



BizViz User Guide

BizViz iPad App

Release: 2.5

Date: Nov. 9, 2016



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1. About this Guide

1.1. Document History

Product Version	Date (Release date)	Description
BizViz iPad App 1.0	June 9 th , 2015	First Release of the document
BizViz iPad App 2.0	February 18 th , 2016	Updated document
BizViz iPad App 2.5	Nov 9 th , 2016	Updated document

1.2. Overview

This guide covers:

- Creating a Connection
- BizViz iPad App Features

1.3. Target Audience

This guide is aimed at business professionals on the move, who use the BizViz iPad App to interact with business intelligence data on their iPads.

2. Introducing and Downloading BizViz iPad App

2.1. Introduction to the BizViz iPad App

Today's businesses depend on high speed decision making. Organizations need to act quickly to stay ahead of their competition. In-time decision making requires platforms to deliver results from anywhere. Interactive visualizations allow users to explore data instantly on mobile platforms.

Insights - Anywhere, Anytime

BizViz' s intuitive touch interface allows users to easily analyze their business data from anywhere, anytime. This convenient, always available access to data gives users the power to make quick, timely business decisions. The results of this power can be seen through quicker closing of deals and on-time delivery of products.

Intuitive User Interface

The BizViz iPad App contains the same features and functions as the BizViz Desktop application. Users can view reports, explore data, and uncover actionable insights into

their businesses within a few taps on their iPads. Decision makers can make key decisions while on the go, instead of being tied down to the office.

2.2. Prerequisites and Supported Devices

Prerequisites:

- iOS 7.0 later
- Download & Install the BizViz iPad App:

App Download URL:

<https://itunes.apple.com/in/app/bizviz/id874843742?mt=8>

Supported Device:

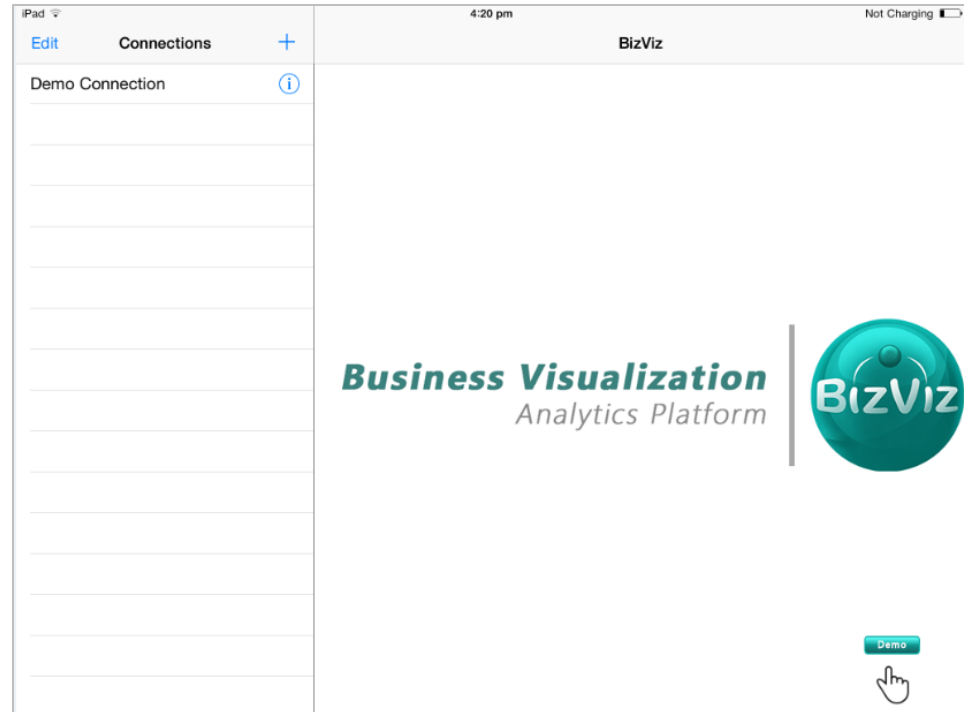
- Apple iPad

3. How to Use the BizViz iPad App

3.1. Creating a Connection


The BizViz iPad App provides user-specific login privileges. '**Connections**' must be created to login and use the iPad App.

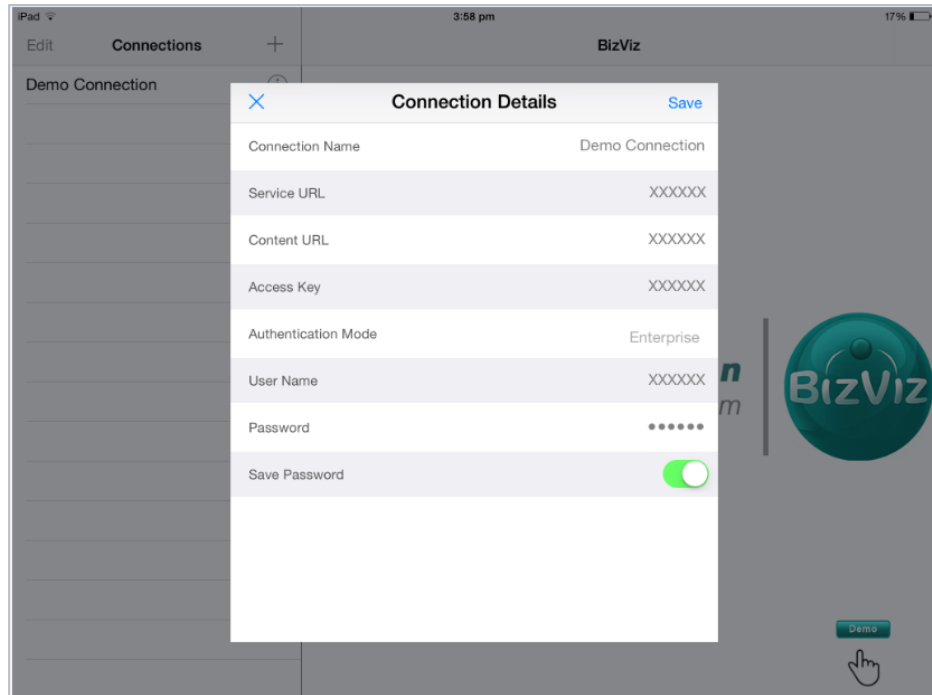
- i) Touch the BizViz Logo to open the app's Home Page
- ii) Select the '+' sign (on the left side of the home page) to open the window for creating a new connection



- iii) A new Connection window will open
- iv) Fill in the necessary connection details such as:
 - i. Connection Name
 - ii. Service URL
 - iii. Content URL
 - iv. Access Key
 - v. Authentication Mode
 - vi. User Name
 - vii. Password
- v) Select **'Save'** to save the connection


3.2. Viewing an Existing Connection

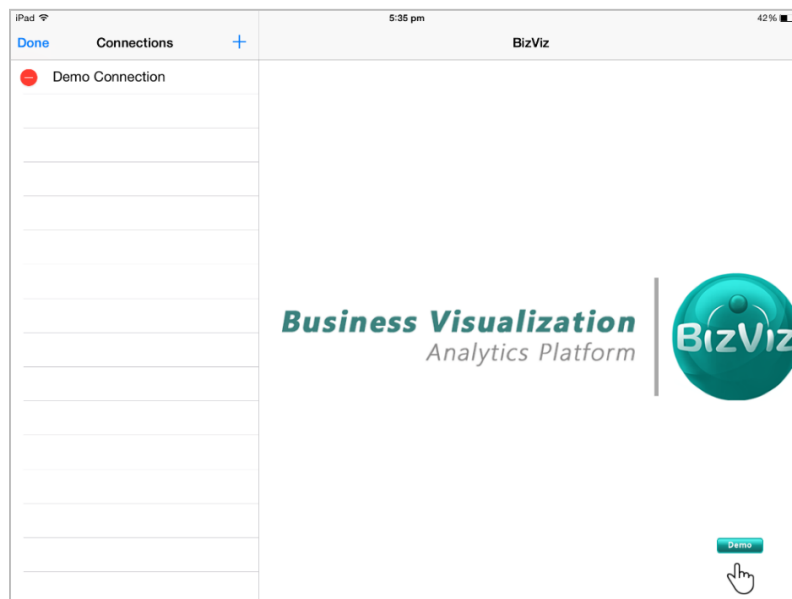
- i) All previously created connections will be listed on the home page, in the left side pane
- ii) Select the information symbol  located at the right of the connection name to view the connection details, such as the credentials



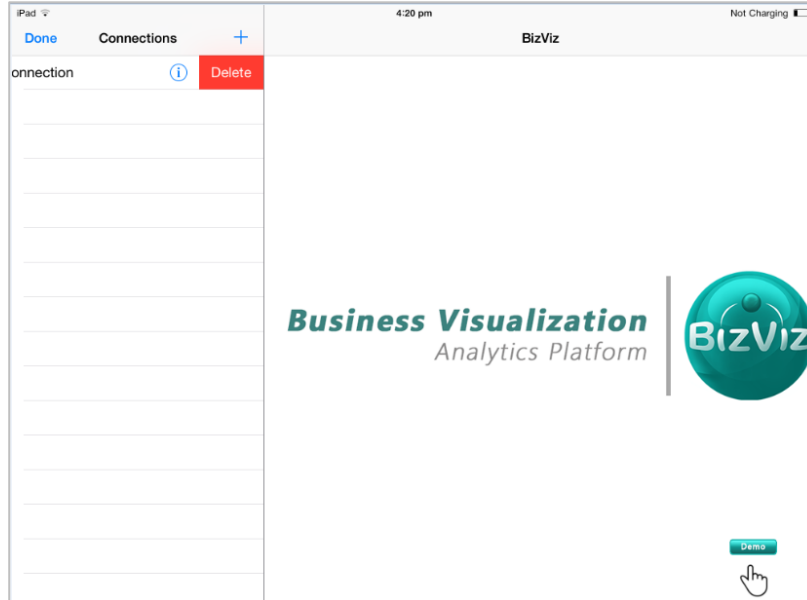
3.3. Deleting a Connection

There are two ways to delete a connection:

- i) Delete using the Edit option
 - a. Select **'Edit'**
 - b. The delete icon will be shown to the left of the connection name
 - c. Select the **'Delete'** icon 



- ii) Delete by scrolling to the Connection name in the left side pane
 - a. Scroll to the connection name on the left side pane to get the delete option
 - b. The Delete option will be shown to the right of the connection name
 - c. Select 'Delete'



Note:

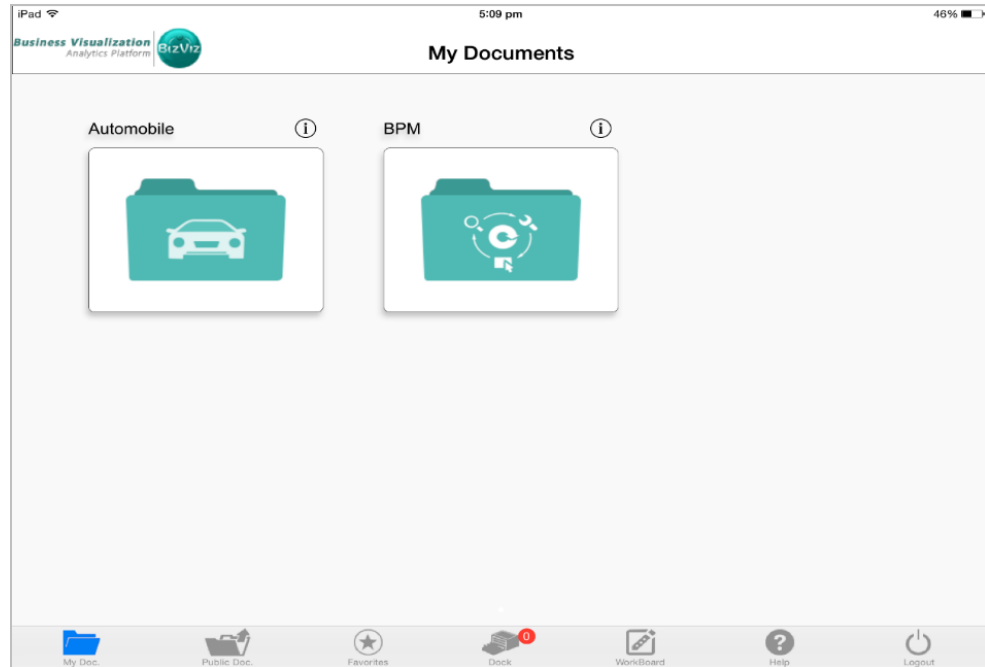
- a. User can access the app by selecting at least one connection.
- b. Multiple users can use a single connection if the 'Save Password' option is selected.

4. Features and Functions

4.1. My Docs

'My Docs' contains all the documents, dashboards, business reports, and business views created by the user. Since it is the first option on the feature page of the app, it is selected by default after signing in.

- i) Choose any connection to login
- ii) The 'My Docs' folder will open by default

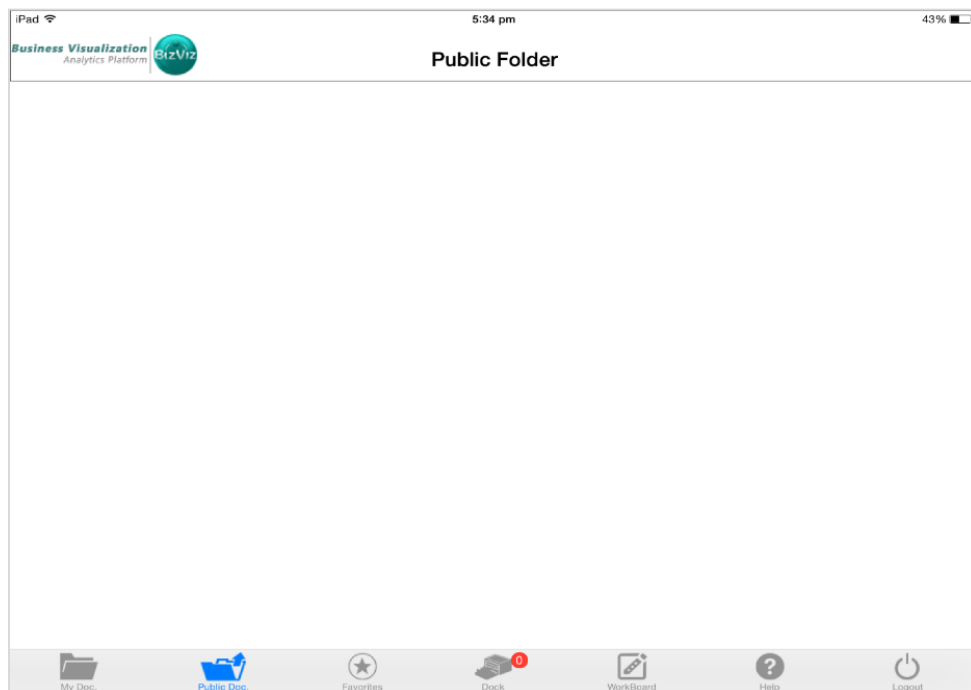


4.2. Public Docs

Public Docs are documents, dashboards, business reports, and business views accessible via the internet.

Choose any connection to login and avail feature page of the app.

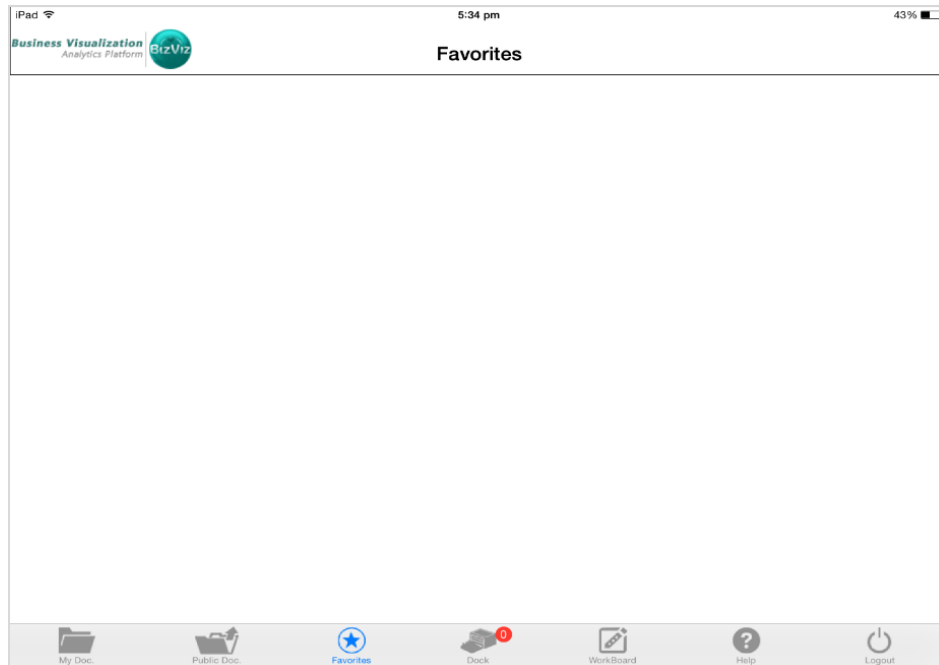
- i) Select '**Public Docs**' from the menu at the bottom of the screen



4.3. Favorites

Frequently used documents, dashboards, business reports, and business views will be listed under this option to make access to these documents easier for the users.

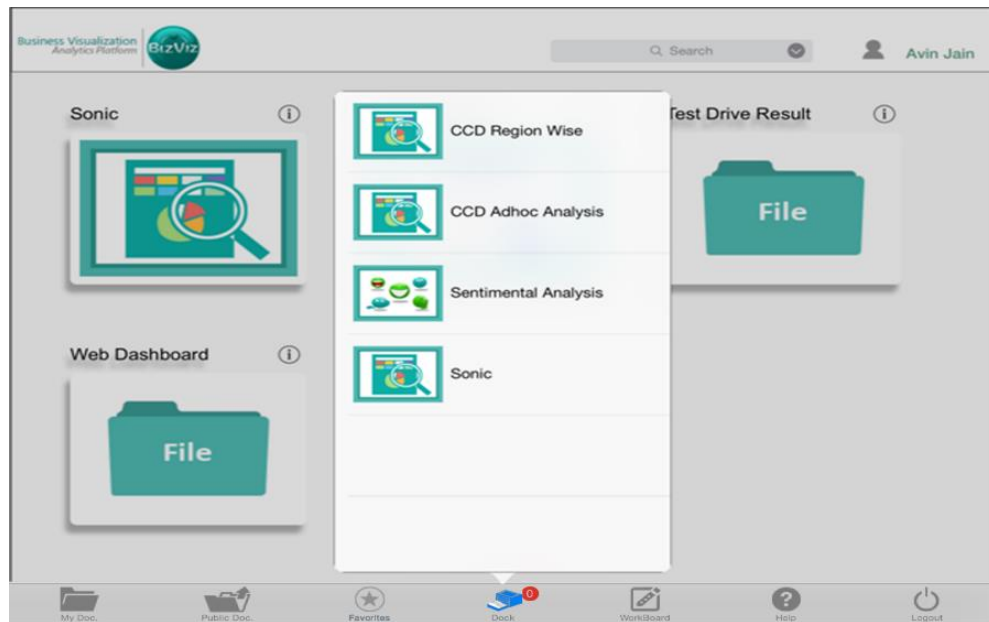
- i) Choose any connection to login
- ii) Select '**Favorites**' from the menu at the bottom of the screen



4.4. Dock

The documents, dashboards, business reports, and business views that are currently in use can be minimized to the Dock. When using the 'Dock', the BizViz app will not need to reload a document each time it is opened since the document is minimized and not closed.

- i) Choose any connection to login
- ii) Select '**Dock**' from the menu at the bottom of the screen to view a list of documents currently in the Dock



Note: The Dock can hold a maximum of 6 frequently used dashboards, documents, business reports, and business views.

4.5. WorkBoard

Users can annotate dashboards, documents, business reports, and business views by adding text, drawings, and highlighting areas. This can be helpful for drawing attention to specific data areas of document, or for presentation purposes. This WorkBoard can be further edited.

4.5.1. Steps to Open a WorkBoard

- i) Choose any connection to login
- ii) Select '**WorkBoard**' from the menu at the bottom of the screen

Dashboards WorkBoard Share Gallery




Save Design Preview Refresh

Sonic **Toyota**



Dealership	Make	Month	Qty	Price
Nandi Toyota	TOYOTA	Apr	73,840	45,682,140
Nandi Toyota	TOYOTA	Aug	60,128	38,068,450
Nandi Toyota	TOYOTA	Dec	61,394	38,068,450
Nandi Toyota	TOYOTA	Feb	115,824	72,330,055
Nandi Toyota	TOYOTA	Jan	86,388	53,295,830
Nandi Toyota	TOYOTA	Jul	59,350	38,068,450
Nandi Toyota	TOYOTA	Jun	59,418	38,068,450
Nandi Toyota	TOYOTA	Mar	79,313	49,488,985
Nandi Toyota	TOYOTA	May	60,951	38,068,450
Nandi Toyota	TOYOTA	Nov	36,239	22,841,070
Summary			1,839,507	1,165,605,704

4.5.2. Functions of the WorkBoard

4.5.2.1. Annotation

Users can add text , draw , and erase  drawings on a dashboard by clicking on the annotation icons.

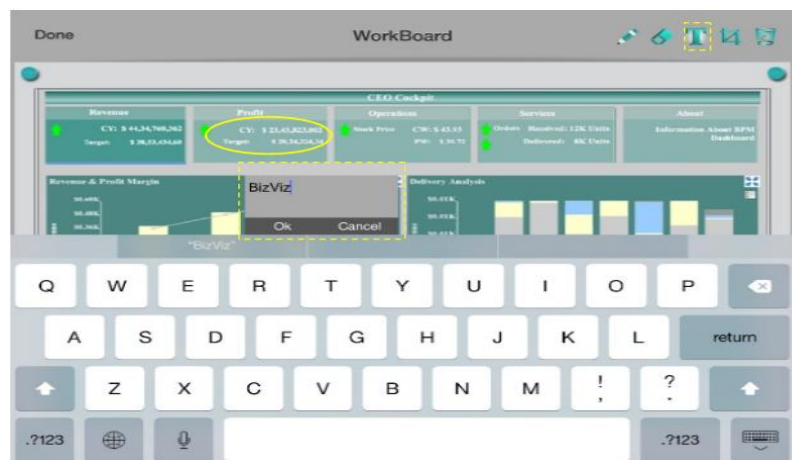
4.5.2.1.1. Drawing on the WorkBoard (and Erasing a Drawing)

- i) Select 'WorkBoard' from the menu at the bottom of the screen
- ii) Select 'Annotate'
- iii) Select the  icon to draw on the WorkBoard
- iv) Select the  icon to erase the drawing
- v) Select 'Done' (on the extreme left of the page)
- vi) A new window will pop-up prompting to save
- vii) Select 'Yes' to save the file
- viii) The image will be saved to the app's gallery



4.5.2.1.2. Annotating the WorkBoard

- i) Select **'WorkBoard'** from the menu at the bottom of the screen
- ii) Select **'Annotate'**
- iii) Select the **T** icon to add text to the current WorkBoard
- iv) A new window will pop up
- v) By touching the new window, an on-screen keyboard will appear
- vi) Type any text in the window.
- vii) Select **'Ok'** to save the text onto the document.
- viii) Select **'Done'** (left side of the page)
- ix) A new window will pop-up prompting to save
- x) Select **'Yes'** to save the file
- xi) The image will be saved to the app's gallery






4.5.2.1.3. Viewing a Saved Image

- i) Select '**WorkBoard**' from the menu at the bottom of the screen
- ii) Select '**Gallery**' (top right of the screen)
- iii) A list of all images saved in the gallery will appear
- iv) Select an image to view it


4.5.2.1.4. Deleting a Saved Image

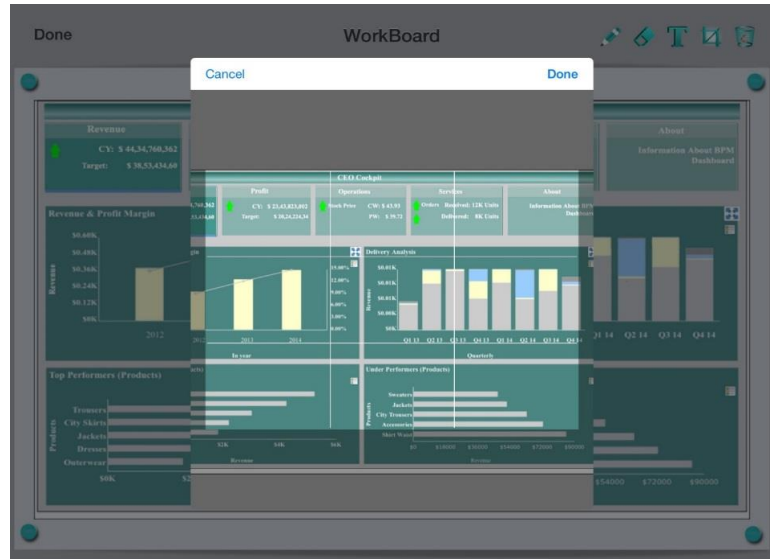
- i) Select '**WorkBoard**' from the menu at the bottom of the screen
- ii) Select '**Gallery**' (top right of the screen)
- iii) A list of all images saved in the gallery will appear
- iv) Scroll the chosen image to left
- v) Select '**Delete**' to delete the image

4.5.2.2. Select and Capture

Users can crop any portion of a dashboard and save it as an image using the crop icon . While viewing dashboards, users can zoom in/out by using standard pinch/spread finger gestures.

4.5.2.2.1. Cropping an Image

- i) Select '**WorkBoard**' from the menu at the bottom of the screen
- ii) Select '**Annotate**'
- iii) Select the  icon to crop a portion of the document
- iv) A new window will pop-up, focusing on the cropped portion of the document
- v) Using pinch/spread gestures, select the exact portion of the document you wish to crop
- vi) Select the '**Done**' in the window to close it
- vii) Again, select '**Done**' (left side of the WorkBoard main page)
- viii) A new window will pop-up prompting to save
- ix) Select '**Yes**' to save the cropped portion of the document
- x) The image will be saved to the app's gallery



4.5.2.2.2. Viewing a Saved Image

- i) Select 'WorkBoard' from the menu at the bottom of the screen
- ii) Select 'Gallery' (top right of the screen)
- iii) A list of all images saved in the gallery will appear
- iv) Select an image to view it


4.5.2.2.3. Deleting a Saved Image

- i) Select 'WorkBoard' from the menu at the bottom of the screen
- ii) Select 'Gallery' (top right of the screen)
- iii) A list of all images saved in the gallery will appear
- iv) Scroll to the image you wish to delete
- v) Select 'Delete' to delete the saved image

4.5.2.3. Resuming an Annotation Session


Users can resume a previously saved annotation.

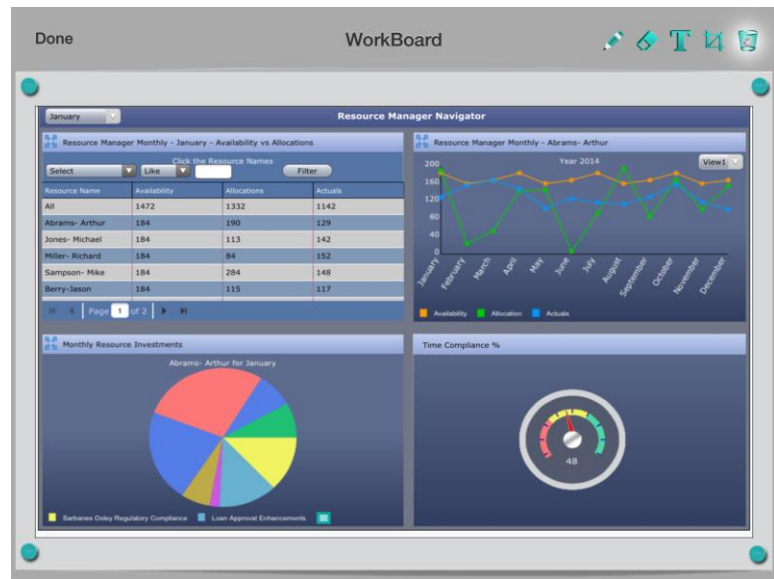
4.5.2.3.1. Steps to Resuming an Annotation Session

- i) Select 'WorkBoard' from the menu at the bottom of the screen
- ii) Select 'Annotation' options ( or **T**)

Or

Select a saved doc from the app's gallery

- iii) Select 'undo'  option
- iv) The previous annotations will be removed
- v) Make new annotations
- vi) Select 'Done' to save it to the app's gallery



Note: Select 'Undo' once to remove the highlighted portion and twice to remove the inserted text.

4.5.2.3.2. Viewing a Saved Image

- i) Go to WorkBoard main page
- ii) Select 'Gallery' (top right of the screen)
- iii) A list of all the saved images will appear in the gallery
- iv) Select an image to view it

4.5.2.3.3. Deleting a Saved Image

- i) Go to WorkBoard main page
- ii) Select 'Gallery' (top right of the screen)
- iii) A list of all the saved images will appear in the gallery
- iv) Scroll and select an image
- v) Select 'Delete' to delete the selected image

4.5.2.4. Sharing a WorkBoard

Users can share a WorkBoard by using the 'Share' option.

Users can share their insights and work with others via:

- **E-Mail:** Email your dashboard to others
- **Save:** Images are saved to the device's photo gallery
- **Print:** Print your dashboard

- **iMessage:** Share your dashboard with other iOS users

Steps to Share a WorkBoard

- Go to WorkBoard main page
- Select **'Share'**
- Select one of 4 options that appear for sharing the WorkBoard (Mail, Save to iPad Photo Gallery, Print, iMessage).

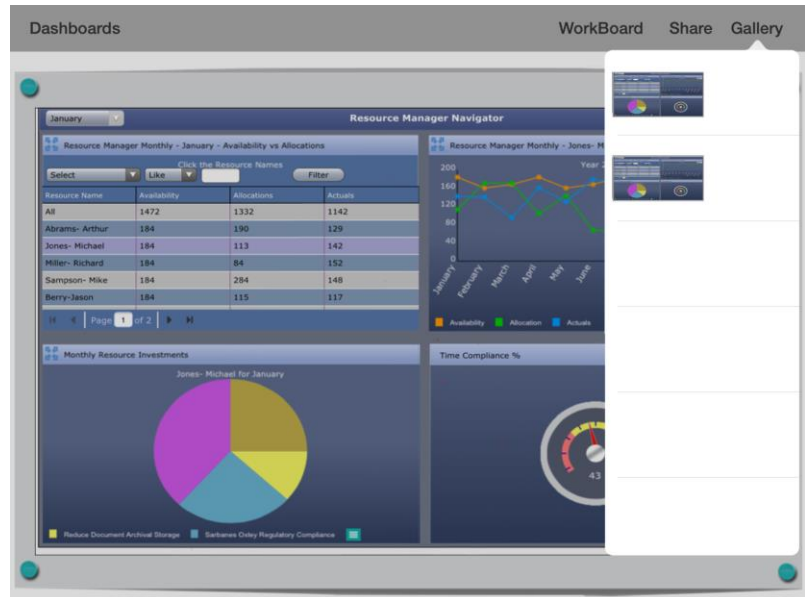


4.5.2.5. Gallery

All images saved via the WorkBoard will be listed in the apps' gallery.

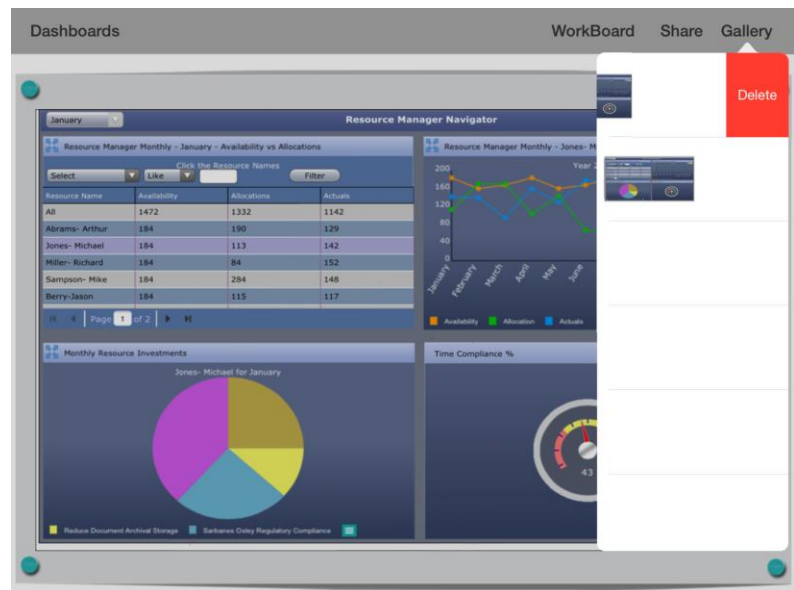
4.5.2.5.1. Opening Images in the Gallery

- Go to WorkBoard main page
- Select **'Gallery'** (top right of the screen)
- Select an image from the list of images



4.5.2.5.2. Deleting Images from the Gallery

- i) Go to WorkBoard main page
- ii) Select '**Gallery**' (top right of the screen)
- iii) Select an image from the list of images
- iv) Scroll the image to the left to avail '**Delete**' option
- v) Select '**Delete**' to delete the saved image

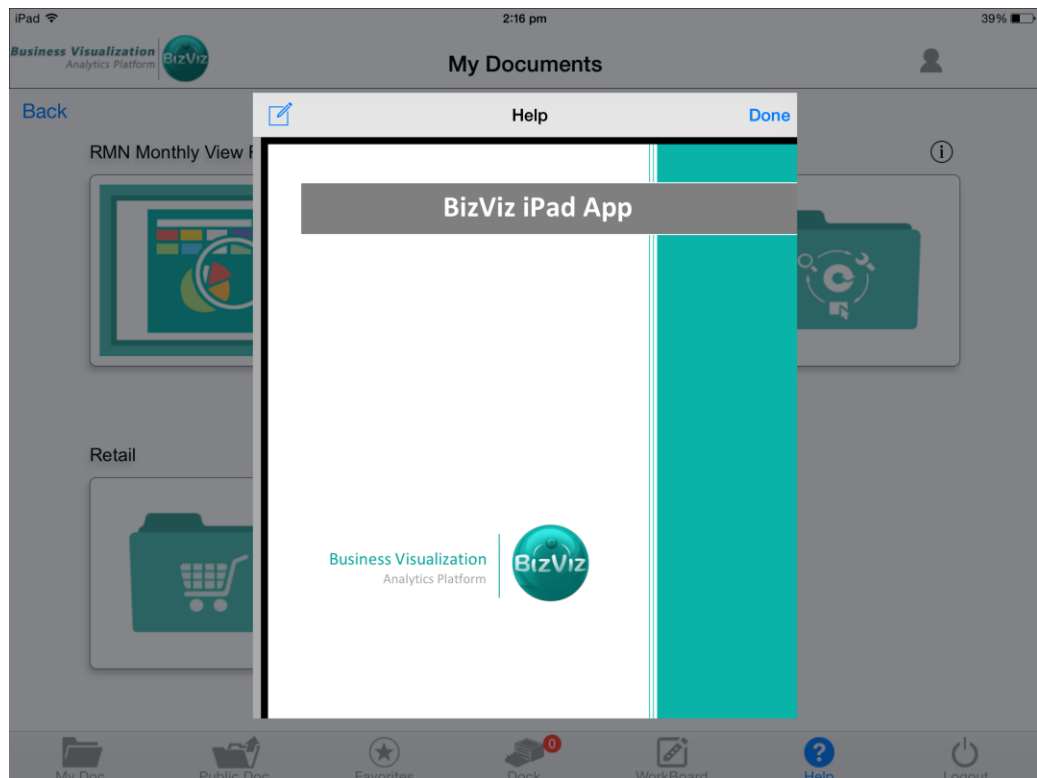


Note: To use the WorkBoard, at least one document must be selected.

4.6. Help

This feature contains the help document to guide the new users regarding the various feature and functions of the BizViz iPad App.

- i) Select a connection to log in
- ii) Go to the app's home page (any page that has the main menu along the bottom of the screen)
- iii) Select '**Help**' (at the bottom of the screen)
- iv) A new window will open displaying the help document



Note:

- a) There is an option on the left side of the help document to email the sales team
- b) Select '**Done**' to close the help document

4.7. Logging Out

User can logout from the app by selecting '**Logout**' provided on the app's home page.

Note: Logout is not available while using the WorkBoard or Help window.