

How do I upload an Excel or CSV file as a source?

1. Overview

Vantage is the analytics and dashboard module inside Converse. As a Vantage Admin, you can upload data, build dashboards, configure AI queries, set up alerts, and share insights with your team. This page helps you find your way around when you open Vantage for the first time.

2. When to Use

- When you are accessing Vantage for the first time.
- When you need to understand the main navigation areas before setting up dashboards.
- When you want to locate the Sources section to start bringing data in.

3. Concepts

- **Vantage Admin** – A user with the Vantage Admin role. Only admins can create sources, build dashboards, configure widgets, and manage sharing. The admin role is assigned within Converse.
- **Sources** – Where all your data lives. Every file you upload, form you connect, or API you sync becomes a source. Sources are the foundation — dashboards, widgets, and AI queries all read from sources.
- **Dashboards** – The main screen your team will see. Each dashboard holds one or more widgets (charts, tables, KPIs) built on top of your sources.
- **Ask AI** – A chat panel where you can type natural-language questions and get answers from your data.

4. Set Up Guide

Step 1: Open Vantage

1. Log in to Converse.
2. Open the sidebar menu.

3. Click **Vantage** to enter the module.

Step 2: Explore the Navigation

When Vantage opens, you will see the main sections:

- **Sources** – Add and manage your data connections.
- **Dashboards** – Create and view dashboards.
- **Ask AI** – Ask questions over your data.

Step 3: Open Sources

1. Click **Sources** from the navigation.
2. You will see the Sources listing — this is empty when you start.
3. From here you can add your first data source using the **Add Source** button.

5. Best Practices

- Start with Sources before building dashboards — you need at least one source before you can create any widget.
- Prepare your data file (Excel or CSV) before opening Vantage so you can upload it right away.
- If you plan to use form data, make sure the form is already created in the Converse form builder.

6. Related Links / FAQs

Can non-admin users access Vantage?

Non-admin users can view shared dashboards and receive alerts, but they cannot create sources, build dashboards, or configure widgets.

What should I do first after opening Vantage?

Go to Sources and add your first data source. Once data is in, you can start building dashboards.

7. Version Notes

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