

Data Analyst

Trusted metrics and explainable decisions

Business analysis with shared definitions and source evidence.

The analyst's real bottleneck

The report is only as dependable as its definitions and joins.

Conflicting numbers

Teams use different revenue dates, return rules and customer populations.

Hidden data issues

A plausible chart can conceal duplicate joins, stale sources or incomplete periods.

Uncontrolled sharing

Exports can lose access controls and leave sensitive details in inboxes.

The analyst showcase

A margin investigation connects detailed records to an accountable business decision.

01 Question

Retail margin and financial context

03 Investigation

Drill-through, exceptions and explanation

05 Extensions

Banking and insurance analysis

02 Meaning

Grain, definitions and certified metrics

04 Delivery

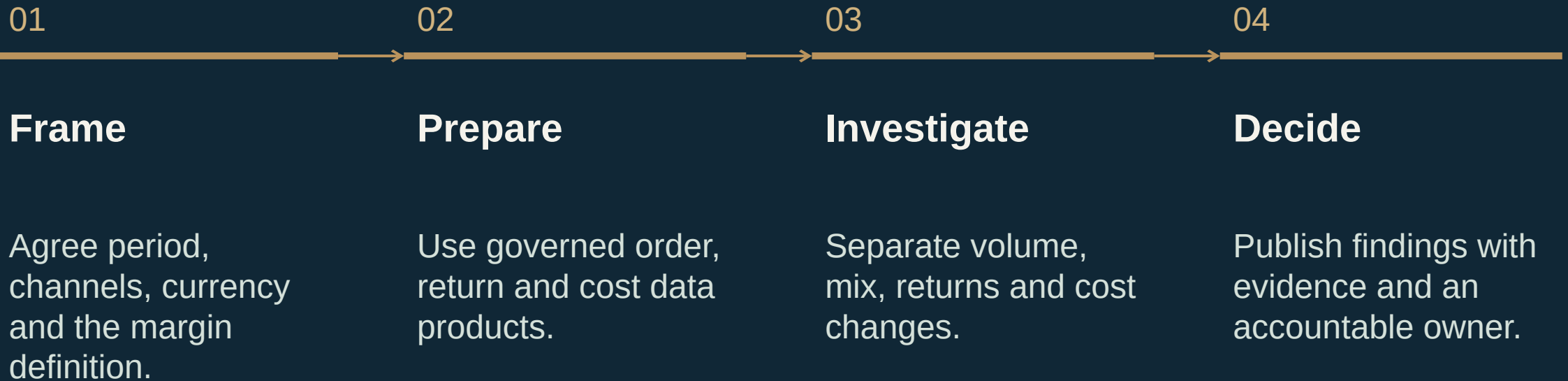
Reports, narratives and access

06 Value

Measured time and decision quality

A margin question with a clear answer

Example: the commercial team sees higher sales but lower contribution margin.



Security: scoped identity, controlled data access and traceable execution at every handoff.

GeneData capabilities and proposed workflows. Deployment scope requires validation.

The metric contract

The analyst and business owner approve meaning before publishing the dashboard.

Item	Definition	Control
Revenue	Recognised sales less returns	Period and return policy agreed
Contribution	Revenue less agreed variable costs	Cost categories explicit
Grain	Order line and product version	No duplicate join expansion
Currency	Reporting currency at approved rate	Rate date and version retained
Scope	Approved channels and entities	Access follows legal entity

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The join that can double revenue

A many-to-many join can create a convincing but incorrect total.

The failure

One order line joins two promotions.

Revenue repeats on both joined rows.

A dashboard sums the expanded result.

The controlled approach

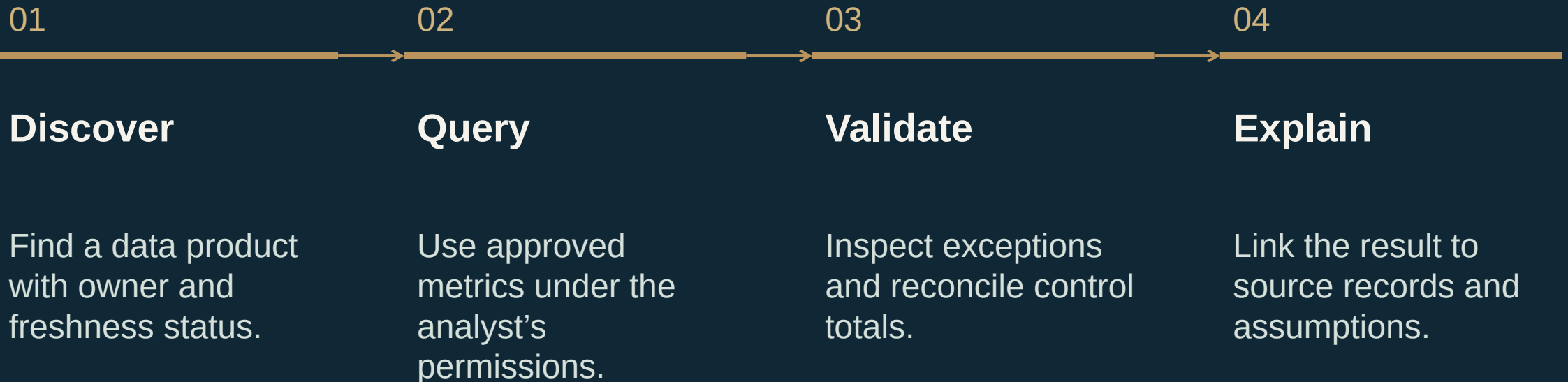
Aggregate promotions to the intended grain.

Test uniqueness of the join keys.

Reconcile the measure before and after joining.

A governed analytical workflow

GeneCatalog definitions and Cortex SQL connect the question to its evidence.



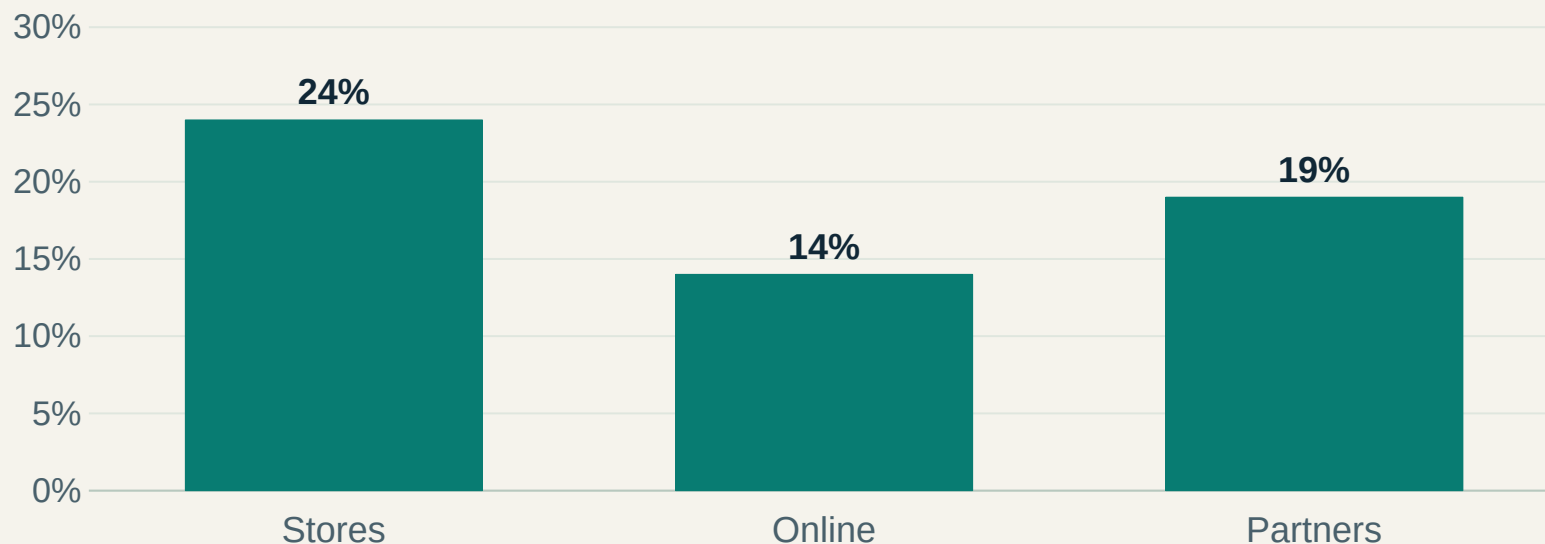
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Margin pressure by channel

Synthetic example: contribution margin rates differ even when sales grow.

Contribution margin as a share of net revenue



14%

Online margin

Investigate fulfilment and returns before assuming the price is wrong.

Synthetic planning example. Assumptions are illustrative, not measured customer outcomes.

A worked channel reconciliation

Synthetic values in thousands of currency units. Each channel uses the same agreed cost definition.

Channel	Net revenue / variable cost	Contribution / margin
Stores	1,000 / 760	240 / 24%
Online	1,000 / 860	140 / 14%
Partners	1,000 / 810	190 / 19%
Combined	3,000 / 2,430	570 / 19%

Synthetic teaching data. Contribution = net revenue – variable costs. Overall margin uses revenue-weighted values.

Drill-through that preserves context

A number becomes actionable when the analyst can explain the records behind it.

Business slice

Compare product, channel and customer cohort without changing the metric definition.

Source evidence

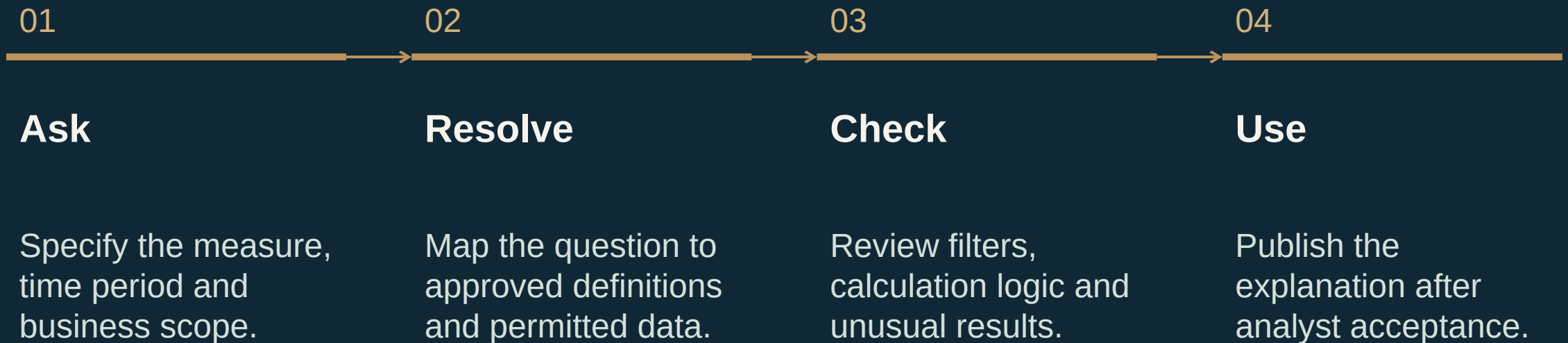
Inspect authorised records and the transformation path behind unusual movements.

Decision brief

State the finding, its limitations and the proposed action. Assign an owner and review date.

Natural-language analysis with review

GeneData describes natural-language queries over a shared semantic layer.



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An analyst's exception checklist

A useful report exposes what is missing instead of disguising it as a complete answer.

Exception	Visible treatment	Owner
Late source	Freshness warning and cutoff	Data Engineer
Missing cost	Excluded or estimated, explicitly	Finance owner
Small population	Suppress where policy requires	Privacy owner
Definition change	Version and restatement note	Metric owner
AI ambiguity	Clarify question before release	Analyst

Secure analysis and distribution

Access to a chart does not imply permission to export the underlying records.

Workspace

Use role and attribute controls. Test entity restrictions and sensitive-column masking.

Distribution

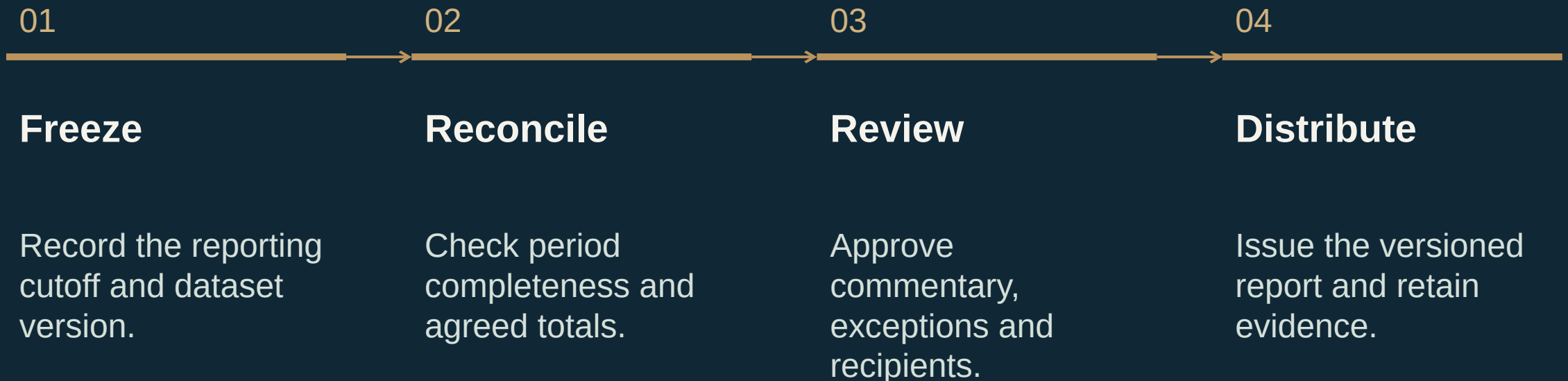
Approve recipients and export scope. Review how downloaded files will be retained and protected.

AI context

Limit submitted data to the approved purpose. Validate provider terms and review generated explanations.

A controlled monthly reporting pack

Reporting automates recurring preparation while retaining financial review.



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Banking analysis with financial discipline

Example implementation: explain deposit and lending movements across business units.

Definitions

Separate booked balance, average balance and cash movement. Agree signs and reporting dates.

Investigation

Resolve entity mappings and currency conversions before comparing branches or products.

Approval

Finance accepts the reconciled output. Analyst commentary remains linked to supporting data.

Insurance analysis with clear denominators

Example implementation: investigate premium, policy retention and claims movements.

Policy population

Define in-force policies and the treatment of reinstatements and cancellations.

Period consistency

Separate paid from incurred claims and distinguish event date from booking date.

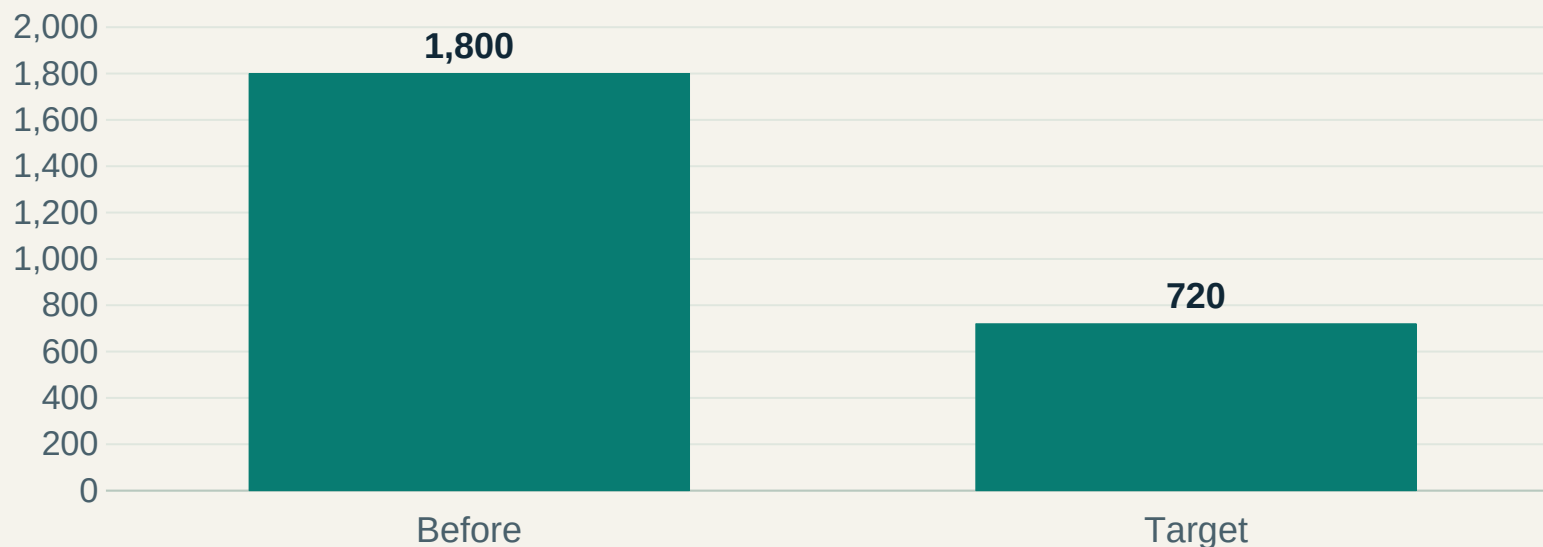
Business ownership

Product and actuarial owners approve definitions before using them for material decisions.

Reporting capacity released

Illustration: 30 monthly reports reduce preparation from 5 to 2 hours per report.

Annual preparation hours



1,080 hours

Potential annual capacity

30 reports × 12 × 3 hours.
Validate report complexity and review time.

A reporting value case

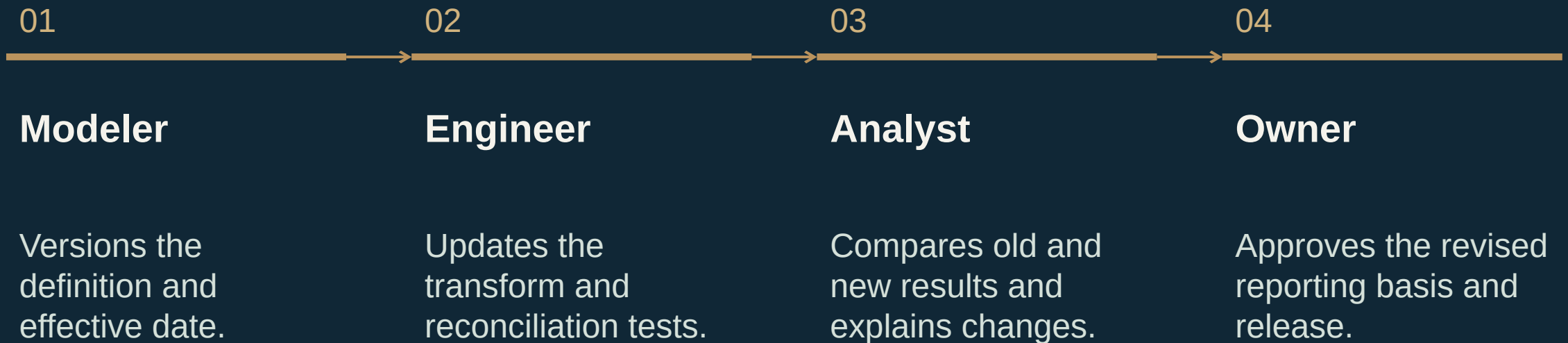
Synthetic economics include time realisation and the complete incremental cost.

Measure	Assumption	Result
Realised value	$1,080\text{ h} \times 65 \times 70\%$	49,140 currency units
Recurring / setup	24,000 / 18,000	42,000 year-one cost
Year-one benefit	$49,140 - 42,000$	7,140
ROI	$7,140 / 42,000$	17%

Illustrative planning model, not a customer result or GeneData quote. Released hours represent capacity.

A metric change across the team

Example: finance changes the approved treatment of returns.



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A measurable first delivery

Genellipse scopes an MVP within six weeks around one agreed workflow and its acceptance tests.

Stage	Working output	Acceptance evidence
Weeks 1–2	Agreed metric contract and baseline	Source access and baseline agreed
Weeks 3–4	Reconciled analysis and controlled reports	Exception and security tests pass
Weeks 5–6	Repeatable reporting pack and ownership	Metric totals and access tests accepted
Expansion	Add sources and consuming teams	Review value and operating capacity

GeneData capabilities and proposed workflows. Deployment scope requires validation.

Security evidence before scale

GeneData's Trust Center makes workload-specific review part of adoption.

Identity and data

Validate SSO, role boundaries, row and column controls, encryption and secret ownership against the chosen deployment.

AI and operations

Agree permitted models, data sent to providers, human approvals, recovery tests and retention responsibilities.

Assurance status

SOC 2 controls are mapped, without an attestation. ISO 27001 certification is not held. Request current control evidence.

Product references and example scope

Detailed workflows show implementation designs. Numerical examples use synthetic assumptions.

Platform capabilities	data.genellipse.ai/product/overview
Role-specific material	data.genellipse.ai/product/business-intelligence
Integration readiness	data.genellipse.ai/integrations
Controls and assurance	data.genellipse.ai/trust

Your next data workflow

Bring the business question, the source systems and the people accountable for the result. Genellipse will help define the architecture, implement the workflow and measure the outcome.

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