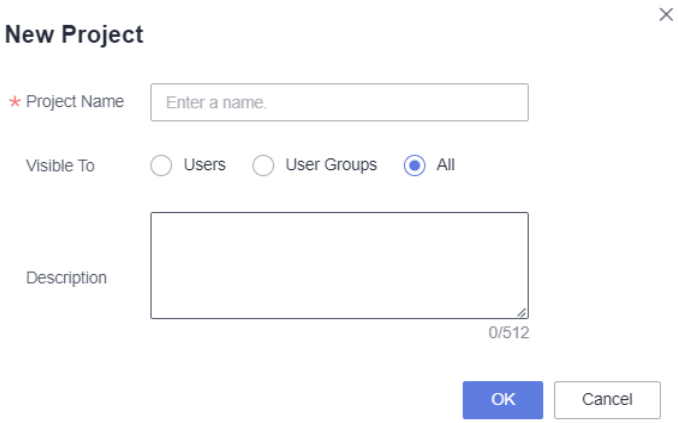
## Step 1: Create a Project

1. Log in to the DataArts Insight console.
2. Click  in the upper left corner of the management console to select a region and select an enterprise project from **Enterprise Project** in the lower left corner of the **Workspace** page.
3. Click **Create Project** in the right pane of the console.

4. Enter the project name, visible type, members, and description. See **Figure 3-2**.
5. Set the parameters and click **OK**.

**Figure 3-2** Creating a project




## Step 2: Connect to a Data Source

In this example, a GaussDB(DWS) data source is connected through the public network..

1. Select the desired project and click the name to access the project space.
2. Choose **Data Management** > **Data Sources**. On the displayed page, click **Create Data Source**. In the slide-out panel, set **Access Network Type** to **Public network**. See **Figure 3-3**.
3. Enter the name, domain name, port number, and database, and click **Test Connection**. For details about the parameters, see **Table 3-3**. Once the connection test is successful, the data source is successfully connected.

**Figure 3-3** Clicking Create Data Source

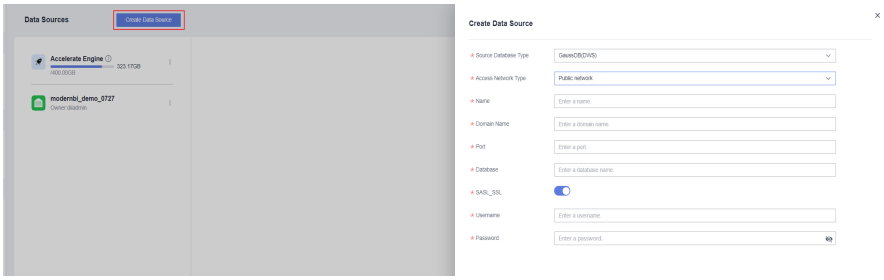


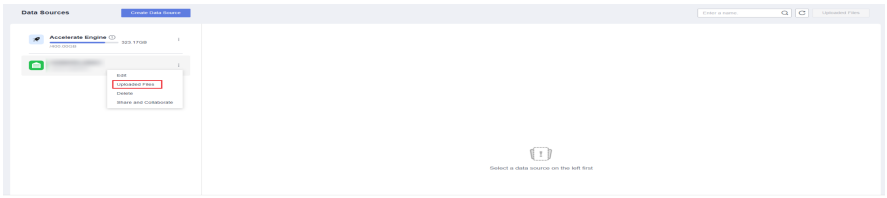
**Table 3-3** Parameters

| Parameter | Mandatory | Description |
| --- | --- | --- |
| Source Database Type | Yes | Type of the accessed data source. In this example, **GaussDB(DWS)** is selected. |
| Access Network Type | Yes | In this example, **Public network** is selected. |
| Name | Yes | Display name of the data source in the list. |
| Domain Name | Yes | IP address of the data source. |
| Port | Yes | Port number for logging in to the database. |
| Database | Yes | Name of the database to be logged in to. |
| SASL_SSL | - | It is used for trusted identity authentication and secure data transmission when DataArts Insight retrieves data from the data source. This function is enabled by default. |
| Username | Yes | Username for logging in to the database. |
| Password | Yes | Password for logging in to the database. |

## Step 3: Create a Dataset

1. Select the desired project and click the name to access the project space.
2. Click  next to the data source name and select **Uploaded Files** (**Figure 3-4**). Select the Excel file you want to upload, modify parameters as required, and click **OK**. Repeat this step to upload all data tables in sequence. In this example, there are three data tables. For details about the data tables, see **Data Description**.

**Figure 3-4** Uploading a file




NOTE

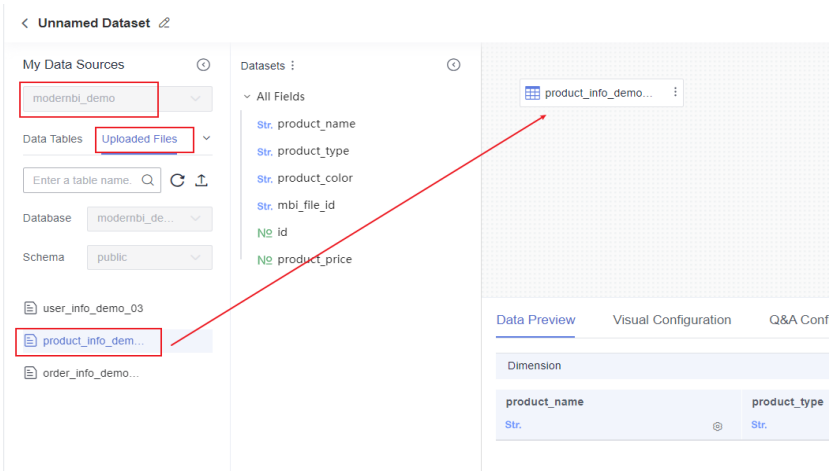
Before uploading files, you need to configure the data storage bucket on the **System Settings** > **OBS Bucket Settings** page.

3. Choose **Data Management** > **Datasets**. On the displayed page, click **Create Dataset**.

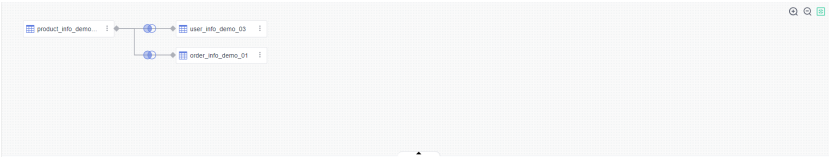
4. Under **My Data Sources**, select the data source that is connected to in **step 2**. Click the **Uploaded Files** and double-click or drag a data table to add it to the operation panel.

**Figure 3-5** Selecting a data table



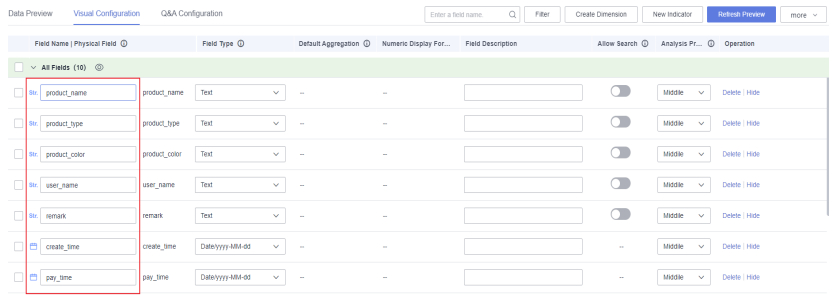

5. Double-click the data table name and set the table's association in the operation panel.
   - Set up a left outer join between **product_info_demo_02** and **order_info_demo_01** using the **id** field as the key for the association.
   - Set up a left outer join between **product_info_demo_02** and **user_info_demo_03** using the **id** field as the key for the association.

**Figure 3-6** Creating a model by associating multiple tables



6. Click the **Visual Configuration** tab and enter descriptions of the fields.

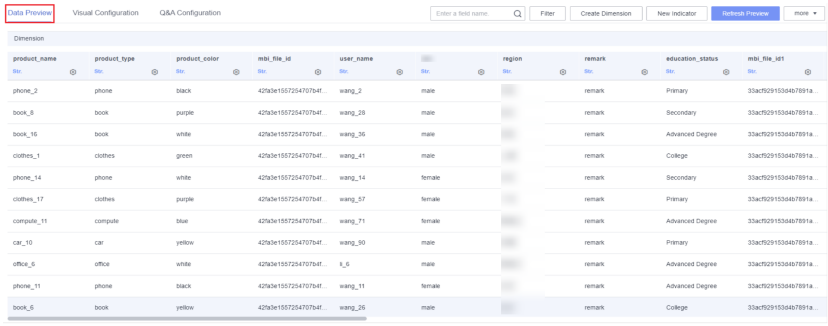
**Figure 3-7** Visual configuration



7. Click the **Data Preview** tab and then **Refresh Preview** to view basic information about the dataset.

**Figure 3-8** Data Preview tab



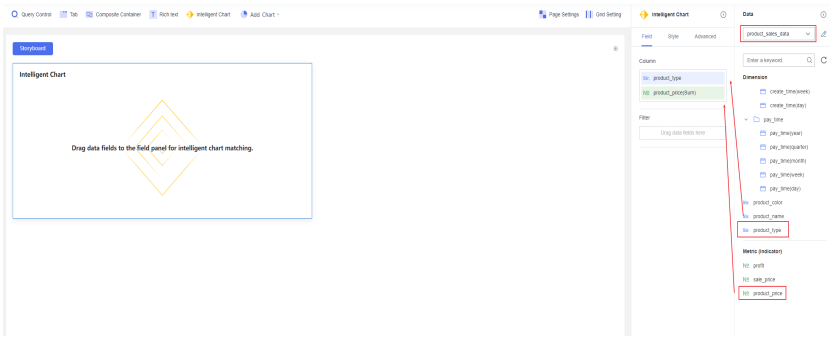
8. Confirm the information and click **Save**.

## Step 4: Create a Dashboard

In this example, we will create an area chart, pie chart, and table on a dashboard.

1. Click the name of the desired project in the **My Projects** area in the right pane.
2. In the navigation pane on the left, choose **Data Analytics** > **Dashboard**. On the displayed page, click **Create Dashboard**.
3. In the **Data** area on the right, select a dataset. Then drag a dimension and metric to the **Column** area of the intelligent chart.

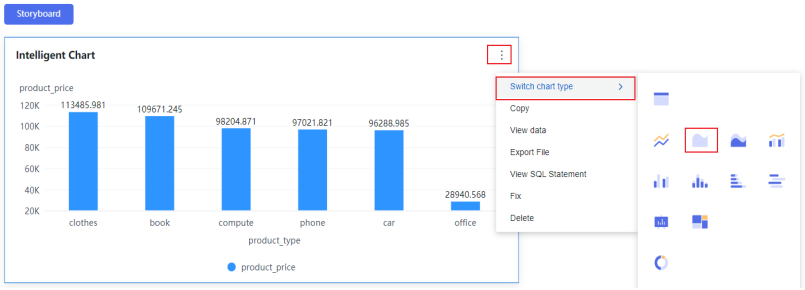
**Figure 3-9** Selecting data



4. Click **Update**. The system automatically generates a chart based on the selected data.
5. Click ⋮ in the upper right corner of intelligent chart, choose **Switch chart type**, and select the desired chart type. In this example, an area chart is selected.

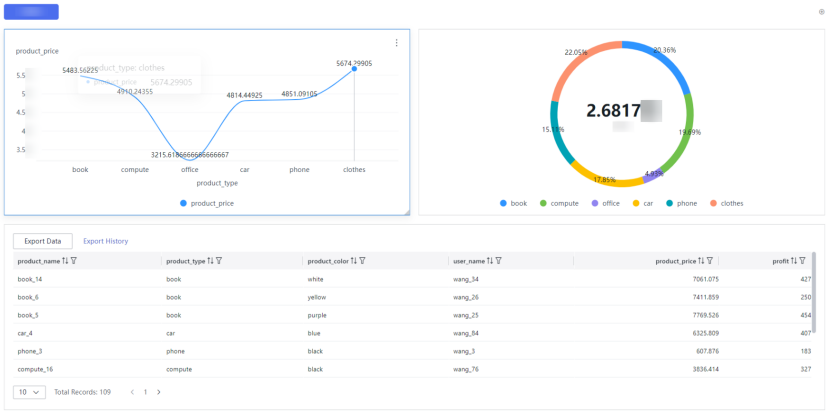
  

**Figure 3-10** Switching the chart type




6. On the top menu, click **Add Chart** and select the required chart template. The pie chart is used as an example.
7. In the **Data** area on the right of the page, select a dataset. Then drag dimensions and metrics to the **Column** area.
8. Click **Update**. The pie chart is created. Create a table by following the same procedure.

**Figure 3-11** Dashboard display



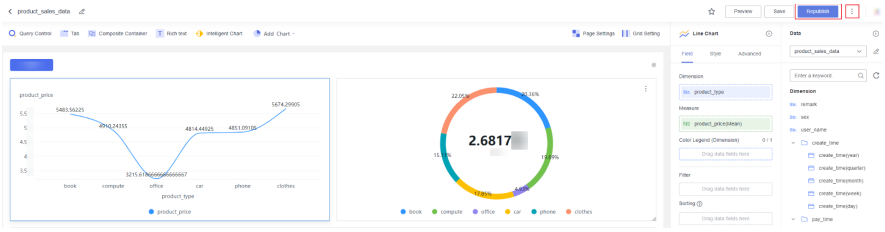

9. Click **Save** in the upper right corner. In the dialog box that appears, enter a dashboard name, and click **Confirm**.

## Step 5: Manage Dashboards

- **Changing the dashboard publish status**
  a. Click the name of the desired project in the **My Projects** area in the right pane.
  b. In the navigation pane on the left, choose **Data Analytics** > **Dashboard**.
  c. Click the name of the desired dashboard.
     - Publishing the dashboard: Click **Save and Publish** in the upper right corner of the page.
     - Taking the dashboard offline: Click ⋮ in the upper right corner of the page and select **Offline**.

**Figure 3-12** Changing the dashboard publish status



- **Managing a published dashboard**

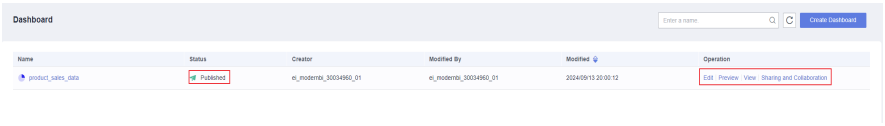
  You can edit, preview, view, share, and collaborate on published dashboards.

  a. Click the name of the desired project in the **My Projects** area in the right pane.

  b. In the navigation pane on the left, choose **Data Analytics** > **Dashboard**.

  c. On the displayed page, locate the dashboard you want to manage, and click **Edit**, **Preview**, **Sharing and Collaboration**, or **Delete** in its **Operation** column as needed.

  **Figure 3-13** Managing a published dashboard



- **Managing a dashboard that has been taken offline**

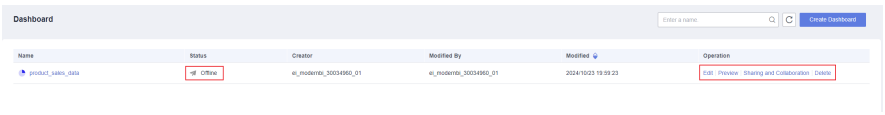
  You can edit, preview, share, collaborate on, and delete dashboards that have been taken offline.

  a. Click the name of the desired project in the **My Projects** area in the right pane.

  b. In the navigation pane on the left, choose **Data Analytics** > **Dashboard**.

  c. On the displayed page, locate the dashboard you want to manage, and click **Edit**, **Preview**, **Sharing and Collaboration**, or **Delete** in its **Operation** column as needed.

  **Figure 3-14** Managing a dashboard that has been taken offline



# 4 Setting Up a Large Screen

## Scenario

A data large screen is a technical solution that graphically and visually displays data on a large screen, combining visualization technology and scenario-based storytelling capabilities. It is often used to display and analyze key data indicators in real-time, helping you quickly understand complex data. This section uses the sales data of a specific type of product as an example to demonstrate how to quickly set up a data large screen.

## Procedure

**Figure 4-1** Process of setting up a large screen

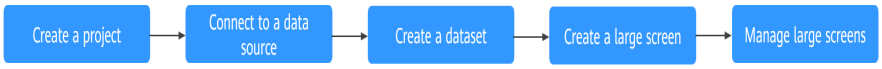



**Table 4-1** Process of setting up a large screen

| No. | Step | Description |
| --- | --- | --- |
| 1 | **Create a Project** | Establish a project where all subsequent data analysis activities will occur, facilitating streamlined data management. |
| 2 | **Connect to a Data Source** | Data sources form the backbone of data analysis. Ensuring successful connections to data sources is essential before commencing any data analysis. |
| 3 | **Create a Dataset** | Datasets serve as an intermediary between data sources and the visual displays, receiving input from data sources and providing input for the visual displays. |
| 4 | **Create a Large Screen** | You can create a large screen by adding various charts to display data from different dimensions and perform visual data analysis. |

| No. | Step | Description |
| --- | --- | --- |
| 5 | Manage Large Screens | After analyzing data, you can publish the large screen or share it with others for collaborative editing. |

## Data Description

To protect user privacy and data security, all data has been sampled and anonymized. In this example, there are three data tables: **order_info_demo_01** (order table), **product_info_demo_02** (product information table), and **user_info_demo_03** (user data table). For details, see **Table 4-2**.

**Table 4-2** Product sales data example

| Data Table | Field | Type | Description |
| --- | --- | --- | --- |
| order_info_demo_01 | id | int | ID |
| | sale_price | int | Sales price |
| | profit | int | Profit |
| | pay_time | int | Payment time |
| | create_time | int | Order creation time |
| product_info_demo_02 | product_id | int | ID |
| | product_name | string | Product name |
| | product_type | string | Product type |
| | product_color | string | Product color |
| | product_price | string | Product price |
| user_info_demo_03 | id | int | ID |
| | user_name | int | Username |
| | age | int | Age |
| | gender | int | Gender |

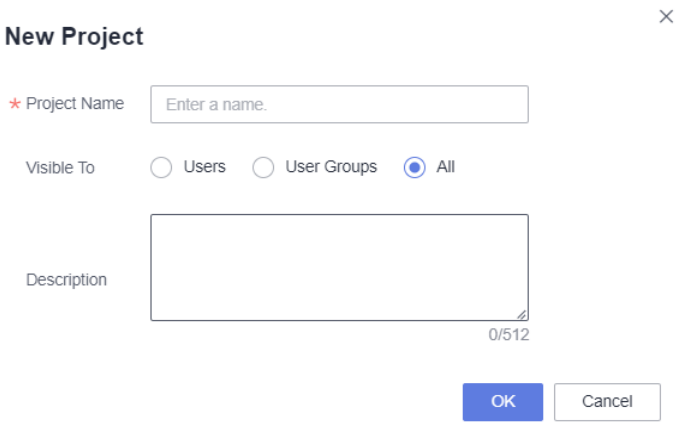
## Step 1: Create a Project

1. Log in to the DataArts Insight console.
2. Click  in the upper left corner of the management console to select a region and select an enterprise project from **Enterprise Project** in the lower left corner of the **Workspace** page.
3. Click **Create Project** in the right pane of the console.

4. Enter the project name, visible type, members, and description. See **Figure 4-2**.
5. Set the parameters and click **OK**.

**Figure 4-2** Creating a project




## Step 2: Connect to a Data Source

In this example, a GaussDB(DWS) data source is connected through the public network..

1. Select the desired project and click the name to access the project space.
2. Choose **Data Management** > **Data Sources**. On the displayed page, click **Create Data Source**. In the slide-out panel, set **Access Network Type** to **Public network**. See **Figure 4-3**.
3. Enter the name, domain name, port number, and database, and click **Test Connection**. For details about the parameters, see **Table 4-3**. Once the connection test is successful, the data source is successfully connected.

**Figure 4-3** Clicking Create Data Source

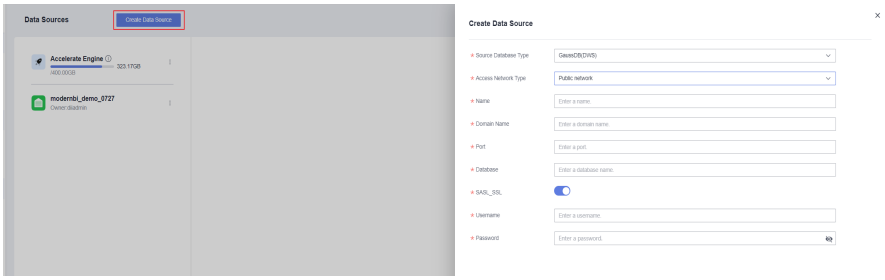


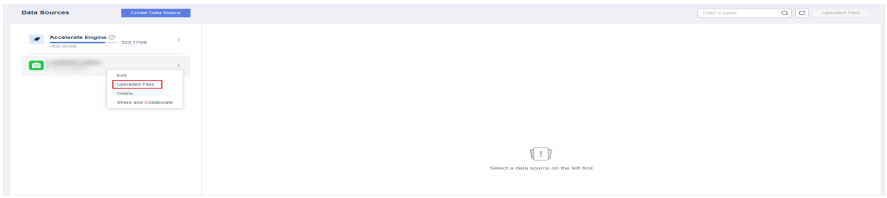
**Table 4-3** Parameters

| Parameter | Mandatory | Description |
| --- | --- | --- |
| Source Database Type | Yes | Type of the accessed data source. In this example, **GaussDB(DWS)** is selected. |
| Access Network Type | Yes | In this example, **Public network** is selected. |
| Name | Yes | Display name of the data source in the list. |
| Domain Name | Yes | IP address of the data source. |
| Port | Yes | Port number for logging in to the database. |
| Database | Yes | Name of the database to be logged in to. |
| SASL_SSL | - | It is used for trusted identity authentication and secure data transmission when DataArts Insight retrieves data from the data source. This function is enabled by default. |
| Username | Yes | Username for logging in to the database. |
| Password | Yes | Password for logging in to the database. |

## Step 3: Create a Dataset

1. Select the desired project and click the name to access the project space.
2. Click  next to the data source name and select **Uploaded Files** (**Figure 4-4**). Select the Excel file you want to upload, modify parameters as required, and click **OK**. Repeat this step to upload all data tables in sequence. In this example, there are three data tables. For details about the data tables, see **Data Description**.

   **Figure 4-4** Uploading a file

   NOTE

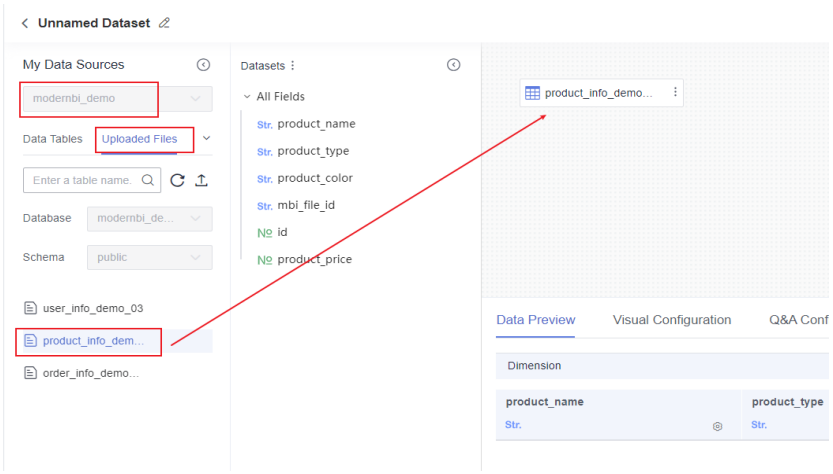
   Before uploading files, you need to configure the data storage bucket on the **System Settings** > **OBS Bucket Settings** page.

3. Choose **Data Management** > **Datasets**. On the displayed page, click **Create Dataset**.

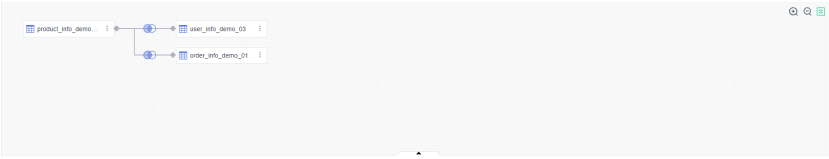
4. Under **My Data Sources**, select the data source that is connected to in **step 2**. Click the **Uploaded Files** and double-click or drag a data table to add it to the operation panel.

**Figure 4-5** Selecting a data table



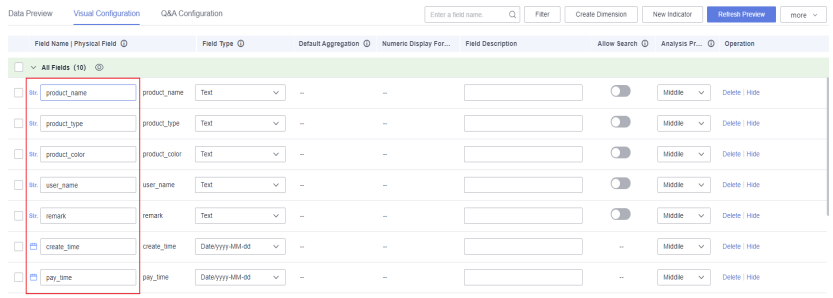

5. Double-click the data table name and set the table's association in the operation panel.
   - Set up a left outer join between **product_info_demo_02** and **order_info_demo_01** using the **id** field as the key for the association.
   - Set up a left outer join between **product_info_demo_02** and **user_info_demo_03** using the **id** field as the key for the association.

**Figure 4-6** Creating a model by associating multiple tables



6. Click the **Visual Configuration** tab and enter descriptions of the fields.

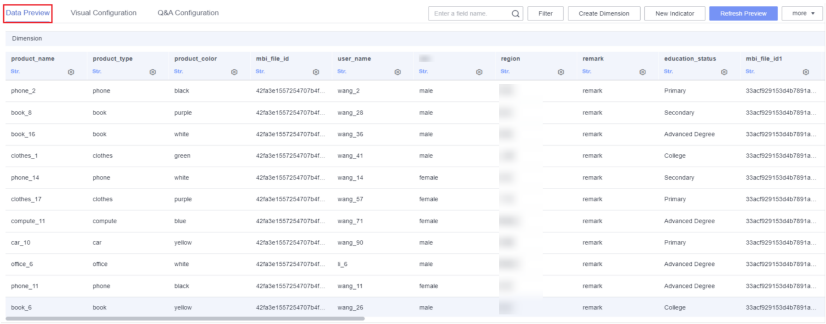
**Figure 4-7** Visual configuration



7. Click the **Data Preview** tab and then **Refresh Preview** to view basic information about the dataset.

**Figure 4-8** Data Preview tab



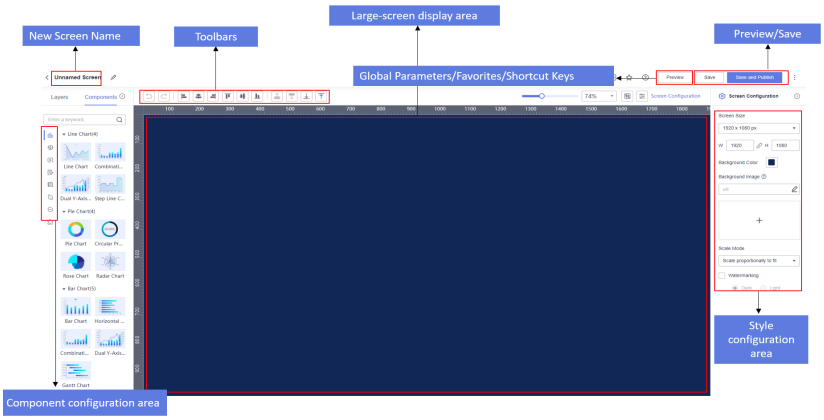
8. Confirm the information and click **Save**.

## Step 4: Create a Large Screen

In this example, we will create a line chart, bar chart, and table on a large screen.

1. Click the name of the desired project in the **My Projects** area in the right pane.
2. In the navigation pane on the left, choose **Data Analytics** > **Large Screen**. On the displayed page, click **Create Screen** in the upper right corner.

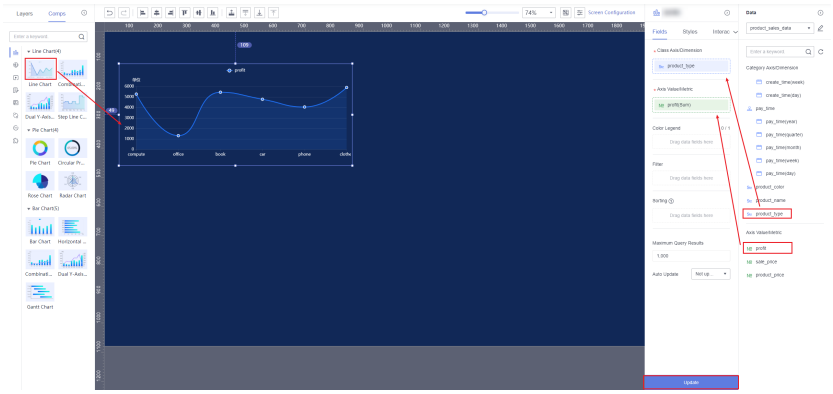
**Figure 4-9** Large screen configuration page




3. Locate a desired component on the left and drag it to the canvas. The following uses a line chart as an example.
4. In the **Data** area on the right of the page, select a dataset. Then drag a field from **Category Axis/Dimension** and **Axis Value/Metric** respectively to the **Class Axis** and **Axis Value/Metric** areas under the **Fields** tab of the line chart (**Figure 4-10**).

**Figure 4-10** Dragging a component and fields



5. Click **Update**. The system automatically generates a line chart based on the selected data.
6. Create a bar chart and table by following the same procedure and display them on the large screen.

**Figure 4-11** Displaying them on the large screen


7. Click **Save** in the upper right corner. In the dialog box that appears, enter a large screen name, and click **OK**.

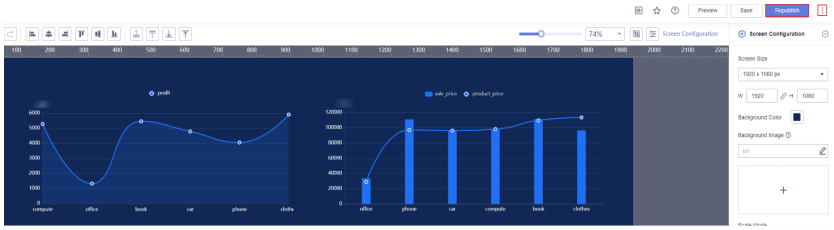
## Step 5: Manage Large Screens

- **Changing the publish status of a large screen**
  a. Click the name of the desired project in the **My Projects** area in the right pane.
  b. In the navigation pane on the left, choose **Data Analytics** > **Large Screen**.
  c. On the displayed page, click the name of the large screen to access the screen editing page.
     - Publishing the large screen: Click **Save and Publish** in the upper right corner of the page.

- Taking the large screen offline: Click ⋮ in the upper right corner of the page and select **Take Offline**.

**Figure 4-12** Changing the publish status of a large screen



- **Managing published large screens**

  You can edit, preview, view, copy, share, and collaborate on published large screens.

  a. Click the name of the desired project in the **My Projects** area in the right pane.

  b. In the navigation pane on the left, choose **Data Analytics** > **Large Screen**.

  c. On the displayed page, locate the large screen you want to manage, and click **Edit**, **Preview**, **Sharing and Collaboration**, or **Delete** in its **Operation** column as needed.

**Figure 4-13** Managing published large screens

- **Managing large screens that have been taken offline**

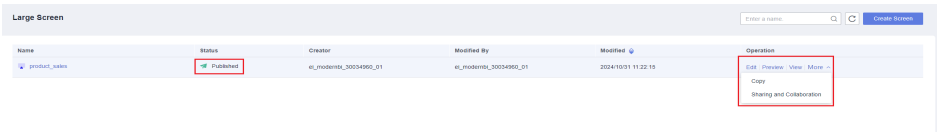
  You can edit, preview, copy, share, collaborate on, and delete large screens that have been taken offline.

  a. Click the name of the desired project in the **My Projects** area in the right pane.

  b. In the navigation pane on the left, choose **Data Analytics** > **Large Screen**.

  c. On the displayed page, locate the large screen you want to manage, and click **Edit**, **Preview**, **Sharing and Collaboration**, or **Delete** in its **Operation** column as needed.

**Figure 4-14** Managing large screens that have been taken offline



# 5 Creating an Intelligent Analysis Assistant

## Scenario

The intelligent analysis assistant provides conversational data analysis, allowing users to interact with data through natural language to perform tasks such as data analysis, gaining intelligent insights, and creating visual charts. The intelligent analysis assistant not only simplifies data analysis but also enhances the efficiency of self-service chart analysis. In this section, we will use sales data of a specific product as an example to demonstrate the method of using the intelligent analysis assistant.

## Procedure

**Figure 5-1** Process of creating an intelligent analysis assistant

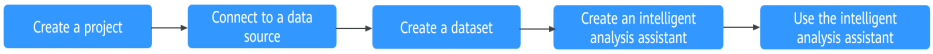



**Table 5-1** Process of creating an intelligent analysis assistant

| No. | Step | Description |
| --- | --- | --- |
| 1 | **Create a Project** | Establish a project space where all subsequent data analysis activities will occur, facilitating streamlined data management. |
| 2 | **Connect to a Data Source** | Data sources form the backbone of data analysis. Ensuring successful connections to data sources is essential before commencing any data analysis. |
| 3 | **Create a Dataset** | Datasets serve as an intermediary between data sources and the visual displays, receiving input from data sources and providing input for the visual displays. |

| No. | Step | Description |
| --- | --- | --- |
| 4 | **Create an Intelligent Analysis Assistant** | Developing an Intelligent Analysis Assistant simplifies tasks such as data retrieval and chart creation. |
| 5 | **Use the Intelligent Analysis Assistant** | When asking questions in the intelligent analysis assistant's Q&A interface, it will automatically return results. |

## Data Description

To protect user privacy and data security, all data has been sampled and anonymized. In this example, there are three data tables: **order_info_demo_01** (order table), **product_info_demo_02** (product information table), and **user_info_demo_03** (user data table). For details, see **Table 5-2**.

**Table 5-2** Product sales data example

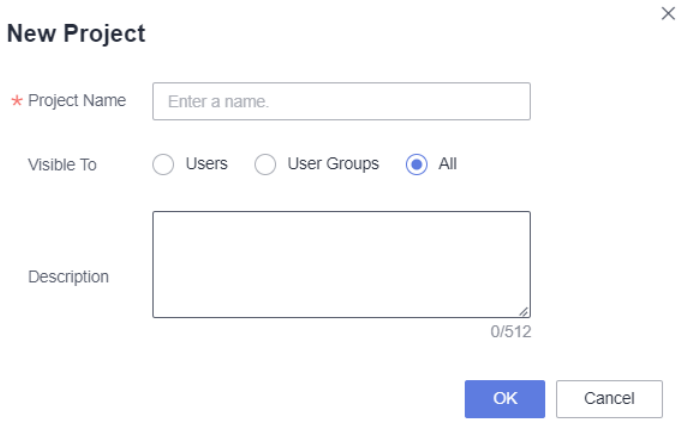
| Data Table | Field | Type | Description |
| --- | --- | --- | --- |
| order_info_demo_01 | id | int | ID |
| | sale_price | int | Sales price |
| | profit | int | Profit |
| | pay_time | int | Payment time |
| | create_time | int | Order creation time |
| product_info_demo_02 | product_id | int | ID |
| | product_name | string | Product name |
| | product_type | string | Product type |
| | product_color | string | Product color |
| | product_price | string | Product price |
| user_info_demo_03 | id | int | ID |
| | user_name | int | Username |
| | age | int | Age |
| | gender | int | Gender |

## Step 1: Create a Project

1. Log in to the DataArts Insight console.
2. Click  in the upper left corner of the management console to select a region and select an enterprise project from **Enterprise Project** in the lower left corner of the **Workspace** page.
3. Click **Create Project** in the right pane of the console.
4. Enter the project name, visible type, members, and description. See **Figure 5-2**.
5. Set the parameters and click **OK**.

**Figure 5-2** Creating a project




## Step 2: Connect to a Data Source

In this example, a GaussDB(DWS) data source is connected through the public network..

1. Select the desired project and click the name to access the project space.
2. Choose **Data Management** > **Data Sources**. On the displayed page, click **Create Data Source**. In the slide-out panel, set **Access Network Type** to **Public network**. See **Figure 5-3**.
3. Enter the name, domain name, port number, and database, and click **Test Connection**. For details about the parameters, see **Table 5-3**. Once the connection test is successful, the data source is successfully connected.

**Figure 5-3** Clicking Create Data Source

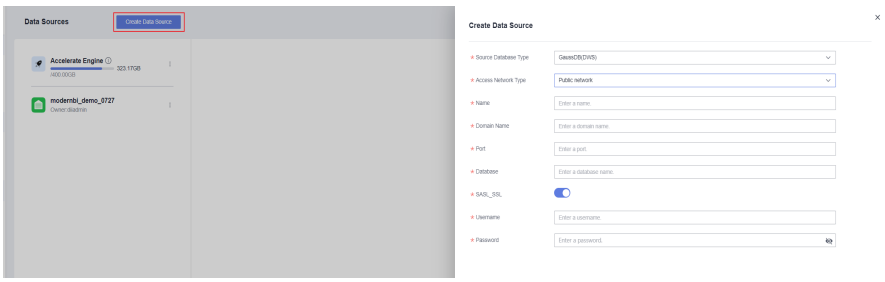


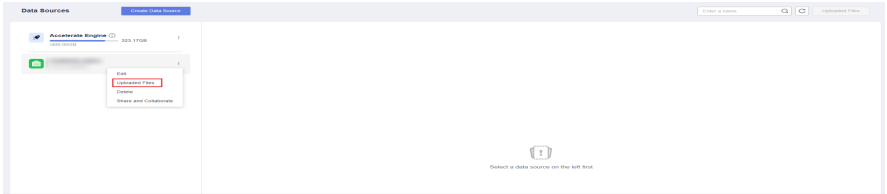
**Table 5-3** Parameters

| Parameter | Mandatory | Description |
| --- | --- | --- |
| Source Database Type | Yes | Type of the accessed data source. In this example, **GaussDB(DWS)** is selected. |
| Access Network Type | Yes | In this example, **Public network** is selected. |
| Name | Yes | Display name of the data source in the list. |
| Domain Name | Yes | IP address of the data source. |
| Port | Yes | Port number for logging in to the database. |
| Database | Yes | Name of the database to be logged in to. |
| SASL_SSL | - | It is used for trusted identity authentication and secure data transmission when DataArts Insight retrieves data from the data source. This function is enabled by default. |
| Username | Yes | Username for logging in to the database. |
| Password | Yes | Password for logging in to the database. |

## Step 3: Create a Dataset

1. Select the desired project and click the name to access the project space.
2. Click next to the data source name and select **Uploaded Files** (**Figure 5-4**). Select the Excel file you want to upload, modify parameters as required, and click **OK**. Repeat this step to upload all data tables in sequence. In this example, there are three data tables. For details about the data tables, see **Data Description**.

**Figure 5-4** Uploading a file



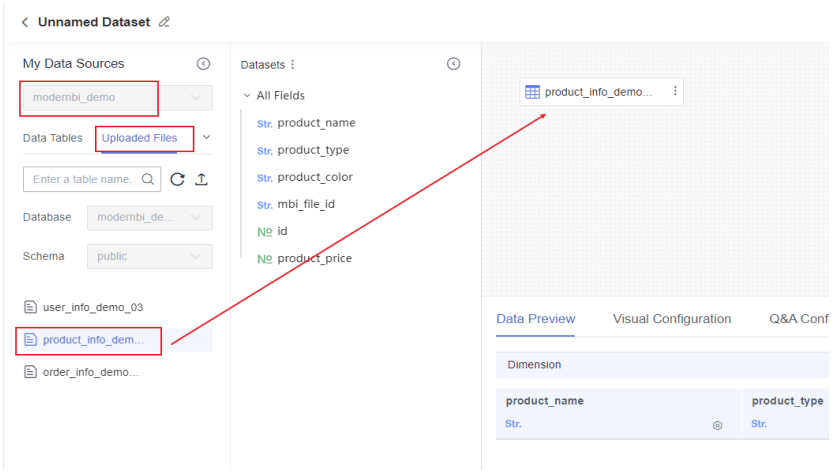

NOTE

Before uploading files, you need to configure the data storage bucket on the **System Settings** > **OBS Bucket Settings** page.

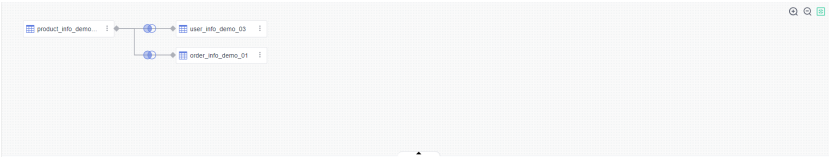
3. Choose **Data Management** > **Datasets**. On the displayed page, click **Create Dataset**.
4. Under **My Data Sources**, select the data source that is connected to in **step 2**. Click the **Uploaded Files** and double-click or drag a data table to add it to the operation panel.

**Figure 5-5** Selecting a data table



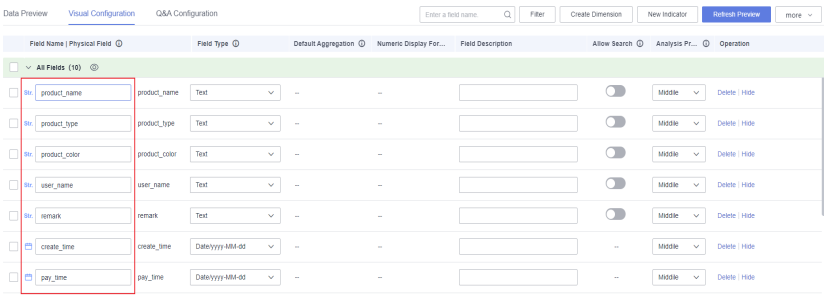

5. Double-click the data table name and set the table's association in the operation panel.
   - Set up a left outer join between **product_info_demo_02** and **order_info_demo_01** using the **id** field as the key for the association.
   - Set up a left outer join between **product_info_demo_02** and **user_info_demo_03** using the **id** field as the key for the association.

**Figure 5-6** Creating a model by associating multiple tables



6. Click the **Visual Configuration** tab and enter descriptions of the fields.

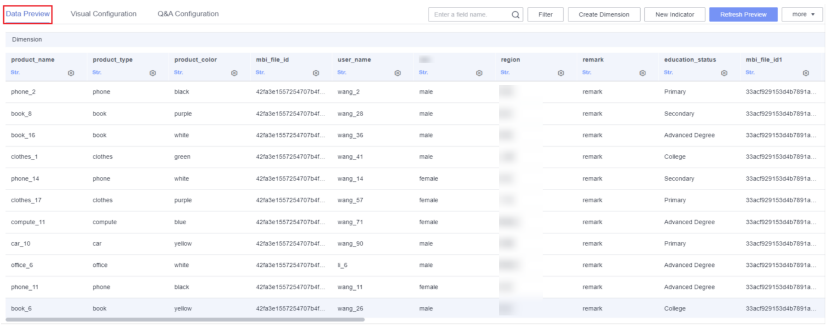
**Figure 5-7** Visual configuration



7. Click the **Data Preview** tab and then **Refresh Preview** to view basic information about the dataset.

**Figure 5-8** Data Preview tab

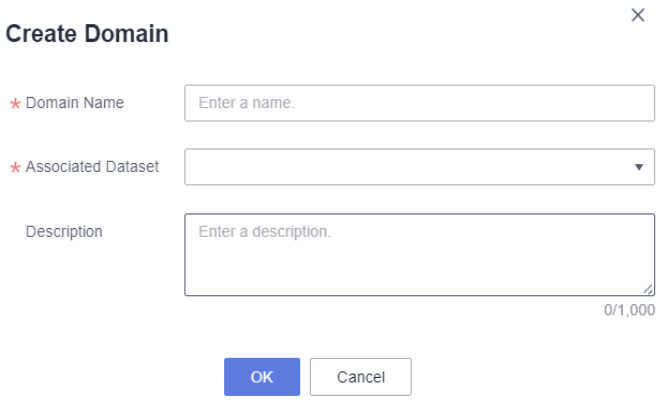



8. Confirm the information and click **Save**.

## Step 4: Create an Intelligent Analysis Assistant

1. Click  in the upper left corner to select a region.
2. In the lower left corner of the navigation pane, select an enterprise project from **Enterprise Project**.
3. Click the name of a project in the **My Projects** list on the right.
4. In the navigation pane on the left, choose **Data Analytics** > **Intelligent Analysis Assistants**.
5. Click **Create Domain**. In the dialog box that appears (**Figure 5-9**), enter a name and select an associated dataset.

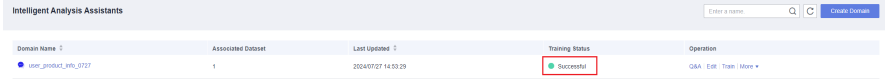
**Figure 5-9** Creating an intelligent analysis assistant




6. Click **OK**.
7. In the list, locate the intelligent analysis assistant you created, and click **Train** in the **Operation** column.

   If **Training Status** is **Successful**, as shown in **Figure 5-10**, the intelligent analysis assistant model is successfully trained.

**Figure 5-10** Training the intelligent analysis assistant

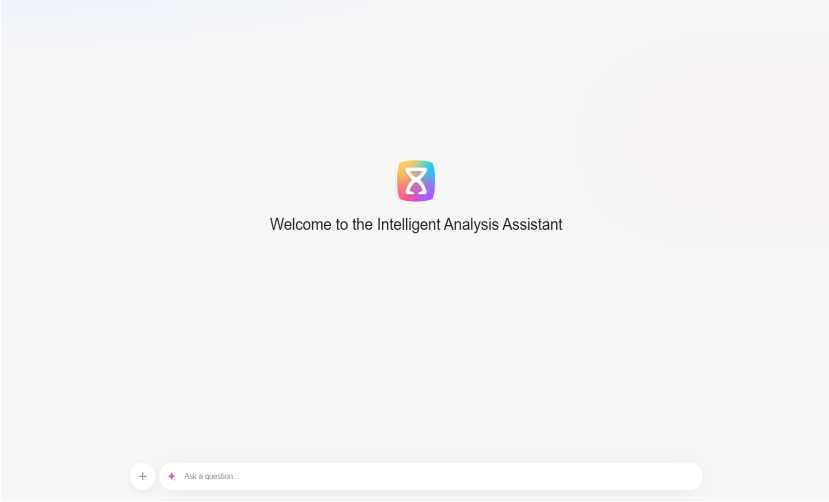


## Step 6: Use the Intelligent Analysis Assistant

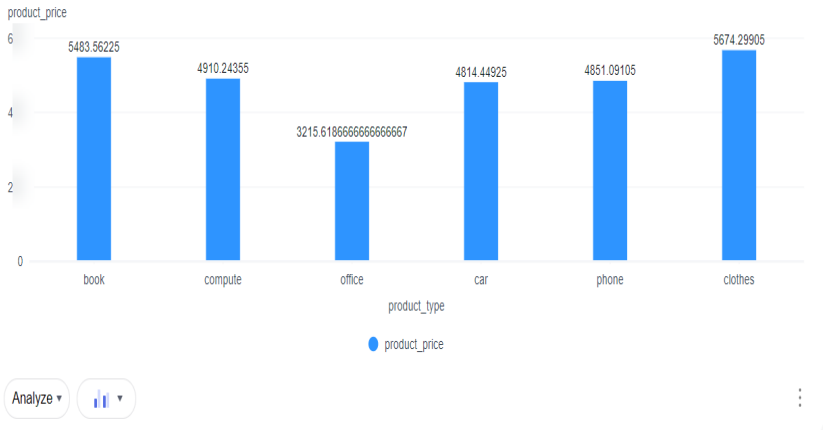
1. Click the name of the desired project in the **My Projects** area in the right pane.
2. In the navigation pane on the left, choose **Data Analytics** > **Intelligent Analysis Assistants**.
3. Locate the intelligent analysis assistant you trained and click **Q&A** in the **Operation** column.

**Figure 5-11** Intelligent analysis assistant's Q&A page




4. Input the question "What are the prices of different types of products?" on the Q&A page.

**Figure 5-12** What are the prices of different types of products



# 6 Creating a Subscription Task

## Scenario

The subscription task feature allows you to receive reports via screenshots or attachments, with the option to set the frequency and delivery method of the subscription. This meets your need for timely access to data information. This section describes how to create a subscription task and push the task through Lark.

## Procedure

**Figure 6-1** Process of creating a subscription task


**Table 6-1** Process of creating a subscription task

| No. | Step | Description |
| --- | --- | --- |
| 1 | **Access Office Software** | DataArts Insight currently supports the integration of DingTalk and Lark. |
| 2 | **Create a Subscription Task** | Creating subscription tasks allows you to send reports to users as either screenshots or attachments, ensuring they receive data promptly. |
| 3 | **Manage Subscription Tasks** | You can manage subscription tasks, including editing, manually sending, suspending sending, and deleting them. |

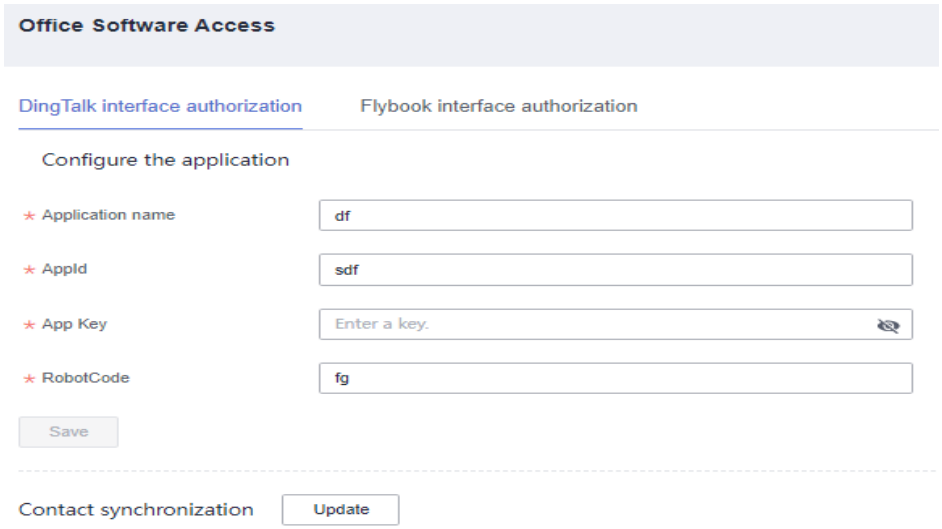
## Step 1: Access Office Software

Currently, DataArts Insight supports integration with DingTalk and Lark. The following uses Lark as an example.

1. Log in to the Lark management background as an administrator, choose **Workbench** > **Application Management**, and click **Create Application**.
2. Choose **Enterprise App** > **Create Enterprise App**.
3. On the creation page, select an enterprise-built application, enter the necessary information, and click **Create**.
4. Click the newly created application **Document test**.
5. Grant the following permissions in permission management: basic address book access, read address book as app, access basic department information, access address book department structure information, access organization information, access user basic information, access user id, user id by phone number or email, access and update group information.
6. Under the application created on the Lark open platform, choose **Credentials and Basic Information** > **App Credentials** and obtain the application ID and key.
7. In the navigation pane of the DataArts Insight console, choose **System Settings**. On the displayed page, choose **Office Collaboration** > **Office Software Access**. On the displayed page, enter the obtained application name, ID, and key. For example, the application name is **Document test**.

   **Figure 6-2** Accessing office software

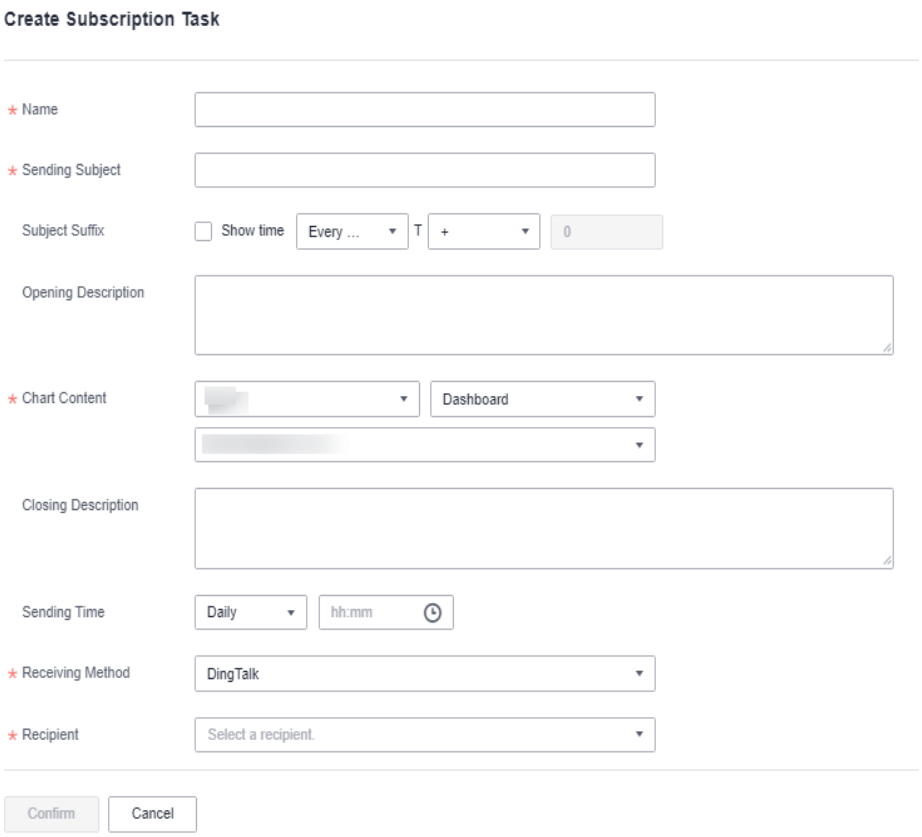
8. Click **Save** and then **Update**.

## Step 2: Create a Subscription Task

1. Log in to the DataArts Insight management console.
2. Click  in the upper left corner to select a region.
3. In the navigation pane on the left, choose **System Settings**.
4. Choose **Office Collaboration** > **Subscription Management**. On the displayed page, click **Create Subscription Task** in the upper right corner.

**Figure 6-3** Creating a subscription task




5. In the slide-out panel, set the parameters based on **Table 6-2**.

**Table 6-2** Parameters

| Parameter | Mandatory | Description | Example Value |
| --- | --- | --- | --- |
| Name | Yes | Name of the subscription task on the subscription management page. | Test1 |
| Sending Subject | Yes | Subject of the subscription task, that is, the title of the email or DingTalk message. | Test1 |
| Subject Suffix | No | Whether to display the time on the subject of the subscription task. The time granularity is day and hour. | / |
| Opening Description | No | The beginning part of the subscription task content, located before the embedded report in the subscription task. | Opening: This is a test. |

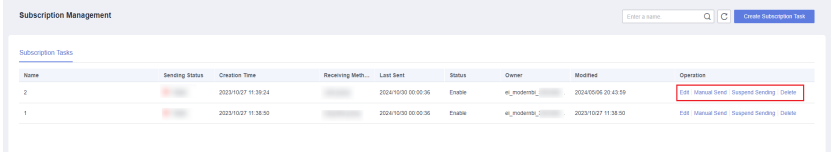
| Parameter | Mandatory | Description | Example Value |
| --- | --- | --- | --- |
| Chart Content | Yes | You can select a project and the type of report to embed into the subscription task. The report type can be **Dashboard**. | Set the project to **Test**, the content to **Dashboard**, and the dashboard to **Test**. |
| Closing Description | No | The ending part of the subscription task content, located behind the embedded report in the subscription task. | Closing: This is a test. |
| Sending Time | No | Time when the subscription task sends the content, for example, 17:00 every day. | Daily 17:00 |
| Receiving Method | Yes | Supported methods: DingTalk, Lark, DingTalk group, and Lark group. | DingTalk |
| Recipient | Yes | User who receives the subscription task. They can be a user or user group. | Test user |

6. Click **Confirm**.

## Step 3: Manage Subscription Tasks

1. In the navigation pane on the left, choose **System Settings**.

**Figure 6-4** Subscription Management page




2. You can manage subscription tasks, including editing, manually sending, suspending sending, and deleting them.
   - Editing: Click **Edit**. The **Edit Subscription Task** slide-out panel is displayed. Set the parameters based on **Table 6-2**.
   - Manual sending: Click **Manual Send**. If the message "Successfully" is displayed, the content has been manually sent.
   - Suspending sending: Click **Suspend Sending**. If the message "Subscription task suspended" is displayed, the subscription task has been successfully suspended.

- Deletion: Click **Delete**. If the **Delete Subscription Task xxx** dialog box appears, click **OK**. Then, the subscription task is successfully deleted.