



Creating Reports in Pyramid

Quick User Guide

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Introduction

This guide is intended to serve you as a guidance & reference for basic operations in creating a new report, Discover, on the Pyramid Analytics platform.

This is not a “How To” guide. This guide covers fundamental concepts and provide best practices for creating a new data discovery.

For expanding your knowledge and information on all types of operations and features, please refer to Pyramid online help available on the following link: [Discover](#).

You can also request access to Pyramid's online learning site at the following address: <https://learn.pyramidanalytics.com>

Additionally, you can get help from the Pyramid community forum and view instructional videos at: <https://community.pyramidanalytics.com>

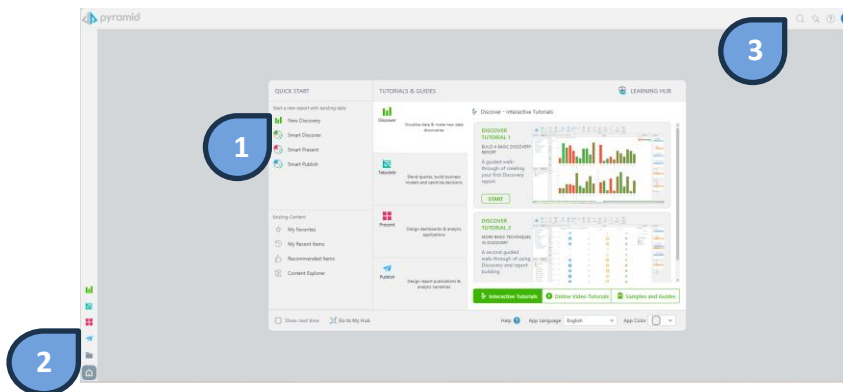
Note 1: This guide is based on Pyramid version 2025. There may be minor visual differences between versions.

Note 2: AI generated features are not included in this document. AI related features will only be available if an AI LLM provider has been configured by your system administrator.

1. Entering the System

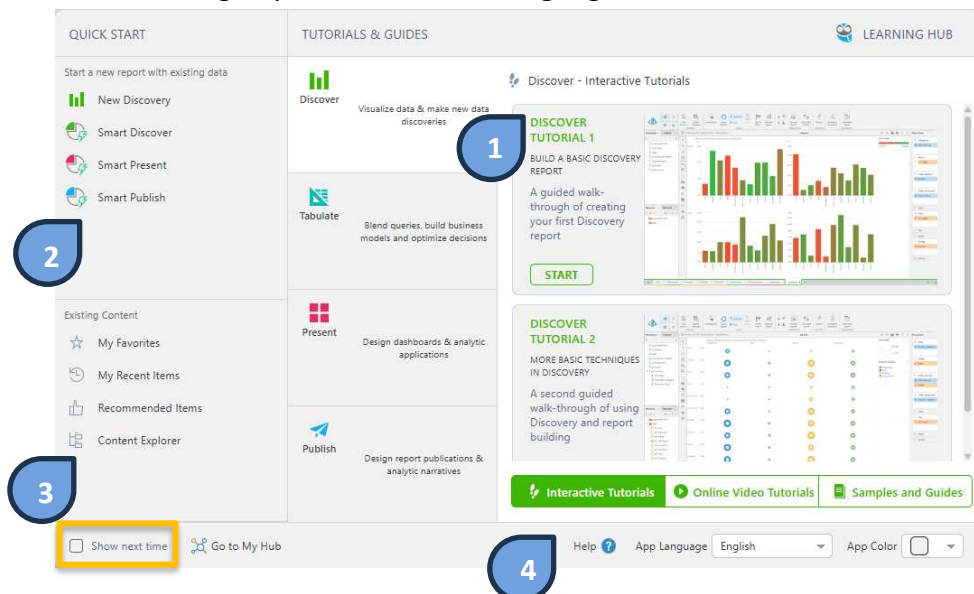
The "Quick Start" window will appear when you log into the system. It contains several menu options for quick operations or access to information.

1. Quick Start window accessing Discovery and links to online guides.
2. Shortcut buttons to launch Pyramid modules – Discover, Tabulate, Present, Publish.
3. Search / Bulletin Board / Online Help / System Information and User Settings.



1.1. Quick Start Window

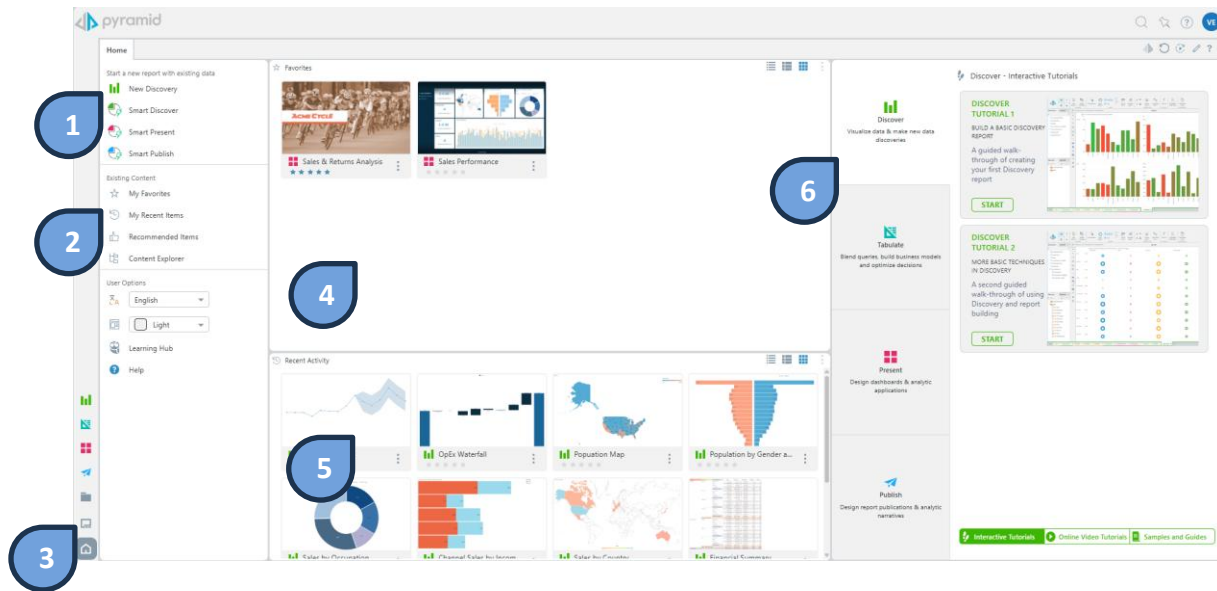
1. Online guides and Learning Center
2. Quick Start for Discovery
3. Access to Existing Content
4. Change Pyramid Interface Language and Color Scheme



You can disable this window from appearing at login again by unchecking the "Show next time" option in the lower left corner of the window.

1.2. Desktop

After closing the Quick Start window, your personal desktop will open:



Here are its various components:

1. Shortcuts for **creating a new report** or new dashboards.
2. **Quick access to content** marked as favorites, recently opened, or via the content explorer.
3. **Actions menu**: Open Discover / Tabulate / Present / Publish / Content Explorer / Back to open tabs / Return to this home screen (this my very by user's profile).
4. Display of items saved as **favorites**.
5. List of **recently opened** items.
6. Access to video **tutorials** / interactive guides / help pages for Pyramid components.

You can change the display of content between "Details view", "Content view", or "Tile view" by selecting from the display options buttons at the top of each section.



1.2.1. Side Menu

-  Create new **Discover**
-  Create a new **Tabulate**, an Excel-like workspace (License & Profile dependent)
-  Create new **Present** dashboard (Profile dependent)
-  Create a new **Publication** (License & Profile dependent)
-  **Content Explorer**
-  Return to Desktop **home**

2. Creating a New Discover

 Clicking the "Discover" button on the side menu will launch the process of building a new Discovery report based on a selected data model.

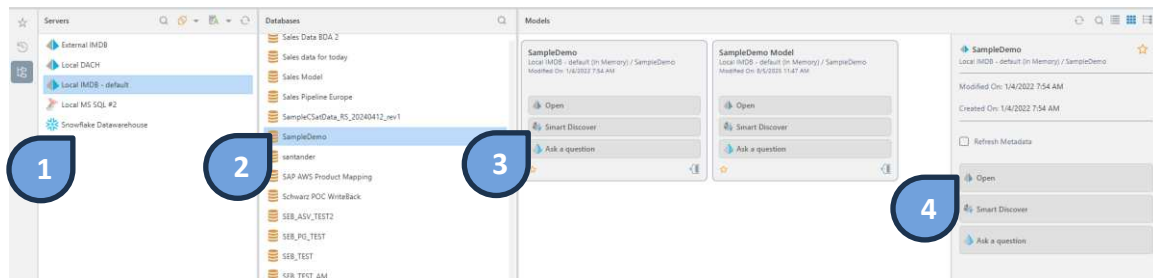
Note: Each report works against one data model.

2.1. Selecting a Model

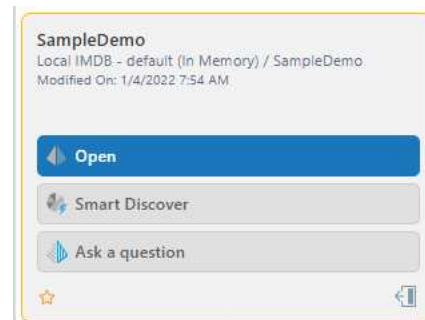
First, you are required to select the data model that will serve as the data source for your report. Multiple data sources may be available for you to select from and on each data source, multiple data models may exist (such as Logistics, Sales, Inventory etc.).

Pyramid will present you with the available data sources you can access, and under each one - the available databases and data models.

1. Select the relevant data source server.
2. Select the database containing the relevant data.
3. Select the relevant model for the Discovery (as mentioned, single database can store numerous different models).
4. Click on the "Open" button; this will open the workspace for creating the report based on the selected model.



- **Open:** Opens a new Discovery report
- **"Smart Discover"** is designed for creating reports by non-expert users and is not relevant to our purposes.
- **"Ask a Question"** uses AI engine to help generate a report from a free text question.



 The **"Add to Favorites"** button will add the selected model to your favorites. This will enable quick access to your preferred models each time.

2.2. Creating a New Report

An empty report template will automatically be loaded with a connection to the data model from the connected data source (the model you selected).

As good practice, it is recommended to start with a Matrix grid visual (Pivot) in which you place all the elements you want to analyze.

- **Dimensions:** Who / What are we measuring: Customers, Products, etc.
- **Measures:** How we measure: by quantity, average revenue, total sales, etc.

Later, you can convert the table to any other type of visualization.

Organized work, following these steps, will help you create reports efficiently and quickly:

1. Get familiarized with the model data layout: locate & confirm the relevant data exists in the model tables.
2. Place the required data on a table grid.
3. Add filters (slicers) as needed.
4. Create or add Calculated Measures (Formulated). These are measures that were built outside the model to add a context specific measure that was not part of the model (i.e., Create an “Average Sales amount” based on model’s “Sales” and “Quantity” measures).

Depending on the user’s privilege, calculated measure can be created through the “Formulate” module or by adding a shared measure that was pre-built by others, working on this same model.

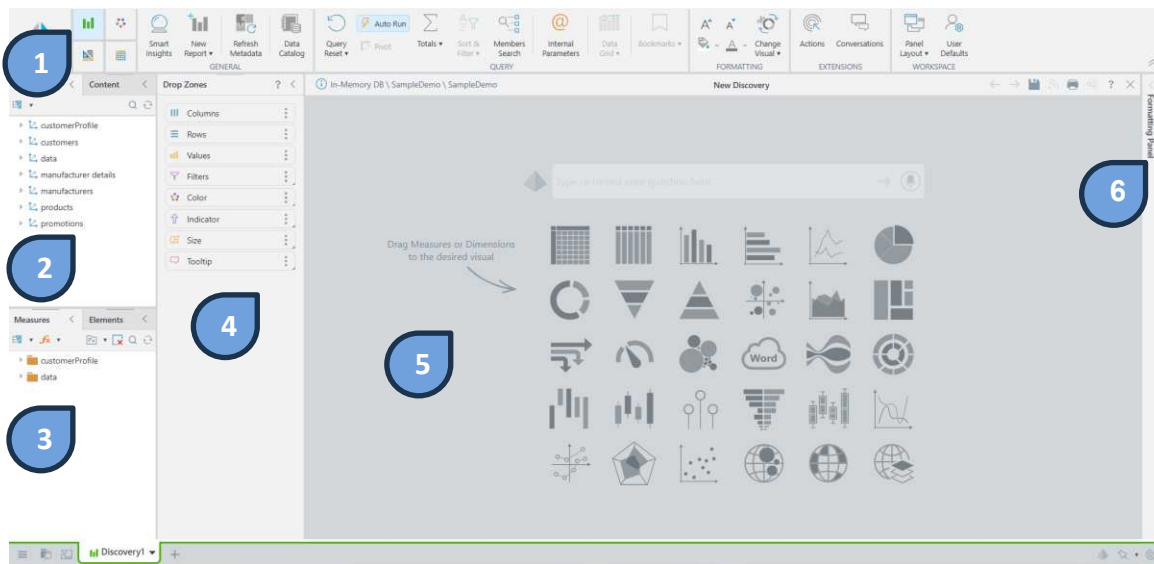
5. After the data required is set, convert to the relevant visualization type.
6. Add formatting elements to enhance the visualization (color, size, etc.).

Important note: If the data set you are working on is very big – consider placing filters first in the report to limit data retrieval size (for example: filter current year / month / day). Also refer to section 3.1.1 hereafter for explanation on how to disable automatic data querying.

3. Getting to Know the workbench

The workbench for Discovery in Pyramid combines Drag and Drop functionality with the mouse and mouse clicks.

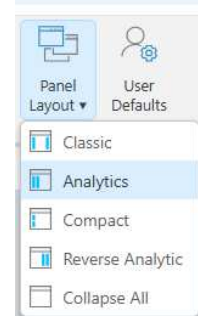
The workbench allows you to select specific dimensions and measures from the tables exposed to you in the model and place them in "drop zones" to build your report structure.



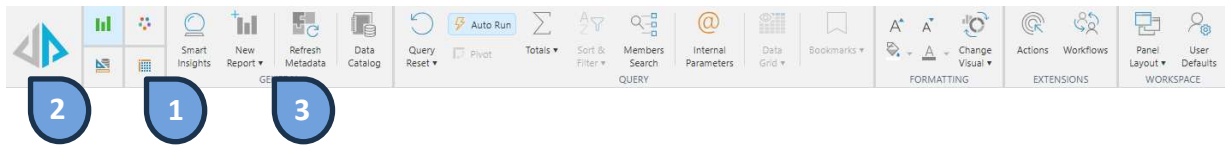
The workbench contains six areas:

1. **Menu selector:** Has 4 main functions for changing menus and affecting report building.
2. Model tables – **Dimensions** list
3. Model tables - **Measures** list
4. **Drop Zones** - data placement
5. **Visual output area** / Chart type selection
6. **Formatting Panel**

Note: I am using here an “Analytics” display layout, which is convenient when working extensively with data on a new report. If you want a similar layout, or if you accidentally closed the panels and would like to return to the original layout, you can change the workbench layout from the Panel Layout menu on the top right of the toolbar.



3.1. Main Toolbar



1. **Menu selector:** for switching between menus. Contains three fixed menus and one dynamic menu:

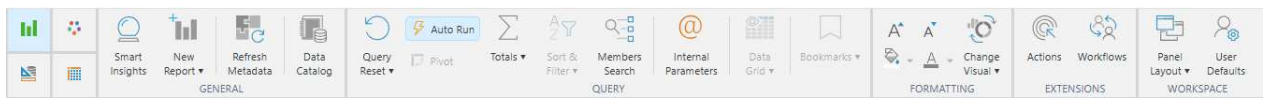


- a. **Report Tab:** General query functions.
- b. **Design Tab:** Tools for formatting various report components.
- c. **Query Tab:** Add built-in advanced functions and calculations.
- d. **Component Tab:** Dedicated toolbar that changes according to the type of visual display selected (table, bar, pie, etc.).

2.  **Run Query** button. Will execute a query against the data source based on the selected dimensions and measures and return data to the display.

3. **Toolbar functions** of the current selected menu.

3.1.1. Report Tab



The Report tab allows quick access to a collection of actions related to general report operations and data refresh. Here are some of the most used functions:

- **New Report:** Allows duplicating current report or opening a new one using the current model.
Note: It is recommended to use this button when you want to "skip" the normal report opening procedure that requires data source & model selection first.
- **Refresh Metadata:** Retrieves updated data to the report if the data source has been updated since the report was opened.
- **Data Catalog:** Generates a PDF report of all elements in the current model.
- **Query Reset:** Resets the report and clears the workspace.
- **Auto Run:** This feature is enabled by default. When enabled, any change in the report workspace will immediately invoke a query execution against the data source and return updated data to the display.

Important: If you are working against a very big data source and you are about to make many changes while building the report, it is advisable to disable Auto Run to avoid overloading the data source with unnecessary queries before the data for display selection is complete.

- **Pivot:** Interchanges Rows and Columns / interchanges Category with Color on charts, etc.
- **Totals:** Adds automatic totals to row / column on the table data.
- **Sort & Filter:** Opens a window for performing advanced filtering or sorting on the data displayed in the report.
- **Members Search:** Opens an advanced search window to find specific elements / information in the model using an advanced search string.
- **Data Grid:** Will display the raw data table that the graph is based on below / next to the graph.
- **Formatting:** Format buttons for font and option to change visual type.
- **Actions:** Create an action that invokes execution of a context related process, i.e.: open another report, jump to URL, execute publication, etc.
- **Chat:** Internal chat system for Pyramid users to share information and insights about the report.
- **Panel Layout:** selection of workspace configuration.

3.1.2. Design Tab

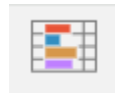


- **Report Title:** Display of report title and options to control title's appearance.
- **Show Notes:** Allows display / editing of notes in free text, which will be saved as part of the report.
- **Runtime Settings:** Controls of which context-menu functions will be available to the user through mouse right-click.
- **Hide Tooltips:** disable the appearance of a pop-up window when hovering with the mouse over data elements in the visualization.
- **Hide Query info:** removes from display the background manipulations indicators, such as sorting or filtering, background filters. This allows for a clean visualization view.
- **Design section:** Collection of controls for setting themes and other elements colors.
- **Auto Colorize:** Each measure added to the report will get individual background color.
- **Readability:** This feature is enabled by default. It is an internal mechanism that ensures that selected colors do not make reading difficult (for example, white on light gray background). It can be modified if needed.

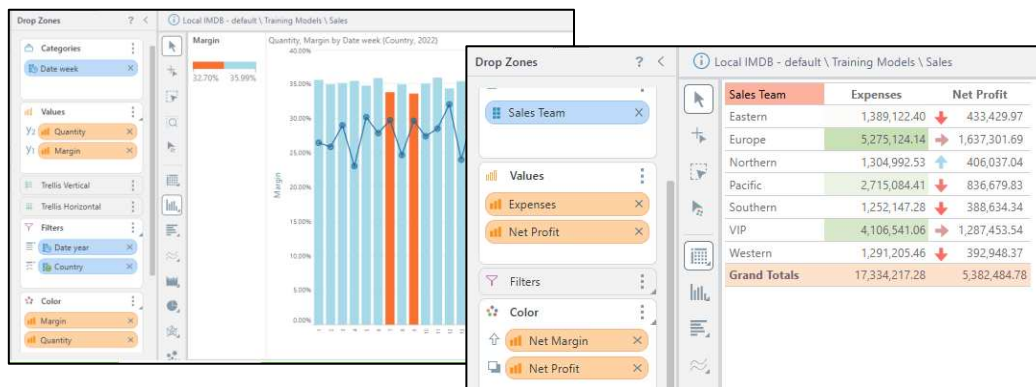
NOTE: At times, you may experience difficulties assigning visual colors and it may seem that Pyramid “refuses” to let you select specific colors. This may be because of conflict between your color scheme and the readability logic. Try disabling the readability to overcome this.

- **Conditional Formatting:** See detailed explanation in section 3.2.2.1 below.
- **Member Color Lock:** Locks the selected color to each displayed element and it will not be reused if elements are removed or added to the screen.

3.2.2.1 Conditional Formatting

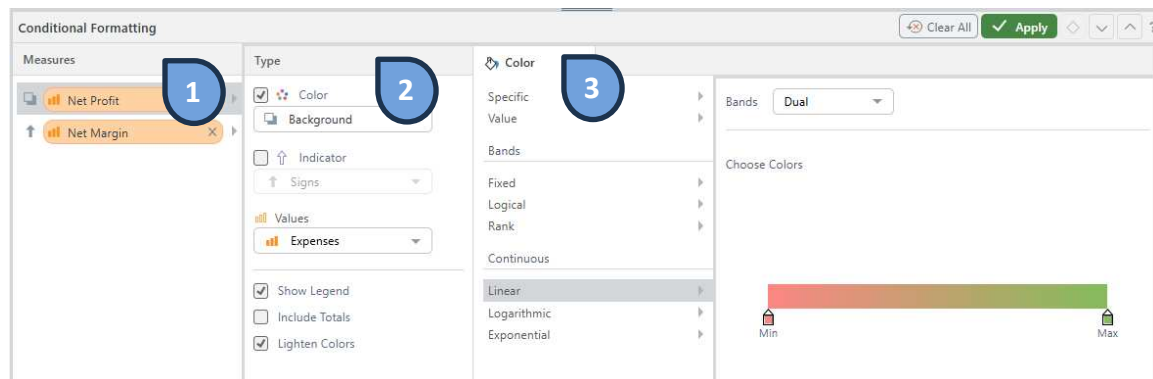


Opens a dedicated window for setting "coloring rules"; changing element color based on value. For example: "Red" – low value, "Green" high value, etc.



The conditional formatting panel is divided into three sections:

1. **Measures:** List of measures in the Color drop zone with conditional formatting.
2. **Type:** Which measure/s in the report will be affected and how (background color, text color, indicator color).
3. **Color:** The logic by which the measure's value will affect the color (minimum to maximum, fixed values, positive or negative, etc.).



Detailed explanation available online at the following link – [\[Link\]](#)

3.1.3. Query Tab



With the functions in this tab, you can perform advanced data analytics operations built into Pyramid that don't require writing code.

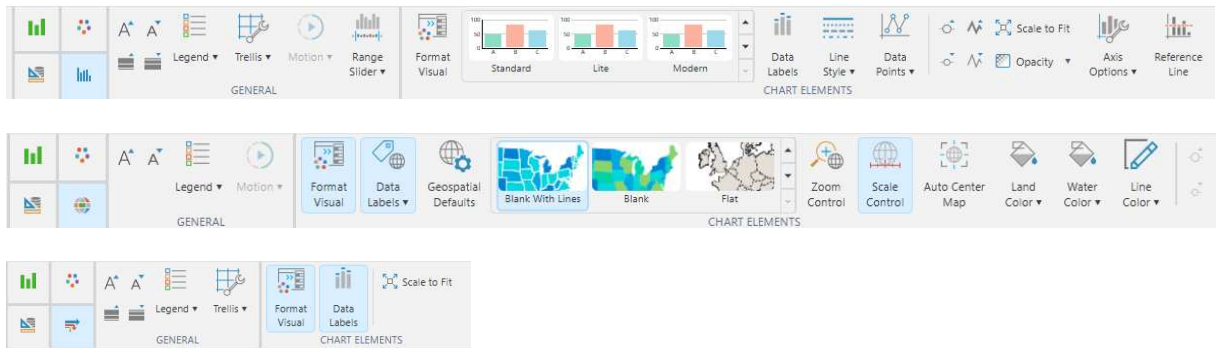
Some of the common functions in the Query were already explained in the Report tab in 3.1.1 above.

- **Eliminations:** To display a note if data has been omitted from the report (through using right-click menu "Select Element – Eliminate") and manage them.
- **N of N:** Create "filter within filter" on two dimensions. For example: "Show the top 5 product categories by sales and the top 3 products in each of these categories"
- **Time Calculations** (if available): Allows quick creation of advanced time calculations based on a date-time dimension in the model: year over year, cumulative month to date, etc.
- **Analysis** (if available): Built-in statistical functions that can be added to the displayed data, such as: Forecast, Regression, Statistics, Clustering, etc.
- **Language** (if available): Option to change the language of the data in the report if configured in the model.
- **Query Settings:** options to modify the data querying operation.

Note: This is something that is rarely used while building a Discover. Consult with your system admin if you think you need to modify this.

3.1.4. Component Tab

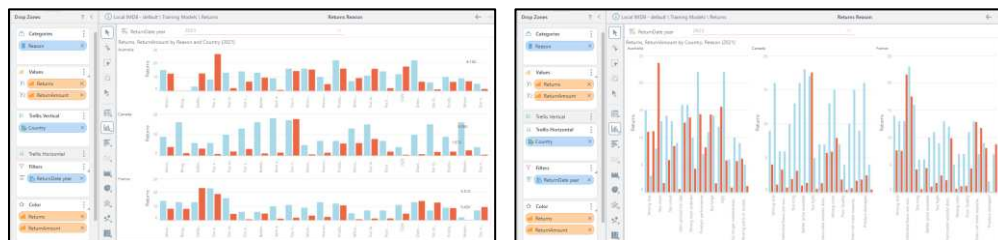
This tab is a dynamic menu that will change according to the type of graphic visualization selected. The toolbar that opens will display functions relevant to the formatting of the selected visual type. Below are several examples:



Usually, these will contain similar design functionalities with some additional visual-specific functions.

Common elements:

- **General** section: Impact on the entire report. Control of font, line spacing, table lines, text position in table.
 - **Legend:** Display / hide / choose position of legend.
 - **Trellis:** enables ordering multiple elements on the screen vertically or horizontally:



- **Format Visual:** Opens the side **Formatting Panel** to control the appearance of all the aspects of the visual and data in the report. More on the Formatting Panel can be found on section 3.6.1 hereafter.
- **Data Labels:** show / hide data labels on the displayed elements.

3.2. Dimensions, Measures and Drop Zones

In this section of the screen, we perform the selection and positioning of the dimensions we want to analyze and the measures by which they are calculated.

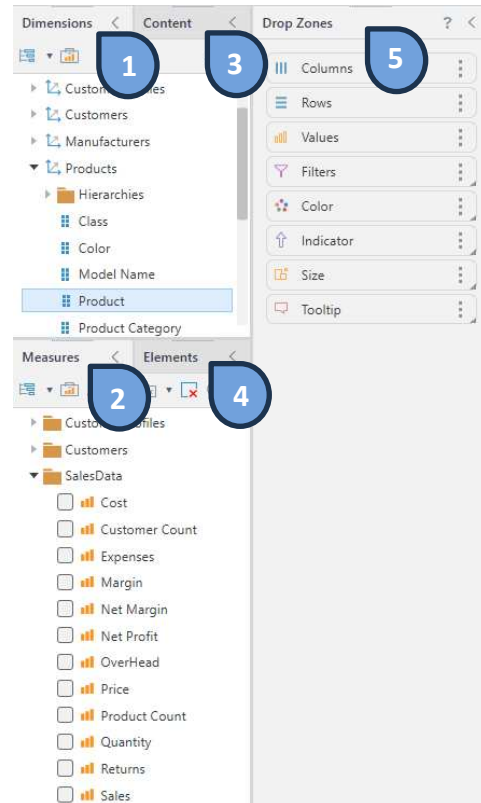
1. **Dimensions Tab:** Displays all the tables in the model containing dimensions. Clicking on the triangle to the left of a table name will open the list of columns (dimensions) in that table.
2. **Measures Tab:** Shows the measures (numerical elements) defined in the model.

Note 1: Not every table in the Dimensions pane will necessarily have a corresponding table in Measures (for example, for time dimensions – day / week / month, there may not be relevant measures).

Note 2: There may be a dimension and a measure with the same name for the same table. For example; from the "Customers" table there may be a "Customer" dimension, containing customers names, and a "Customer" measure, that is an actual count of customers. This is not an ideal situation – we aim for a clear distinction between the different names (for example: "Customer Names" versus "Customer Count") but sometimes this cannot be avoided.

Note 3: the data source may contain many more tables that are not presented on the screen. This may be because the model builder omitted them as they were deemed not relevant. If you think a table is missing, contact your system administrator.

3. **Content Tab:** For quick access to open an existing content.
4. **Elements Tab:** Will display content of the data residing in a selected dimension column.
5. **Drop Zones:** Used for placing data in the report and characterizing the visual logic. Note: The elements in the drop zones will change depending on the type of graphic visualization selected: "Rows" and "Columns" for a table, "Categories" for bar charts, etc.

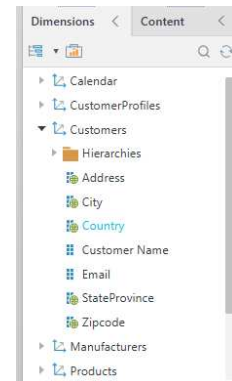


3.3. Operations on Dimensions

The Dimensions window displays all available tables and columns in the model.

You can expand each of the tables by clicking the triangle left to its name and it will display the list of columns in the table (dimensions and hierarchies).

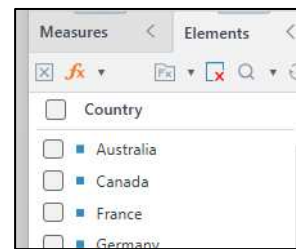
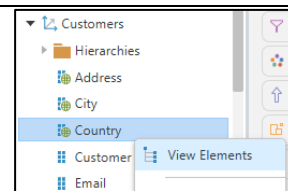
From this window, you can add the selected column / hierarchy to the workspace by dragging it to the desired drop zone or by opening the control menu using the right-click on the mouse:



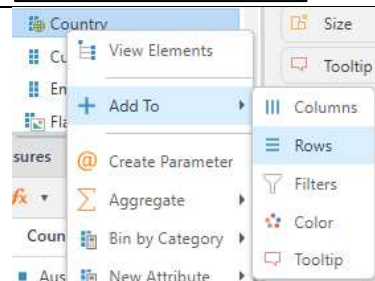
3.3.1. Right-click Menu

Some of the most common functions:

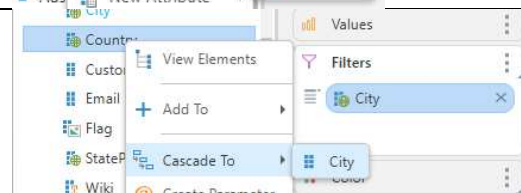
View Elements: Will open a list of the actual data content of the selected column (dimension).
This is a useful method to preview data of a column to verify it is the data you need for your report. This also allows select / deselect specific data entries from the list on the report (through the checkbox selections).
 In the example here: The elements of “Country” presents us with the list of countries in our data.



Add To: Select to which Drop Zone element to add the current dimension to.
 The elements within this list will change in accordance with the type of visualization used.



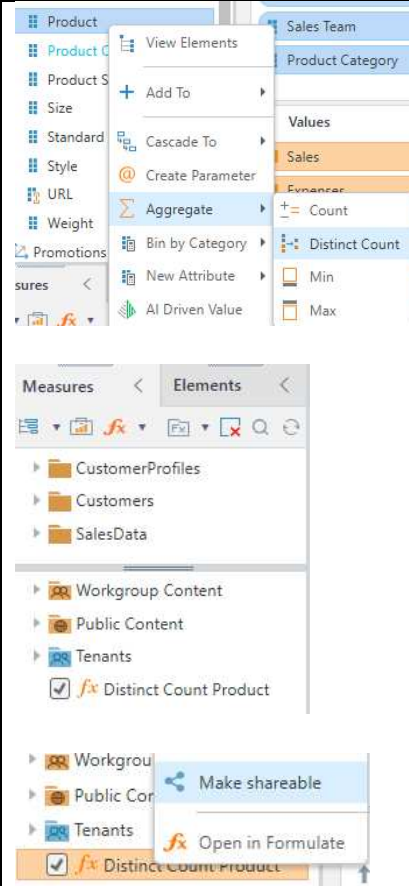
Cascade To: a useful method to chain-link filters in a hierarchy.
 In the example here: “City” is already a filter in the report. Cascading “Country” to it will add Country to the report as a filter that filters cities according to selected Country.
 NOTE: This is not required if you only need this type of filter link in a dashboard (Present). In the dashboard it is a simple connection.



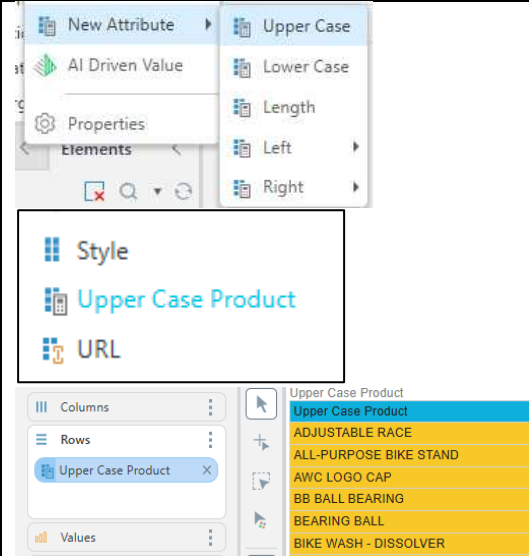
Aggregate: quickly create a new measure based on the selected dimension.

In this example: we create a measure that counts all the Products (distinct, so each product will only be counted once).

- This Calculated Measure will be added to the bottom of the measures window and can be used like any other measure in this report.
- **Make Shareable:** Allows you to save this measure in a public location so that other users will be able to utilize it in their own reports (Which are based on this same model), without the need to create it again.

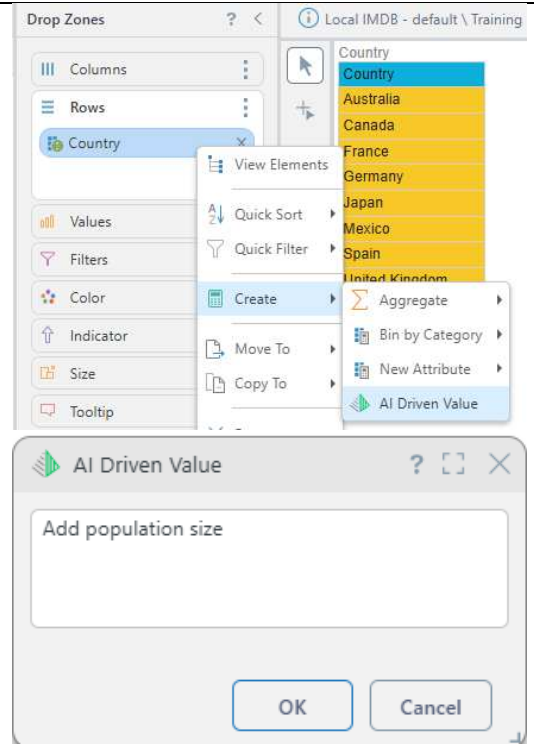


New Attribute: Creating a duplicate of the selected dimension with new attribute. In this example, I created an all-Upper Case Product names dimension



AI Driven value: create a new measure relevant to the selected dimension through an AI request.

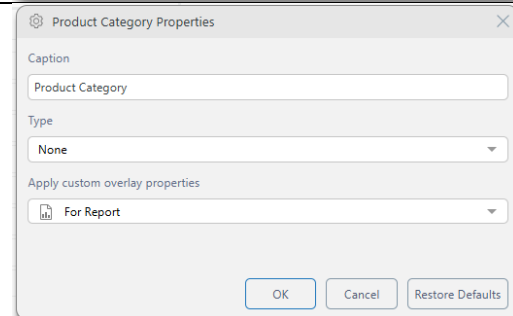
In this example: add a new measure of population size for each of the countries.



Properties: Allows changing locally the dimension's name, category and to which user types it affects.

NOTE: It is not recommended to use this, unless necessary, as it may cause confusion to users. It may result in a situation where the same dimension is named differently in different reports.

If need to rename or change properties of a dimension, it is always better to do so in the model itself.

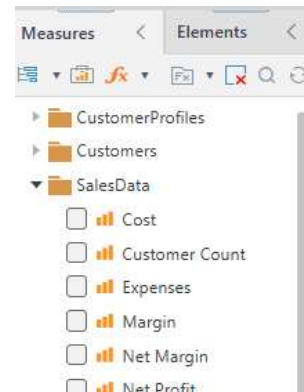


3.4. Operations on Measures

The Measures window displays all available measures in the model under their corresponding table names.

You can open each of the tables by clicking the triangle to its left and then a list of measures for each table will be displayed.

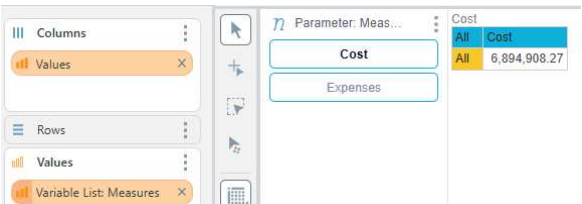
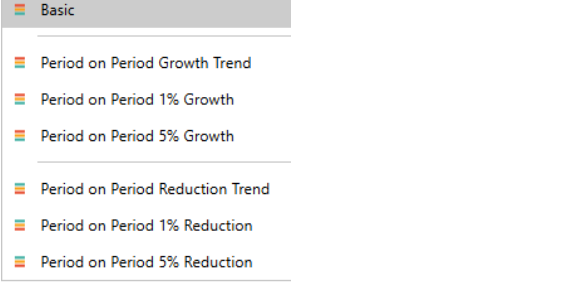
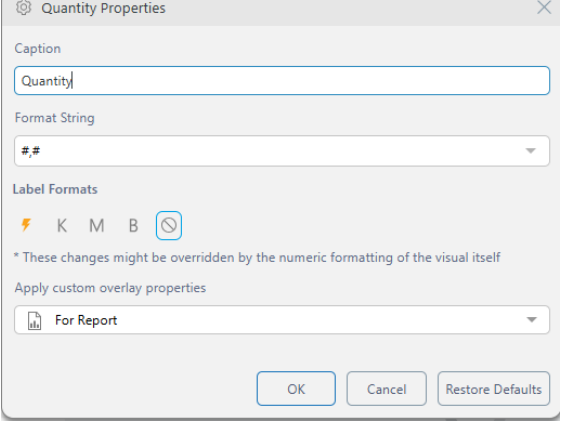
From this view, you can add the selected measure to the workspace by clicking its checkbox or dragging it to the desired drop zone.



3.4.1. Right-click Menu

Some of the most common functions:

Add To: will display the available drop zones to locate the measure (as a value, as a color logic, etc.) The available drop zones will change according to the visual selected.	
Create measure: Allows for creation of a new calculated measure based on the selected measure. I.e.: Add a “difference” value to measure changes across different time periods, or create “accumulated” value across several periods, etc.	
Create List: These functions can be used when you select several measures together (through holding the Ctrl key + mouse click on each). • Standard List: you can “bundle” several measures together to be added at once into the report	

• Variable List: Allows to create a “switch” of measures to be switched between by the user	
Quick KPI: a fast way to create a visual showing the measure’s current value against a target. More about this can be found online: 🔗	
Properties: Allows changing locally the measure’s name and appearance. • Format string: the numerical display; With or without decimals, percentage display, Currency, etc. • Label format: whether to display the number in full or categorized / divided into Thousands (K), Millions (M), etc. NOTE: It is not recommended to use this, unless necessary, as it may cause confusion to users. It may result in a situation where the same measure is named differently in different reports. If need to rename or change properties of a measure, it is always better to do so in the model itself.	

3.5. Drop Zone

The Drop Zones are designed to set the position of dimensions and measures for a specific visual output. They determine how and where they are displayed and how they affect each other.

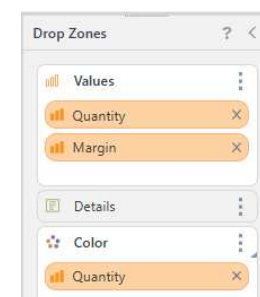
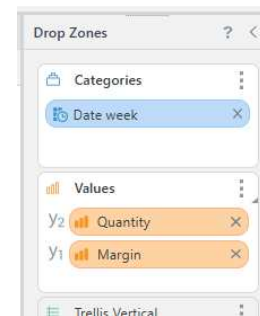
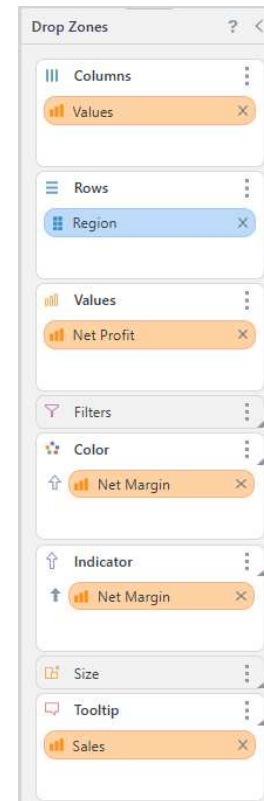
The number and type of drop zone elements that appear will change according to the type of graphic visual selected; "rows" and "columns" for a table, "categories" for a bar chart, etc.

Common properties:

- **Columns / Rows / Category**, etc.: The main axes of the dimensions being analyzed.
- **Values**: The selected measures to display in the report calculated per dimension it interacts with.
- **Trellis**: Enables ordering multiple elements graphs on the screen vertically or horizontally.
- **Filters**: Data filtering by selected dimension – date, organizational structure, etc.
- **Color**: Coloring of elements (background, font, indicator) in the report based on logic. See more in 3.2.2.1.
- **Indicator**: a special visual element to a grid report representing business logic.



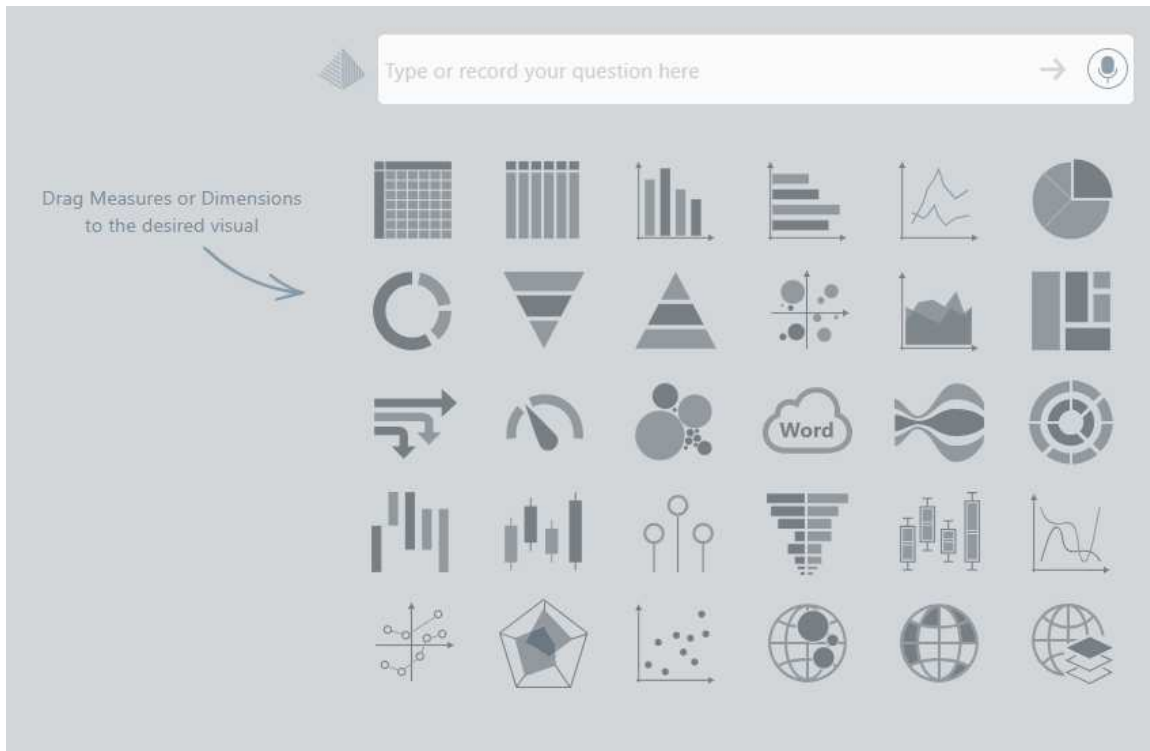
- **Size**: Effect on the size of graphic element displayed based on a selected measure.
- **Labels**: Display of a selected dimension's name on top of visual elements instead of the actual dimension used to create the graph.
- **Tooltip**: Additional dimensions and measures data can be presented in a tooltip pop-up window when hovering with the mouse over the graph.



3.6. Display area and Different Chart Types

At the beginning of work, the display area allows you to choose the type of visual report to build by dragging a dimension or measure to one of several different graph pictures displayed on it.

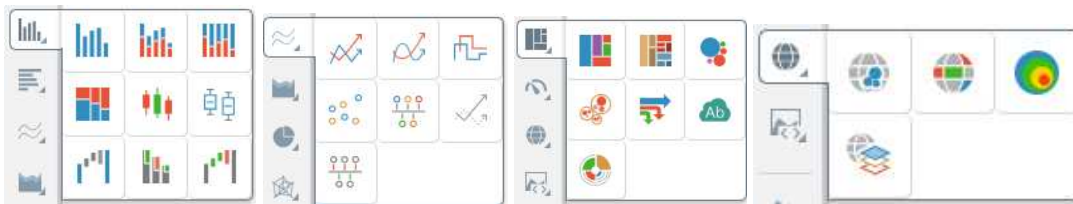
If Chatbot is available, you can type your business request in the text box, and a report will be generated for you through AI.



After the initial selection, the workspace and drop zones will change in accordance with the selected visual type and then you can add the remaining dimensions and measures as needed.

You can change the visual type in the display any time by using the charts menu. Right-clicking on a visual's icon will display all the available visuals within that group.

Few examples:

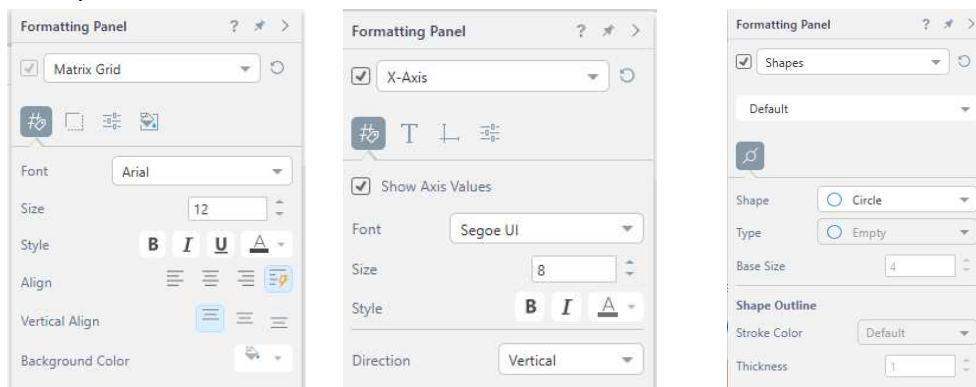


3.6.1. Formatting Panel

To the right of the screen, you can access the Formatting Panel which allows advanced formatting settings that will allow modifying specific visual elements displayed on screen.

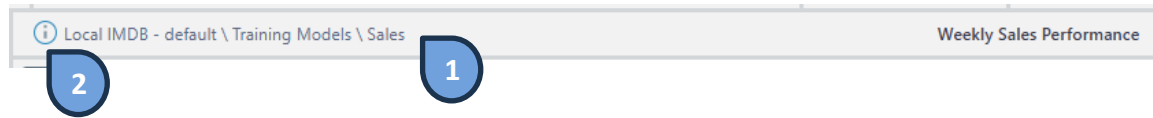
The formatting options menu changes in accordance with the type of visual you are working with, but in most cases the following options are available:

- **[visual name]** overall settings: Settings that affect the entire visual, such as font, colors, lines, alignment, screen coverage percentage, etc.
- **Report Title:** Show title and edit its text, alongside visual formatting
- **Visual specific formatting:** Rows / Columns / XY axes
- **Data Labels:** Display of measures and dimensions values inside / outside the elements in the display.
- **Legend:** Display and position of legend on the visual.
- **Shapes:** Choice of visual shapes for data points on the visual: circle, square, star, etc.

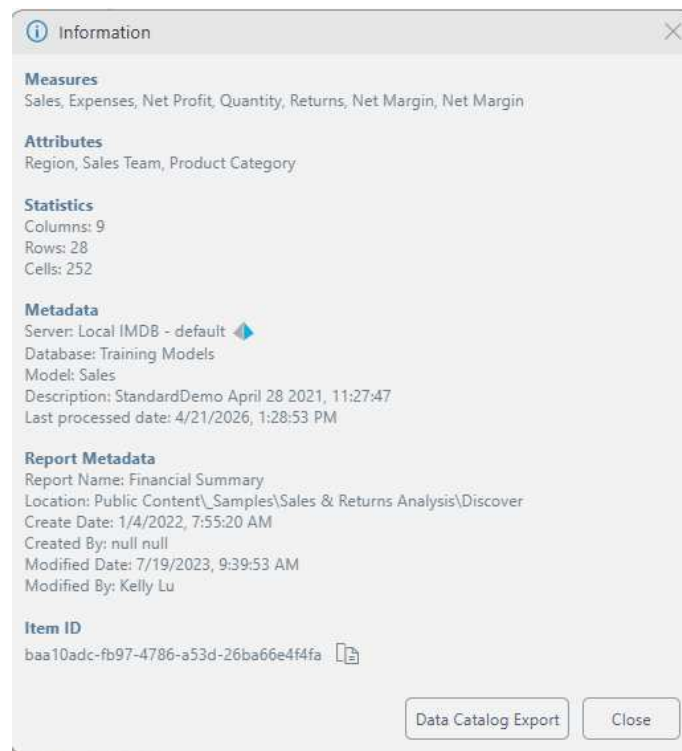


3.6.2. Title Frame

The title frame of the workbench provides additional helpful information about the model and data currently being worked on:



1. **Data source:** Server name\ Database name\ Model name.
This enables you to confirm you are working on the correct data set.
2. **Info:** Opens information window detailing additional report data such as its location in the content tree, number of elements displayed and statistics.
NOTE: Use the "Statistics" section to verify that the correct number of data elements were returned by the query when executing the report, i.e.: “did the number of employees data rows returned equal to the actual number of employees I expected?”



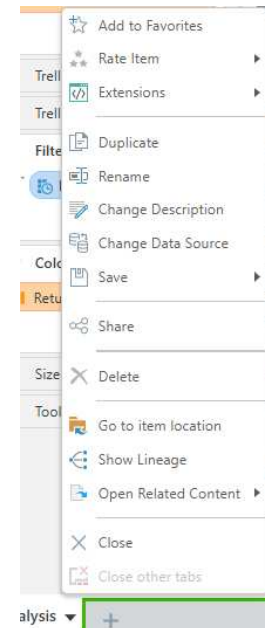
Actions Menu

-  **Undo** last action (same as Ctrl-Z)
-  **Redo** action
-  **Save** report
-  **Subscribe:** creates an automated schedule for sending the up-to-date report to email recipient or bulletin board (Daily at 9am, Weekly on Friday, etc.)
-  **Print:** print the report in a selected format – PDF, Excel, etc.
-  **Share:** Allow sharing this report through a link to another user inside / outside the organization (available through specific license and administration).
-  Quick access to Pyramid's Online Help.
-  Close the report.

3.6.3. Bottom Tab Menu

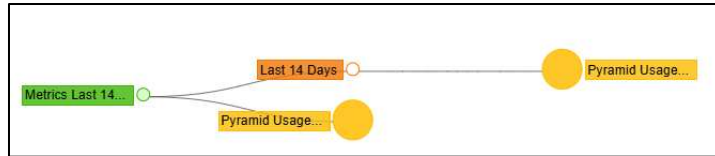
After a report is saved, you can access its actions menu in the bottom tab by clicking on the triangle next to its name:

- **Add to Favorites:** Add this report to your favorites. It will be added to the favorites window on the home screen.
- **Rate Item:** You can give a "rating" to any report that Pyramid uses to recommend content to all users.
- **Extensions:** Options for sharing the report by getting a direct link to it, getting code for embedding (EMBED) on other content pages and more, Exporting OData and more.
- **Duplicate:** Create a new copy of the current report.
- **Rename:** Change the report name.
- **Change Description:** Add free text to describe the report.
- **Change Data Source:** allows for switching data source of the report. This is required when migrating content between development to production environment or when changing data sources.
- **Save:** Save options; Save with new name, save as new version.
- **Share:** allows for sharing this report inside or outside the Pyramid environment (requires license).
- **Delete:** Delete the report.



- **Go to Item Location:** Opens content explorer at the location where the report is saved.
- **Show Lineage:** Will open a window showing the mapping of the report to its model and calculated measures if exist in it.

This is very helpful to verify which components make up the report.

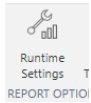


- **Open Related Content:** Allows quick opening of the elements the report is connected to; dashboards and calculated measures.
- **Close:** Closes current report.
- **Close Other Tabs:** Closes all other open content tabs except the current report.

4. User experience with a published report – Self-Service

A report, when shared with “Viewer” type users, allows them to perform “Self Service” analyses operations, “slice & dice”, on the report and save a private copy under their profile in Pyramid.

4.1. Enabling user functions

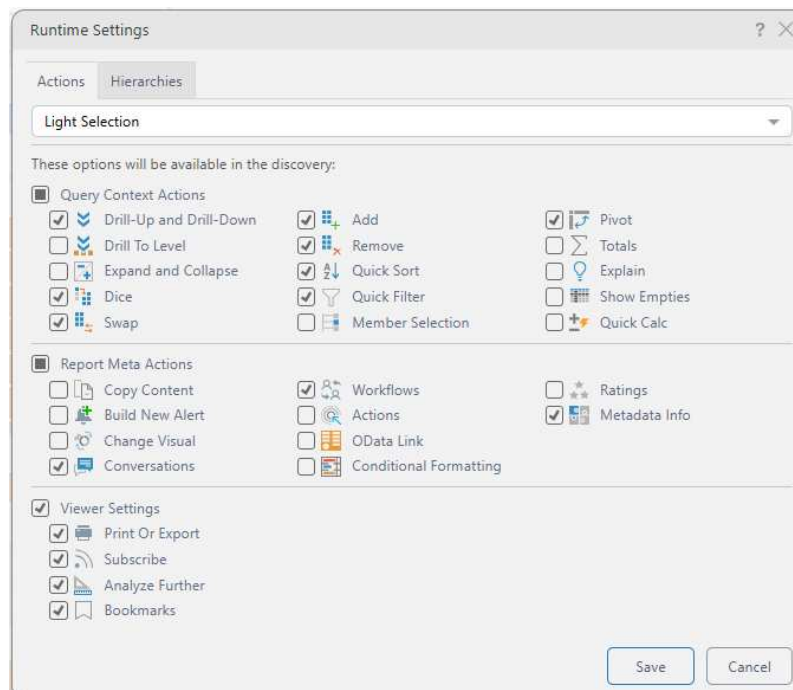


To enable this feature, you need to expose the specific capabilities through the Design tab's "Runtime Settings" button.

In the window that opens, you can select which operations are allowed for users viewing the report.

There are 3 sections to the settings:

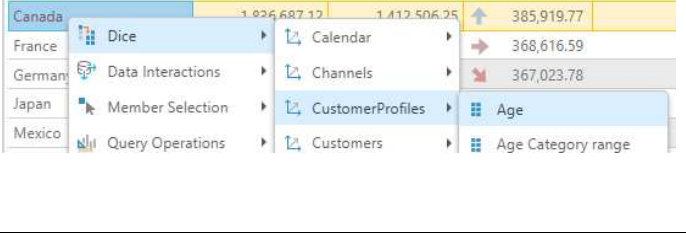
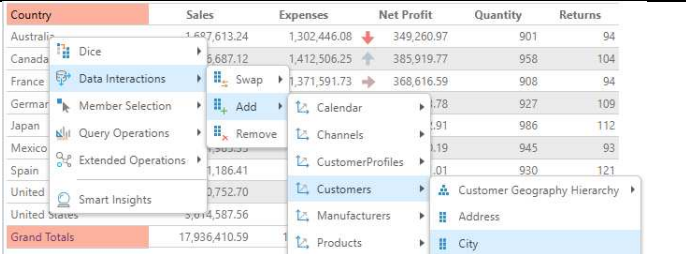
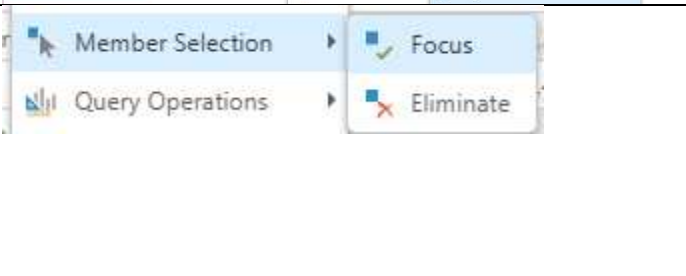
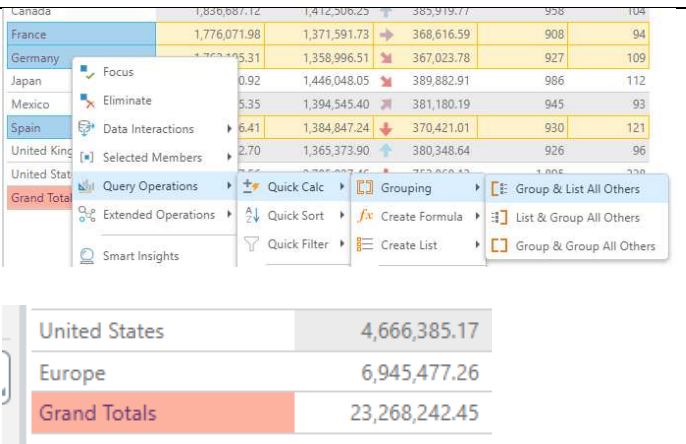
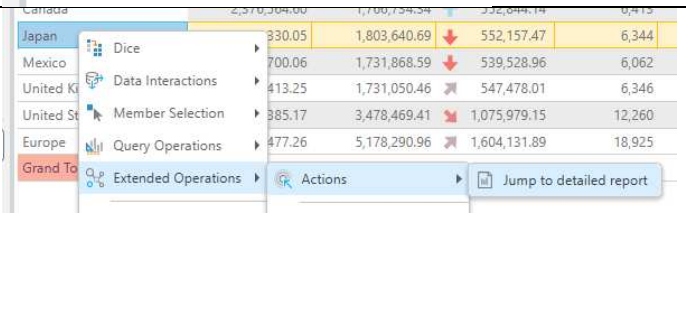
1. **Query context actions:** manipulating the data on the display, i.e.: adding or removing data elements, sorting & filtering, etc.
2. **Meta actions:** related to interactivity functions such as creating automated alerts, opening chat sessions, etc.
3. **Viewer settings:** enable print, subscription, editing report with “Analyze further” (and saving a private copy), etc.



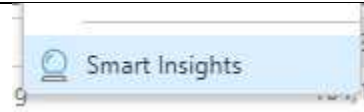
There are several predefined “actions” templates that load specific runtime options.

4.2. Actions on Members

Here are some highlights of functions that can be performed when selecting a member within a dimension:

Dice: change the report to show (“zoom in”) a breakdown of the selected member by another dimension. In the example: switch to show sales by age in Canada	
Data interactions: you can add swap or remove dimensions from the report. In the example: we will add cities to report under each country.	
Member selection: • Focus: keep the selected member and remove the rest • Eliminate: remove the selected member and retain the rest	
Query operations: allows for quick grouping, sorting and filtering of members. In the example: I took France, Germany & Spain, grouped them together and created a calculated group entity, I named “Europe”, which will always show the totals of the these three combined.	
Extended operations: additional functions for conversations, workflows, conditional formatting. In the example: Giving the user an “Action” to “jump” to another detailed report for the selected “Japan”.	

Smart Insights: AI generated statistical insights, highlighting possible connection of underlying data.



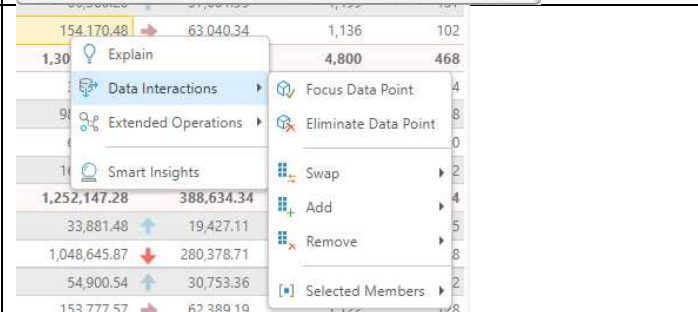
4.3. Actions on Data Points

Here are some highlights of functions that can be performed when selecting a specific measure within the report:

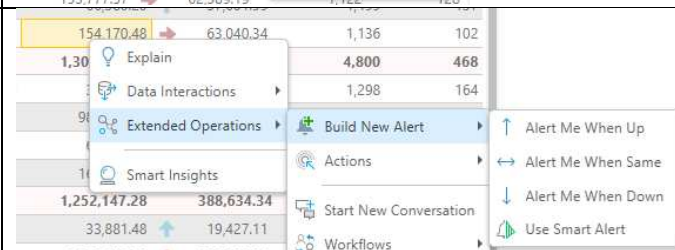
Explain: Will generate a graphical report explaining the underlying data element makeup & contribution to the value of the selected measure.



Data interaction: various functions, from focusing on or eliminating a data point, through adding to swapping, etc.



Extended Operations: additional options for conversations, workflows, conditional formatting. In the example: the user can define **automated alert** to notify him when a specific data point value changes at a predefined schedule



Smart Insights: AI generated statistical insights, highlighting possible connection of underlying data.

