



User Guide



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This documentation has been created for the version 2024.77

It is also valid for subsequent software versions as long as no new document version is shipped with the product.



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Support:

For more information, visit <https://www.whiz.ai/contact>

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Disclaimer

Every effort has been made to ensure that this document is an accurate representation of the functionality of WHIZAI platform. However, the development of the software is a continuous process for new features and change. So, small inconsistencies may occur.

We would appreciate any feedback on this document.

Send comments via email to: support@whiz.ai

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Preface

This user manual intends to help you know about WhizAI and its functionalities; it gives you a broad overview of the out-of-the-box features and functions WhizAI along with the necessary information and instructions about using WhizAI through different interfaces.

You can refer to the following sections to get started with WhizAI:

- [Getting Started](#)
- [Understanding WhizAI User Interface](#)
- [Using WhizAI on the web](#)

Intended Audience

This guide is intended primarily for the following users:

- Pilot team who performs UAT to navigate through WhizAI
- Trainers to onboard new users on WhizAI and for training purposes
- New or existing business users as a reference manual

Related Documents

Along with this user manual, you can refer to the following documents:

- Administrator's Guide
- NLP Guide
- ExplAIIn Guide
- QRG Pinboards
- QRG Product

Contacting WhizAI

For any support, you can reach to WhizAI support team in any of the following ways:

- Website: <https://whiz.ai>
- Email: support@whiz.ai

Introduction

WhizAI is the first and only generative AI-powered analytics platform purpose-built for life sciences and healthcare. Fast, easy, and scalable, WhizAI is transforming analytics with self-service analytics, zero-code dynamic dashboarding, and automated insights generation making WhizAI the trusted partner of choice at top global pharma and healthcare companies.

Learn more at www.whiz.ai

Getting Started

This chapter provides information that you need to know about the supported environment for WhizAI, thus you can get started with WhizAI your system environment. This section details the following:

- Supported browsers
- Supported channels
- Logging in to WhizAI
- Logging out from WhizAI

Supported browsers

WhizAI supports the following browsers:

- Google Chrome, v130 & above
- Mozilla Firefox, v130 & above
- Microsoft Edge, v130 & above (Windows); v130 & above (MacOS)
- Safari V15 & above (MacOS)

IPAD/Tablet Support

WhizAI supports the following browsers:

- Google Chrome, v130 & above
- Safari V15 & above (MacOS)



Note! For Google Chrome and Safari, WhizAI has voice support as a feature.

Supported channels

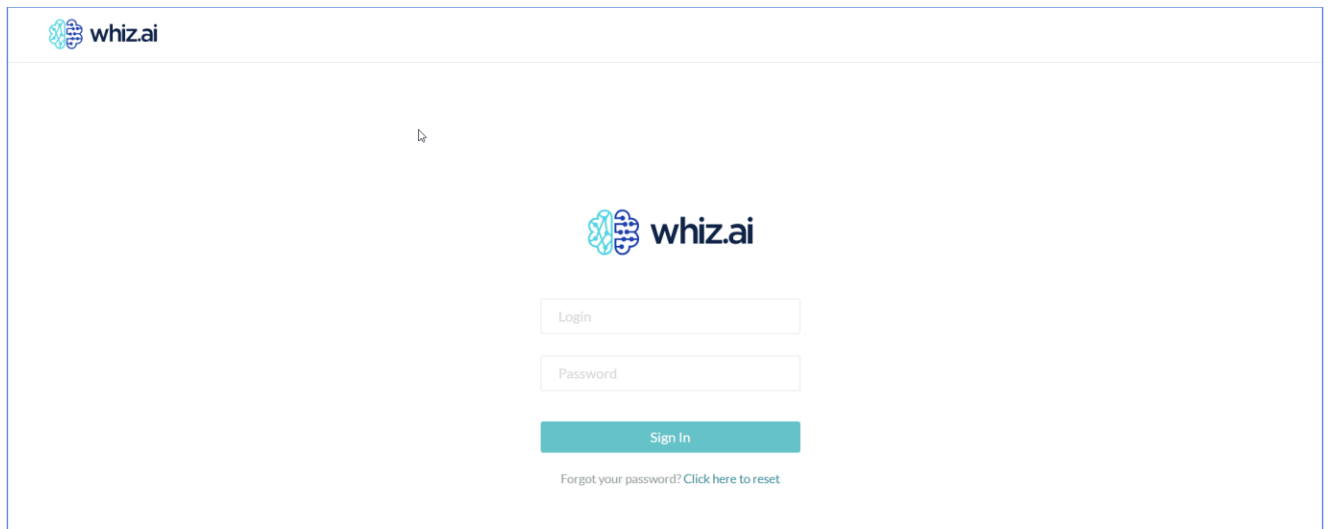
You can access WhizAI it from the following channels:

- Web: You can access WhizAI through web browsers. Refer to the list of supported browsers. Also, for more information, see Using WhizAI on the web.
- Collaboration Tools (MS Teams, SMS, Skype, Slack, and so on)
- MS Teams: You can access WhizAI through your Microsoft Team interface.
- SMS: You can interact with WhizAI by sending an SMS through your registered mobile number. You need to send a separate SMS for each question and each option number in the response.

- Skype: You can interact with WhizAI by sending messages through your Skype account registered in WhizAI.
- Slack: You can interact with WhizAI by sending messages through your Slack account registered in WhizAI.

Logging in to WhizAI

1. Open any of the supported browsers and enter the URL for WhizAI. The login page appears:



2. Enter your login credentials and click **Sign In** to log in WhizAI.

Logging out from the WhizAI

1. From the top right corner of WhizAI **Explorer**, click the **Profile** icon.
2. Click **Logout**. You log out WhizAI.

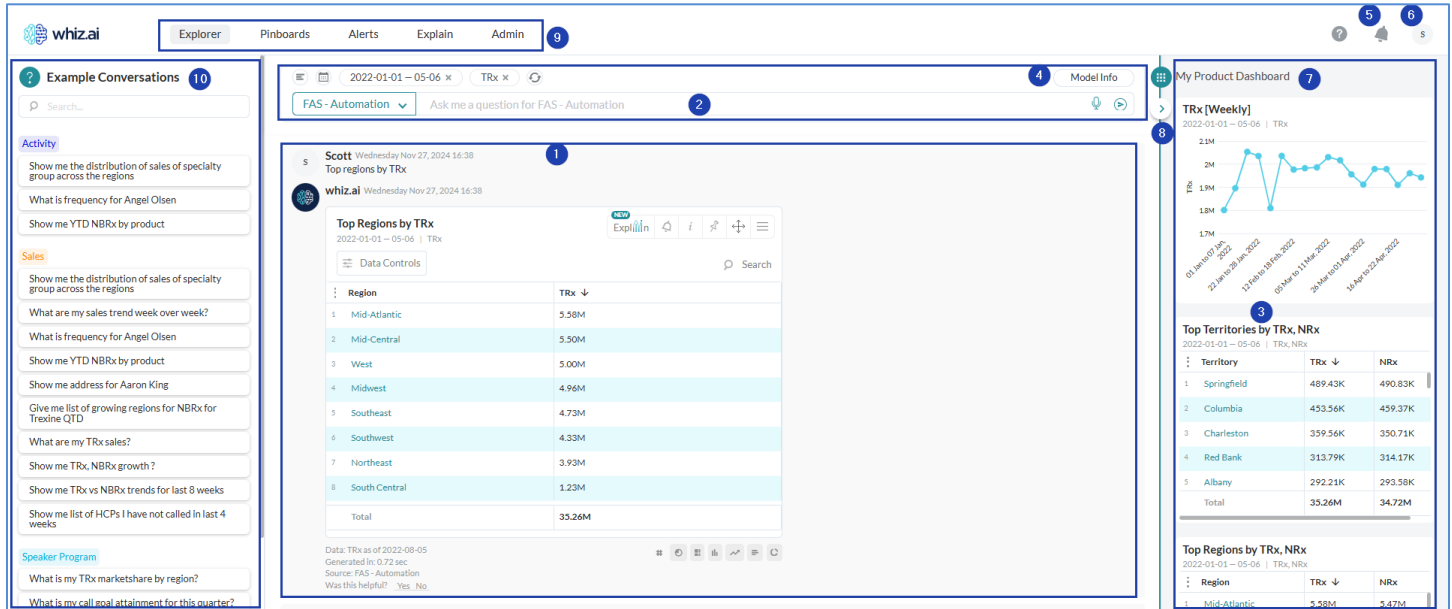
Understanding WhizAI User Interface

This chapter explains different sections of WhizAI platform's user interface.

- [Explorer](#)
- [Top navigation](#)
- [Conversation box](#)
- [Response box](#)
- [Pinboards](#)
- [Profile Menu](#)

Explorer

Explorer is the home page that you see after Logging in to WhizAI platform. It is designed and developed as a clean and user-friendly interface so that you can easily navigate and access the required functionality.



The following table explains the different sections of the **Explorer**:

Callout	Description
1	Response area: In this area, you can see the responses to the questions you ask WhizAI.
2	Conversation box: In this area, you can enter your questions and view the filters that WhizAI applies to the response. For more information, see the "Info Model" section in the conversation box.
3	Board panel: This panel shows the different cards that are pinned to Current pinboard. For more information, see Pinboards.
4	Model Info: Click the Model Info to view the list of metrics, dimensions, and reports in the selected data model
5	Notification: Click the bell icon to view the Notification and Alerts generated in the WhizAI platform.

Callout	Description
6	Profile: Click the profile icon of the logged-in user to access Profile Settings, Get Started, About us, and to Logout of WhizAI.
7	All Pins: Click this icon to open the main boards panel where you can view all the pinboards and cards . Also, you can perform the board settings and share boards.
8	Expand/ Collapse: The icon to expand the response area by collapsing the board panel.
9	Top Navigation Pane: You can click any of the header-level navigation options for easy transitioning between different areas of the product. The top header navigation pane is always visible no matter where you are in the product. You can effortlessly access the different areas within the product.
10	Example Conversations panel: You can click on any predefined user queries from this panel to start with your analysis. When you choose a query, the system resets the context and generates a corresponding response in the Explorer. Administrators can configure whether these example questions display on the Explorer or Model Info panel.

Top Navigation options

You can access the following areas of the product from the top navigation:

- **Explorer** - navigates to WhizAI Explorer with the latest response at the top.
- **Pinboards** - navigates to the main pinboard's panel.



Note! When you click Pinboards from the top navigation, you land on the pinboard that is pre-configured for you by your system administrator. (known as the landing page). However, if such a board is not pre-configured, then the first board existing under Favorites opens.

- **Alerts** - navigates to the **Alerts** page. You can manage the alerts from here.
- **Explain** - navigates to the Explain Workbench to derive meaningful insights from the data you want to analyze.
- **Admin** - opens the Admin dashboard.
- **Help** - navigates to the WhizAI support center.







Tip! WhizAI shows a warning message when you attempt to navigate to any area with any pending changes. This warning message serves as a reminder to review and save your changes before proceeding, thus preventing loss of unsaved work and ensures data integrity.




Conversation box



The following table explains the context bar options:

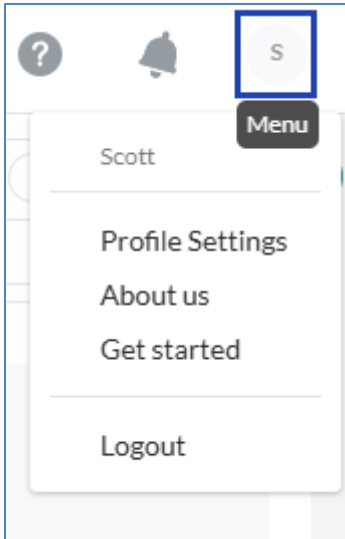
Context	Description
Question area	The area where you can enter your question. For more information, see Asking a question
Context bar (filter)	<p>The gray color bar shows the filters that WhizAI are identified in your question. The filters that appear are based on the question that you enter. You can remove these filters by clicking the cross (x) icon for each filter condition.</p> <p>There are the following types of filters:</p> <ul style="list-style-type: none"> • Default: Time and Metric are the default filters. You cannot remove these filters. • Context: The context is set due to reference to metadata entities or metrics used in the question asked by the user. • Authorization: Set due to user authorization. You cannot remove this filter. <p>It shows the data to which you have limited access. Knowing this detail helps you query the data accordingly.</p> <p>You can see (maximum) twelve entities in this list. If you have access to more than 12 entities, WhizAI shows the 12 entities "+x", where "x" indicates the number of entities. For example, if you have access to fourteen entities, the Authorization icon will show you the list of 12 entities (+2).</p> <p>For more information, see Context.</p>
Model Info & Suggested Queries	<p>Click the Model Info button to view the list of metrics, dimensions, and reports in the selected data model. You can see a + icon before the list of dimensions and metrics. If you click the + icon, WhizAI expands all the metrics/dimensions, and you can see the hierarchical data under it.</p> <p>For each metric, you can see a list of available computations. This information is useful when you add these computations to card filters. If you hover the cursor over the respective metric or dimension, WhizAI shows more information about the metric or dimension in a tooltip.</p> <p>Within the info model, you can see a section that shows the suggested queries for the selected data model. You can click these queries, as required, to view the corresponding response.</p> <p>Also, this 'Info' page shows a 'Reports' section that contains all the available reports for the data model. Click any of the report to generate it. All the base metrics for the selected data model are displayed.</p>

Context	Description
	<p>If you click any dimension, WhizAI shows you the values for that dimension. You can expand the metrics to view the applicable computations. Within the info page, you can also see a search bar that helps you filter any metric, dimension, or report, as required.</p> <p>Tip! If you hover the cursor over any metric, you can see a short description of the metric.</p> <p>The 'Info' page also includes categories that are defined according to business areas. You can click a business area category to view the corresponding metrics, dimensions, and reports applicable to that business area.</p>
Reset Context	<p>Click  icon to reset the context that is established from your previous question. After you click Reset, the Context Reset message appears in the Response box.</p>
Voice Input	<p>Click  icon and hold it to provide voice input for specifying the question instead of typing.</p> <p>For more information, see Using Voice to Ask the question.</p>
Slicers	<p>You can capture the context set in the conversation box and create a slicer around it. You can see the slicer's icon in the conversation box.</p> <p>If you click  this icon, WhizAI shows you a list of existing slicers under the Slicers tab.</p> <p>If you select a slicer from the list, WhizAI applies it to the context thereby replacing the existing context. To create a slicer from the conversation box:</p> <p>Click Create new slicer + under the Slicers tab in the Slicer and Cohort icon. WhizAI shows the Create slicer dialog. The filter values you see in the Create Slicer dialog are picked up from the context set in the Conversation box.</p> <p>You can add more filters or remove the existing filters, as required.</p> <p>Enter a name for the slicer, as required, and click Save. WhizAI creates the slicer and adds it to the list of existing slicers.</p>
Cohorts	<p>Cohorts allows you to group values of a dimension that share the same characteristics to analyze your patient and customer data.</p> <p>If you click Slicer and Cohort icon , WhizAI displays a list of existing slicers under the tabs All, My lists and Shared with me in the Cohorts tab. WhizAI shows the Create cohort dialog.</p> <p>Click Create new slicer + under the Cohorts tab in the Slicer and Cohort icon. the box. WhizAI shows the Create slicer dialog. The dimension values that share the same characteristics are grouped together having single target dimension. The condition is built using AND logic between one or more conditions with In and Not In operators to select the values.</p> <p>As an owner or editor, WhizAI allows you to, Copy, Share, Edit, or Delete the cohorts from the explorer or pinboard. A system notification is sent to all the recipients if the cohort is shared or unshared by the cohort owner.</p> <p>Note! To update the target dimension option is not allowed</p>

Context	Description
	You can create cohorts and use them on Explorer using NLQs as well as on Pinboard by adding as filters.
Authorization	<p>Click the Authorization icon  to view a list of all the default geographies, metrics, and dimensions for which you have limited access.</p> <p>WhizAI allows to set default values for Market and Product as well.</p>
Smart search	<p>Click on the Smart Search icon  on the conversation box on the WhizAI Explorer.</p> <p>Smart Search allows you to search and add entities to your queries. The smart search can be configured from the content management tab under the Admin console section.</p>
Data Model	Shows the data models configured for you
Reference Date	<p>Click the reference date icon  to select a date, as required, and query data for the metrics applicable until the selected date.</p> <p>A reference date is a specific date or time period chosen to filter and display relevant data on pinboards. It helps ensure that only pertinent information is shown when you deal with multiple data sources.</p> <p>You can set reference dates to align data representation with your analysis needs.</p> <p>For example, if you select sales_nbrx as a data source, it will have data from 2022-01-01 to 2022-05-06</p>

Profile Menu

The Profile icon shows the following options:

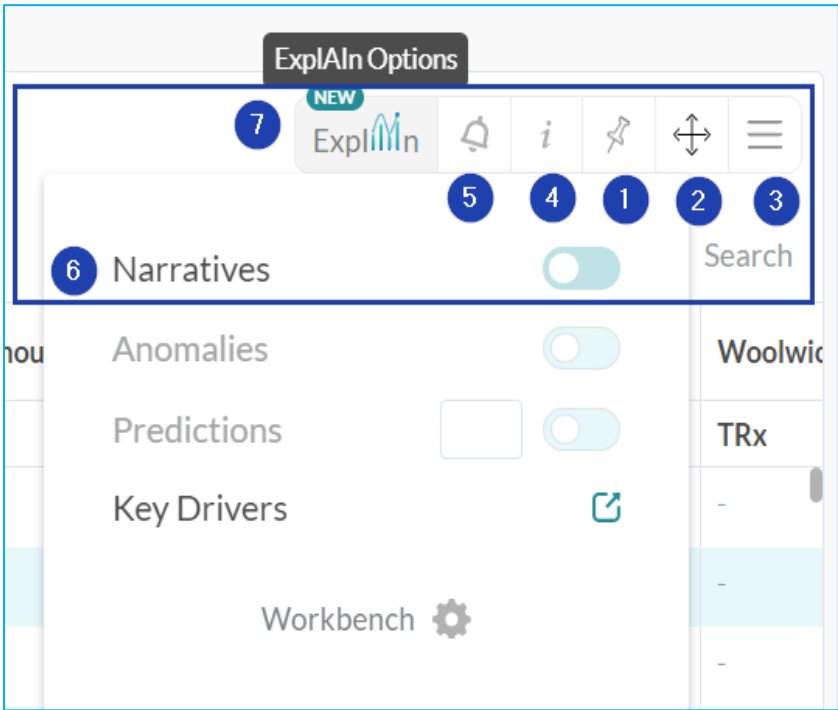


- **Profile Settings** - You can change the password, select the preferred language, and select the default landing page option from the User Settings page. By default, the landing page and English language are set during user creation. However, WhizAI offers the flexibility to override the default selection using the **Profile Settings**.
- **About us** - allows you to access:
 - WhizAI Privacy Policy
 - WhizAI Terms of Service
 - Release version information
 - Help
- **What's new** - access the latest WhizAI features and tips.
- **Get started** - information about the features and options on WhizAI Explorer. This option is visible only when you are on the **Explorer** or the **Pinboards** page.
- **Logout** - Logs out of the WhizAI application.

- [Creating a Board](#)


Response Options

In every response, you can see options (as shown in the following figure) to perform additional actions on that response other than changing the response layout and format.



The following table explains the response options and their description:

Callout	Response Option	Description
1	Pin Message	Pins the response message to the selected pinboard.
2	Expand	Pops-up the response in its original size so that you can view the details.

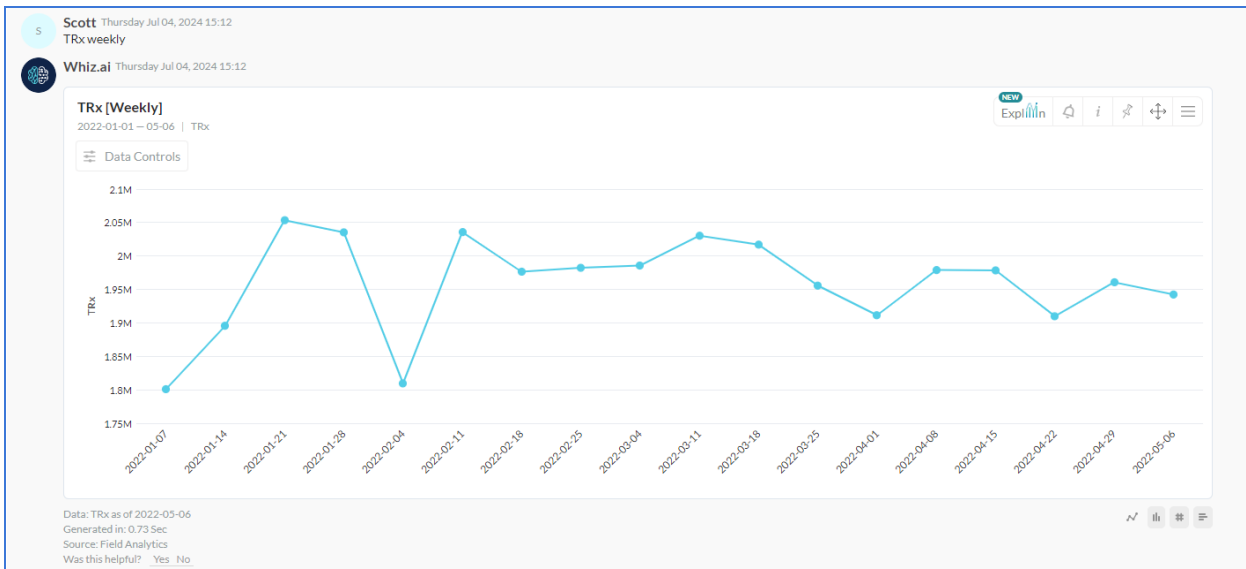
Callout	Response Option	Description
3	More actions	<p>Displays more actions:</p> <ul style="list-style-type: none"> • Average: Calculates the National/ District/ Region/ Territory level average values (You can see this option in a tabular response, only). • Download data: Downloads the data of the response to a CSV file. • Download image: Download the response as an image in PNG format. • Share: Opens the Share response with dialog. You can select a user or a user group, as required, and share the response.
4	Info	Business Data Descriptions are displayed on the user interface when you hover the cursor on a dimension/metric on the Info page or when you click on the Info option  on the response.
5	Alerts	WhizAI allows you to define the scope and filters for creating alerts. These alerts can be set for each data refresh. You can set multiple conditions and create alerts based on the data points, entity or metric comparisons, and dimensions. Also, you can subscribe or unsubscribe from alerts and choose to receive the alert notifications through the web or email, depending on your preferences.
6	Narratives	WhizAI provides text narratives from your data. These narratives prove to help derive meaningful insights from the data shown in the response. They equip you to make informed decisions.
7	ExplAI	<p>WhizAI offers the ExplAI Workbench UI to:</p> <ul style="list-style-type: none"> • Find key driving factors for a given business metric • Detect Anomalies in a trend • Derive futuristic trends

Data Controls

The **Data Controls** option allows you to change the time granularity (day, week, month, quarter, year) directly on applicable charts and tables, enhancing flexibility and user experience. This feature enables you to toggle between different time granularities without firing new queries and also allow pinboard owners and editors to save changes on the pinboard.

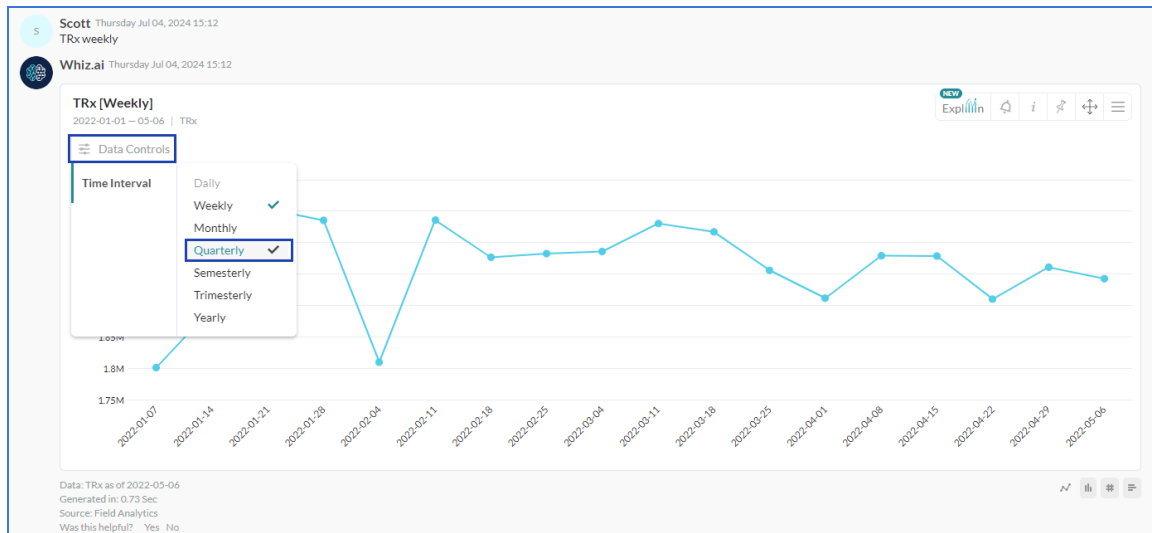
How to use Data Control?

Let us ask the following query, show me TRx weekly



Follow the steps to use Data Control

1. Click **Data Controls**. A list of **Time Interval** options are displayed.



2. Select the time interval bucket. The visualization reflects the time granularity based on the selected period.



Note! Changing the time granularity reflects for all the applicable visuals even when you switch to different visuals i.e. if granularity is changed from Week to Quarter on trendline, then switching to a table OR bar chart retains that changed Quarterly granularity.

Scott Thursday Jul 04, 2024 15:12
TRx weekly

Whiz.ai Thursday Jul 04, 2024 15:12

TRx [Quarterly]
2022-01-01 – 05-06 | TRx

Data Controls

Search

Quarter ↑	TRx
2022-Q1	25.49M
2022-Q2	9.77M

View as Table

Data: TRx as of 2022-05-06
Generated in: 0.73 Sec
Source: Field Analytics
Was this helpful? Yes No

Response box

The **Response box** is the area where WhizAI respond to all your questions. WhizAI interactively displays responses so that you can easily get the information that you are looking for. If required, you can drill down the response and retrieve more details.

Being AI-enabled, WhizAI not only displays a response but also analyzes the best visualization suitable for that response. In visualization, WhizAI decides whether to display the response in a table format, chart format, or a simple message format. Each response provides additional visualization options so that you can view the response your way.



Note! You can view comparison responses for more than two entities. In this case, WhizAI shows only the data values; however, when you compare only two entities, along with the values, WhizAI also shows the absolute and percentage change in those values. Remember! When you compare two entities, you can select one of these entities as a base for carrying out the comparison.



Note! In a comparison response, WhizAI shows the percentage value along with the numbers. Also, large numbers are shown as abbreviations, for example, 1,163,310 is displayed as 1.1 M or 447,334 is displayed as 447K.

In response, WhizAI shows only the data for which you have authorization.

You may see responses with a message that says: *"You are not authorized to see data for <entity name>".* This is the case when you ask a query and you do not have the authorization to view the data in the response.

For more information on Authorization, contact your system administrator.



Important! It is possible to configure WhizAI so that for some metric-dimension pairs, the metric and its corresponding values are not shown in the response.

If you ask NLQs having multiple geographies that belong to the same hierarchy level, WhizAI adds the values and shows an aggregated response. For example, if you ask WhizAI: Show me the unit volume for Boston MA, Hartford CT, and Atlanta GA.

In this case, WhizAI adds the unit volume for each of the geographies and displays the result. However, if you ask NLQs having multiple geographies that belong to an unrelated hierarchy level, WhizAI shall not give a response.

In a comparison response having more than two entities, you can select any one entity as a 'base' entity and compare the remaining two with that base entity.

For example, in a query such as: Compare Boston MA vs Chicago IL vs Philadelphia by months; any one of these three entities can be selected as a base entity. Assuming 'Chicago IL' is selected as the base entity, WhizAI displays a comparison response that contains details for Boston MA vs Chicago IL and Philadelphia vs Chicago IL.



Tip! WhizAI displays a comparison response for related as well as unrelated hierarchies. Thus, you can ask a query such as: Compare Boston MA vs New England vs Northeast by months.

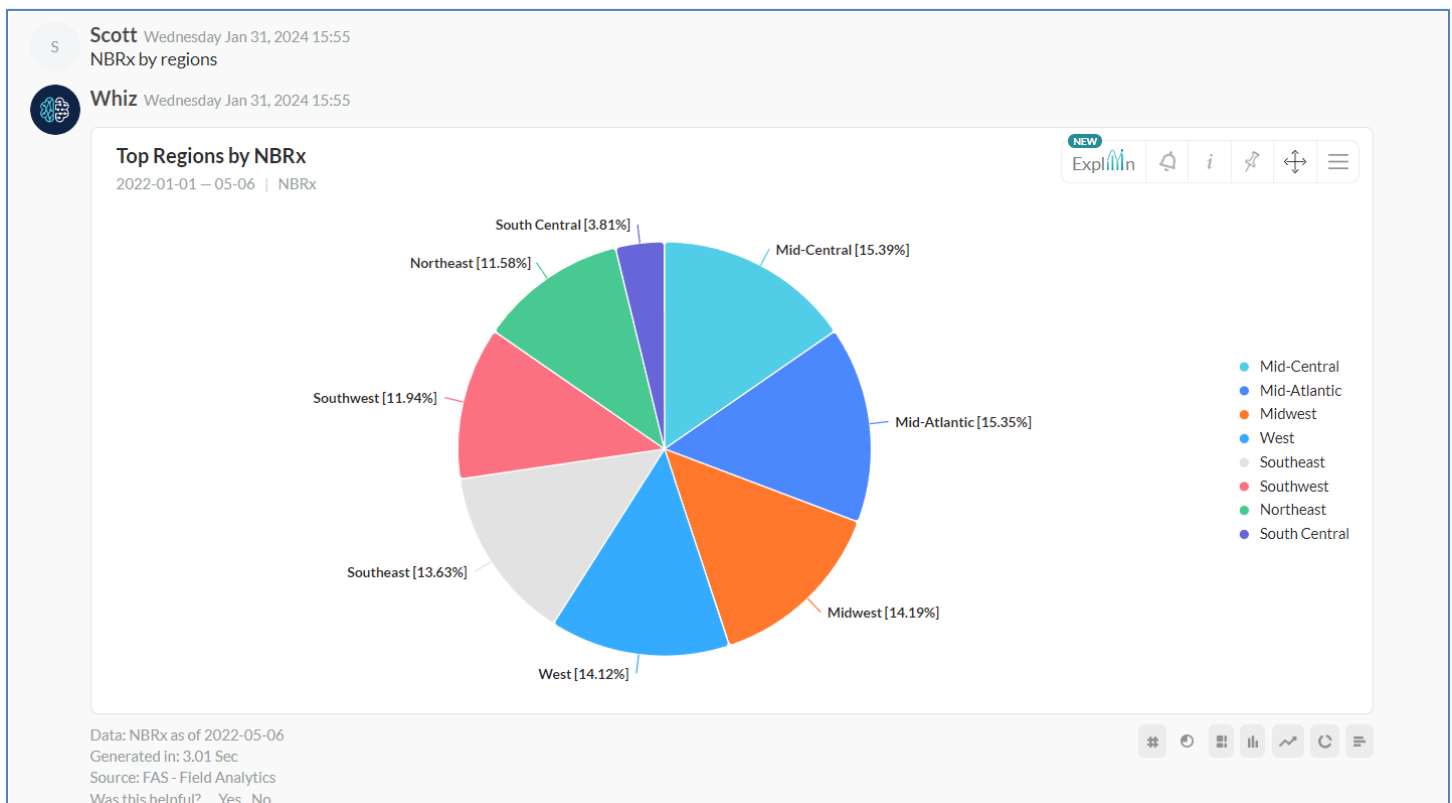
For all tabular responses (except responses that show variance) WhizAI shows a 'Total' and 'Sub-Total' row and column, as applicable. Having these rows in the response adds to the insights you can derive out of the data shown in the response.

For example: You can see such 'Total' or 'Sub-Total' row for queries such as:


- By Regions By Brands
- Brands by regions by districts
- Units by brands
- Units by months (or any other time scale)

Following are the examples of different response types in WhizAI:

Response - Chart



Response - Message



Whiz Tuesday Nov 28, 2023 23:15

Hi, [redacted]! You can ask me questions about FAS - Field Analytics business data.

I know quite a bit about sales transaction data for now. Here are some examples:

- Sales in North America in 2016?
- EAC? [yes, I can keep conversation context!]
- All Products
- Reset [for resetting current conversation context]
- Top 5 Customers by Sales Margin2 \$ in South America last year?


I guess you got it. So what can I answer for you?

Was this helpful? [Yes](#) [No](#)

Response - List View

WhizAI supports “View as List” visualization option for single-metric, multi-metric, and variance response to display data in a single-row format, accessible across both Explorer and Pinboard.

Example 1, TRx



Scott Sunday Nov 24, 2024 22:02

whiz.ai Sunday Nov 24, 2024 22:02

TRx
 2022-01-01 – 05-06 | TRx

NEW

Expln

i

35.26M \$

Data: TRx as of 2022-05-06

Generated in: 1.48 sec


Source: FAS - Field Analytics

Was this helpful? [Yes](#) [No](#)

Switch to List view to view data in a single-row format as follows.

S

Scott Thursday Nov 14, 2024 12:55
TRx





whiz.ai Thursday Nov 14, 2024 12:55


TRx
2022-01-01 – 05-06 | TRx


NEW


Expln















TRx
35.26M
[View as List](#)


Data: TRx as of 2022-08-05
Generated in: 0.58 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)



Example 2, TRx, NRx, NBRx

S

Scott Thursday Nov 14, 2024 12:59
TRx, NRx, NBRx





whiz.ai Thursday Nov 14, 2024 12:59


TRx & NRx & NBRx
2022-01-01 – 05-06 | TRx, NRx, NBRx


NEW


Expln













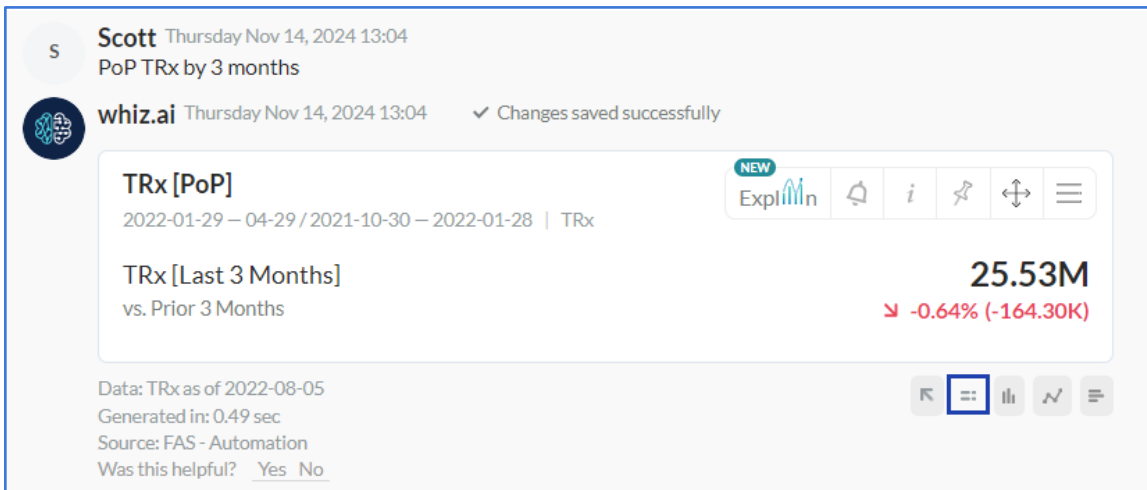


TRx	35.26M
NRx	34.72M
NBRx	53.40K

Data: TRx, NRx as of 2022-08-05
Data: TRx, NRx, NBRx as of 2022-08-05
Generated in: 0.60 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)



Example 3, PoP TRx by 3 months



Response - Table

Scott Wednesday Nov 20, 2024 11:30
NBRx by Regions

whiz.ai Wednesday Nov 20, 2024 11:30

Top Regions by NBRx
2022-01-01 – 05-06 | NBRx

[Data Controls](#) [Search](#)

	Region	NBRx ↓
1	Mid-Central	8.22K
2	Mid-Atlantic	8.20K
3	Midwest	7.58K
4	West	7.54K
5	Southeast	7.28K
6	Southwest	6.37K
7	Northeast	6.18K
8	South Central	2.03K
	Total	53.40K

Data: NBRx as of 2022-08-05
Generated in: 0.60 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

In a tabular response, WhizAI shows you a list of metrics and attributes along with the generic data from the response.

From this list, you can select an attribute and WhizAI adds the attribute's data to the table.



Note! Currently, you can select only those attributes that are directly related to the dimension, for example: Account and Account Type.

Response - Question/ Answer

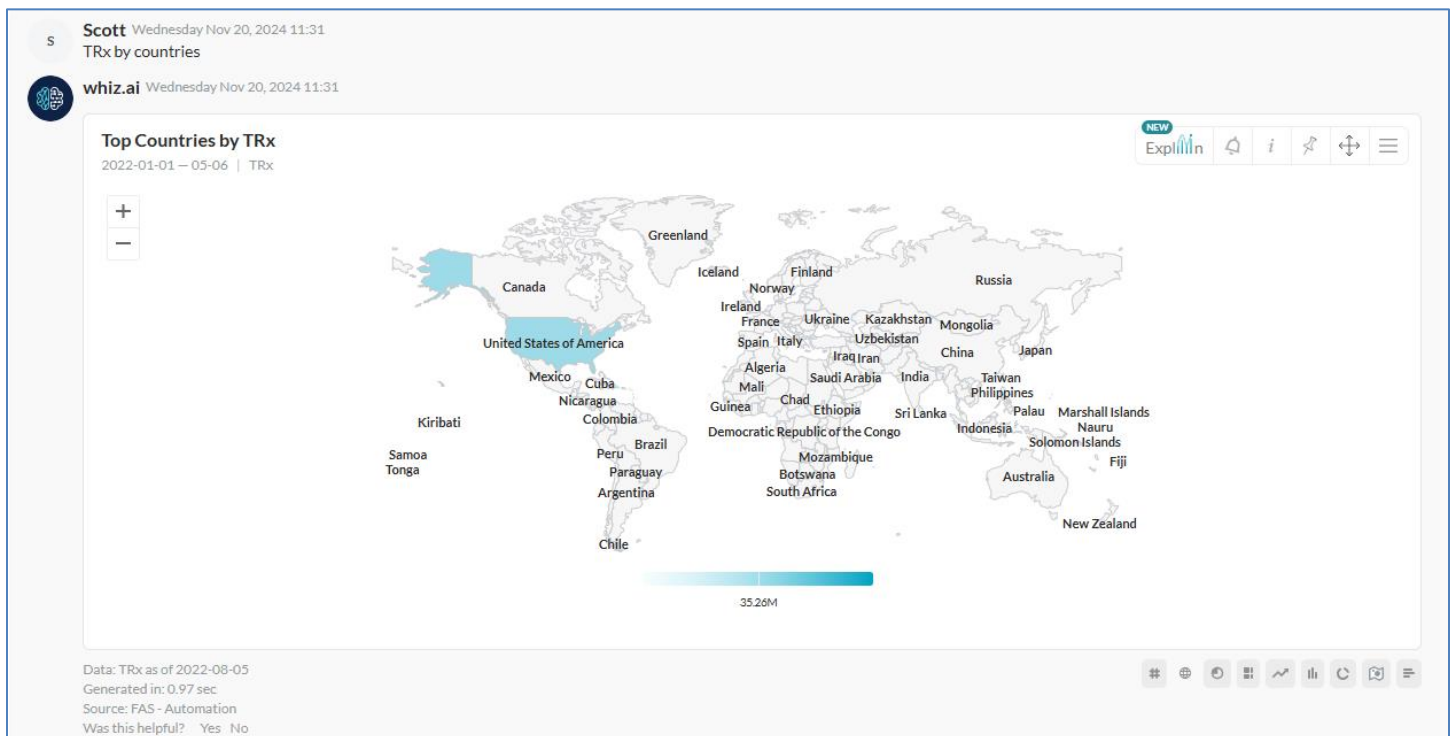
WhizAI, being AI-enabled, understands the intent of a question. For certain questions, it provides descriptive information as an answer instead of analyzing the data from the database.

Sometimes, your intent to ask the question is to know the definition, and meaning of a term, or even the full form of an acronym. In such a case, WhizAI understands these questions and provides the appropriate information in a formatted manner.

Response - Map

In a map response, you can click the '+' button to zoom in on the response zoom in and view all the details. To get back to the original state, click '-' so the system zooms out. In 'Maps' type visualization, you can view different geographical groups in different colors. Thus, you can easily segregate and identify regions based on the entity values of dimensions. For example1, if you ask a query "Show me sales by cluster by countries on a map. In this case, WhizAI shows the data by clusters, assigns a unique color to every cluster, and shows it on a map.

For example 2, if you ask, "Trx by Countries", it will highlight the countries configured for your data model.



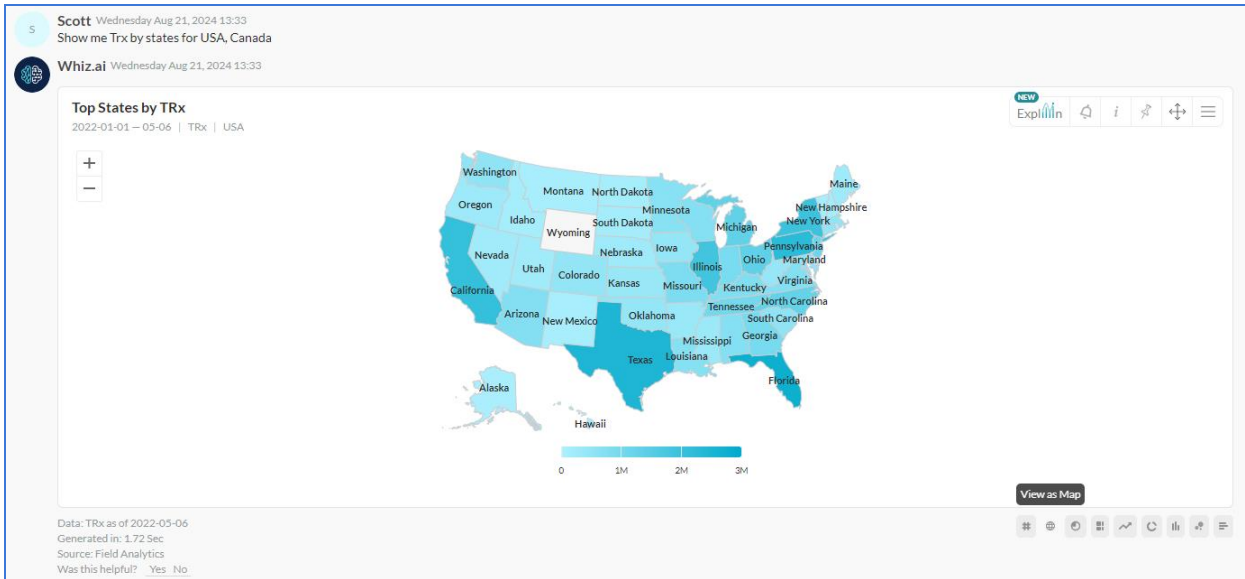
Response - State level Map Visualization for USA and Canada

In the 'Maps' type visualization, you can view different geographical groups in different colours. You can do state-level data analysis for countries USA and Canada by using Map Visualization.

Thus, you can easily segregate and identify regions based on the entity values of dimensions.

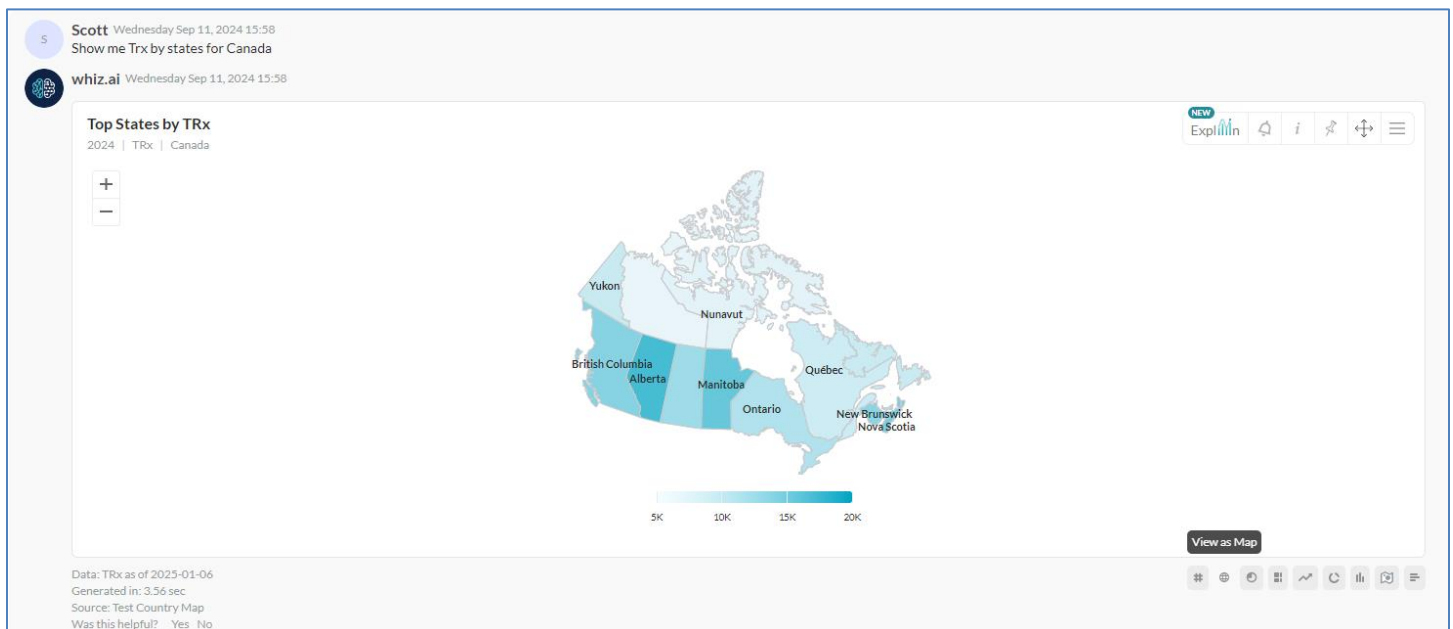
For example1, if you ask a query: Show me Trx by states for USA

In this response, WhizAI displays regions of the USA, grouping the data by clusters and assigning a unique colour to each cluster.



For example2, if you ask a query: Show me Trx by states for Canada

In this response, WhizAI displays regions of Canada, grouping the data by clusters and assigning a unique colour to each cluster.



Response - Bubble Map Chart for USA maps

Bubble Map chart allows you to visualize geographically based data more effectively, thereby allowing you to analyze data from different locations. The bubble map chart utilizes bubbles to represent the data points and displays them in varying sizes based on the magnitude of the information. The bubble map chart acts as a powerful and interactive tool for analyzing and understanding data from different locations.

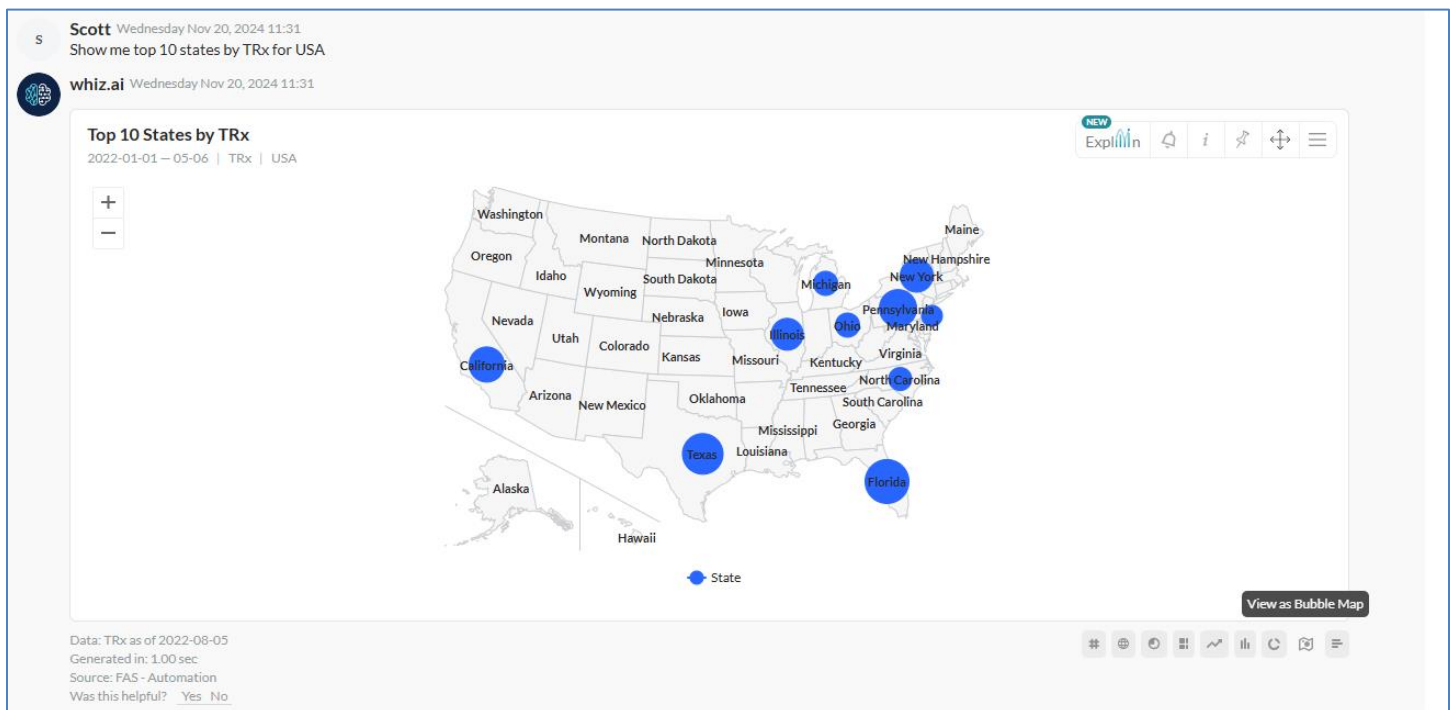
The following are the key features that enhance its analytical capabilities.

- Zoom in and out of the map for detailed analysis.
- tooltip that provides detailed information about the data points.

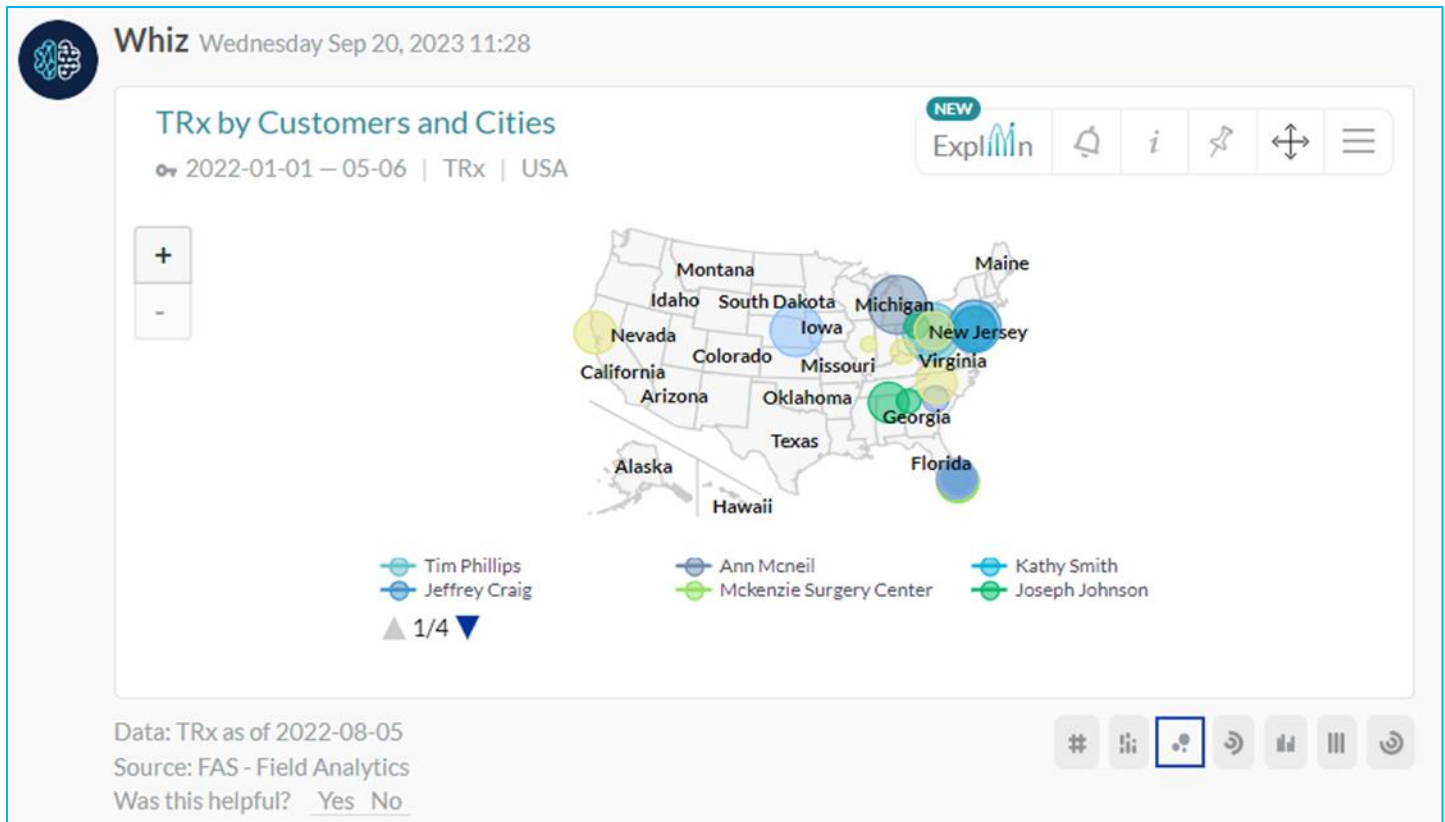


Note! This is a configurable feature. For more information refer to the section Configuring Bubble Map Chart in the configuration guide.

Example query 1: When you ask the query "Show me top 10 states by TRx for USA", you will get the following response.



Example Query 2: If you ask, 'show me Top 10 customers by cities by trx', you will get the following response.



Response - Bubble and scatter chart

A bubble and scatter chart is a type of chart that shows data points as bubbles. Each bubble represents a combination of three values: one metric value for the X-axis, another metric value for the Y-axis, and a third metric value represented by the size of the bubble. The bubble charts help us understand the relationship between these three variables. WhizAI assigns different colors to bubbles of different dimensions. Thus, it helps you to distinctly identify the different data points and you also get more context from the data in the visualization.

Moreover, the bubble and scatter chart show horizontal and vertical grid lines, creating a clear quadrant layout. The negative bubbles are displayed with a red border, making it easier to identify and interpret data values and ranges at a glance. If the chart axis begins with a non-zero number, then the 0 value is clearly indicated with horizontal -vertical plot lines. This ensures intuitiveness and better clarity in the data displayed on the chart.



Note! The X-axis and Y-axis in a Bubble map chart are determined based on the order of the metric specified in the natural language query (NLQ) query. Metric 1: X-axis; Metric 2: Y-axis.

Example Query: 'Show me Nrx, Trx, NBRx, by region, by product'.



The bubble and scatter chart highlights the zero value with a dark gray grid line, creating a clear quadrant layout.

As you can see, this bubble map chart represents prescription-related metrics for different regions and products. From this Bubble map chart, you can visualize:

- X-axis: TRx (metric 1)
- Y-axis: NRx (metric 2)
- Bubble size: NBRx(metric)
- Bubble: region (dimension)
- Legend color: Product region (dimension)

Thus, you can visualize new prescriptions (NRx), the number of total prescriptions (TRx), and the number of non-refillable prescriptions (NBRx) for each region and product.

Each region is represented by a bubble, and the size of the bubble corresponds to the values of the selected metric (NBRx). The larger the bubble, the higher the value of the metric for that specific region and product.

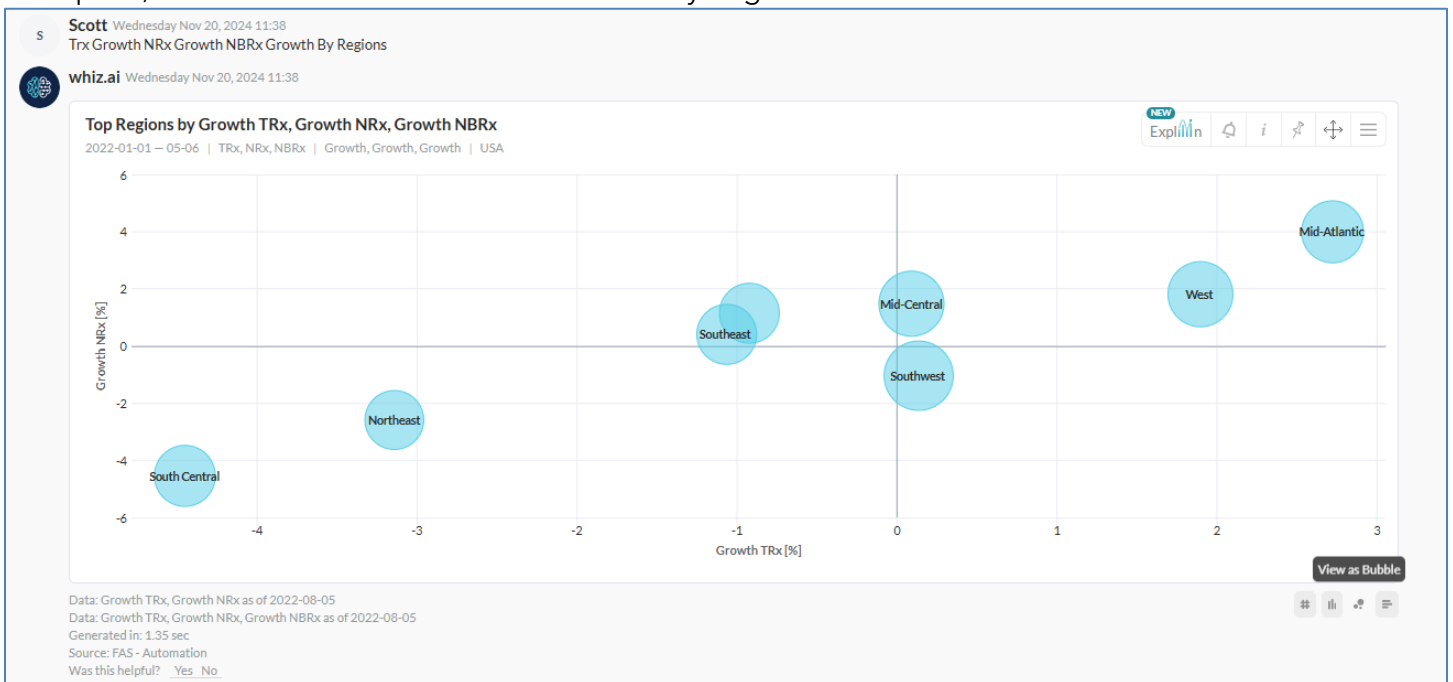
The products are represented by the legend color.

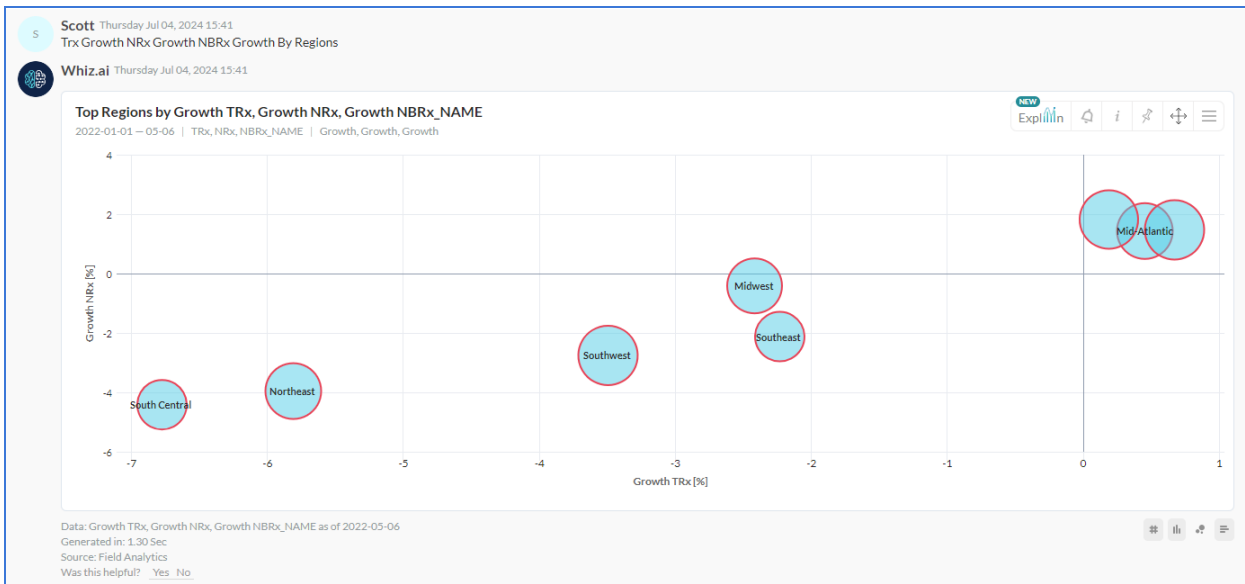
Example Query 2: 'Show TRx, NRx, NBRx by region'.



- X-axis: TRx
- Y-axis: NRx
- Bubble size: NBRx
- Bubble /legend color: Region

Example 3, Trx Growth NRx Growth NBRx Growth By Regions.





The bubble and scatter chart highlights the zero value with a dark gray grid line, creating a clear quadrant layout.

The negative bubbles are displayed with a red border, making it easier to identify and interpret data values and ranges at a glance.

Features of Bubble Chart

- View distinct plots over the axis: This will enable you to see separate bubbles for different combinations of calls and referrals. It helps you understand how many physicians received at least a certain number of calls before making referrals.
- Clicking any bubble shows a tooltip: When you click on a bubble, a tooltip appears. The tooltip provides information about the correlation between the size of the bubble and the values on the X and Y axes. For example, the tooltip could show that the largest brown bubble represents 2874 physicians who received no referrals and made only one call.

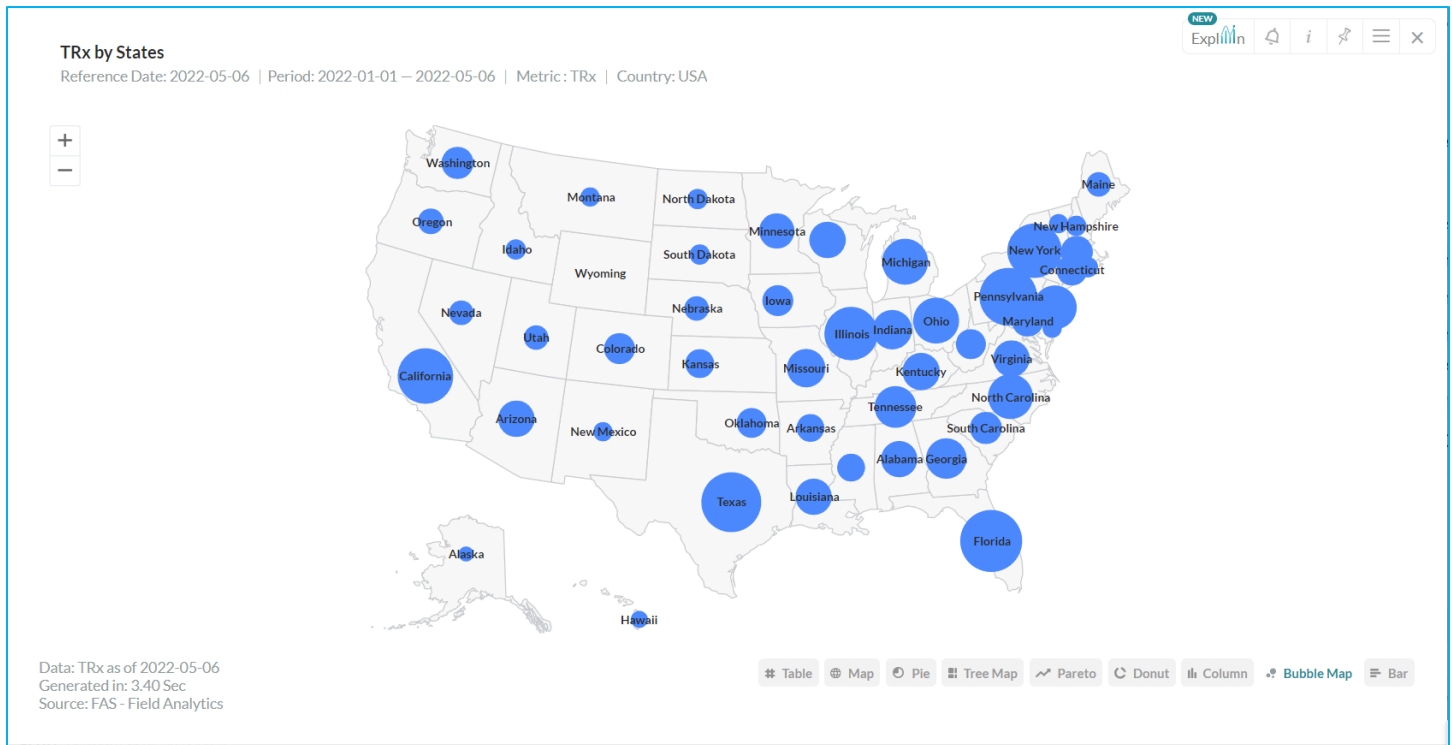


Note! When you hover over any data points, the bubble is highlighted.



Note! This is a configurable feature. For more information refer to the section Configuring Bubble Map Chart in the configuration guide.

Example query: When you ask the query "Show me top 10 cities by TRx for USA", you get the following response:



Response - Plotting customers or Health care professionals on map visualization

WhizAI now supports Maps visualization that allows you to plot customers or HCPs in clusters. This provides a birds eye view of the count of customers and their location for analysis.



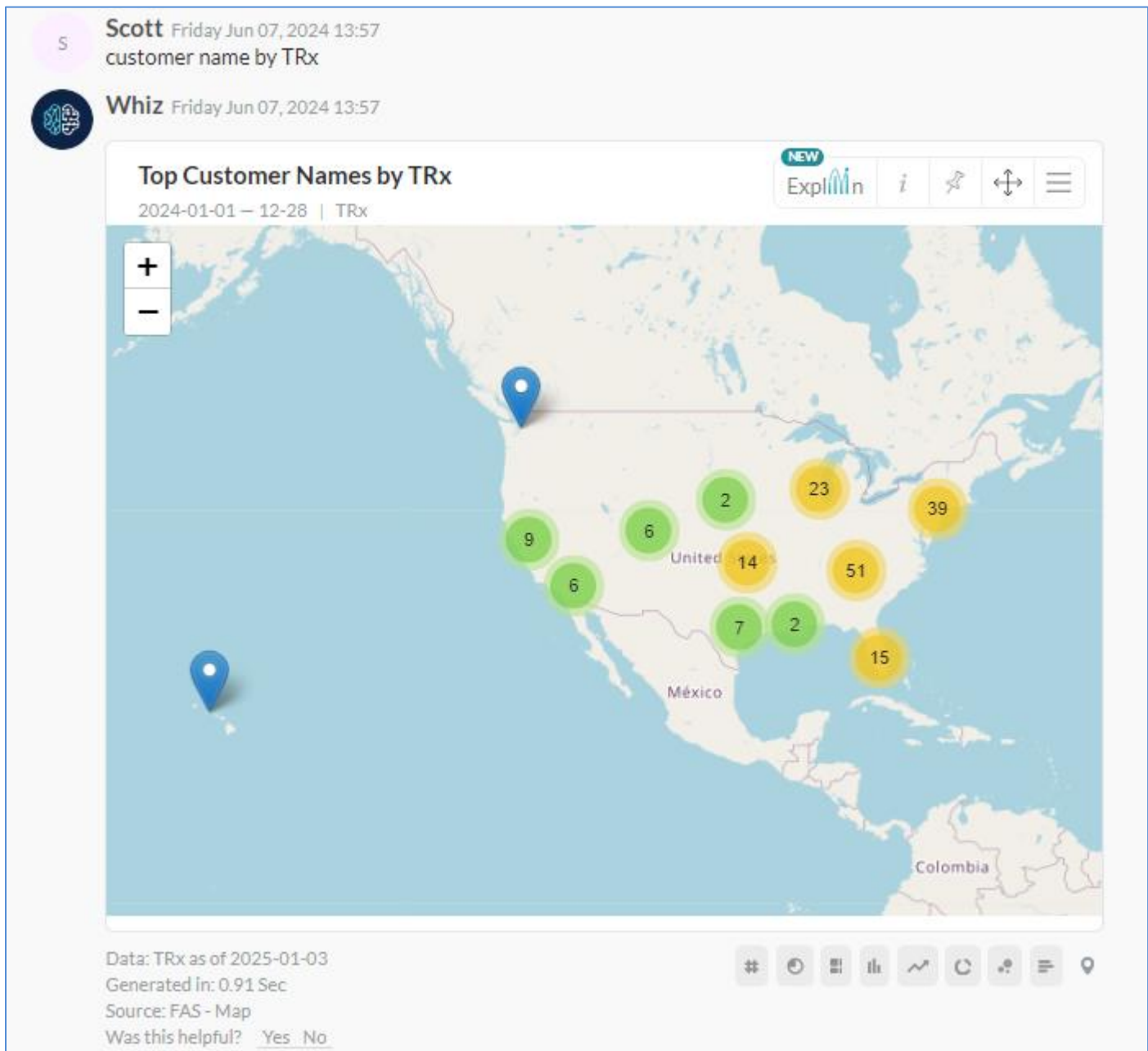
Important! As an administrator you can invoke map visualization by adding the intent Map view in the intentObject.csv file with code as "mapview" and level "object", and Latitude and Longitude under Dimension Attribute in Data Model configurations.



Important! From v74 onwards, the Map configuration settings has been updated to invoke map view visualization.

If you click on the cluster counter (yellow color), the map is zoomed in to that area and all the customers/HCPs clusters in that specific area are displayed with individual counts (green color). If you zoom in till the last count, then the lat and long (blue markers) of the customers/HCPs are displayed. If you hover on the location, a tooltip is displayed which includes the customer name/HCP, metric, and other dimension details mentioned in the NLQ.

For example, "customer name by TRx"



Response - Timeline

When certain important events happen in a patient cycle or a sales cycle, you can view these events in a timeline chart. Along with the event, you can also view the respective periods when they have occurred. Every data point in this chart is displayed as a separate event along a horizontal timeline. Each data point has some descriptive text associated with it that gives information about the event. For example, this type of chart can be useful when you must view a patient's journey. You can see the status with the date (Date of Admission, Surgery, Discharge, etc.). All the event dates are shown on a timeline chart.

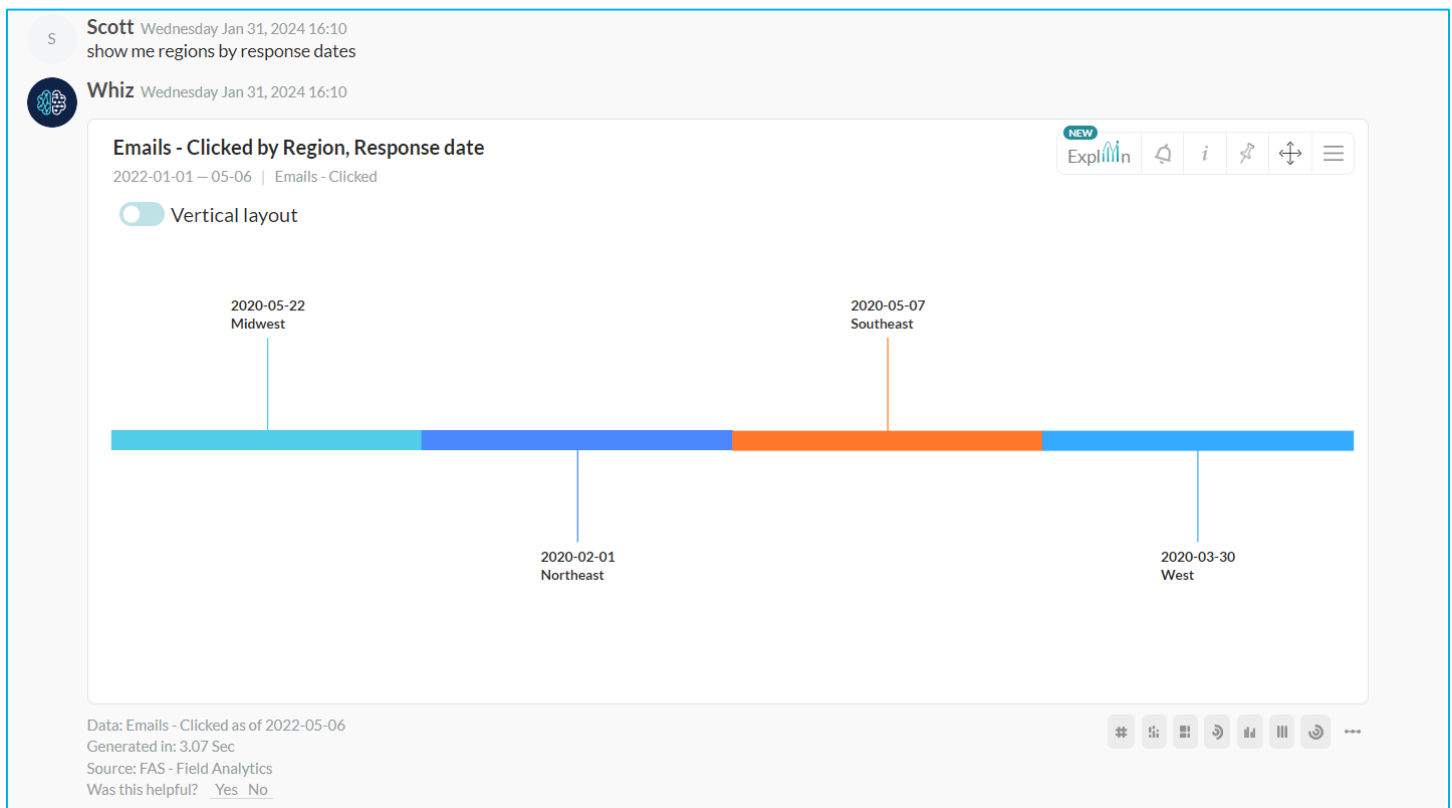


Remember! This visualization will not show a result when one event has happened on multiple dates.

Note the following points:

- WhizAI analyzes and displays the best visualization that is suitable for a response, however, if you mention 'timeline' in your query, by default, WhizAI displays the Timeline chart visualization.
- For the Timeline chart to properly work, you need the following types of relationships between events and dates in the NLQ: Many to One or One to One.

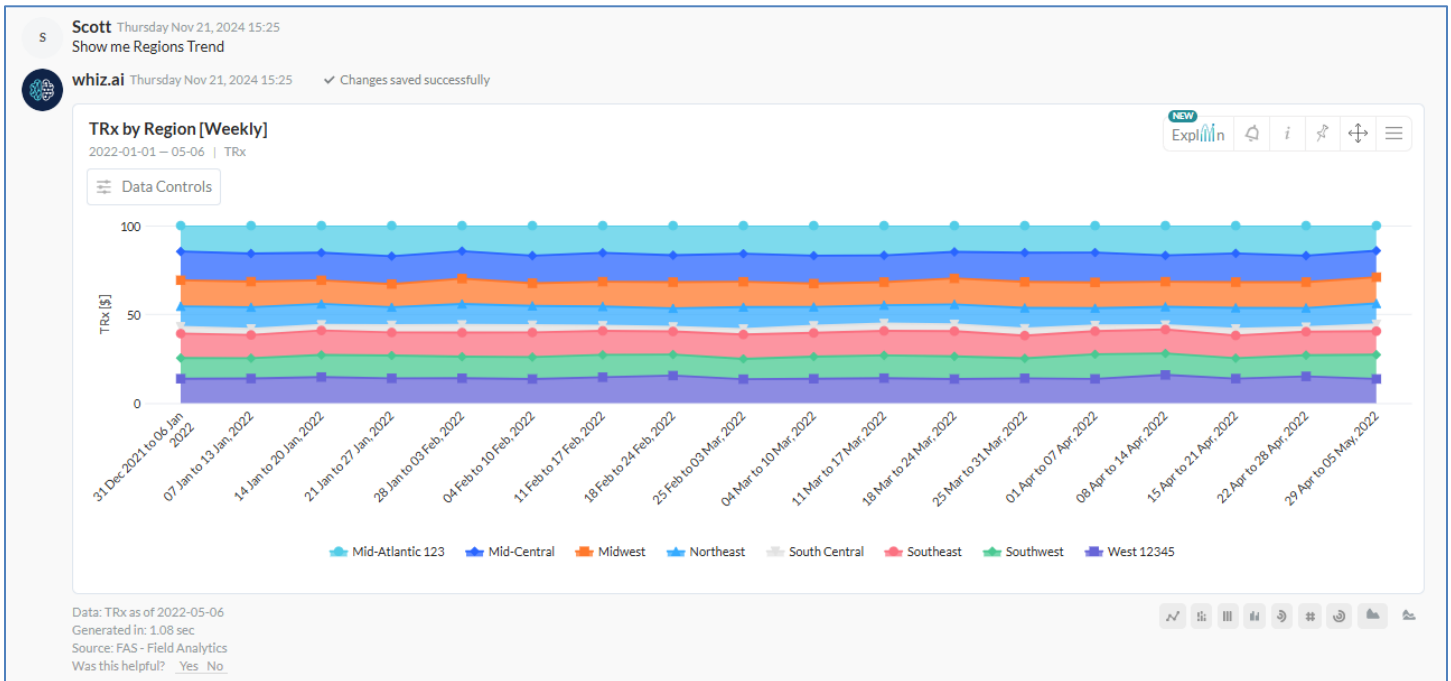
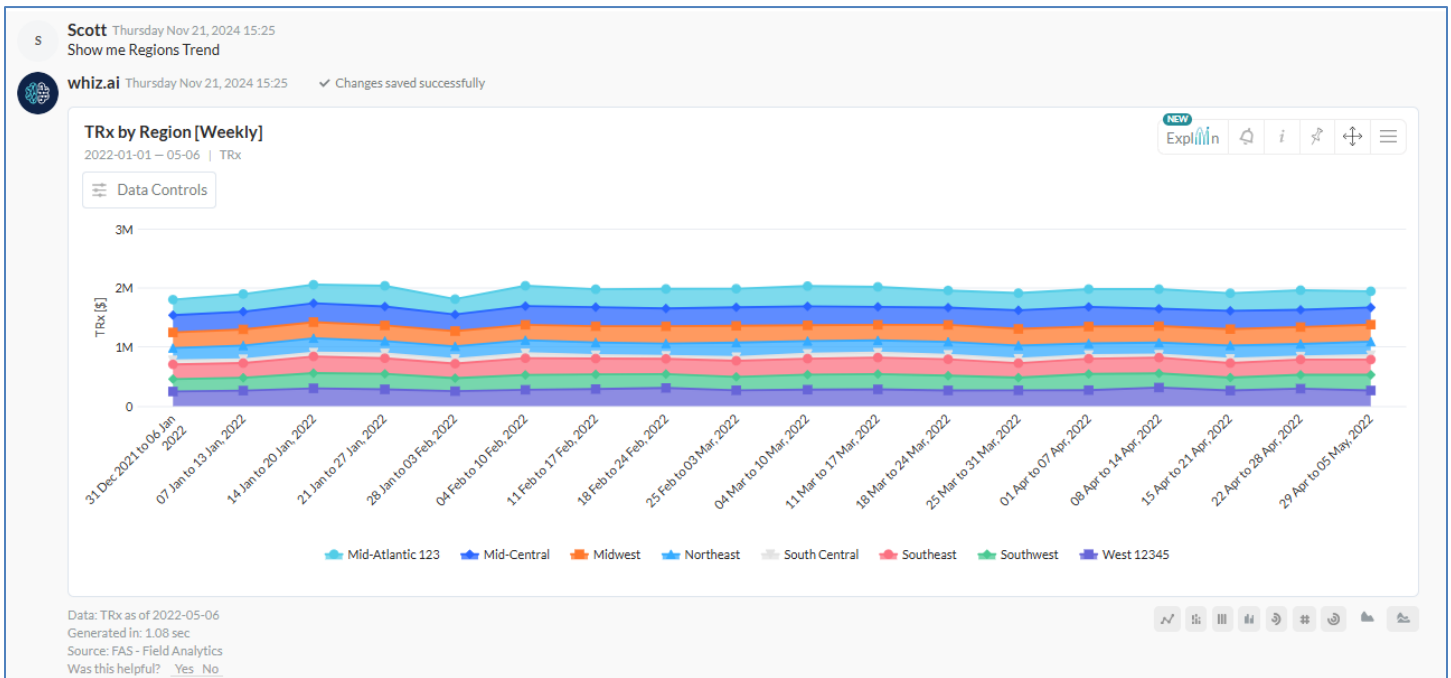
WhizAI shows a timeline visualization on both pinboards and responses for multidimensional queries. For example, when you ask 'Show me region by response dates' then in the response you can see the option for timeline visuals as shown in the following figure:



Response - Area/ Percentage Area Chart

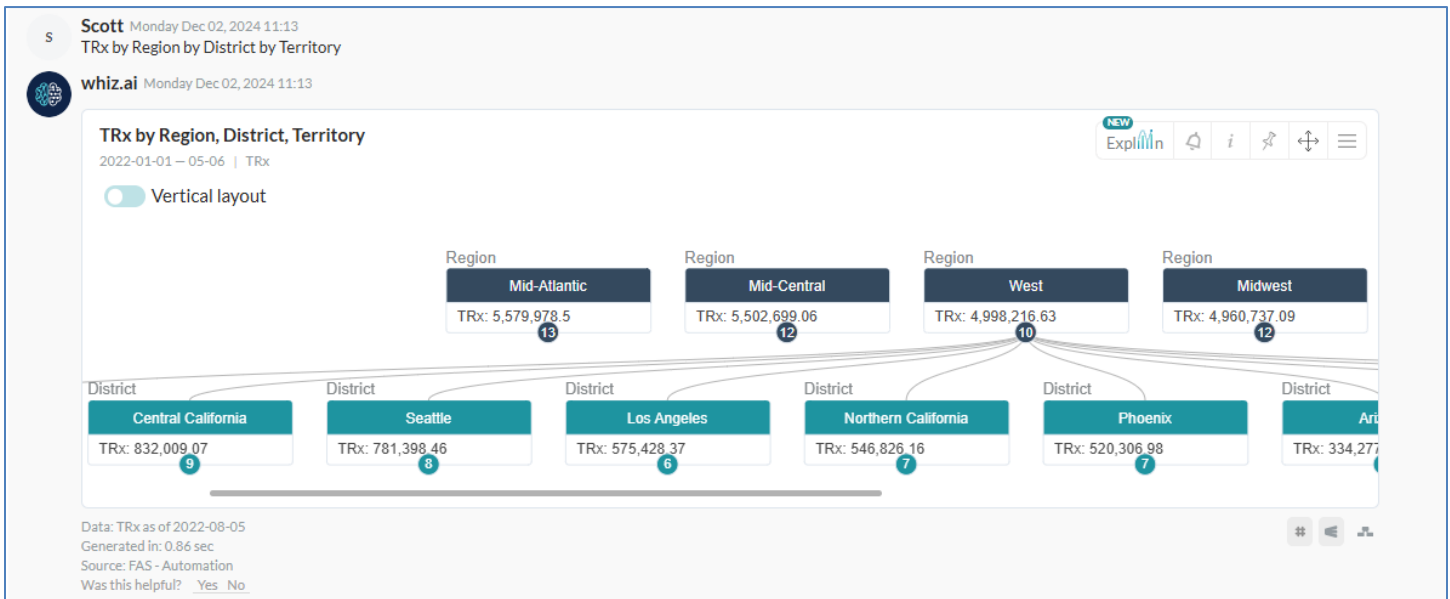
Now, if you ask a query that includes 'Trend' such as "Show me Regions Trend" or "Show me the Products Trend", WhizAI provides the following additional visualization option:

Area/ Percentage Area Chart as shown in the figure below:



Response - Hierarchical Charts

You can view data in 'Organization Chart' format as shown in the following figure:



Charts help better analyze hierarchical data. A few points to note when using this visualization format for analysis:

- Hierarchical charts are rendered when you ask (only) one dimension, and that dimension belongs to the same category (Geographical or Non-Geographical). For example, WhizAI will show a response for the following NLQ: Show me brand groups by brands in an organization chart. However, a response will not be shown for the following NLQ: Show me hierarchy chart for regions by districts by brands. Although it is required to include only one dimension, you can include more than one metric in the NLQs.
- You can click every parent node to collapse the child nodes to get a compressed view. Also, you can view the charts in horizontal or vertical display, as shown in the above figure. If required, you can choose which hierarchy levels you want to see in the response. For example, a hierarchy chart for North-East displays Regions > Districts > Territories. In case, you want to view only Regions > Territories, WhizAI allows you to make such a selection in the response.
- Every hierarchy level and its nodes are indicated by a particular node color. The colors of parents and children's nodes are different.
- When you change the card filter or pinboard filter, the details in the chart are updated.
- WhizAI displays metric data upfront for a single metric hierarchy chart in compact mode.

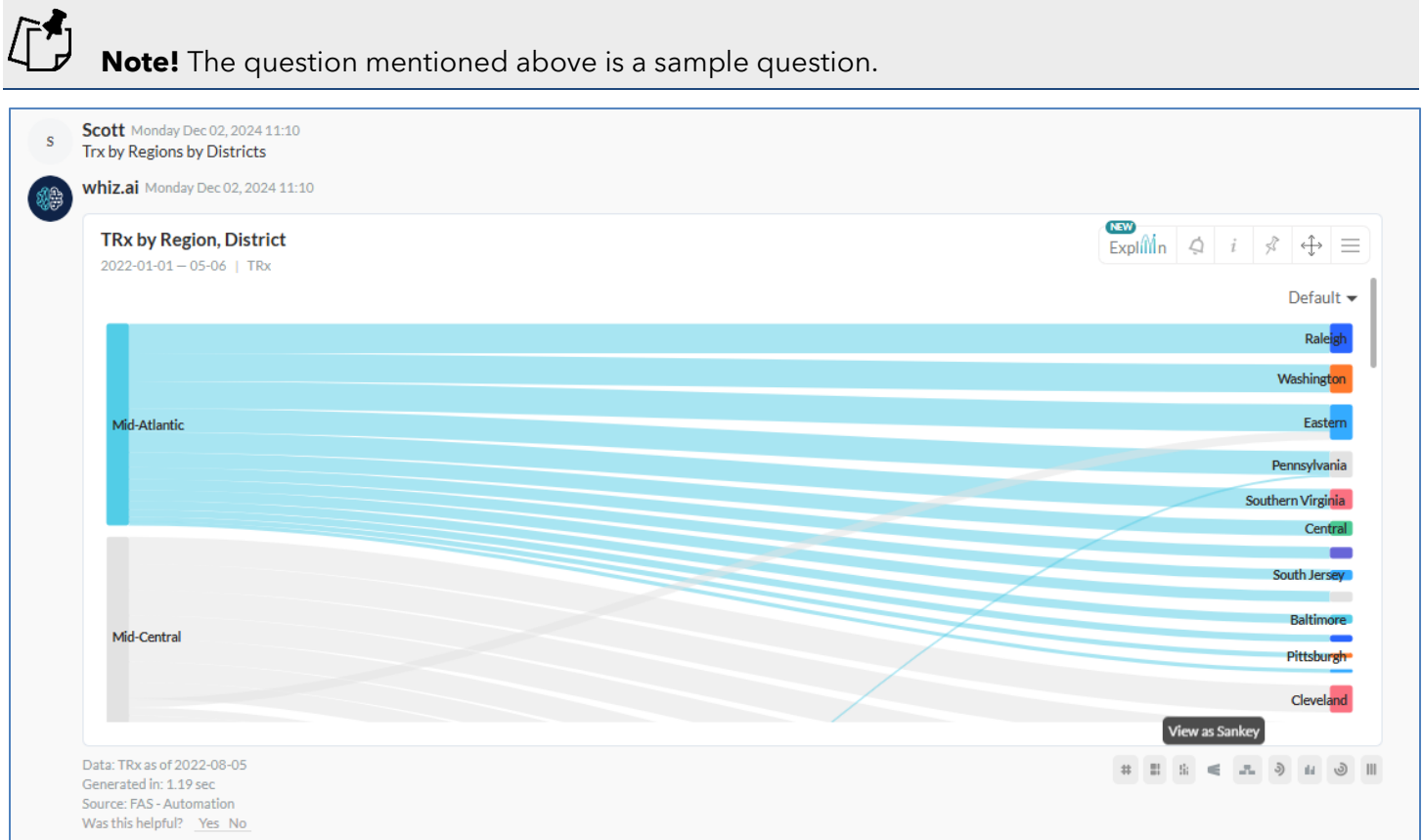
Viewing filtered Hierarchical Data

When viewing data in hierarchical charts, if you apply a filter to a pinboard or a card, the hierarchy chart retrieves and displays the filtered data node and its child node. Also, if multiple entities are selected, the same are retrieved and displayed.

For example, if the card shows data for the query *By regions by districts* and then you apply the filter - Region (Northeast); in this case, the hierarchical chart shows only the *Northeast* node and its corresponding districts.

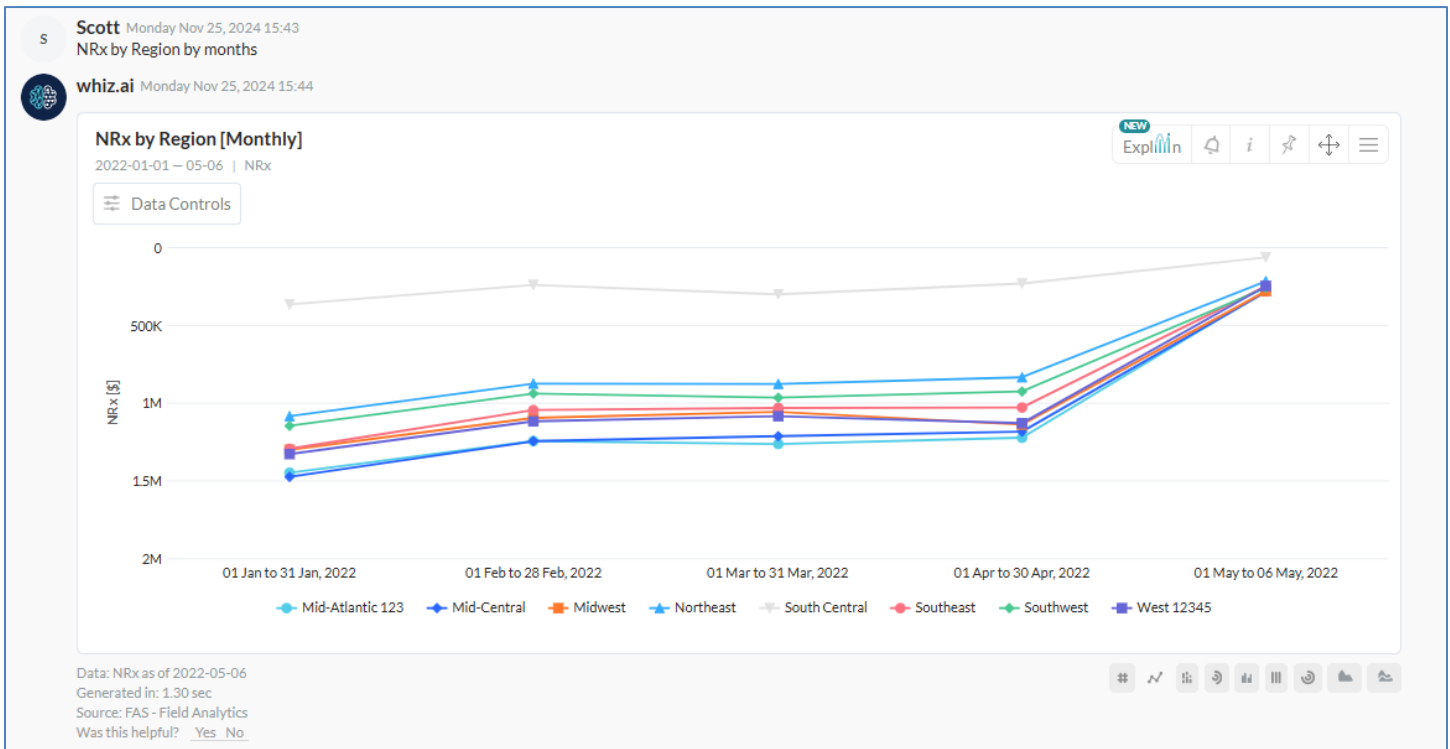
Response - Sankey Chart

Sankey charts are a type of visualization used to depict the flow of data between different levels. These charts represent the hierarchies and their levels. For example, if you ask 'Trx by Regions by Districts' then you get the response as shown in the following figure:



Response - Bump Charts

WhizAI offers another visualization option - Bump charts. A Bump Chart is a simpler form of a line chart that can be used to view changes in ranks over time. With this chart, you can easily compare the position or performance of multiple observations. It can be used to view how a particular region has performed on a defined sales metric over a period of time. For example, if you ask the query 'NRx by Region by months', then you will get the response as shown in the following figure.



Response - Viewing the default sorting order

For table responses, either on Explorer or Pinboards, by default, you can see a small arrow icon () beside the column name. This arrow indicates that when the response is generated, the data in that column is sorted, by default.

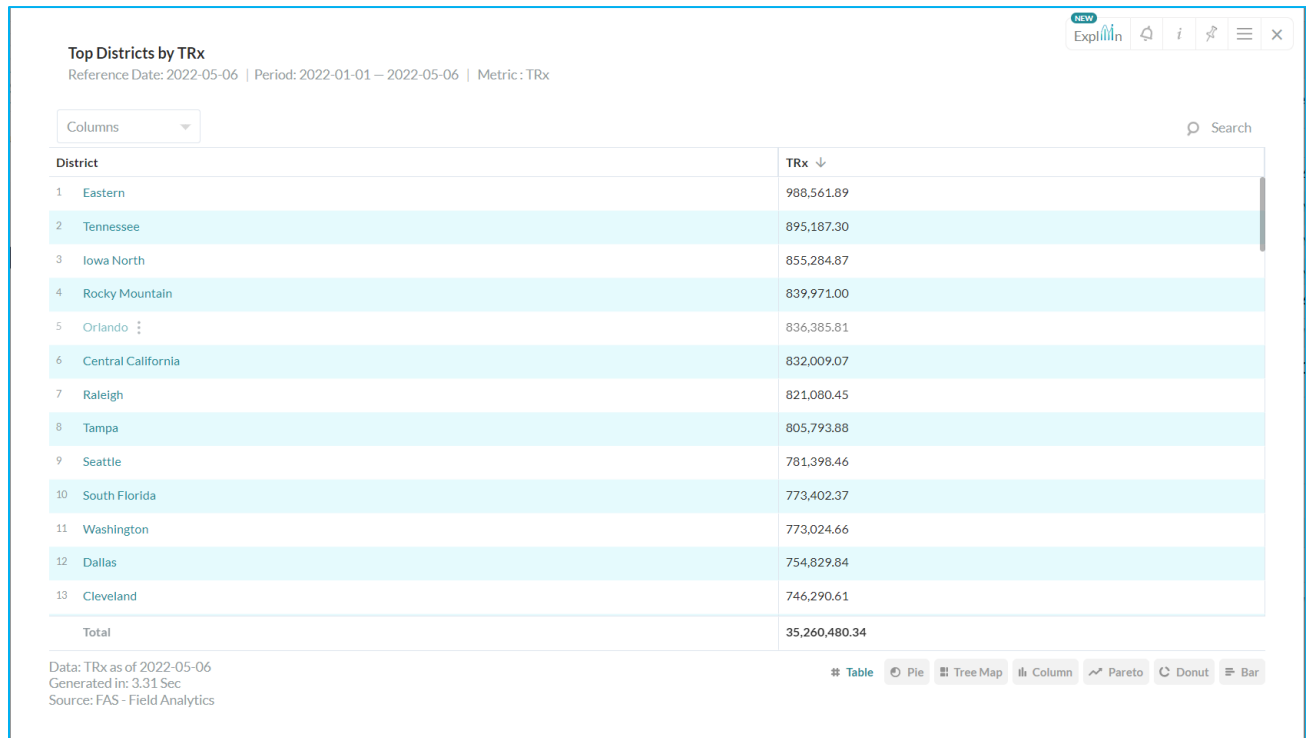
Also, this icon indicates the sorting order, that is, if the data is sorted in ascending or descending order. This allows you to intuitively analyze the data findings.

In the above image, by default, the data in **Abs Chng** column is sorted in descending order. To change it into ascending order, click the arrow.

Following are the default sorting conditions for different types of responses:

- **Table responses:** The default sorting order is 'Descending'. By default, the data in the first metric column is sorted in that order.

For example, Top districts by TRx



Top Districts by TRx
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: TRx

Columns Search

District	TRx ↓
1 Eastern	988,561.89
2 Tennessee	895,187.30
3 Iowa North	855,284.87
4 Rocky Mountain	839,971.00
5 Orlando	836,385.81
6 Central California	832,009.07
7 Raleigh	821,080.45
8 Tampa	805,793.88
9 Seattle	781,398.46
10 South Florida	773,402.37
11 Washington	773,024.66
12 Dallas	754,829.84
13 Cleveland	746,290.61
Total	35,260,480.34

Data: TRx as of 2022-05-06
Generated in: 3.31 Sec
Source: FAS - Field Analytics

Table Pie Tree Map Column Pareto Donut Bar

- **Responses having multiple dimensions:** The default sorting order is 'Ascending.' By default, the data in the first metadata column is alphabetically sorted in that order.

For example TRx by Customer by product

- Metric - TRx
- Dimension - Customer, product

S

Scott
Wednesday Nov 20, 2024 11:50
TRx by Region by product

whiz.ai

Wednesday Nov 20, 2024 11:50

NEW

Expln

Data Controls

Search

Region ↑	Arobi	Emarun	Ofasan	Plabenil	Trexine
Mid-Atlantic	1.74M	373.35K	419.02K	1.50M	1.54M
Mid-Central	1.74M	363.02K	378.66K	1.42M	1.60M
Midwest	1.47M	344.20K	356.71K	1.37M	1.42M
Northeast	1.25M	234.33K	294.00K	1.11M	1.04M
South Central	372.33K	86.47K	65.03K	382.56K	325.30K
Southeast	1.52M	323.78K	360.97K	1.21M	1.31M
Southwest	1.35M	339.14K	300.31K	1.10M	1.24M
West	1.51M	368.00K	360.37K	1.44M	1.32M
Total	10.96M	2.43M	2.54M	9.53M	9.80M

Data: TRx as of 2022-08-05

Generated in: 0.58 sec

Source: FAS - Automation

Was this helpful? [Yes](#) [No](#)

#

- Responses with Nested data and period-over-period comparison:** Default sorting order is 'Ascending' and by default, the first metadata column is alphabetically sorted in that order. The nested columns represent a multi-dimensional response.

For example, Trx by region by product

- Metric - TRx
- Dimension - product, region

For example, product by region by district

- Metric - TRx
- Dimension - Product, Regions, Districts

Scott Wednesday Nov 20, 2024 11:52
TRx by Product by region by District

whiz.ai Wednesday Nov 20, 2024 11:52

TRx by Product, Region, District
2022-01-01 – 05-06 | TRx

Data Controls

NEW Explain

Search

Product	Mid-Atlantic										
	Baltimore	Central	Charlotte	Delaware	Eastern	Pennsylvania	Philadelphia	Pittsburgh	Raleigh	South Jersey	South Virginia
Arobi	85.53K	123.02K	48.46K	114.00K	257.04K	207.60K	88.28K	30.77K	222.27K	99.98K	168.4
Emarun	25.63K	27.40K	12.44K	25.80K	31.38K	45.24K	21.48K	17.07K	52.81K	20.05K	34.75
Ofasan	13.10K	15.90K	32.32K	19.45K	55.44K	52.56K	14.74K	8.84K	58.44K	25.61K	35.00
Plabenil	61.23K	103.87K	53.78K	86.11K	195.09K	165.11K	92.23K	37.43K	230.58K	72.55K	166.6
Trexine	63.16K	142.52K	50.37K	77.74K	210.90K	180.22K	80.01K	43.22K	256.99K	78.70K	161.5
Total	248.65K	412.72K	197.36K	323.09K	749.86K	650.73K	296.74K	137.33K	821.08K	296.88K	566.3

Data: TRx as of 2022-08-05
Generated in: 0.63 sec
Source: FAS - Automation
Was this helpful? Yes No

- **Absolute change column for all PoP/Variance and Comparison responses** - Default sorting is placed on the **abs chg** column.

For example: Arobi vs ofasan by district.

- Metric - Trx
- Dimension - Arobi, Ofasan, Districts

Scott Wednesday Nov 20, 2024 11:53
Arobi vs ofasan by district

whiz.ai Wednesday Nov 20, 2024 11:53

Top Districts by TRx for Arobi v/s Ofasan
2022-01-01 – 05-06 | TRx | Arobi, Ofasan

Data Controls

NEW Explain

Search

District	Arobi vs Ofasan			
	Arobi	Ofasan	Abs Diff ↓	% Diff [%]
1 Eastern	325.86K	64.74K	+261.13K	+403.36%
2 Tennessee	310.65K	56.29K	+254.36K	+451.89%
3 Tampa	290.10K	73.85K	+216.25K	+292.83%
4 Orlando	260.62K	48.72K	+211.90K	+434.89%
5 Seattle	256.28K	57.05K	+199.23K	+349.24%
6 Central California	253.06K	55.66K	+197.40K	+354.64%
7 Southern Texas	238.51K	43.30K	+195.22K	+450.87%
8 Washington	265.64K	79.55K	+186.09K	+233.93%
9 Southern New E...	223.81K	39.48K	+184.33K	+466.93%
Total	10.96M	2.54M	+8.43M	+332.46%

Data: TRx as of 2022-08-05
Generated in: 0.68 sec
Source: FAS - Automation
Was this helpful? Yes No

Response - Intuitive Time period labels for Period over Period (Variance) response

Time periods displayed in the column headers of a Period over Period (PoP) response are intuitive and thus can be easily understood. Instead of date ranges, WhizAI displays explicit labels that describe the time period represented. For example: *Show me QTD TRx POP by brands.*

The screenshot shows a WhizAI interface with a chat conversation. The user 'Scott' asks 'Show me QTD TRx POP by brands'. The assistant 'whiz.ai' responds with a table titled 'Top Products by TRx' for the period '2022-04-02 - 05-06 / 01-01 - 02-04 | TRx'. The table has columns for Product, QTD, Prior QTD, Abs Chg, and % Chg. A blue box highlights the 'QTD vs Prior QTD' header, and an arrow points to it from a label 'Intitutive labels for Time Periods'.

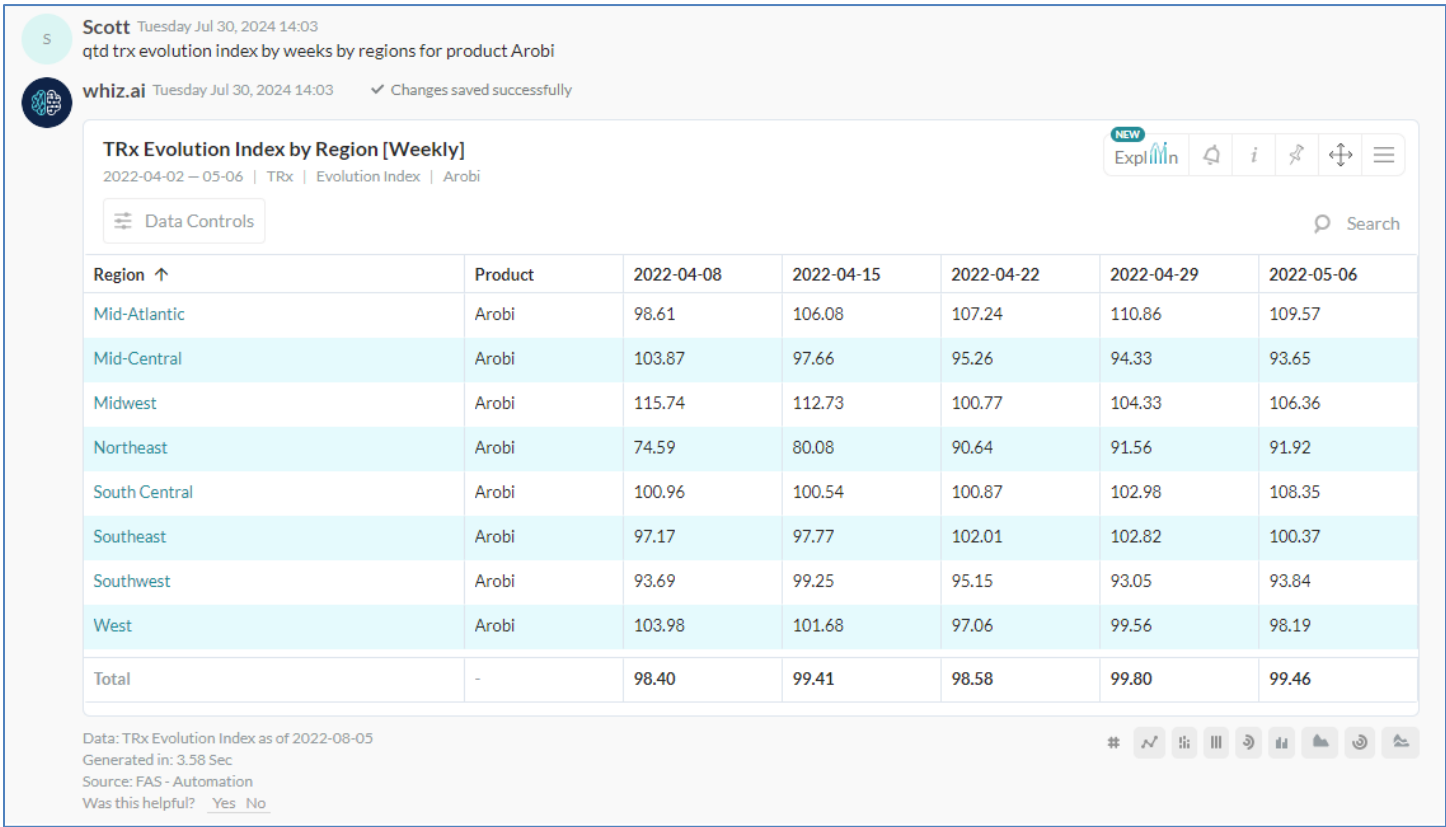
Product	QTD	Prior QTD	Abs Chg ↓	% Chg [%]
1 Trexine	2.74M	2.65M	+82.89K	+3.12%
2 Plabenil	2.62M	2.57M	+52.85K	+2.06%
3 Emarun	687.78K	641.08K	+46.70K	+7.28%
4 Arobi	3.06M	3.02M	+38.76K	+1.28%
5 Ofasan	663.00K	708.59K	-45.59K	-6.43%
Total	9.77M	9.59M	+175.60K	+1.83%

Data: TRx as of 2022-08-05
Generated in: 0.64 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

Response - Evolution Index Calculation for Time Period Filters


WhizAI supports accurate Evolution Index calculations for all TD buckets i.e. QTD, MTD, HTD, and YTD time period filters on weekly trend charts. This accurate Evolution Index allows users to compare week-over-week periods within a selected time period to the exact same weeks in the corresponding previous period, ensuring precise and meaningful insights. For example, the system compares the last two weeks in the current quarter to the last two weeks in the previous quarter.

Example, qtd trx evolution index by weeks by regions for product Arobi



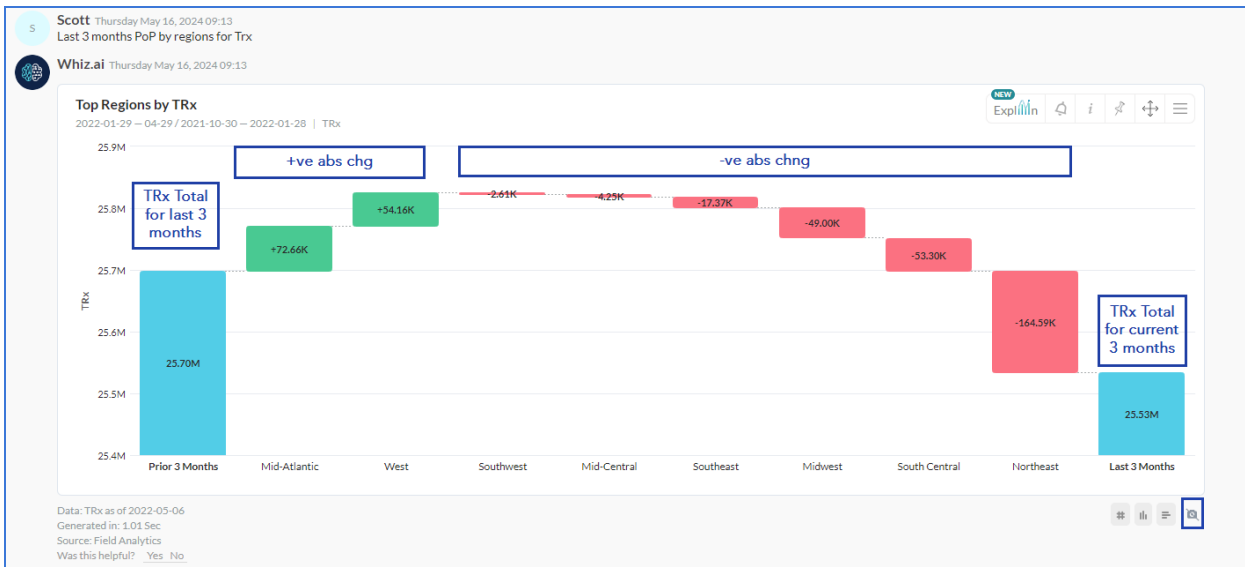
Response - Bridge chart

WhizAI supports Bridge chart for variance/ Period over period response for comparing continuous periods. The chart represents the absolute change in data from the previous period to the current period. This chart either displays sequential or categorical data. It uses a series of floating bars displayed in green and red indicating increase or decrease. It illustrates how initial figures were influenced by events, resulting in the final figures. The start and end bars depicted as full bars on the axis represent the totals.



Note! The NLQ should be a single dimension, single metric POP.

Example 1, Last 3 months PoP by regions for Trx



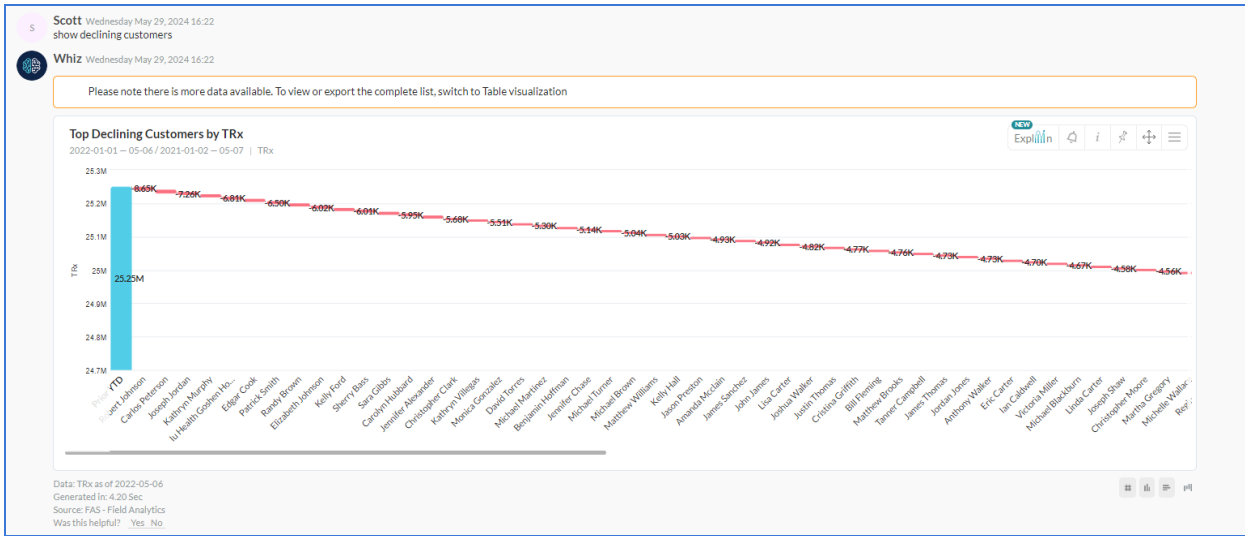
The chart represents how the absolute change in TRx in the regions for a period of 3 months influences the total TRx of the current period. The start and the end bar represent the totals of TRx of last three months and current three months respectively. The floating bar displays the gains or losses represented by absolute change.

Example 2, Region by months PoP for Trx for 2021



It represents absolute change in TRx for regions with time granularity (month) in year 2021.

Example 3, show declining customers



It represents the decline in absolute change in TRx for customers (indicated in red bars) between the period YTD(Year Till date and prior year till date).



Note! If you apply a follow-up on the bridge chart, the variance table is displayed with the follow-up values populated.



Note! Enabling spotlighting highlights the filtered value bars in the charts.

Response - Smart Totals

WhizAI gives the ability to view totals for computed metrics for all the applicable responses. The totals are calculated based on computational calculations. For example, if you ask WhizAI 'Show me region by brand for TRx marketshare' then in the response table, you will see the total percentage of each brand against all the regions.

Scott
Wednesday Nov 20, 2024 11:57

Show me region by brand for TRx marketshare

whiz.ai
Wednesday Nov 20, 2024 11:57

Your query looks incomplete. We need more inputs to resolve your question.

VIEW OPTIONS

TRx Market Share by Region, Product

NEW
Expln

2022-04-02 — 05-06 | TRx | Market Share | AMARD

Data Controls

Search

Region ↑	Arobi [%]	Emarun [%]	Ofasan [%]	Plabenil [%]	Trexine [%]
Mid-Atlantic	33.27	6.35	7.10	26.85	26.42
Mid-Central	31.57	6.80	7.20	25.65	28.79
Midwest	30.45	6.85	5.69	27.08	29.92
Northeast	30.49	6.28	7.46	28.70	27.08
South Central	33.30	8.96	6.07	28.32	23.34
Southeast	32.29	8.27	6.50	23.69	29.25
Southwest	30.18	6.82	6.23	26.64	30.13
West	29.94	7.47	7.49	29.32	25.78
Total	31.30	7.04	6.79	26.86	28.02

Data: TRx Market Share as of 2022-08-05
Generated in: 0.27 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

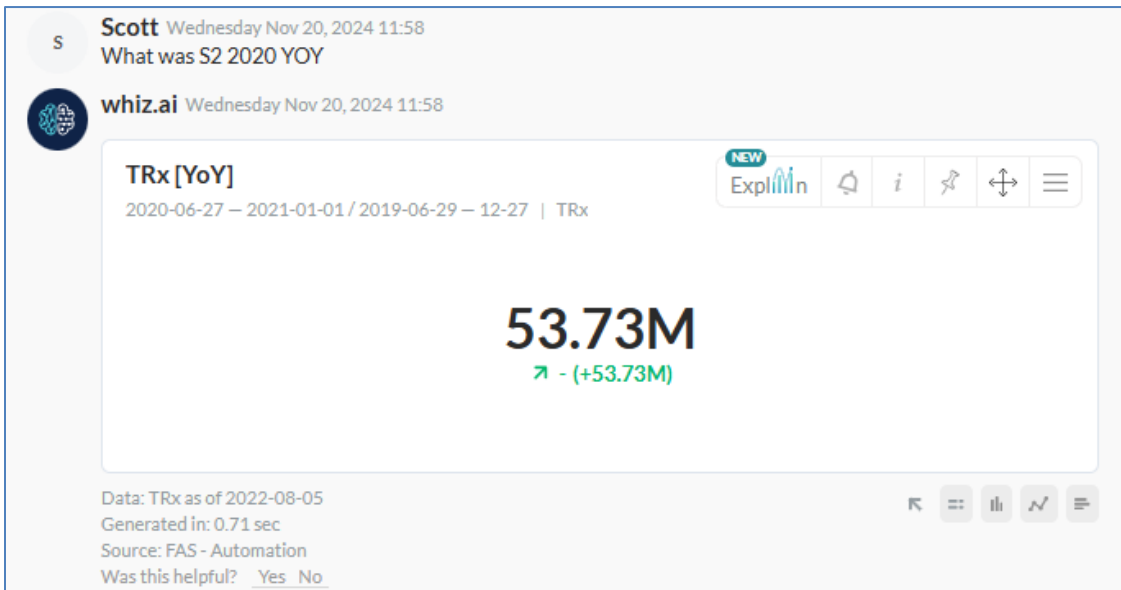
#

Response - Semester-level Volume and Growth

WhizAI allows you to call "semester-level" volume and growth in the same way that you can pull "YTD", "QTD" and "latest month" volume and growth.

For example, you can ask: *"What was S2 2020 YOY" which means the last 6 months of 2020 percentage growth versus the last 6 months of 2019.*

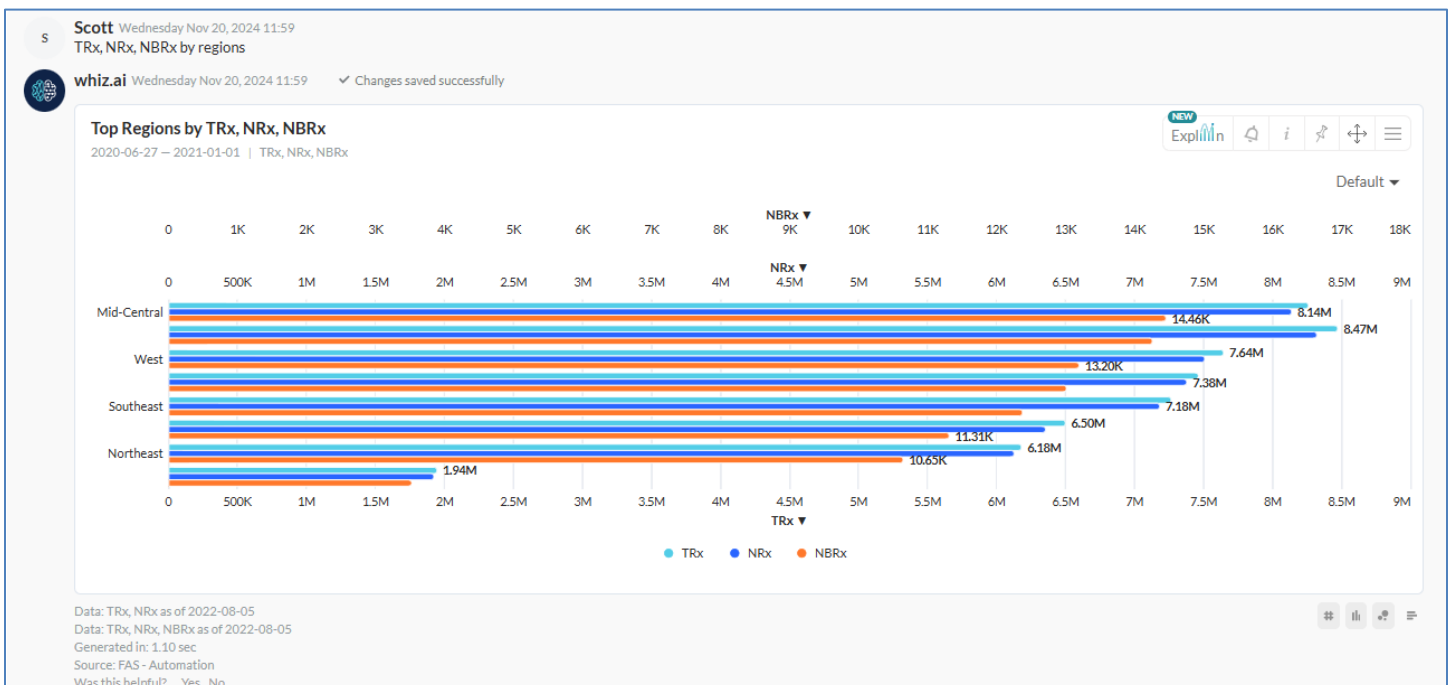
Also, you can ask: *"What is the semester-level trend since 2015 for Brand A" which would give semester-level volume for Brand A in a trend line since 2015.*



Response - Bar charts

For bar charts, data is displayed in horizontal bars with different colors (Please refer to the image). For this chart, categories of data are displayed on the vertical axis and the data values are displayed on the horizontal axis.

This way, this horizontal bar graph can be used to visualize comparisons between various metrics and thereby also analyze the data performance. For example, if you ask the query 'TRx, NRx, NBRx by regions' you will get the response as shown in the following figure.

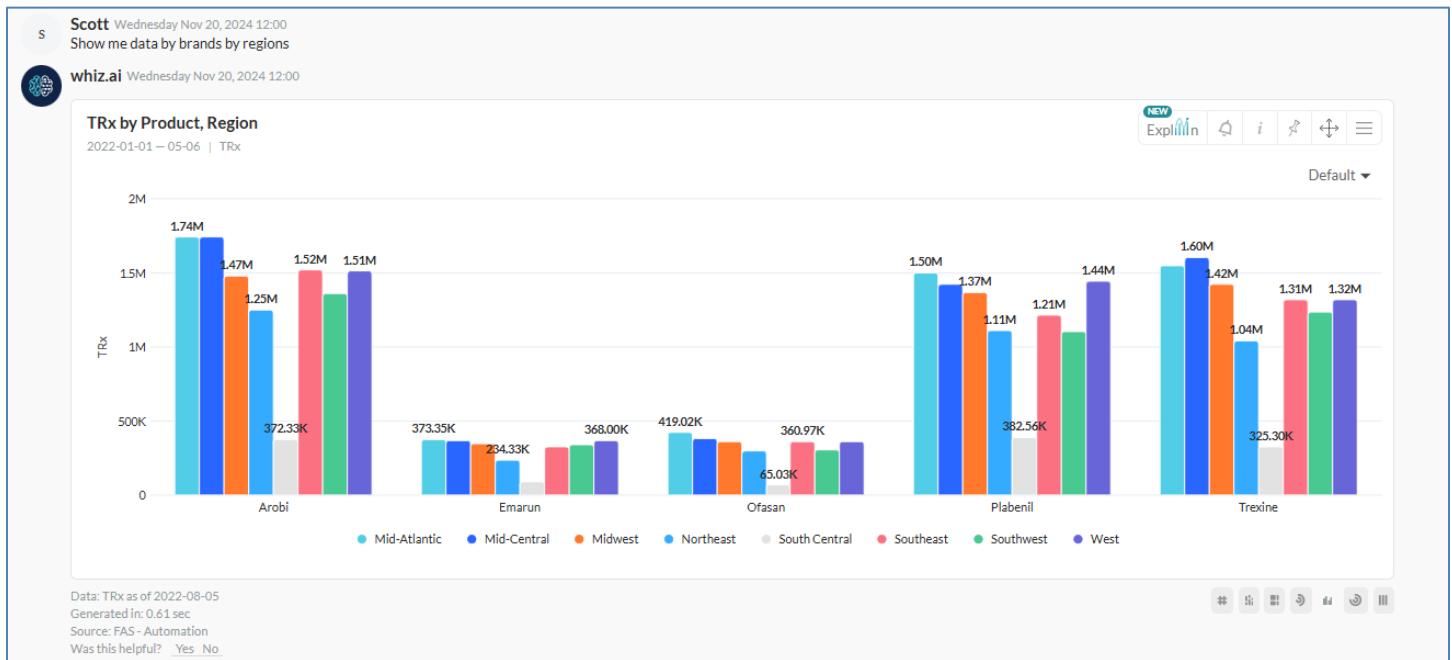


Response - Column Graph

In this visualization option, data is displayed in vertical bars that go across a horizontal axis. These charts can be used to view data comparisons. For example, you can compare data across brands for a particular metric or you can compare data for brands in different regions, etc.

Example queries:

- Show me data by brands,
- Show me data by brands by regions

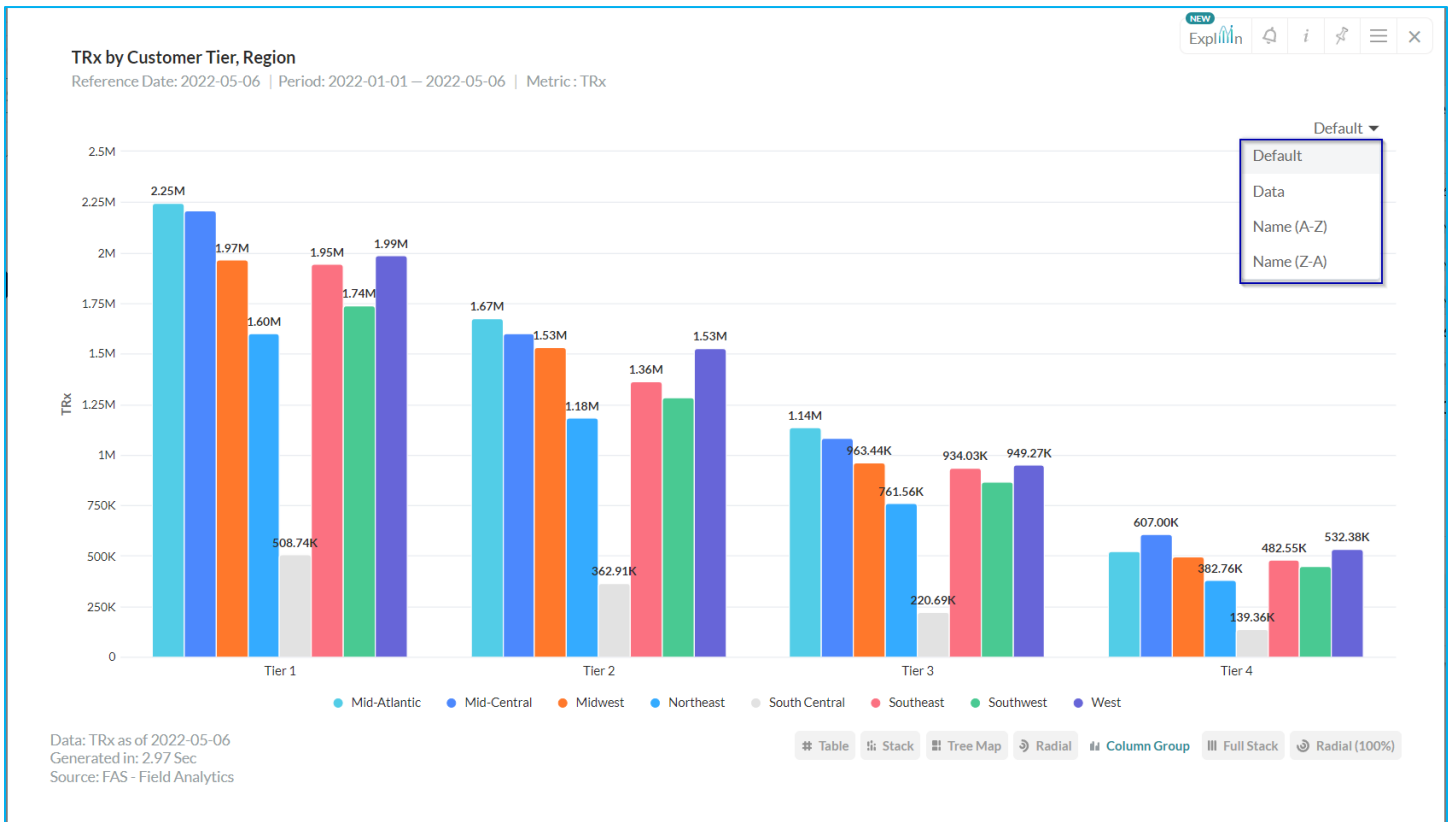


Response - Column Group chart: Sort data on the Y-axis in Descending order

You can sort the bars in a Column Group chart response in descending order. For example:

NLQ: *Show me the TRx by Customer Tier and Regions*

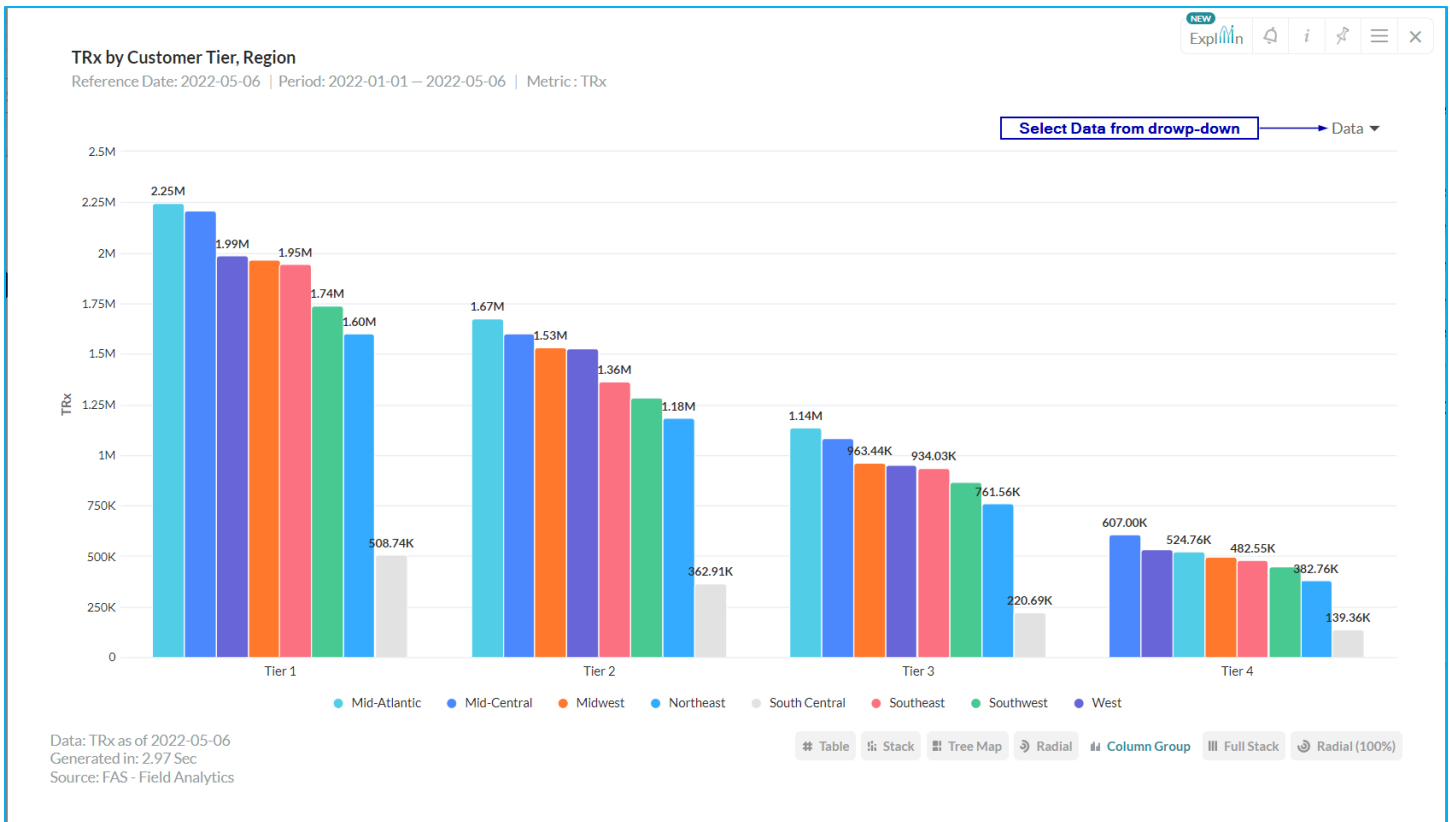
Response:



This Column Group chart contains a drop-down list at the top-right side that contains the following values:

- Default
- Data
- Name (A-Z)
- Name (Z-A)

Earlier, when you clicked **Data** from this list, there was no change on the bars of the Column Group chart. However, now, when you click **Data** from the drop-down list, the bars in the groups of columns get sorted in descending order as shown in the figure below:



Note! The behavior of all the other options of the column group chart (i.e. Default, A-Z, Z-A) remains unchanged. Also, for all the other charts, the behavior of all the options in the drop-down list remains the same.



Note! Zooming is disabled for column group/Stack chart only for the data sorted chart. For default sorting or sorting by name, zooming is enabled.

Response - Grouping and positioning of metric-axis scales in bar and column charts

You can group the Y-axis and X-axis metric scales together in column and bar chart respectively if their unit of measurement and metric category are identical. This feature ensures accurate data interpretation, when multiple scales have different units.

In addition, you have the flexibility to adjust the axis position for vertical charts, shifting it from left to right or vice versa, and for horizontal charts, moving it from top to bottom or vice versa.

Follow the steps given below to group-ungroup axes having comparable metrics on bar or column charts. Consider the following example, Top regions by TRx, NRx, NBRX.



- Click on the scale to which you want to group with the other scales.
 - Click + on **Group** option and select the metric axis you wish to group and click **Apply**.

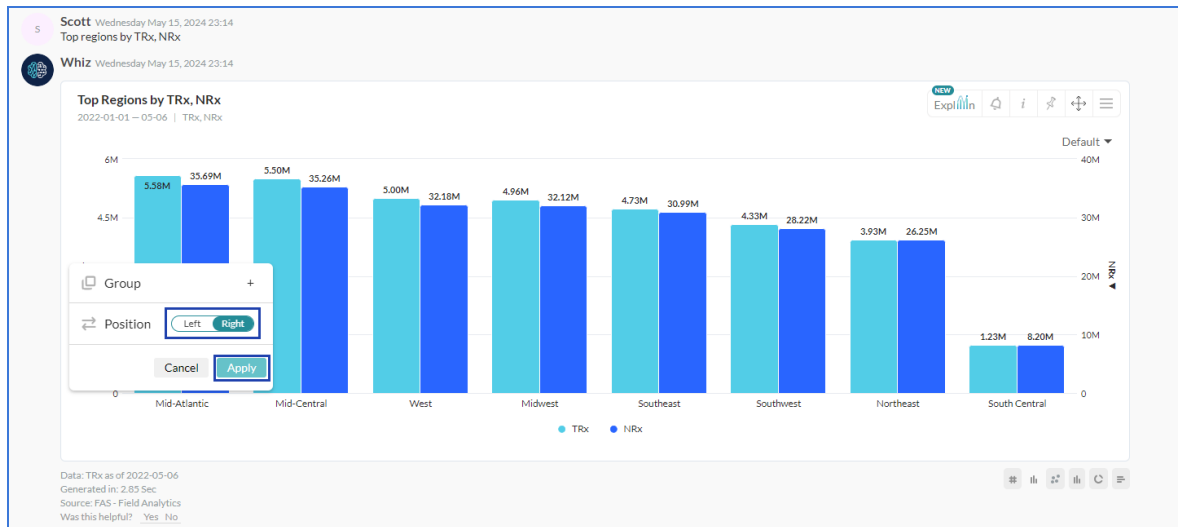


The scales are grouped together and are adjusted as per the Highchart standards.



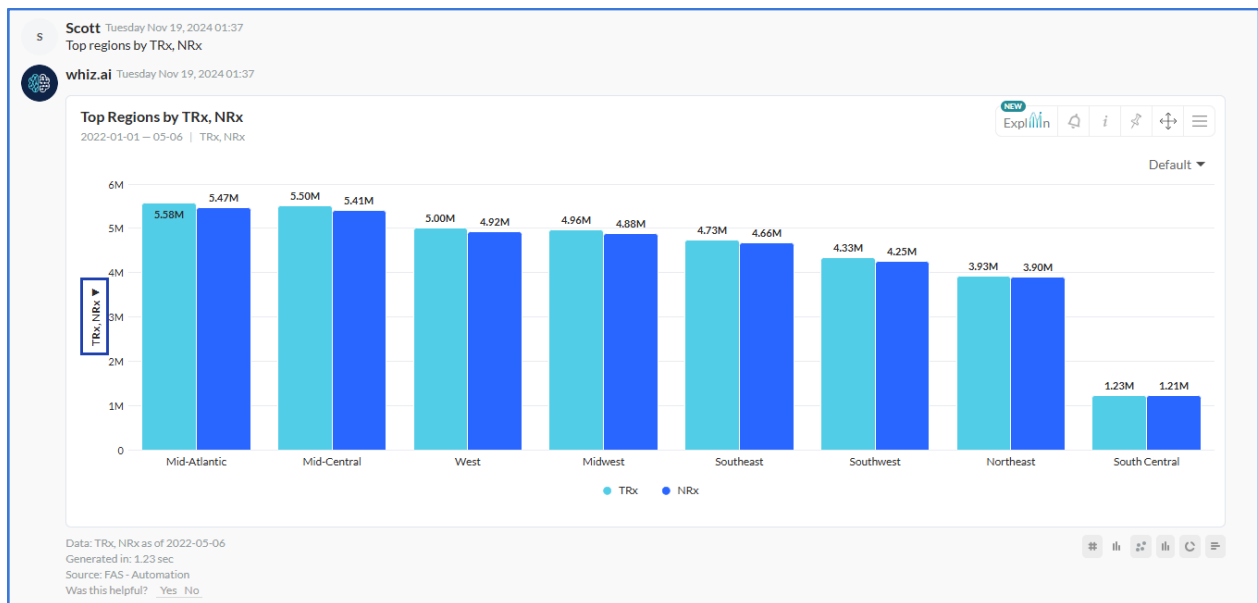
Note! If you ungroup the scales, ungrouped scales are displayed besides each other.

- Click on the axis you wish to adjust the axis position and switch the toggle position either to **left** or **right**. Click **Apply**.



OR

Example2, Top regions by TRx, NRx





Note! Contact the system admin to enable the global configuration “**Merge axes for metrics with same units**” to display the identical metrics on the same axis.



Tip! To separate the axes, go to the drop-down arrow and click the Unmerge toggle.

Response - Table total support for Time Granular Data Views

The total is displayed for metric columns in responses involving only time granularity, without additional dimensions.

Totals are displayed for various time granularities, such as weekly, monthly, quarterly, semesterly, and yearly, and are included in export formats (XLS, PDF, PPT).

Example1, Arobi vs Plabenil vs Ofasan by months

S

Scott Thursday Nov 14, 2024 11:48
Trx, NRx, nbrx by months

whiz.ai

Thursday Nov 14, 2024 11:48

NEW

Expln

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2022-01-01 – 05-06

| TRx, NRx, NBRx

Data Controls

Search

Month ↑	TRx	NRx	NBRx
31 Dec 2021 to 27 Jan 2022	7.79M	7.69M	12.21K
28 Jan to 24 Feb, 2022	7.80M	7.65M	11.07K
25 Feb to 31 Mar, 2022	9.90M	9.76M	14.72K
01 Apr to 28 Apr, 2022	7.83M	7.72M	12.33K
29 Apr to 05 May, 2022	1.94M	1.90M	3.07K
Total	35.26M	34.72M	53.40K

Data: NBRx as of 2022-05-07

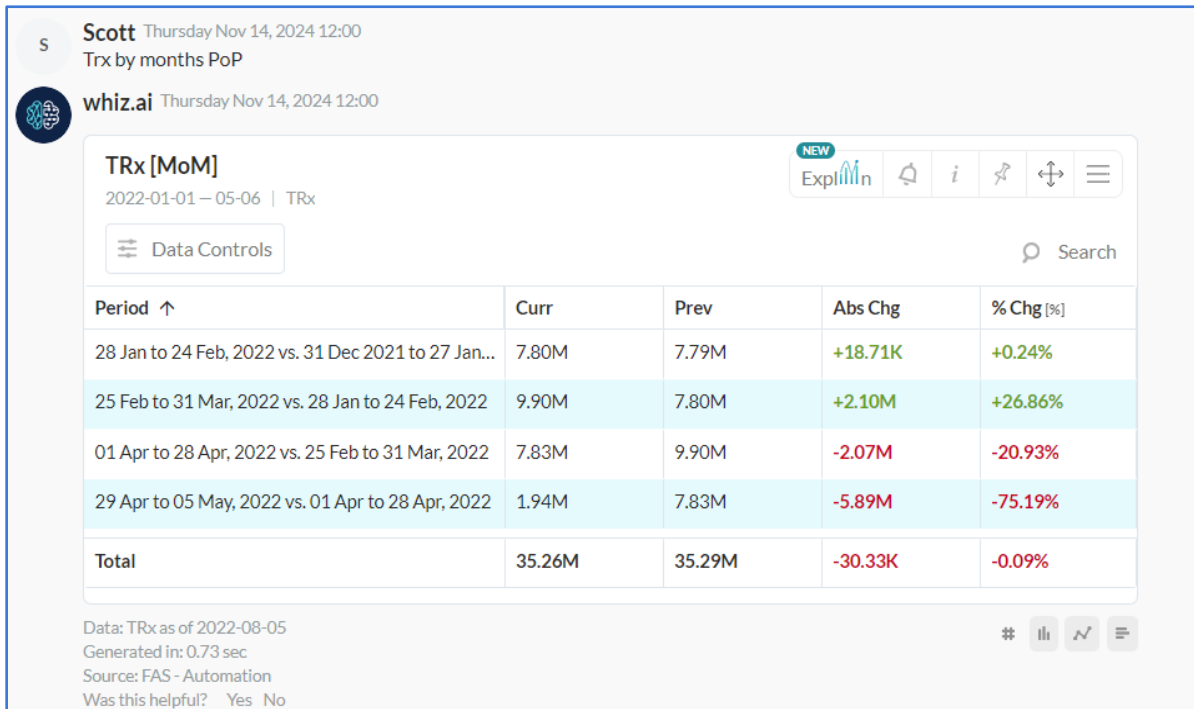
Data: TRx, NRx, NBRx as of 2022-05-07

Generated in: 1.27 sec

Source: FAS - Field Analytics

Was this helpful? [Yes](#) [No](#)

Example 2, Trx by months PoP



Response - Displaying Full Date Range

WhizAI supports the display of full date ranges on the X-axis for tables and charts using granularity. Users can view date ranges ("Jan 1 to Jan 11, 2024 or 2022 - 01 - 07 to 2022 -01 - 14") instead of only single dates, enhancing data interpretation and analysis. This feature is configurable at the model level and extends to other time granularities such as monthly and yearly. Date ranges are preserved in all exports (XLS, PDF, PPT) and are available via tooltips when space is limited. The date format adapts to language settings and handles year transitions appropriately.

Example, WoW for last QTD by Trx, Nrx



Example 2, TRx and NRx weekly



Response - Additional Dimension Selection Based on Metrics



Note! This is a configurable feature. For more information refer to the section Configuring Top N Additional Metadata in WhizAI Configuration Guide.

When you want to apply additional dimensions to list responses (such as *"top 5 customers"*), the table configurability (**Columns** drop-down list) dialogue shows both the common and uncommon dimensions for a particular set of metrics that are selected from this dialog. Consider an example,

Scott Wednesday Nov 20, 2024 12:02
NRx, TRx by Customer by District

whiz.ai Wednesday Nov 20, 2024 12:02

NRx, TRx by Customer, District

2022-01-01 – 05-06 | NRx, TRx

Data Controls

NEW
Explains

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Search

Customer ↑	Alabama			Arizona			Atlanta			Baltimore			Boston			Brookline
	NRx	TRx		NRx	TRx		NRx	TRx		NRx	TRx		NRx	TRx		
1960 Family Practice	-	-		-	-		-	-		-	-		-	-		-
1960 Family Practice Harmony	-	-		-	-		-	-		-	-		-	-		-
25 East Same Day Surgery Center	-	-		-	-		-	-		-	-		-	-		-
436 Beverly Hills Llc	-	-		-	-		-	-		-	-		-	-		-
Aaron Armstrong	-	-		-	-		-	-		-	-		-	-		-
Aaron Ashley	-	-		-	-		-	-		-	-		-	-		-
Aaron Bell	-	-		-	-		-	-		-	-		-	-		-
Aaron Boyd	-	-		-	-		-	-		-	-		-	-		-
Aaron Brewer	-	-		-	-		-	-		-	-		-	-		-
Total	660.44K	685.41K		319.60K	334.28K		625.89K	629.75K		242.48K	248.65K		292.20K	284.68K		568.

Data: NRx, TRx as of 2022-06-05

Generated in: 0.94 sec

Source: FAS - Automation

Was this helpful? ☐ Yes ☐ No

The following metric dimension association exists in the above example:

Metric	Dimensions associated with the metric	Common Dimensions	Uncommon Dimensions
NRx	Region and District	Region	District and Customer Tier
TRx	Region and Customer Tier		

District, and **Customer Tier** (even the uncommon dimensions are selected). Thus, now, there is no need to manually select the uncommon dimensions when analyzing different metrics. The uncommon additional dimensions are selected automatically based on your metric selection.



IMPORTANT! If there are multiple metrics on response and you add an additional dimension from the table configurability (**Columns** dropdown). If this additional dimension is associated with only one metric, then for all the other non-associated metrics, the system duplicates the values in multiple rows. This ensures correct totals for the metric values.

Example query: 'Show me top customers by Call Volume, NBRx, Call Goal'.

Whiz Wednesday Nov 29, 2023 14:20

Top Customers by Call Volume, NBRx, Call Goal
2022-01-01 – 05-01 | Call Volume, NBRx, Call Goal

Columns

1: multiple tier relationship value

values duplicated for non-related metrics

	Customer	Territory	NBRx	Call Volume ↓	Call Goal
1	David Oliver	Charlotte	9.05	39.9K	40.19K
2	Bryan Mitchell	Houston North	6.12	26.82K	18.22K
3	Brandon Weber	Knoxville	5.42	26.8K	10.35K
4	Robert Smith	Clermont	8.16	22.65K	17.45K
5	Robert Snow	Langhorne	3.68	18.8K	15.55K
6	Andrew Harris	Waukegan	1.96	17.05K	10.82K
7	Frederick Mccann	Amarillo	-	16.24K	12.54K
8	Alex Rhodes	Manchester	1.09	15.63K	14.79K
	Total	-	21.64K	28.6M	22.41M

Data: Call Volume, NBRx, Call Goal as of 2022-05-06
Generated in: 3.04 Sec
Source: FAS - Field Analytics

In the above example, you can see that customer Michael Johnson has distinct **NBRx** values for every territory (one-to-many relationship). However, the values for metrics **Call Goal** and **Call Volume** are duplicated for the Customer Michael Johnson, as both these metrics are not associated with the dimension Territory (the additional dimension **Territory** is not configured for the metrics **Call Goal** and **Call Volume**).



Note! The duplicate values of metrics Call Goal and Call Volume do not affect the value in the Total row.

Response Options - Hiding Columns in a Tabular Response

For a table response, WhizAI allows you to hide columns as shown in the following figure:

The screenshot shows the WhizAI interface with a user named Scott. The main content area displays a table titled "Top 8 Regions by TRx, NRx" for the period 2022-01-01 to 05-06. The table has columns for Region, TRx, and NRx. A "Data Controls" panel is open on the left, showing a search bar and a list of columns with checkboxes to toggle their visibility. A callout box points to the "Dimensions" checkbox with the text "To hide a column, clear the checkbox".

Region	TRx	NRx
1		5.47M
2		5.41M
3		4.92M
4		4.88M
5		4.66M
6 Southwest	4.33M	4.25M
7 Northeast	3.93M	3.90M
8 South Central	1.23M	1.21M
Total	35.26M	34.72M

At the bottom of the interface, there is a footer with the following information:

- Data: TRx, NRx as of 2022-08-05
- Generated in: 0.89 sec
- Source: FAS - Automation
- Was this helpful? Yes No

Hiding the irrelevant data helps make the tabular response easy to read and less cluttered.

Response Options - Searching for Data within a Response

You can search for data in tabular responses. When you open a tabular response, you can see a search field. Click **Search** and enter the details you want to find. As you begin to type details in the search box, WhizAI searches and displays the record.

Scott Wednesday Nov 20, 2024 12:12
Top regions by TRx

whiz.ai Wednesday Nov 20, 2024 12:12

Top Regions by TRx
2022-01-01 – 05-06 | TRx

Data Controls Search

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.50M
3 West	5.00M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

Data: TRx as of 2022-08-05
Generated in: 0.73 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

Scott Wednesday Nov 20, 2024 12:12
Top regions by TRx

whiz.ai Wednesday Nov 20, 2024 12:12

Top Regions by TRx
2022-01-01 – 05-06 | TRx

Data Controls Midwest

Region	TRx ↓
1 Midwest	4.96M
Total	4.96M

Data: TRx as of 2022-08-05
Generated in: 0.73 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

Now, WhizAI facilitates your configuration in a tabular response, as required, you can use the following options while configuring the tabular response.

Now, for a tabular response that spans multiple pages, you can scroll through the response to the last row irrespective of the number of records in the response.

Earlier, the response showed the pagination option, only, to browse through it.

WhizAI allows you to search data in each dimensional column in a tabular response. You can go to a particular column, define certain filter conditions, and search for the data that you are looking for. Follow these steps to search:

Scott Wednesday Nov 20, 2024 12:30
Top 10 customers by TRx


whiz.ai Wednesday Nov 20, 2024 12:30

Top 10 Customers by TRx
2022-01-01 – 05-06 | TRx

Data Controls Search

Customer	TRx ↓
1 Michael Johnson	
2 Tim Phillips	
3 Christian Sosa	
4 Jonathan Smith	
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
9 John Smith	14.74K
10 Ann Mcneil	14.71K
Total	173.02K

Data: TRx as of 2022-08-05
Generated in: 1.36 sec
Source: FAS - Automation
Was this helpful? Yes No

2. Click the  icon to go to the filter tab.

Scott Wednesday Nov 20, 2024 12:30
Top 10 customers by TRx

whiz.ai Wednesday Nov 20, 2024 12:30

Top 10 Customers by TRx
2022-01-01 – 05-06 | TRx

Data Controls Search

Customer	TRx ↓
1 Michael Johnson	
2 Tim Phillips	
3 Christian Sosa	16.43K
4 Jonathan Smith	17.47K
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
9 John Smith	14.74K
10 Ann Mcneil	14.71K
Total	173.02K

Data: TRx as of 2022-08-05
Generated in: 1.36 sec
Source: FAS - Automation
Was this helpful? Yes No

3. Select the filter condition, as required.
4. In the **Filter** text box, enter the data value and click **Apply**.

The screenshot shows the WhizAI interface with a table titled "Top 10 Customers by TRx". The table has two columns: "Customer" and "TRx". The data is as of 2022-08-05. A filter dropdown is open for the "TRx" column, showing a search box with the text "John" and buttons for "Reset" and "Apply".

Customer	TRx
1 Michael Johnson	
2 Tim Phillips	
3 Christian Sosa	
4 Jonathan Smith	
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
9 John Smith	14.74K
10 Ann Mcneil	14.71K
Total	173.02K

The screenshot shows the WhizAI interface with the same table, but now filtered. Only three records are visible: Michael Johnson (22.16K), John Brown (15.82K), and John Smith (14.74K). The total is 52.71K.

Customer	TRx
1 Michael Johnson	22.16K
2 John Brown	15.82K
3 John Smith	14.74K
Total	52.71K

5. WhizAI searches and displays the records according to the defined filter conditions. Also, you can click **Reset** to clear the searched record.

Pinning Columns:

You can pin dimension columns of tabular responses either to the left or right, as shown below:

Whiz Wednesday Nov 29, 2023 15:08

Top 10 Customers by TRx
2022-01-01 – 05-01 | TRx

Columns Search

	Customer	TRx ↑
1	Ann Mcneil	14.71K
2	John Smith	14.74K
3	Robert Smith	15.56K
4	John Brown	15.82K
5	Michael Moore	15.83K
6	Daniel Smith	16.43K
7	Jonathan Smith	17.47K
8	Christian Sosa	18.45K
	Total	173.02K

Pin Column left no right
Autosize Column

Data: TRx as of 2022-05-06
Generated in: 0.63 Sec
Source: FAS - Field Analytics

You can use the **Pin Column** option that allows you to lock the columns so that when you scroll either to the left or right, the pinned column/s remains on the screen.

Copy, and Copy with Headers Details

You can copy and paste the data from a tabular response as shown in the following figure:

Scott Wednesday Nov 20, 2024 12:39
Top 10 Customers by Trx

whiz.ai Wednesday Nov 20, 2024 12:39

Top 10 Customers by TRx
2022-01-01 – 05-06 | TRx

Data Controls Search

	Customer	TRx ↓
1	Michael Johnson	22.16K
2	Tim Phillips	21.86K
3	Christian Sosa	18.45K
4	Jonathan Smith	17.47K
5	Daniel Smith	16.43K
6	Michael Moore	15.83K
7	John Brown	15.82K
8	Robert Smith	15.56K
9	John Smith	14.74K
10	Ann Mcneil	14.71K
	Total	173.02K

Right click here

Copy Ctrl+C
Copy with Headers

Data: TRx as of 2022-08-05
Generated in: 0.74 sec
Source: FAS - Automation
Was this helpful? Yes No

If you right-click a particular row, you can see options as shown in the above figure:

- **Copy:** Copies the data from a tabular response. You can then paste it, as required.
- **Copy with Headers:** Copies the data with column headers from a tabular response.

Auto Sizing Columns:

You can auto-size the columns in a tabular response without having to manually adjust the width. Let's say the **TRX** column was wider as shown in the following figure:

Top 10 Customers by TRx
2022-01-01 — 05-06 | TRx

Data Controls

	Customer	TRx ↓
1	Michael Johnson	22.16K
2	Tim Phillips	21.86K
3	Christian Sosa	18.45K
4	Jonathan Smith	17.47K
5	Daniel Smith	16.43K
6	Michael Moore	15.83K
7	John Brown	15.82K
8	Robert Smith	15.56K
9	John Smith	14.74K
10	Ann Mcneil	14.71K
	Total	173.02K

Pin Column (left no right)
Autosize Column

After click the Autosize Column the size of the column is reduced as per size

Data: TRx as of 2022-08-05
Generated in: 0.74 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

After you click the **Autosize Column** option, WhizAI automatically adjusts its width.

Responses - Supporting XLSX export for all the responses

You can download an XLSX file for all different types of responses, irrespective of the number of records in them. The downloaded XLSX file captures the entire data that is displayed on the response table.

For example, if you ask 'Show me top customers' and from the table click the **Download as XLSX** option as shown in the following figure.

S

Scott
Wednesday Nov 20, 2024 19:14

Top 10 Customers by Trx

whiz.ai

Wednesday Nov 20, 2024 19:14

Top 10 Customers by TRx

NEW
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Download image
Download as XLSX
Download as CSV
Share
Create slicer

2022-01-01 – 05-06 | TRx

Data Controls

	Customer	TRx ↓
1	Michael Johnson	22.16K
2	Tim Phillips	21.86K
3	Christian Sosa	18.45K
4	Jonathan Smith	17.47K
5	Daniel Smith	16.43K
6	Michael Moore	15.83K
7	John Brown	15.82K
8	Robert Smith	15.56K
9	John Smith	14.74K
10	Ann Mcneil	14.71K
	Total	173.02K

Data: TRx as of 2022-08-05
Generated in: 1.19 sec
Source: FAS - Automation
Was this helpful? Yes No

The downloaded XLSX file displays the entire data from the response table. On cards, when you make some changes on the table and then download the XLSX file, the downloaded file retains the changes.

For example, if you ask 'Show me TRx by region by product' then you receive the response as shown in the following figure.

S

Scott

Wednesday Nov 20, 2024 19:16

Show me TRx by region by product

whiz.ai

Wednesday Nov 20, 2024 19:16

TRx by Region, Product

2022-01-01 – 05-06 | TRx

NEW Explain

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Data Controls

Search

Region ↑	Arobi	Emarun	Ofasan	Plabenil	Trexine
Mid-Atlantic	1.74M	373.35K	419.02K	1.50M	1.54M
Mid-Central	1.74M	363.02K	378.66K	1.42M	1.60M
Midwest	1.47M	344.20K	356.71K	1.37M	1.42M
Northeast	1.25M	234.33K	294.00K	1.11M	1.04M
South Central	372.33K	86.47K	65.03K	382.56K	325.30K
Southeast	1.52M	323.78K	360.97K	1.21M	1.31M
Southwest	1.35M	339.14K	300.31K	1.10M	1.24M
West	1.51M	368.00K	360.37K	1.44M	1.32M
Total	10.96M	2.43M	2.54M	9.53M	9.80M

Data: TRx as of 2022-08-05

Generated in: 1.07 sec

Source: FAS - Automation

Was this helpful? [Yes](#) [No](#)

#

Now, when you reorder the column **Arobi** and download the XLSX file, the downloaded XLSX file retains the reordering of columns.

S

Scott
Wednesday Nov 20, 2024 19:16
Show me TRx by region by product

whiz.ai
Wednesday Nov 20, 2024 19:16

Changes saved successfully

TRx by Region, Product
2022-01-01 – 05-06 | TRx

NEW

Expl

Bar

Line

Area

Table

Map

Full Screen

More

Data Controls

Search

Region ↑	Emarun	Ofasan	Plabenil	Trexine	Arobi
Mid-Atlantic	373.35K	419.02K	1.50M	1.54M	1.74M
Mid-Central	363.02K	378.66K	1.42M	1.60M	1.74M
Midwest	344.20K	356.71K	1.37M	1.42M	1.47M
Northeast	234.33K	294.00K	1.11M	1.04M	1.25M
South Central	86.47K	65.03K	382.56K	325.30K	372.33K
Southeast	323.78K	360.97K	1.21M	1.31M	1.52M
Southwest	339.14K	300.31K	1.10M	1.24M	1.35M
West	368.00K	360.37K	1.44M	1.32M	1.51M
Total	2.43M	2.54M	9.53M	9.80M	10.96M

Data: TRx as of 2022-08-05
Generated in: 1.07 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

#

Table

Bar

Line

Area

Map

Full Screen

More

Note: Now, for a tabular response that spans multiple pages, you can download the XLSX and CSV files irrespective of the number of records in the response.

When you export the XLSX or CSV file, you can continue to use WhizAI until the file gets downloaded. For example, when you ask, 'Show me top regions by TRx', WhizAI shows the following response.

70 of 315

s

Scott Wednesday Nov 20, 2024 19:16
Show me TRx by region by product

whiz.ai

Wednesday Nov 20, 2024 19:16

More actions

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☰

Download image

Download as XLSX

Download as CSV

Share

Create slicer

TRx by Region, Product

2022-01-01 — 05-06 | TRx

Data Controls

Region ↑	Emarun	Ofasan	Plabenil	Trexine	
Mid-Atlantic	373.35K	419.02K	1.50M	1.54M	
Mid-Central	363.02K	378.66K	1.42M	1.60M	1.74M
Midwest	344.20K	356.71K	1.37M	1.42M	1.47M
Northeast	234.33K	294.00K	1.11M	1.04M	1.25M
South Central	86.47K	65.03K	382.56K	325.30K	372.33K
Southeast	323.78K	360.97K	1.21M	1.31M	1.52M
Southwest	339.14K	300.31K	1.10M	1.24M	1.35M
West	368.00K	360.37K	1.44M	1.32M	1.51M
Total	2.43M	2.54M	9.53M	9.80M	10.96M

Data: TRx as of 2022-08-05

Generated in: 1.07 sec

Source: FAS - Automation

Was this helpful? [Yes](#) [No](#)

#

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When you click the hamburger menu ☰ and then click either **Download as CSV** or **Download as XLSX** options, the following dialog displays.

The export is in progress now. You will be prompted to save your exported card once ready.

You may choose to close this dialog as export may take a while.

☐ Don't show this again

OK

You can click **OK** and continue to use the WhizAI application. After the file is ready to download you receive a notification with the download link as shown in the following figure.

71 of 315

The screenshot shows the WhizAI interface with a sidebar on the left containing 'Example Conversations' and 'Speaker Program'. The main area displays a chat conversation with 'Scott' dated Wednesday Nov 20, 2024 19:14. The chat history includes a query 'Show me TRx by region by product' and a response showing a data table. A modal dialog is open over the table, stating: 'The export is in progress now. You will be prompted to save your exported card once ready. You may choose to close this dialog as export may take a while.' with an 'OK' button and a checkbox 'Don't show this again'. A notification at the bottom right says: 'Your card TRx by Region, Product.xlsx is ready for download. The link to download file expires in the next 1 day(s). a few seconds ago'.

	A	B	C	D	E	F
1	TRx by Region, Product					
2	Reference date : 2022-05-06 [sales_automation]					
3	Period : 2022-01-01 - 2022-05-06					
4	Metric : TRx					
5	Data : TRx as of 2022-08-05					
6	Data Model : FAS - Automation					
7	Data extracted at : 2024-11-20 13:49:35 UTC					
8						
9		Emarun	Ofasan	Plabenil	Trexine	Arobi
10	Region	TRx	TRx	TRx	TRx	TRx
11	Mid-Atlantic	3,73,348.51	4,19,024.36	14,99,777.22	15,44,872.45	17,42,955.95
12	Mid-Central	3,63,023.50	3,78,656.73	14,19,694.18	16,00,935.80	17,40,388.86
13	Midwest	3,44,201.16	3,56,711.08	13,68,015.67	14,18,378.56	14,73,430.62
14	Northeast	2,34,326.37	2,94,004.82	11,11,065.72	10,39,531.33	12,47,479.68
15	South Central	86,473.51	65,028.53	3,82,558.16	3,25,299.61	3,72,334.01
16	Southeast	3,23,778.35	3,60,974.11	12,09,563.00	13,13,195.95	15,19,232.64
17	Southwest	3,39,136.57	3,00,309.85	11,03,819.94	12,36,045.94	13,54,690.98
18	West	3,67,997.40	3,60,372.46	14,39,432.95	13,17,774.63	15,12,639.19
19	Total	24,32,285.36	25,35,081.93	95,33,926.84	97,96,034.28	1,09,63,151.93

Response Options: Enhanced tables for Period over Period (POP) and Comparison responses

You can now hide or show the available data in the tables for the POP or Comparison responses. For example, for a POP response if you ask a query, 'Show me Brands POP for TRx, NRx' then in the response, you can see a **Data Controls** tab. Under the Columns option, you can select or clear the checkbox to hide or show the data available on the response.

Scott Wednesday Nov 20, 2024 19:22
Show me Brands POP for TRx, NRx

whiz.ai Wednesday Nov 20, 2024 19:22

Top Products by TRx, NRx
2022-01-01 – 05-06 / 2021-01-02 – 05-07 | TRx, NRx

Data Controls

Columns

Search

Columns ☒ Metrics ☒

TRx ☒ NRx ☒

NRx ☒ TRx ☒

				YTD vs Prior YTD					
				Abs Chg ↓	% Chg [%]	YTD	Prior YTD	Abs Chg	% Chg [%]
1				+144.23K	+1.54%	9.35M	9.14M	+218.27K	+2.39%
2				+53.83K	+2.26%	2.41M	2.32M	+85.72K	+3.69%
3	Ofasan	2.54M	2.55M	-18.71K	-0.73%	2.52M	2.52M	-6.20K	-0.25%
4	Trexine	9.80M	9.90M	-102.71K	-1.04%	9.64M	9.66M	-19.33K	-0.20%
5	Arobi	10.96M	11.07M	-106.98K	-0.97%	10.79M	10.83M	-33.12K	-0.31%
	Total	35.26M	35.29M	-30.33K	-0.09%	34.72M	34.47M	+245.34K	+0.71%

Data: TRx, NRx as of 2022-08-05
Generated in: 1.71 sec
Source: FAS - Automation
Was this helpful? Yes No

Similarly, for a comparison response, when you ask a query, 'Compare Boston MA vs Chicago IL vs Philadelphia by months' then in the response, you can see a **Data Controls** tab. Under the **Columns** dropdown this dropdown, you can select or clear the checkbox to hide or show the data available on the response.

Scott Wednesday Nov 20, 2024 19:28
Compare Boston MA vs Chicago IL vs Philadelphia by months

whiz.ai Wednesday Nov 20, 2024 19:28

**Need some clarifications for the following terms: "boston", "chicago", "philadelphia".
The following response is based on your previous choices.**

VIEW OPTIONS **DISMISS**

TRx by Philadelphia v/s Boston v/s Chicago [Monthly]
2022-01-01 – 05-06 | TRx | Massachusetts, Illinois | Philadelphia, Boston, Chicago

Data Controls

Columns

Search

Time Interval ☒

Reference value ☒

Philadelphia vs Chicago ☒

Boston vs Chicago ☒

				Boston vs Chicago					
				Abs Diff	% Diff [%]	Boston	Chicago	Abs Diff	% Diff [%]
3				-146.96K	-100.00%	61.71K	146.96K	-85.25K	-58.01%
2				-165.69K	-100.00%	65.64K	165.69K	-100.05K	-60.39%
2				-173.02K	-100.00%	68.52K	173.02K	-104.49K	-60.39%
	01 Apr to 28 Apr, 2022	-	169.39K	-169.39K	-100.00%	63.36K	169.39K	-106.03K	-62.59%
	29 Apr to 05 May, 2022	-	35.62K	-35.62K	-100.00%	25.45K	35.62K	-10.17K	-28.56%
	Total	-	690.68K	-690.68K	-100.00%	284.68K	690.68K	-406.00K	-58.78%

Data: TRx as of 2022-08-05
Generated in: 1.83 sec
Source: FAS - Automation
Was this helpful? Yes No

The following enhanced table features are also available for the PoP and Comparison responses:

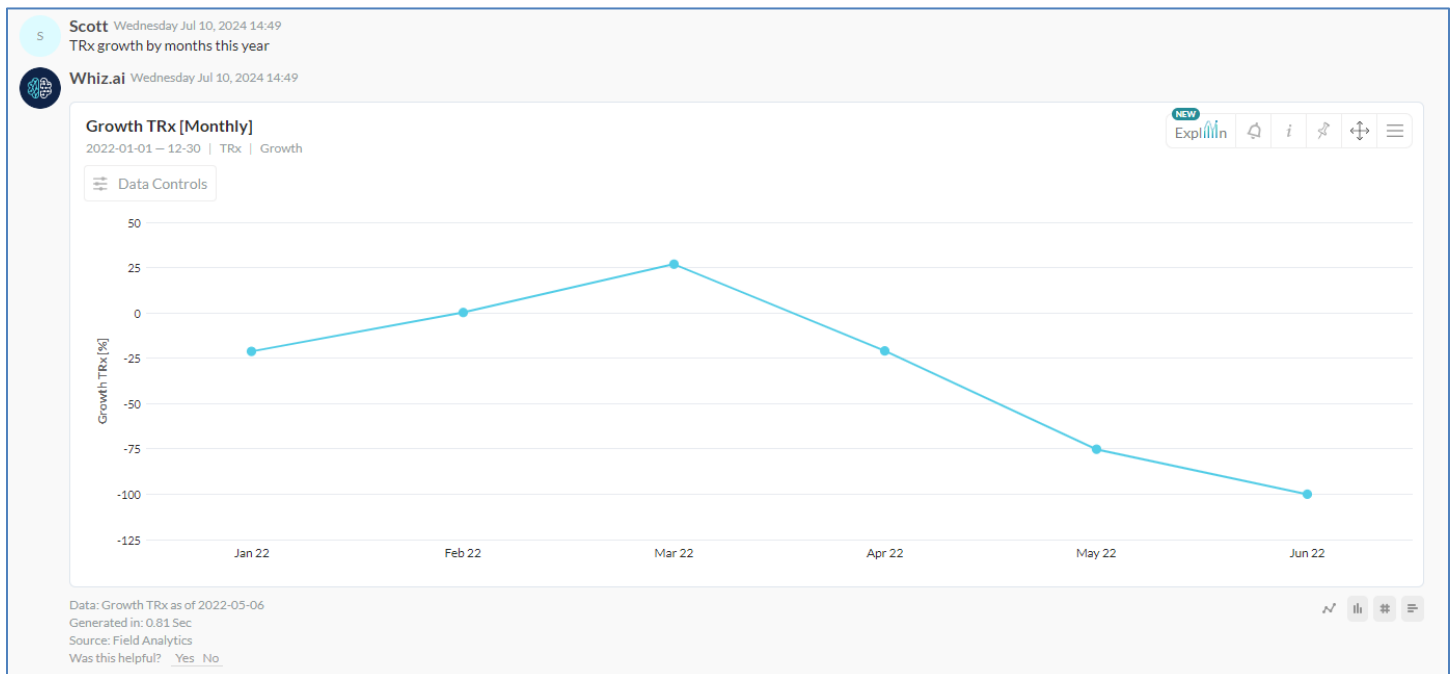
- Scroll bar to navigate to the last row
- Ability to search data in a dimensional column
- Pin columns to the Left/Right/No pin
- Option to simply copy and paste the data or copy with headers details
- Auto sizing columns

Response - WhizAI response for trend queries that include growth computation

For trend queries that include growth computation, WhizAI renders a trend response where the trend line is plotted over multiple data points. Plotted data points (growth values) are calculated by comparing the metric values with previous periods in the given time period.

Consider the following scenarios: If you ask for weekly/monthly/quarterly/yearly growth trend for any time period (for example: *last month, last 2 months, last quarter, YTD, QTD, MTD*); then in the response, a trend line is shown for growth for the granularity in the specified time period. For more information, refer to the following example.

For example, if you ask 'TRx growth by months this year' here the granularity for the trend is 'months' and time period is 'this year'. In this case, data points (growth values) are calculated from the period over period (pop) comparison and not year over year (yoy) comparison, meaning the growth trend is shown by comparing month 1 with month 2, month 2 with month 3, month 3 with month 4 and so on.



Response - Persisting user actions on an explorer card

WhizAI automatically saves changes made in explorer cards (tables/charts) and persists them when pinned to the pinboards.

Following user actions are persisted

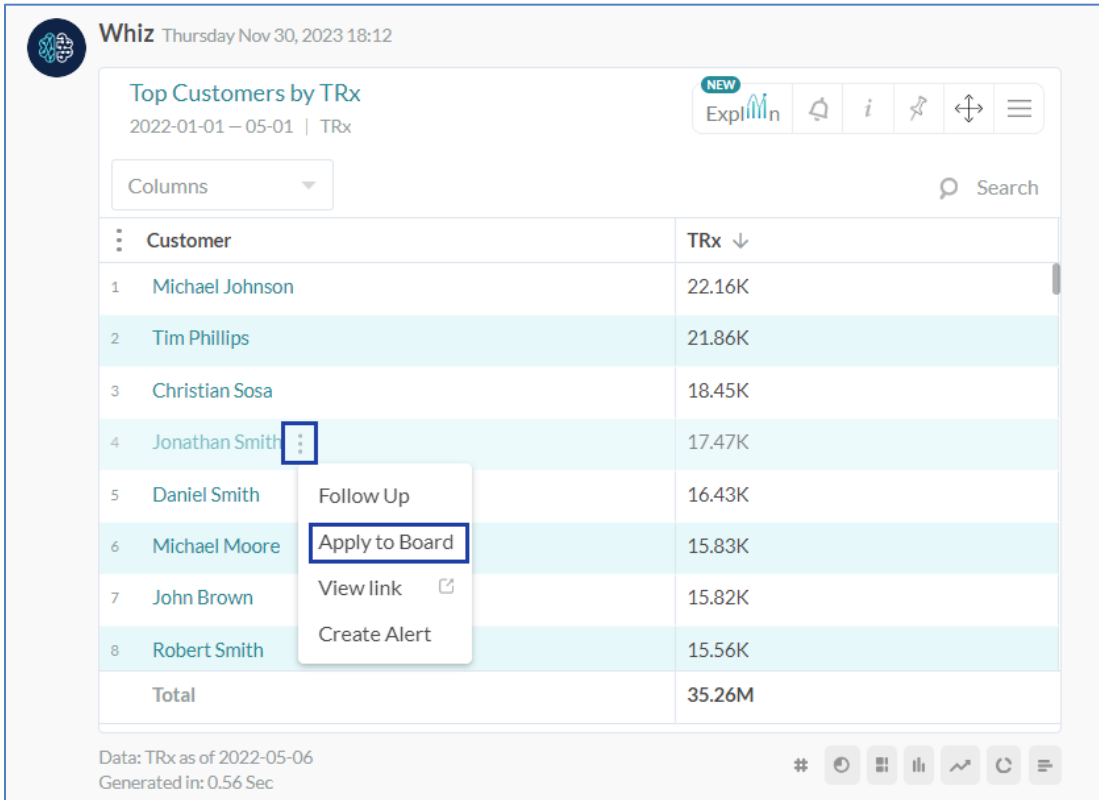
- hiding/showing columns through table configurability
- resizing and reordering columns
- pinning cards
- grouping and ungrouping axes on charts
- changing position of axis on charts
- sorting in charts
- expanding/collapsing hierarchy nodes

This maintains your customizations across explorer and pinboards.

Response - Applying to Board from cards

On cards when you click **Apply to Board**, only those pinboards are displayed that are relevant to the record. For example, when you ask a response NLQ 'Show me top customers' and hover the cursor over this

icon  against **Michael Johnson** and click the **Apply to Board** button.



Whiz Thursday Nov 30, 2023 18:12

Top Customers by TRx
2022-01-01 – 05-01 | TRx

Columns Search

Customer	TRx ↓
1 Michael Johnson	22.16K
2 Tim Phillips	21.86K
3 Christian Sosa	18.45K
4 Jonathan Smith	17.47K
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
Total	35.26M

Data: TRx as of 2022-05-06
Generated in: 0.56 Sec

The list of only those pinboards where the customer **Michael Johnson** is available is displayed as shown in the following figure.

Whiz Thursday Nov 30, 2023 18:23

Top Regions by TRx, Call Goal
2022-01-01 – 05-01 | TRx, Call Goal

Columns Search

	Region	TRx ↓	Call Goal
1	Mid-Atlantic	5.58M	6.75M
2	Mid-Central	5.5M	6.84M
3	West	5M	6.07M
4	Midwest	4.96M	5.99M
5	Southeast	4.73M	5.77M
6	Southwest	4.33M	5.43M
7	Northeast	3.93M	4.96M
8	South Central	1.23M	1.46M
	Total	35.26M	43.27M

Data: TRx, Call Goal as of 2022-05-06
Generated in: 0.52 Sec



Note! In the previous version, when you clicked Apply to Board, the entire list of pinboards was displayed. The boards that were not associated with the record were displayed in gray color and when you hovered the cursor over those pinboards, a tooltip was displayed 'This board does not have any matching filters.'

Response - Enumerated data

WhizAI supports NLQs that render enumerated responses. An enumerated response contains a list of all the data objects (dimensions) or shows the total number of objects for a dimension included in the NLQ. Data objects can be employees, resources, patients, etc.

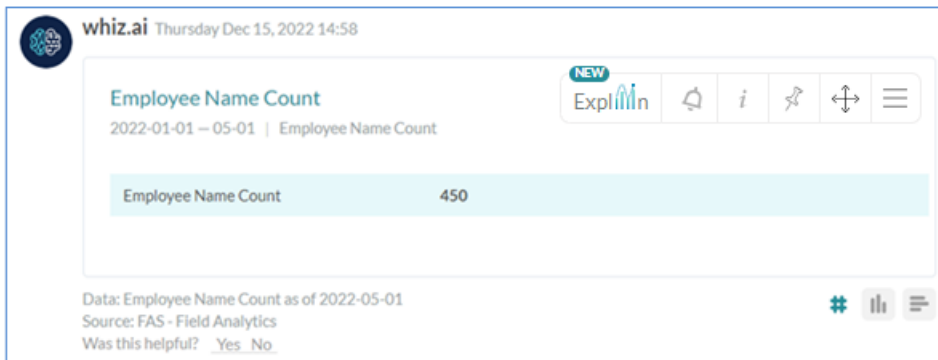
You can configure the source data to add flag variables such as Yes (true) / No (false). These variables are set for different dimensions in the data. Flag variable signals WhizAI that a certain condition has been met. This signal acts as a Boolean variable indicating a condition to be either true (yes) or false (no). WhizAI associates flag variables with the respective dimension included in the query and provides enumerated responses.

For example: In the following data, two employees are COVID-infected, and the variable set for them is 'true' (Y). One employee is not infected by COVID, and the variable set for this employee is 'false' (N).

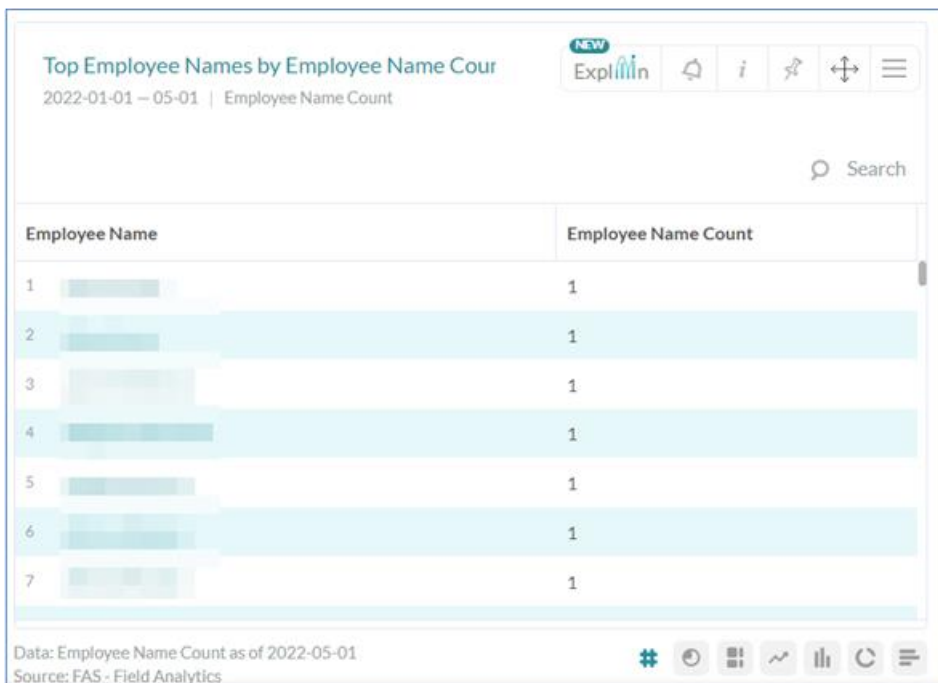
Data assets	Is COVID affected	Flag variable
-------------	-------------------	---------------

Employee 1	Yes	Y
Employee 2	Yes	Y
Employee 3	No	N

Example query 1: How many employees are COVID affected?



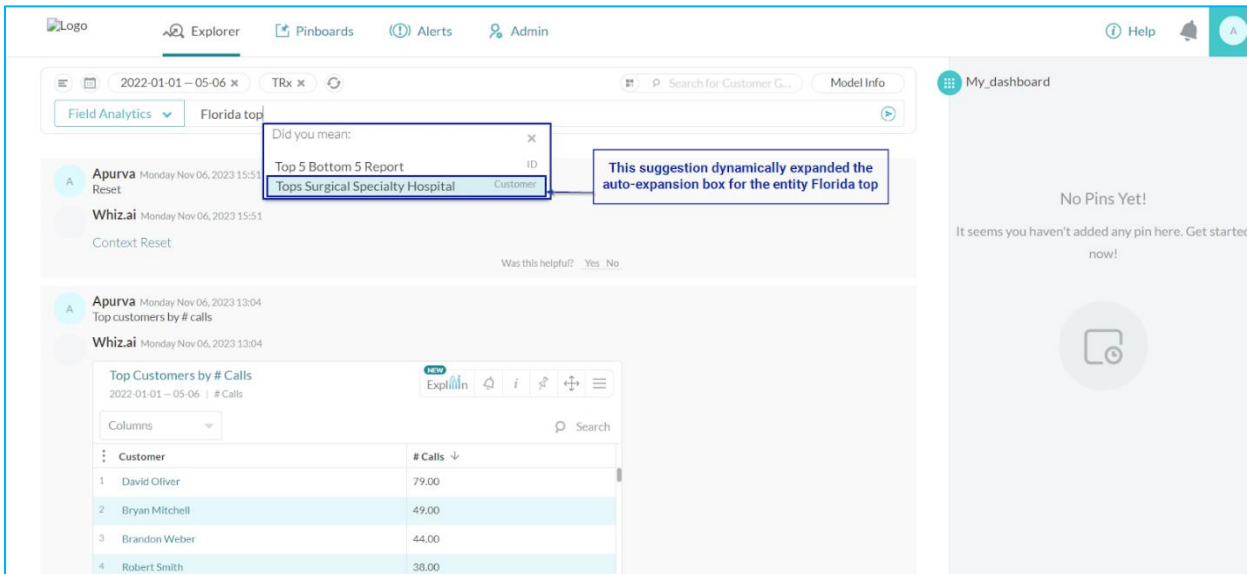
Example query 2: How many employees are not COVID affected?



NLQs - Dynamic Sizing of Auto-Suggestion box

When you begin to type a question in the Conversation box, the auto-suggestion box prompts you with synonyms, suggestions, or spell checks.

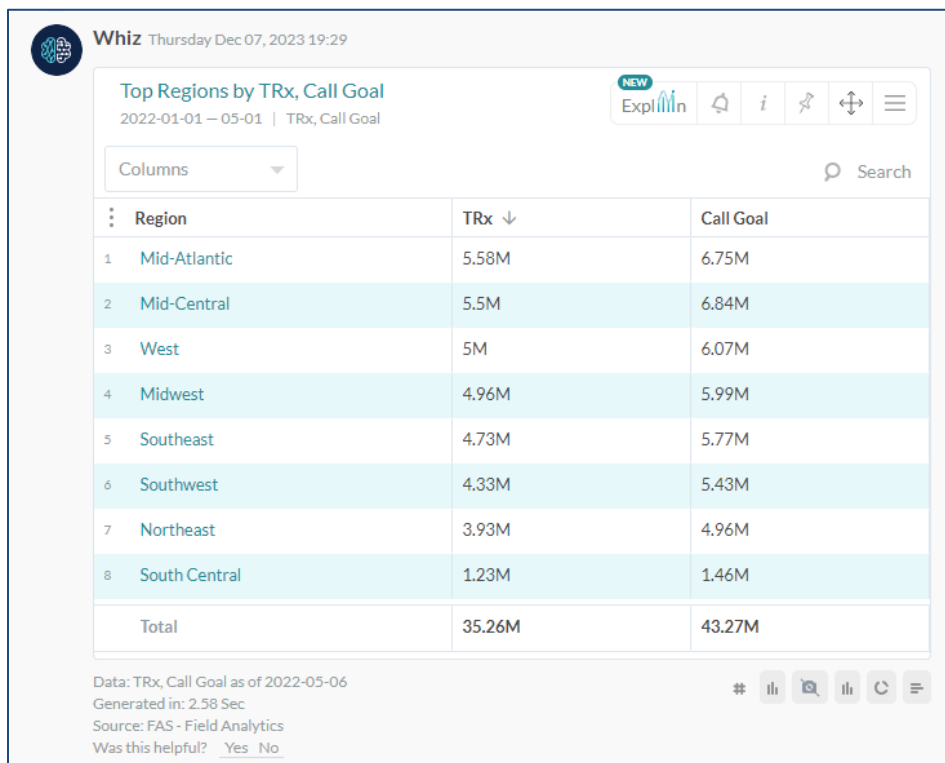
Now, this auto-suggestion box is dynamic, so that you can see the longer entity names clearly in a single row. The box is not wrapped up below, thus, more entities are seen in the search result with the box size being vertically reduced.



Response - Viewing data or images using external links on cards

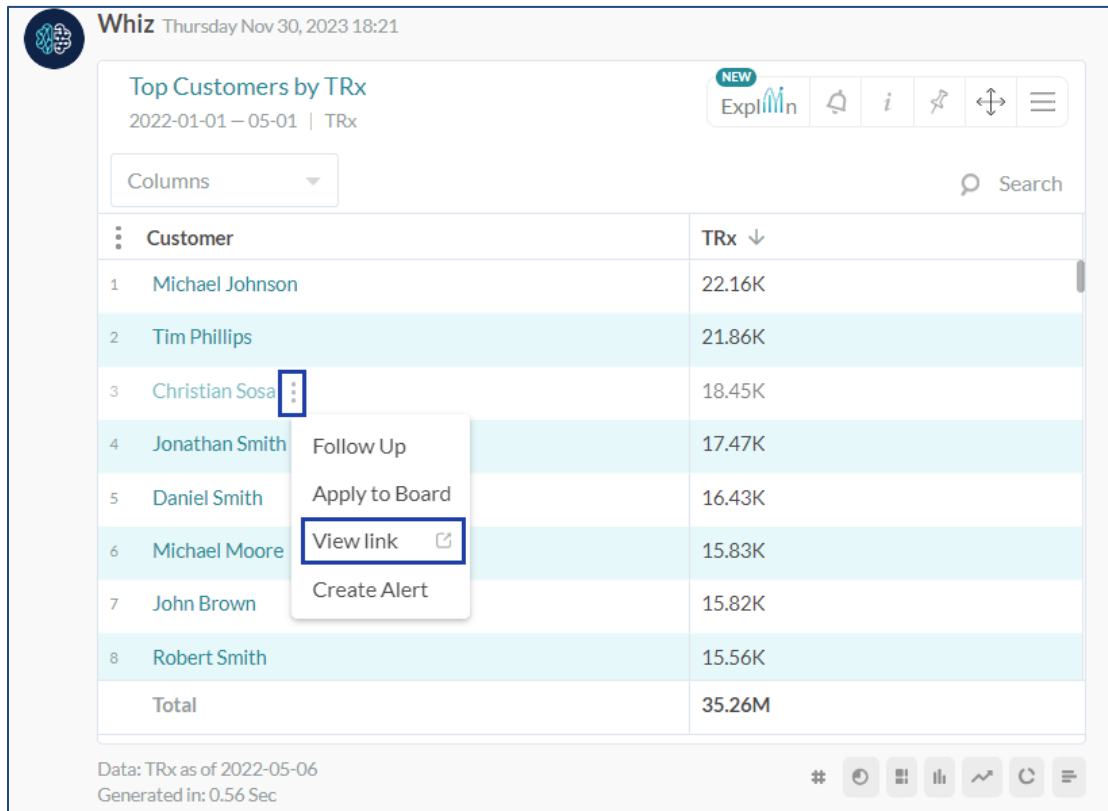
On pinboards and responses, certain cards contain clickable links that are associated with corresponding dimension values displayed in the cards.

For example, if you ask a query 'Region by TRx by call goal' then WhizAI shows the following response:



For any dimension value, when you hover the cursor over this icon  WhizAI shows the following options:

- **View link:** redirects to an external link that shows the data.
- **View image:** redirects to an external link that shows the images.



When you click the link, you get redirected to a new tab where you can view data or images associated with those dimension values. This provides you with additional capabilities to perform a better analysis of the data displayed in the response.

Response - Changing Card Formats


You can change the format in which the details are displayed on a card. Broadly, you can change the format from 'table' to 'chart' and vice-versa. Open the **card** from the **pinboard** and below the card, you can see a list of all the formats available for that response:

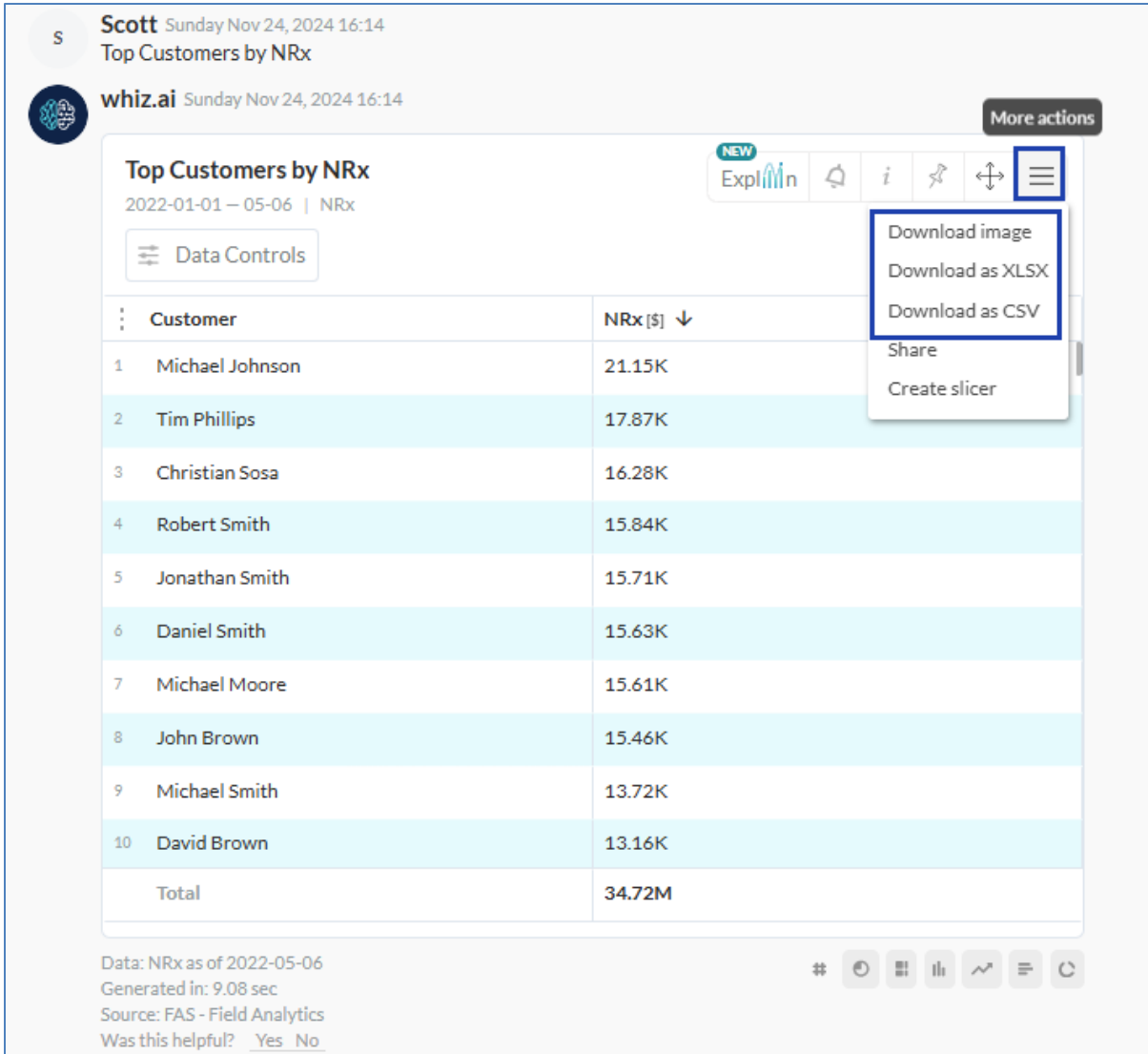


For example: In the following figure, the Line response is changed to Column response.



Response - Downloading Data from Cards

Open the card from which you have to download data, click  and then click **Download CSV**, **Download XLSX**, or **Download Image**. WhizAI downloads the card data in CSV or PNG formats.



The screenshot shows a WhizAI interface with a card titled "Top Customers by NRx" dated 2022-01-01 to 05-06. The card displays a table of customer data. A dropdown menu is open, showing options to "Download image", "Download as XLSX", "Download as CSV", "Share", and "Create slicer".

Customer	NRx [\$] ↓
1 Michael Johnson	21.15K
2 Tim Phillips	17.87K
3 Christian Sosa	16.28K
4 Robert Smith	15.84K
5 Jonathan Smith	15.71K
6 Daniel Smith	15.63K
7 Michael Moore	15.61K
8 John Brown	15.46K
9 Michael Smith	13.72K
10 David Brown	13.16K
Total	34.72M

Metadata at the bottom of the card:

- Data: NRx as of 2022-05-06
- Generated in: 9.08 sec
- Source: FAS - Field Analytics
- Was this helpful? [Yes](#) [No](#)

'Partial' text displayed in the downloaded file (XLSX)

When you download (XLSX format) a response that contains multiple time periods, you see the 'partial' text against the metric values for months with partial historical data.

AutoSave ☐ Off TRx by Arobi v/s Ofasan [Monthly] (3) Search Apruva Bhalerao Comments Share

File Home Insert Page Layout Formulas Data Review View Automate Help

IR_PAGE... fx TRx by Arobi v/s Ofasan [Monthly]

Reference date : 2022-05-06 [sales]
 Period : 2021-01-02 - 2021-12-31, 2022-01-01 - 2022-12-30
 Metric : TRx
 Product : Arobi, Ofasan
 Data : TRx as of 2022-08-10
 Data Model : FAS - Field Analytics
 Data extracted at : 2023-06-26 10:38:12 UTC

	2021				2022			
	TRx				TRx			
	Arobi vs Ofasan				Arobi vs Ofasan			
Month	Arobi	Ofasan	Abs Chg	% Chg [%]	Arobi	Ofasan	Abs Chg	% Chg [%]
January	25,13,693.23	5,64,693.97	19,48,999.25	345.14%	24,42,420.37	5,63,887.27	18,78,533.10	
February	24,10,388.53	5,87,082.99	18,23,305.53	310.57%	24,20,653.90	5,72,591.44	18,48,062.46	
March	31,61,537.31	6,97,468.09	24,64,069.21	353.29%	30,42,123.23	7,35,605.32	23,06,517.91	
April	23,69,868.87	5,77,552.36	17,92,316.50	310.33%	24,51,007.59	5,25,617.20	19,25,390.39	
May	24,70,581.53	5,79,574.30	18,91,007.22	326.28%	25,15,641.60	5,72,352.09	19,43,289.51	
June	31,11,221.12	7,12,449.33	23,98,771.79	336.69%	31,49,177.30	7,56,407.77	23,92,769.53	
July	24,61,984.01	5,83,285.83	18,78,698.18	322.09%	25,63,653.88	6,00,909.78	19,62,744.10	
August	24,34,426.24	5,96,028.46	18,38,397.78	308.44%	635925.27 (partial)	150886.25 (partial)	4,85,039.01	
September	31,40,437.76	6,97,313.52	24,43,124.24	350.36%				
October	24,62,484.28	5,96,582.46	18,65,901.81	312.77%				
November	24,70,590.07	5,62,414.65	19,08,175.41	339.28%				
December	30,76,063.06	7,28,804.39	23,47,258.67	322.07%				

Example Query: "Arobi vs ofasan by months in 2021, 2022"

Whiz Monday Jun 26, 2023 16:04

TRx by Arobi v/s Ofasan [Monthly]
 2021-01-02 - 12-31, 2022-01-01 - 12-30 | TRx | Arobi, Ofasan

Columns Ofasan Search

	2021				2022			
	Arobi vs Ofasan				Arobi vs Ofasan			
Month ↑	Arobi	Ofasan	Abs Chg	% Chg [%]	Arobi	Ofasan	Abs Chg	% Chg [%]
February	2.41M	587.08K	1.82M	+310.57%	2.42M	572.59K	1.85M	+322.75%
March	3.16M	697.47K	2.46M	+353.29%	3.04M	735.61K	2.31M	+313.55%
April	2.37M	577.55K	1.79M	+310.33%	2.45M	525.62K	1.93M	+366.31%
May	2.47M	579.57K	1.89M	+326.28%	2.52M	572.35K	1.94M	+339.53%
June	3.11M	712.45K	2.4M	+336.69%	3.15M	756.41K	2.39M	+316.33%
July	2.46M	583.29K	1.88M	+322.09%	2.56M	600.91K	1.96M	+326.63%
August	2.43M	596.03K	1.84M	+308.44%	635.93K (partial)	150.89K (partial)	485.04K	+321.46%
September	3.14M	697.31K	2.44M	+350.36%	-	-	-	-

Data: TRx as of 2022-08-10
 Source: FAS - Field Analytics
 Was this helpful? Yes No

Go to the hamburger icon  at the top right corner of the options and click **Download as XLSX**.

Whiz Thursday Nov 30, 2023 17:15

TRx by Arobi v/s Ofasan [Monthly]
2021-01-02 – 12-31, 2022-01-01 – 12-30 | TRx | Arobi, Ofasan

Columns Reference Product Ofasan

More actions
NEW Expln Download image Download as XLSX Download as CSV Share

Month ↑	2021				2022 (partial)			
	Arobi vs Ofasan				Arobi vs Ofasan			
	Arobi	Ofasan	Abs Chg	% Chg [%]	Arobi	Ofasan	Abs Chg	% Chg [%]
January	2.51M	564.69K	1.95M	+345.14%	2.44M	563.89K	1.88M	+333.14%
February	2.41M	587.08K	1.82M	+310.57%	2.42M	572.59K	1.85M	+322.75%
March	3.16M	697.47K	2.46M	+353.29%	3.04M	735.61K	2.31M	+313.55%
April	2.37M	577.55K	1.79M	+310.33%	2.45M	525.62K	1.93M	+366.31%
May	2.47M	579.57K	1.89M	+326.28%	606.95K (partial)	137.38K (partial)	469.57K	+341.80%
June	3.11M	712.45K	2.4M	+336.69%	-	-	-	-

Data: TRx as of 2022-05-06
Generated in: 0.54 Sec

AutoSave off TRx by Arobi v/s Ofasan [Monthly] (3) Search Apruva Bhalariao

File Home Insert Page Layout Formulas Data Review View Automate Help

JR_PAGE... TRx by Arobi v/s Ofasan [Monthly]

2021					2022			
TRx					TRx			
Arobi vs Ofasan					Arobi vs Ofasan			
Month	Arobi	Ofasan	Abs Chg	% Chg [%]	Arobi	Ofasan	Abs Chg	% Chg [%]
January	25,13,693.23	5,64,693.97	19,48,999.25	345.14%	24,42,420.37	5,63,887.27	18,78,533.10	
February	24,10,388.53	5,87,082.99	18,23,305.53	310.57%	24,20,663.90	5,72,591.44	18,48,062.46	
March	31,61,537.31	6,97,468.09	24,64,069.21	353.29%	30,42,123.23	7,35,605.32	23,06,517.91	
April	23,69,868.87	5,77,552.36	17,92,316.50	310.33%	24,51,007.59	5,25,617.20	19,25,390.39	
May	24,70,581.53	5,79,574.30	18,91,007.22	326.28%	25,15,641.60	5,72,352.09	19,43,289.51	
June	31,11,221.12	7,12,449.33	23,98,771.79	336.69%	31,49,177.30	7,56,407.77	23,92,769.53	
July	24,61,984.01	5,83,285.83	18,78,698.18	322.09%	25,63,653.88	6,00,909.78	19,62,744.10	
August	24,34,426.24	5,96,028.46	18,38,397.78	308.44%	635925.2 (partial)	150886.25 (partial)	4,85,039.01	
September	31,40,437.76	6,97,313.52	24,43,124.24	350.36%				
October	24,62,484.28	5,96,582.46	18,65,901.81	312.77%				
November	24,70,590.07	5,62,414.65	19,08,175.41	339.28%				
December	30,76,063.06	7,28,804.39	23,47,258.67	322.07%				

In the downloaded XLSX file, the TRx values for Ofasan and Arobi in May 2022 are accompanied by the string "partial."



Important! Please note that MS Excel functions and operations, including calculations for totals, percentages, and other formulas, can be impacted by the presence of this text. Make sure you take appropriate notice of the "partial" text to avoid any unintended effects on calculations or data analysis.

Response - Providing Feedback

WhizAI provides a feedback system by which you can give your feedback and comments about using the WhizAI platform. While working with WhizAI, it might be possible that the platform does not understand the question, does not respond correctly, or displays incorrect data. In such cases, WhizAI would like to understand the issue so that the experience can be improved by making the necessary updates.


For each response, you can find the **Was this helpful?** link with **yes** and **no** options. After you select **Yes**, WhizAI mark that answer to the response. However, if you click **no**, WhizAI opens the feedback dialog box for you to submit the feedback.

In the dialog box, select the correct type of your feedback and enter any additional comments, if any. Click **Send Feedback** to submit the feedback.

The feedback is submitted to the WhizAI Administrator. Additionally, you can also view the feedback in the User Logs.

Using Commands

This chapter explains the default commands that WhizAI provides out of the box.

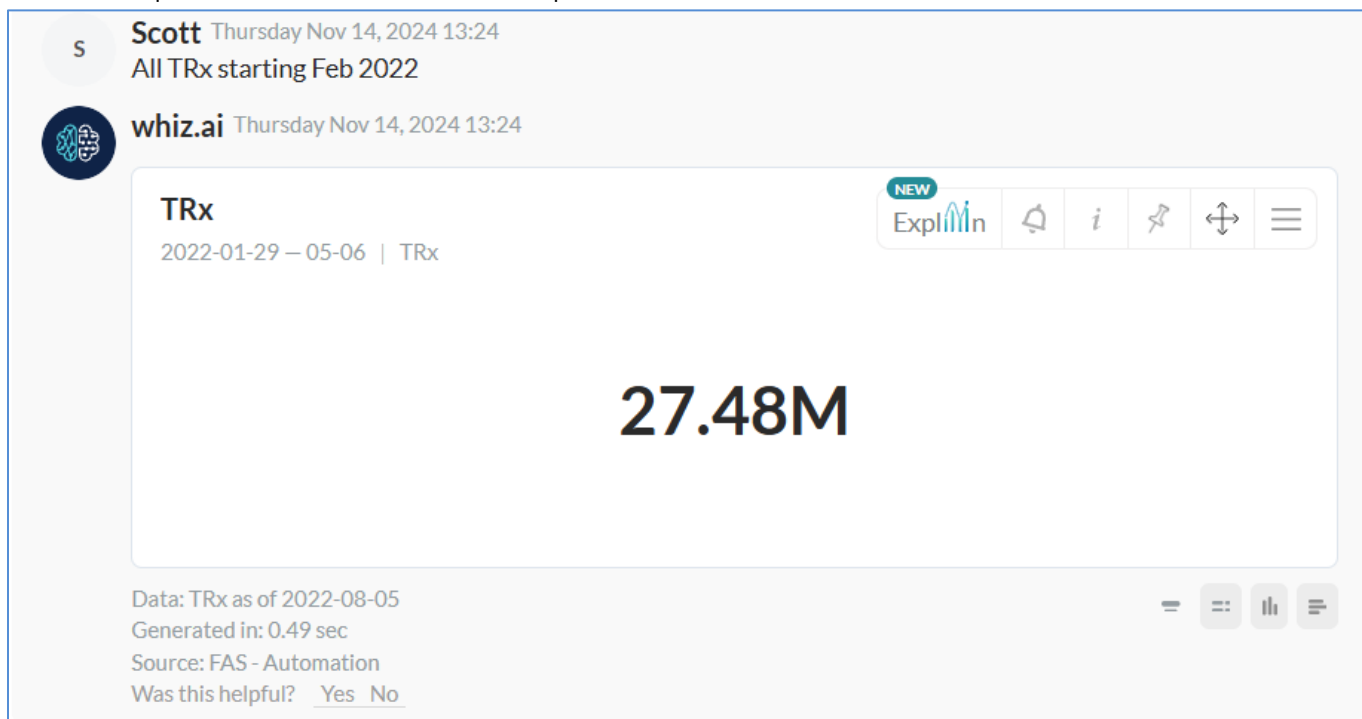
Command	Response from WhizAI platform
Hi	WhizAI greets you and lets you know that it is ready to get started. Also, it gives you information about the currently available sources.
Help	WhizAI displays the initial help so that you can learn about asking questions to WhizAI.
Context	WhizAI displays the current context that WhizAI has established from the previous question asked.
Reset	WhizAI resets the context established from the previous question. After resetting the context, when you ask a question, WhizAI gives you the response without assuming any prior context. Also, this command can reset all or a specific dimension or metric. For example, reset territory or reset TRx Volume .
Show dimensions	WhizAI displays all dimensions currently available in the selected data model or a data source.
Show metrics	WhizAI displays all metrics currently available in the selected data model.
Show CSV Show XLSX	WhizAI displays a link to download the response in a CSV and XLSX file. <div>  Note: This command only works when the response is in tabular format. Otherwise, you get the error message that the response is not in the correct format to download. </div>
Go to <data source>	WhizAI switches the current data source to the specified data source name.

NLQs

NLQs - Handling "Since-Time" Expressions in Queries

WhizAI supports an expanded range of "since-time" expressions for queries. This feature improves the system's ability to understand and process various ways users express time-based queries. Based on user feedback, the system now recognizes a broader set of variations for the "since" operator. Now, you can use variations like starting, onwards, to date, to current, from-to date, till date and the system provides the correct response

Some examples and variations of since expressions are as below.



- Number of products for June to date

Scott Thursday Nov 14, 2024 13:27
Number of products for June to date

whiz.ai Thursday Nov 14, 2024 13:28

Product Count

2021-05-29 – 2022-05-06 | Product Count

5

Data: Product Count as of 2022-08-05
Generated in: 9.81 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

- All TRx 2022 to current

Scott Thursday Nov 14, 2024 13:30
All TRx 2022 to current

whiz.ai Thursday Nov 14, 2024 13:30

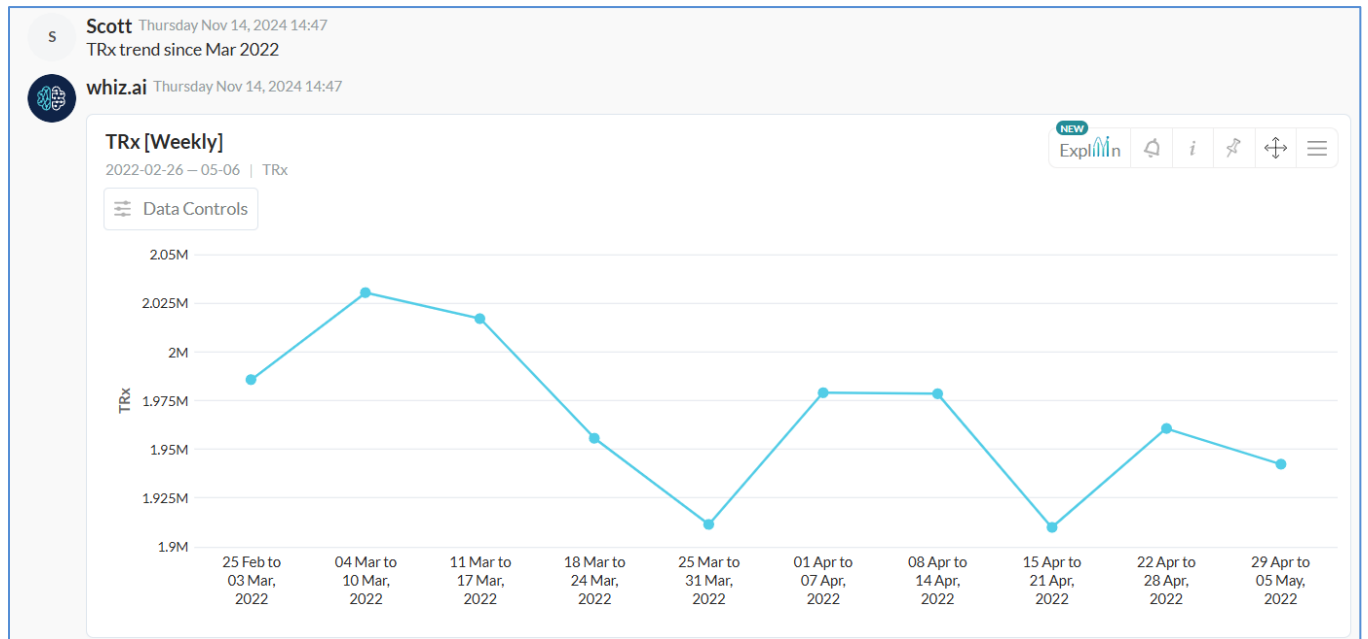
TRx

2022-01-01 – 05-06 | TRx

35.26M

Data: TRx as of 2022-08-05
Generated in: 0.54 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

- TRx trend since Mar 2022



NLQs - Using Cohort in NLQs

WhizAI integrates NLQs with Cohorts, allowing you to apply cohorts within the explorer context. This functionality ensures responses match the predefined conditions set for the target dimension in the cohort.

NLQs can identify and utilize cohort for analysis. This feature is available for owned and shared cohorts. Additionally, you can find the correct cohort name using the auto-suggestions that appear while typing. The responses generated will pre-dominantly depend on the types of cohorts (static or dynamic) used in the NLQs.




Note! Cohort functionality is supported only with API metrics that use scripts in new format

For more information, let's look at the examples below:


Static cohorts

Example1, You can query, "Show top 10 Customers for Chort1", where the predefined condition for Cohort1 is customers belonging to 1960 Family Practice, 1960 Family Practice Harmony, 25 East Same Day Surgery Center, and 463 Beverly Hills Llc.

Tip! In this case, the target dimension and the condition dimension are the same, so the generated list of responses will always remain static and will not change over time.








Scott Thursday Jun 06, 2024 16:16
Customers by cohort 1



Whiz Thursday Jun 06, 2024 16:16

NEW

Expln














Columns ▾

Search


	Customer	TRx ↓
1	436 Beverly Hills Llc	6.71K
2	25 East Same Day Surgery Center	5.18K
3	1960 Family Practice Harmony	3.19K
4	1960 Family Practice	1.72K
Total		16.79K

Data: TRx as of 2022-05-06
Generated in: 3.06 Sec
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)










Example 2, you can query “TRx for cohort 1 by region” where the predefined condition for Cohort1 is customers belonging to 1960 Family Practice, 1960 Family Practice Harmony, 25 East Same Day Surgery Center, and 463 Beverly Hills Llc.

Tip! In this case, the generated response gives an aggregated value of the cohort by default.








Scott Thursday Jun 06, 2024 16:15
 TRx for cohort 1 by region



Whiz Thursday Jun 06, 2024 16:15

NEW

Expln














Columns ▾

Search


	Region	TRx ↓
1	West	11.89K
2	Midwest	3.19K
3	Southeast	1.72K
	Total	16.79K

Data: TRx as of 2022-05-06
 Generated in: 2.82 Sec
 Source: FAS - Field Analytics
 Was this helpful? [Yes](#) [No](#)










Dynamic Cohorts

Example 1, you can query, "Show top 10 customers for Cohort2", where the predefined condition for Cohort2 is customers belonging to region Mid-Atlantic and gender female."








Scott Monday May 27, 2024 17:21
 Top 10 customers by Cohort2




Whiz Monday May 27, 2024 17:21

Top 10 Customers by TRx
 2022-01-01 – 05-06 | TRx | Cohort2

NEW
 Expln













Columns ▼

 Search


	Customer	TRx ↓
1	Kathy Smith	13.62K
2	Jessica Smith	12.08K
3	Rachel Johnson	11.83K
4	Allison Williams	10.10K
5	Michelle Williams	10.06K
6	Heidi Smith	9.81K
7	Cheryl Lin	9.59K
8	April Allen	9.49K
9	Rebecca Rivera	9.17K
	Total	104.84K

Data: TRx as of 2022-05-06
 Generated in: 2.05 Sec
 Source: FAS - Field Analytics
 Was this helpful? [Yes](#) [No](#)









The cohort will filter the list of 10 customers by TRx (TRx set as default in context) for the set context period and the conditions set in the cohort.

Tip! From the table configurability box, select the dimensions set in the conditions of the cohort.








Scott Monday May 27, 2024 17:21
 Top 10 customers by Cohort2



Whiz Monday May 27, 2024 17:21

NEW

Expln

Columns







▼

Search

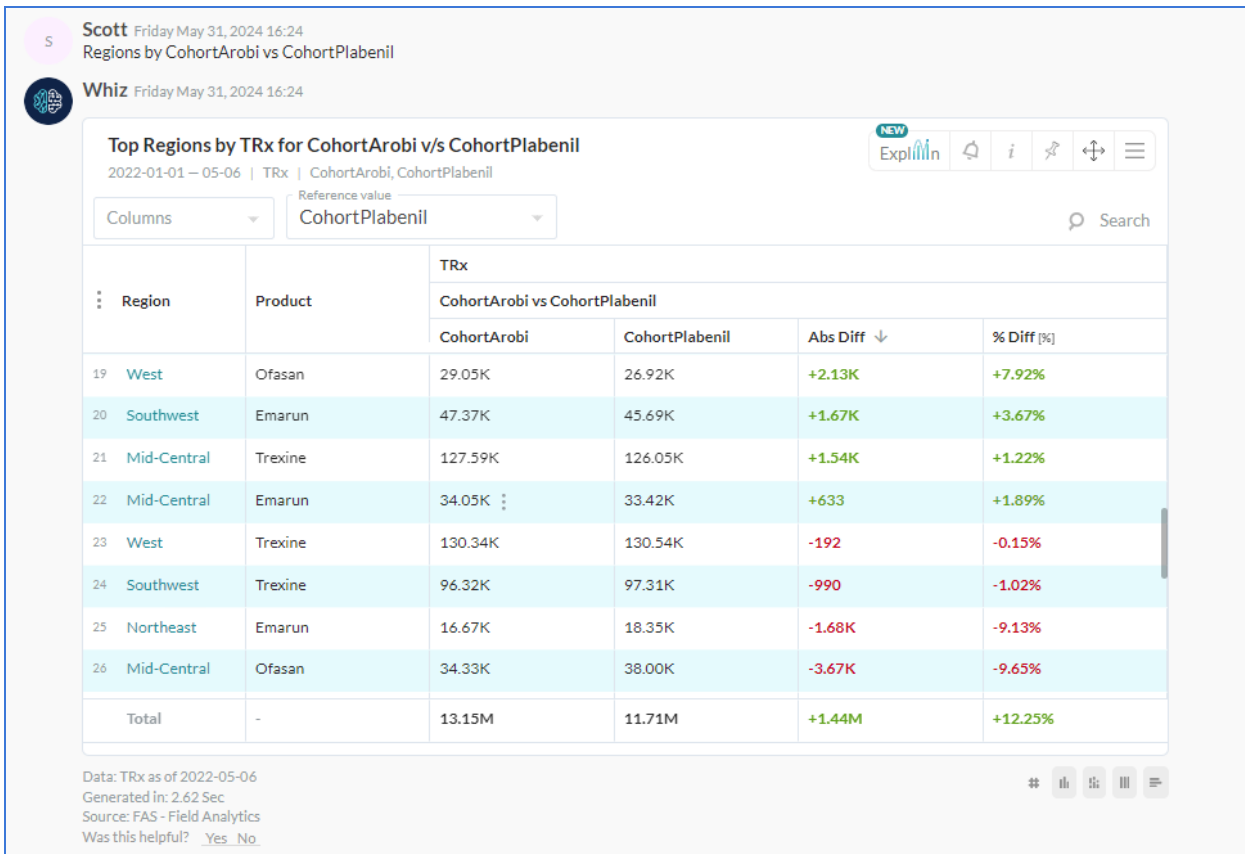
🔍

	Customer	Gender	Region	TRx ↓
1	Kathy Smith	Female	Mid-Atlantic	11.44K
2	Cheryl Lin	Female	Mid-Atlantic	9.59K
3	April Allen	Female	Mid-Atlantic	9.49K
4	Rebecca Rivera	Female	Mid-Atlantic	9.17K
5	Allison Williams	Female	Mid-Atlantic	9.02K
6	Patricia Mcdonald	Female	Mid-Atlantic	8.70K
7	Amy White	Female	Mid-Atlantic	8.66K
8	Carla Sellers	Female	Mid-Atlantic	8.35K
9	Rachel Anderson	Female	Mid-Atlantic	8.09K
	Total	-	-	90.58K

Data: TRx as of 2022-05-06
 Generated in: 2.05 Sec
 Source: FAS - Field Analytics
 Was this helpful? Yes No

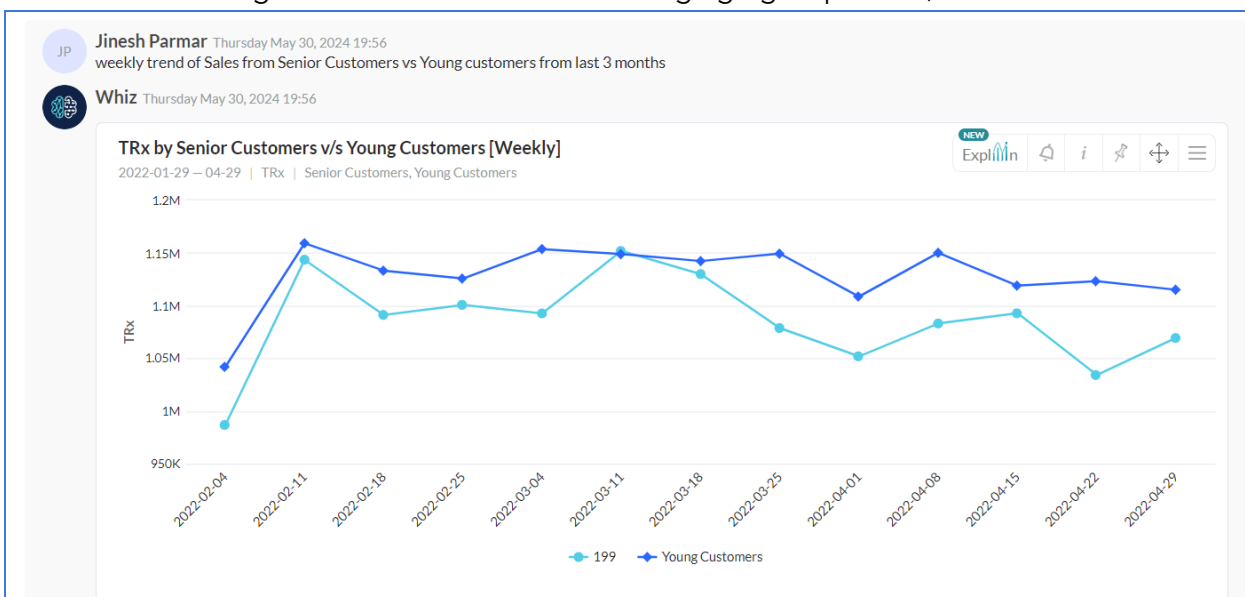







Example 2, "Regions by CohortArobi vs CohortPlabenil", where the predefined condition for CohortArobi is customers having the product Arbobi and predefined condition for CohortPlabenil is customers having the product Plabenil.



The generated response lists regions for the target customers and displays the absolute value and % difference values for the product Arobi and Plabenil for those regions.

Example 3, “weekly trend of Sales from Senior Customers vs Young Customers from last 3 months”, where the predefined condition for Senior Customers is customers having age group 60 and above predefined condition for Young Customers is customers having age group 19-30, 31-40.



The generated response compares the TRx trends for cohort Senior Customers and Young Customers for last 3 months.



Note! Clicking on a cohort name automatically applies it in the user context, visible in a drop-down list of existing cohorts.

Conditions for overriding/ persisting cohort in user context

- NLQs containing a dimension name matching the cohort's target dimension display individual elements within the cohort. ?
For example, Show me Cohort 1 by patients will give me all individual patients by the default Trx metric.
- NLQs containing an entity value matching the cohort's target dimension replaces the cohort in the context with the new value.
For example, Cohort has Customer dimension and when the NLQ contains By Customers, the system does not override the already applied cohort and gives results based on the cohort only. If the cohort includes the Customer dimension and the NLQ specifies "By Customers," the system maintains the previously applied cohort and provides results based on its conditions without overriding it.
- NLQs containing a dimension name matching a cohort condition display data based on the cohort's conditions.
- If a dimension value in the NLQ does not match the context filter value, the system throws a "no data found" error.
- If a new cohort name is asked in the NLQ, then the system replaces the previous cohort in the context bar with the new cohort from NLQ.
- If the NLQ contains a dimension/value that is neither the target dimension nor the condition, is treated as an additional filter.
- For example, Show me Cohort1 by customer by region, where the predefined condition of Cohort1 is customers having age group above 60. In this case, the dimension 'region' asked in the NLQ will be treated as an additional filter in the response.

Scott Wednesday Jun 12, 2024 14:14
Show me Cohort1 by customer by region

Whiz Wednesday Jun 12, 2024 14:14

TRx by Customer, Region
2022-01-01 — 05-06 | TRx | Cohort1

Columns Search

Customer ↑	Mid-Atlantic	Mid-Central	Midwest	Northeast	South Central	Southeast	Southwest	West
TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx
Aaron Ashley	-	727	-	-	-	-	-	-
Aaron Boyd	-	-	399	-	-	-	-	1.49K
Aaron Brewer	-	-	-	-	-	-	-	2.43K
Aaron Campos	-	499	-	-	-	-	-	-
Aaron Castillo	9.65K	-	-	-	-	-	-	-
Aaron Daniels	374	-	-	-	-	-	-	-
Aaron Edwards	-	-	-	-	-	-	-	581
Aaron Figueroa	-	-	3.38K	-	-	-	-	533
Aaron Fischer	-	-	1.01K	-	-	-	-	-
Total	2.16M	2.08M	1.91M	1.53M	510.75K	1.90M	1.76M	1.95M

Data: TRx as of 2022-05-06
Generated in: 6.04 Sec
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)

NLQs - Improved error messages

WhizAI displays improved error messages with suggestions for refining search parameters, selecting appropriate time periods, or modifying query formats, facilitating a smoother data search process. The error messages aid in simplifying the user query ambiguity and supports more efficient NLQ navigation.

The following error messages are rephrased.

- No data available for your current scope of the filters in the context. Try asking again with updated search criteria.

Scott Friday Apr 12, 2024 14:40
top growing regions with TRx growth >10%

Whiz Friday Apr 12, 2024 14:40

No data available for your current scope of the filters in the context. Try asking again with updated filter scope.

Was this helpful? [Yes](#) [No](#)

- No data available for the requested time period. Please select a timeframe between period 1 and period 2 and try again.

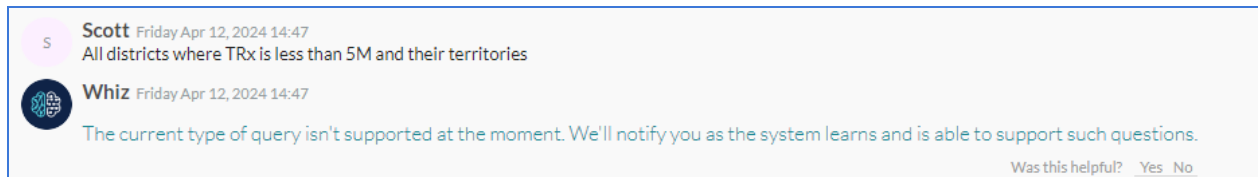
Scott Wednesday Mar 27, 2024 18:10
arobi vs trexine in 2018

Whiz Wednesday Mar 27, 2024 18:10

No data available for requested time period. Please select a timeframe between 2020-05-03 and 2022-07-31 and try again.

Was this helpful? [Yes](#) [No](#)

- The current type of query isn't supported at the moment. We'll notify you as the system learns and is able to support such questions.



NLQs - Support for multi-metric entity comparison

WhizAI supports multi-metric entity comparison, that is, you can compare more than one metric for the entity or time comparison. For more information, refer to the following examples:

- TRx, NRx for Trexine vs Plabenil
- TRx, NRx for Trexine vs Plabenil by brands by regions
- TRx, NRx for Trexine vs Plabenil by brands

NLQs - Support for positive and negative expressions in queries

WhizAI understands positive and negative expressions from your queries.

Positive expression: A query with a positive expression usually conveys a favorable result.

Example query: Show me regions with positive sales.

Negative expression: A query with a negative expression usually conveys an unfavorable result.

Example query: Show me regions with negative sales.

NLQs - Support for interrogative questions



Note! You must configure the business action for linguistic intent support queries. For more information refer to the configuring business actions section in the NLP guide.

WhizAI also supports interrogative questions, providing even more versatility. This improvement includes the addition of the following question types:

- **Where:** Now you can ask data for specific geographic locations such as regions, districts, or territories (which can be customized according to your needs). For example, *"Where was Trexine sold the most?"*
- **When:** This question type provides detailed information regarding the timing or dates of certain events or actions. For instance, it can reveal when a patient was admitted or when a customer clicked on emails. For example, *"When was the patient admitted to the hospital?"*

Consider the following queries:

Example query 1: When you ask show me *Where was plabenil sold the most last year?* WhizAI filters results based on Plabenil and automatically sorts them in descending order by default.

Scott Wednesday Feb 07, 2024 12:55
When you ask show me Where was plabenil sold the most last year?

Whiz Wednesday Feb 07, 2024 12:55

Growth TRx

2021-01-02 – 12-31 | TRx | Growth | Plabenil

Growth TRx 47.13%

Data: Growth TRx as of 2022-05-06
Generated in: 3.13 Sec
Source: FAS - Field Analytics
Was this helpful? ☐ Yes ☐ No

Example query 2: When you ask show me *When customers clicked email*? WhizAI filters results based on **Emails-Clicked** and automatically sorts them in descending order by default.

Whiz Friday Sep 22, 2023 22:35

Top Customers by Emails - Clicked

2022-01-01 – 05-06 | Emails - Clicked

Columns Search

	Customer	Emails - Clicked ↓
1	Susan Gross	7.06K
2	Kaitlyn Miles	6.8K
3	Anthony Perry	6.69K
4	Christopher Hopkins	6.4K
5	Carol West	6.06K
6	Megan King	6.05K
7	Daniel Suarez	5.45K
8	Lynn Cameron	5.45K
9	Robert Buchanan	5.44K
	Total	353.71K

Data: Emails - Clicked as of 2022-05-06
Generated in: 2.02 Sec
Source: FAS - Field Analytics

NLQs - Support for different variations of the same query

WhizAI understands different variations of the same query. Different queries can have the same underlying meaning but can be structured and asked differently.

For example, consider the following queries that convey the same intent but have different phrasing:

- Show me comparison for Trexine and Plabenil
- How is Plabenil doing against Trexine?
- How are plabenil and Trexine performing against one another?
- How are plabenil and Trexine doing against each other?

WhizAI understands such questions that can be structured differently and renders the response accordingly.

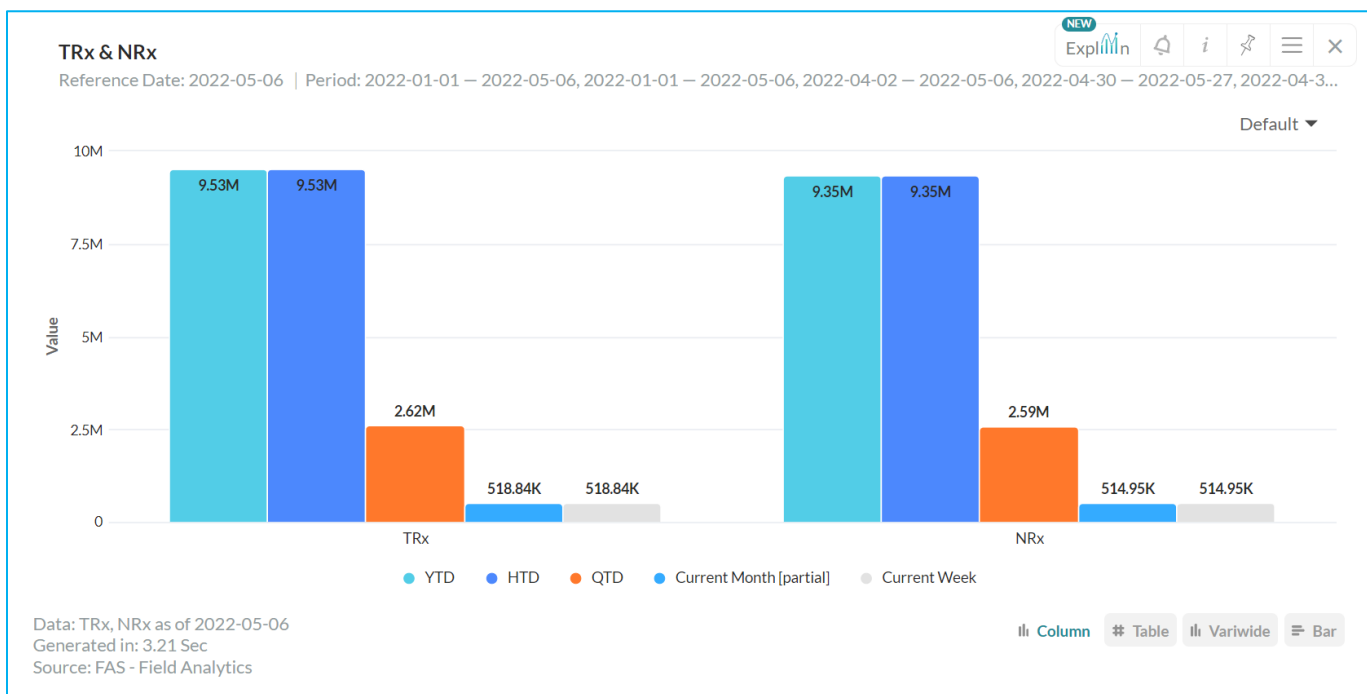


Note! The above list of example queries is not a comprehensive list. The purpose of these examples is to show how the same question can be asked using a different variation and WhizAI still understands and supports the same.

NLQs - Questions having multiple time periods with multiple metrics or entities

You can include multiple time periods, metrics, and computations in your queries. For more information, refer to the following example queries with responses.

Example query: Show me the YTD, HTD, QTD , current month, and current week for TRx, NRx



NLQs - Complex time expressions

For example, if you ask WhizAI: “Show me sales for first 4 weeks of last quarter of last year”; in this question, you have included a combination of multiple time references (first 4 weeks, last quarter, last year) instead of asking the data for only specific time period or specific date range. In such cases, WhizAI comprehends such complex time period references and renders the response accordingly. Thus, along with specific time periods or intervals, you can use relative time references in your queries and WhizAI identifies them with ease, processes them, and renders the response accordingly.

Refer to the following additional example queries with such time expressions.

Arobi sales in Boston for last month of last year

Show me sales by brands for first 8 weeks of second quarter in 2021.

Example queries:

Q1 vs Q2 by brands for last year - In this query ‘last year’ is associated with time periods Q1 & Q2.

NLQs - Using MAT expression in queries.

MAT stands for Moving Annual Total. It is the total value of a variable over the past twelve months, as the twelve-month period moves forward with each month, the value from the latest month is added and the sales value from the oldest month is removed from the calculation. This means MAT considers the most recent month as the endpoint. When you include MAT expression in the query, the response shows the sales value for the last twelve months with respect to the time period mentioned in the query. If you don't specify the time period, then by default, the last twelve months are considered. For more information, refer to the following examples.

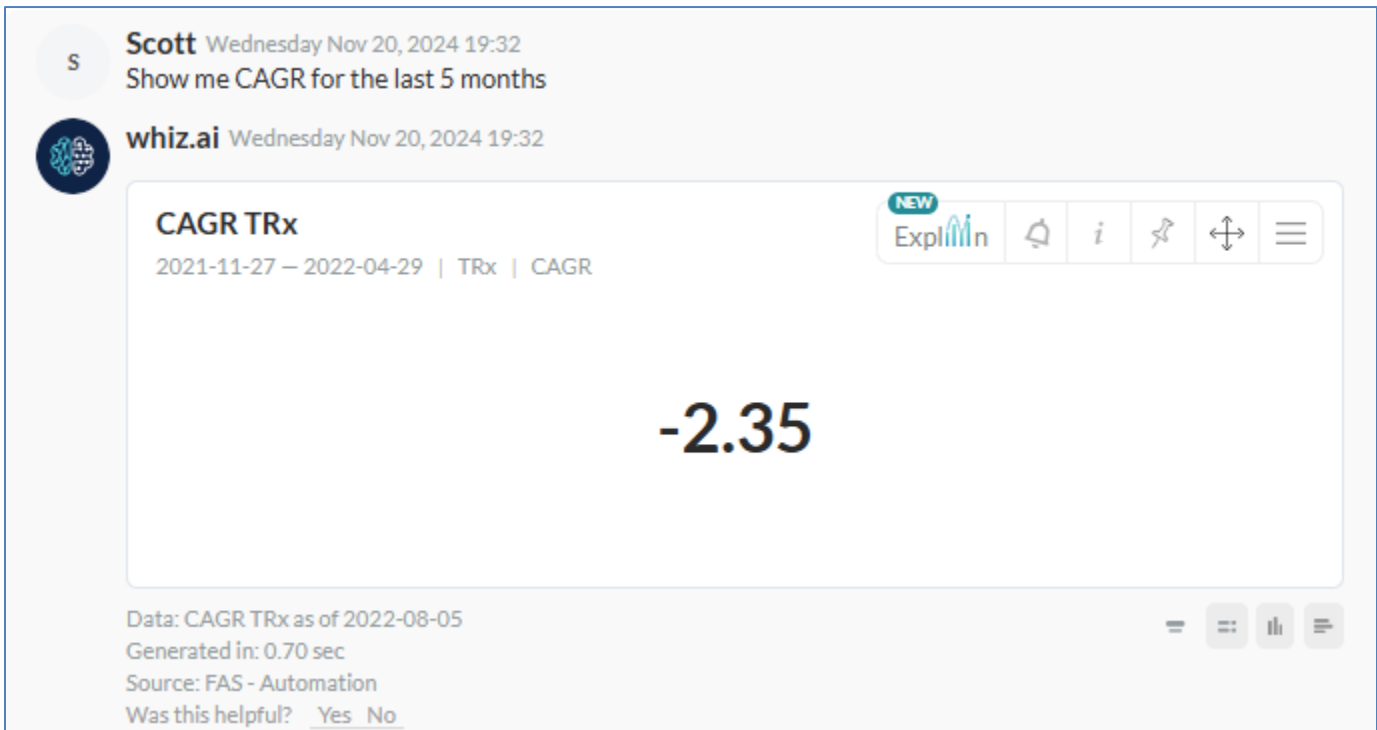
You can include the following types of expressions along with MAT in your questions:

- **reference time periods** such as ‘last month’, ‘last quarter’, last year, etc. Example queries: *MAT last month*, *MAT for Q3 last year*, and so on.
- **monthly, quarterly, yearly trend** - Example queries: *Monthly MAT 2022*, *Monthly MAT for Q3 2022*, *Yearly MAT for the last 5 years*, and so on.
- **period over period / year over year analysis** - Examples queries: *MAT Jan 2022 PoP*, *MAT Q3 PoP*, *MAT Jan 2022 YoY*, *MAT Q1 YoY* and so on.

NLQs - Support for CAGR (Compound Annual Growth Rate) computation

WhizAI supports CAGR computation. CAGR stands for Compound Annual Growth Rate. It is a widely used measure to evaluate the growth rate of a business over a specific period of time. It considers the compounding effect and gives you a clear picture of the annualized growth rate. Refer to the following example queries on the use of CAGR computation.

Example query: Show me CAGR for the last 5 months.



Note! This is a configurable feature. For more information, please contact the WhizAI support team.

NLQs - Using trimester and semester expressions in queries

WhizAI supports Trimester over Trimester (ToT) and Semester over Semester (SoS) time expressions in NLQs. Semester and Trimester granularities are supported similarly to the other granularities such as weekly, monthly, quarterly, yearly, etc. You can include 'by trimester' or 'by semester' in NLQs to specify the time granularity in the response. Trimester expression divides a period of twelve months into three periods of four months. If you include a ToT expression in a query, WhizAI compares the given metric for the current four-month period with the previous four-month period and gives you the absolute and percent change in the metric value.

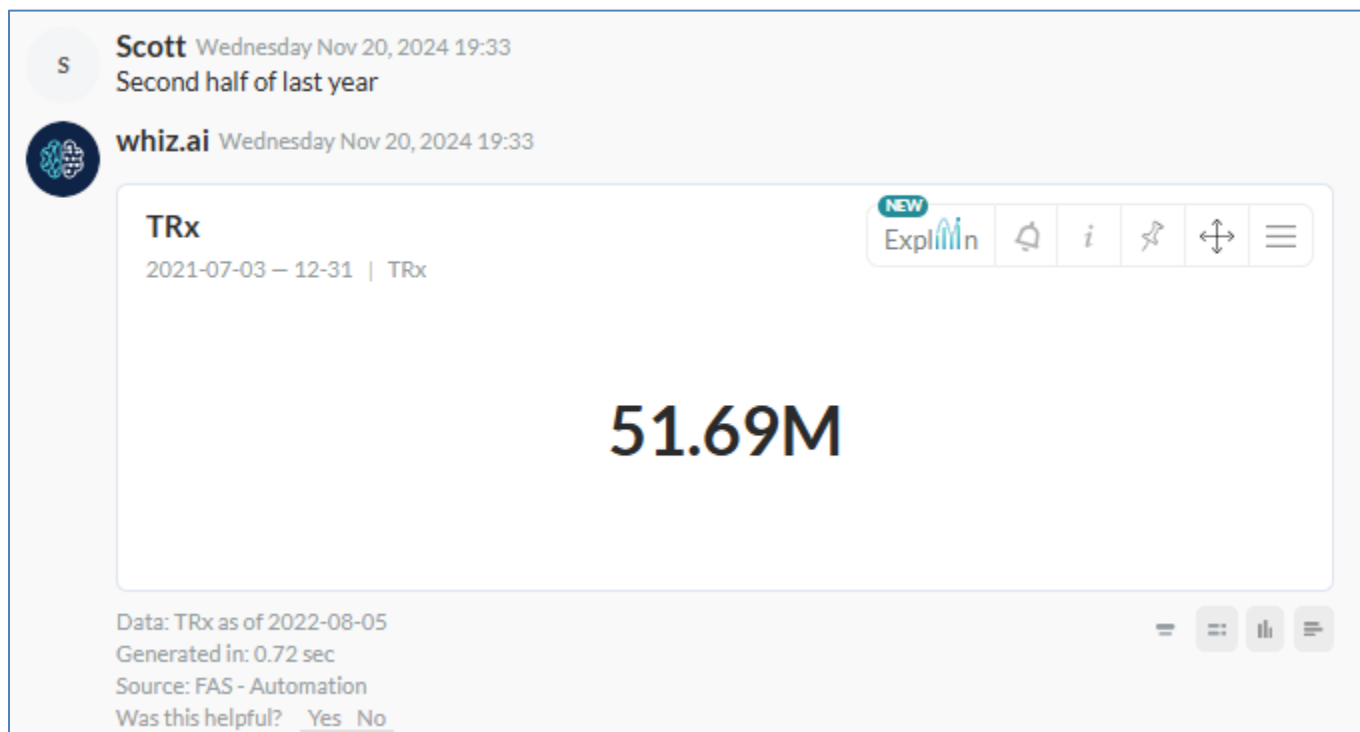
Semester expression divides a period of twelve months into two periods of six months. If you include SoS expression in a query, WhizAI compares the given metric for the current six-month period with the previous six-month period and gives you the absolute and percent change in the metric value.

For more information on the use of these expressions, refer to the following table.

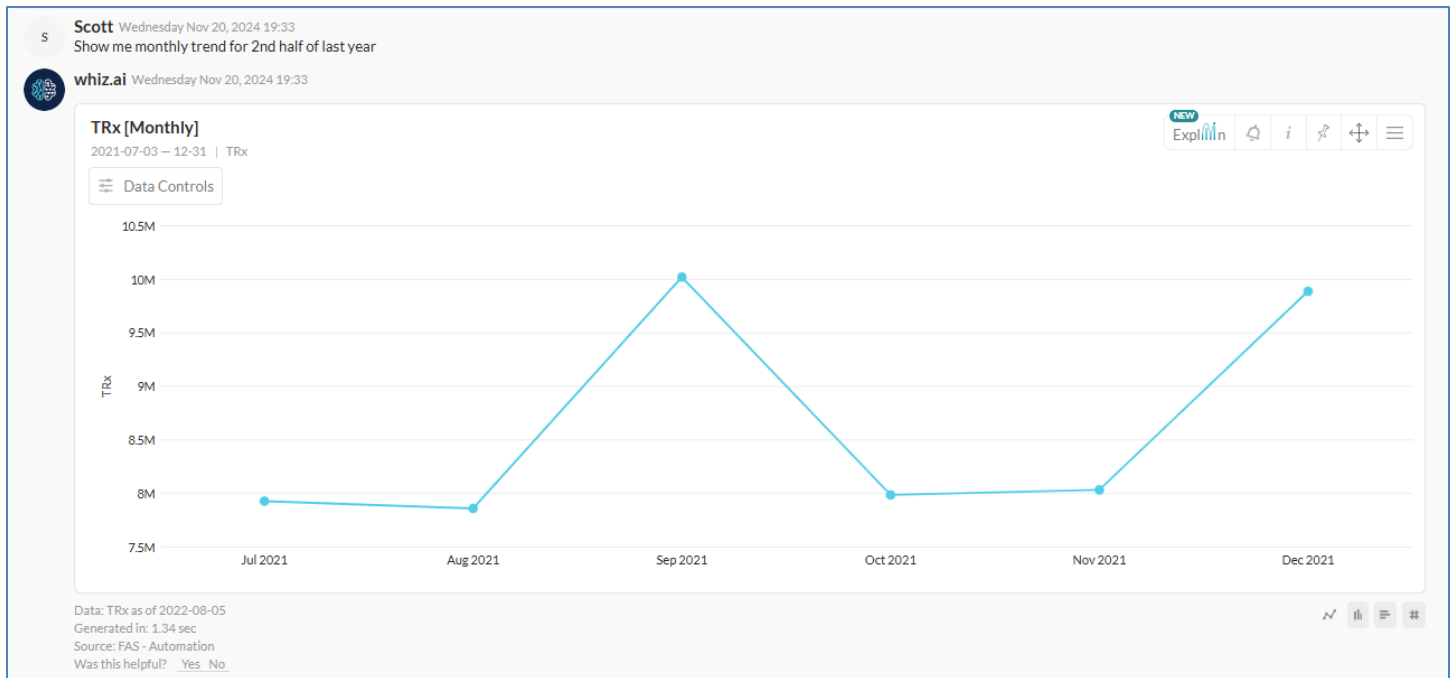
Example NLQs	WhizAI response
TRx in 2021 by trimester	TRx trend in 2021 by trimester. / TRx in each trimester in 2021
T1 2021 by months for TRx	TRx trend in the first trimester in 2021 by months.

SoS	Compares TRx for the current six-month period with the previous six-month period
NRx in 2021 SoS	Compares NRx for 2021 by semesters (H2 vs H1)
ToT	Compares the given metric for the current four-month period with the previous four-month period
ToT 2021	Compares the given metric for 2021 by trimesters T2 vs T1 and T3 vs T2
TRx STD PoP	Compares TRx value for the period of current semester till date with the same period of previous semester
TRx TTD PoP	Compares TRx value for the current trimester till date with the same period of previous trimester

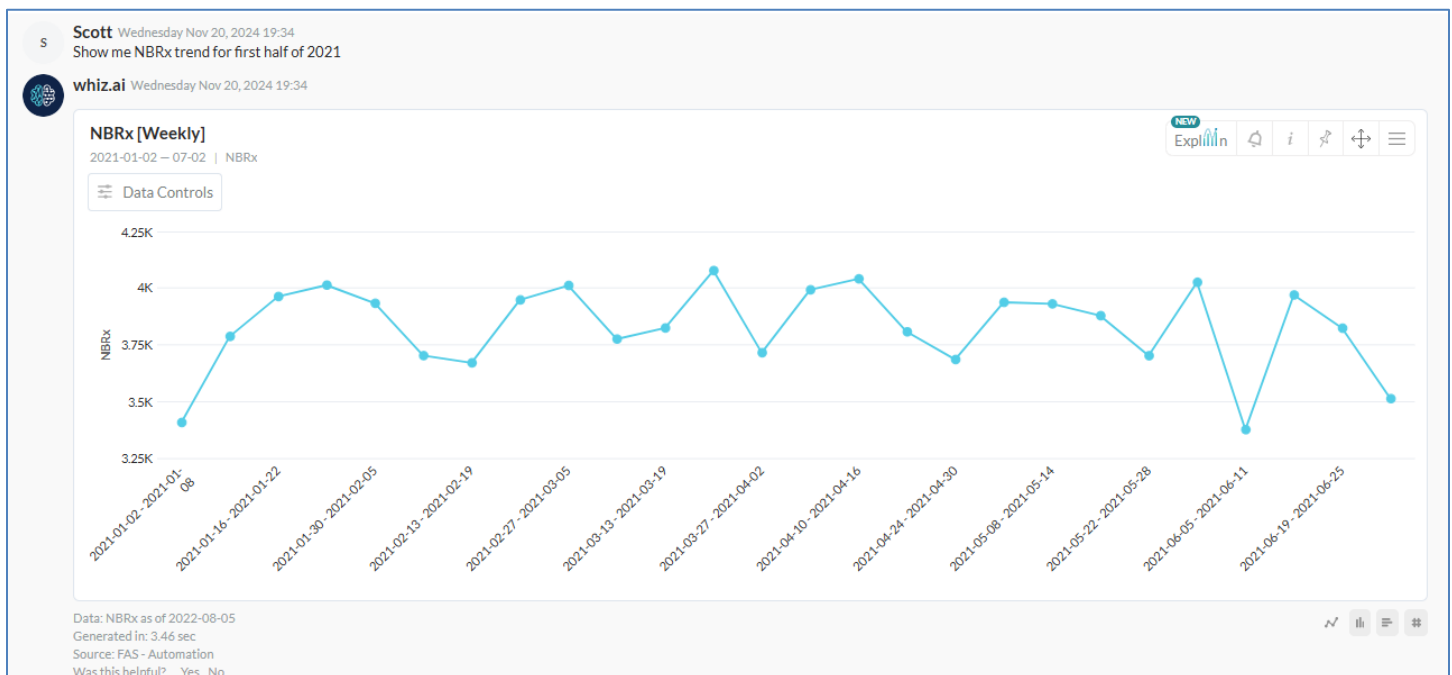
Example NLQs with the responses
Second half of last year



Show me monthly trend for 2nd half of last year



Show me NBRx trend for first half of 2021



NLQs - Using 'Day' expression in queries

Similar to time granularities such as 'year', 'quarter', 'month', 'week' etc., WhizAI now also supports 'Day' time granularity. You can now use the following time expressions in your queries.

- Days
- Daily
- Day over day (dod)

- last <N> days
- previous <N> days.

Refer to the following example queries:

Query type	Example queries
Last/Previous/Current N days	Show me sales for the last 10 days Note! Last/Previous/Current N days will include ref date set in the context on the Explorer.
Trend - 'Daily'	Daily sales trend for Jan 2021 Show me daily sales for Q1 2022
Day over Day (DoD)	Show me dod query count Show me dod NRx for last 10 days



Note! Responses for these NLQs are rendered with reference to the date set in the context on the explorer.



Note! To use the above-mentioned expressions in your queries, you must refresh the data daily.

Example NLQs with the responses:

Example 1: Show me sales for last 50 days

s

Scott Wednesday Nov 20, 2024 19:35
 Show me sales for last 50 days

whiz.ai

Wednesday Nov 20, 2024 19:35

TRx

2022-03-17 — 05-05 | TRx

NEW

Expln

i

13.64M

Data: TRx as of 2022-08-05

Generated in: 0.39 sec

Source: FAS - Automation

Was this helpful? [Yes](#) [No](#)


NLQs - Co-referencing: Asking follow up queries with reference to the previous query


You can ask follow-up queries by co-referencing the entities in the previous query. For example: If you have asked 'Show me top brands of last year', you can ask a follow-up query as 'How are they trending this year?' WhizAI understands this follow-up query and co-refers the word 'they' with the 'brands' asked in the previous query. You can use the following type of pronouns for co-referencing.

- they
- their
- this
- them
- these
- those
- it etc.

Example:






Initial query: Show me top brands of last year



Scott Wednesday Nov 20, 2024 19:36
 Show me top brands of last year


whiz.ai Wednesday Nov 20, 2024 19:36

Top Products by TRx
 2021-01-02 – 12-31 | TRx








NEW
 Expln

 Search

	Product	TRx ↓
1	Arobi	32.08M
2	Trexine	28.83M
3	Plabenil	27.44M
4	Ofasan	7.48M
5	Emarun	7.10M
Total		102.94M

Data: TRx as of 2022-08-05
 Generated in: 1.66 sec
 Source: FAS - Automation
 Was this helpful? [Yes](#) [No](#)

Follow-up query: How are they trending this year?

Scott
Wednesday Nov 20, 2024 19:36

How are they trending this year?

whiz.ai
Wednesday Nov 20, 2024 19:36

Referred Products by TRx
2022-01-01 – 12-30 | TRx

NEW
Expln

Search

	Product	TRx ↓
1	Arobi	19.22M
2	Trexine	17.13M
3	Plabenil	16.59M
4	Ofasan	4.48M
5	Emarun	4.28M
	Total	61.70M

Data: TRx as of 2022-08-05
Generated in: 1.53 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

NLQs - Support for contextual conversations and co-referencing

We have improved our co-referencing support for list responses, that is, a new response is generated based on the previous query using certain keywords namely their, they, those, them, etc.

Important! Co-referencing works on NLQs that provide a 'list' as an output.

Following is the list of supported list responses:

- Top 5 regions <TopN/ BottomN>
- Top 5 growing regions <TopN Time Comparison/ BottomN Time Comparison>
- Top 5 regions by brands <Multi-dimensional>
- Top 5 regions by trend <Top N trend/ Bottom N trend>

Following are some examples of co-referencing contextual conversations.

- Top 5 regions by TRx

S

Scott
Wednesday Nov 20, 2024 19:39
Top 5 regions by TRx

whiz.ai

Wednesday Nov 20, 2024 19:39

NEW

Expl

in

Data Controls

Search

	Region	TRx ↓
1	Mid-Atlantic	9.64M
2	Mid-Central	9.61M
3	Midwest	8.73M
4	West	8.71M
5	Southeast	8.30M
	Total	44.99M

Data: TRx as of 2022-08-05
Generated in: 1.27 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

#

Follow up query: How are *they* performing? (PoP for same top 5 regions)

S

Scott
Wednesday Nov 20, 2024 19:39
How are they performing?

whiz.ai

Wednesday Nov 20, 2024 19:39

NEW

Expl

in

Data Controls

Search

	Region	Current Year (partial) vs Prior Year			
		Current Year	Prior Year	Abs Chg ↓	% Chg [%]
1	Southeast	8.30M	13.91M	-5.60M	-40.29%
2	West	8.71M	14.38M	-5.67M	-39.43%
3	Midwest	8.73M	14.61M	-5.88M	-40.24%
4	Mid-Central	9.61M	15.83M	-6.22M	-39.28%
5	Mid-Atlantic	9.64M	15.95M	-6.31M	-39.57%
	Total	44.99M	74.67M	-29.68M	-39.74%

Data: TRx as of 2022-08-05
Generated in: 1.76 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

#

In the example mentioned above the list response of regions is contextualized to know how they are performing.

- Top 2 brands by NRx

The screenshot shows a chat interface with a user named Scott asking for the 'Top 2 brands by NRx'. The WhizAI assistant responds with a visualization titled 'Top 2 Products by NRx' for the period 2022-01-01 to 05-06. The visualization includes a table with the following data:

Product	NRx
1 Arobi	10.79M
2 Trexine	9.64M
Total	20.44M

Below the table, it states: 'Data: NRx as of 2022-08-05', 'Generated in: 0.96 sec', 'Source: FAS - Automation', and 'Was this helpful? Yes No'. A blue box highlights the 'NRx' column header in the table.

Follow up query: Show me *their* TRx. (Note that the NRx metric was included in the original NLO, as a response for this question, WhizAI has switched the metric and the TRx for top 2 brands is shown in the response)

The screenshot shows a follow-up query from Scott: 'Show me their TRx'. The WhizAI assistant responds with a visualization titled 'Referred Products by TRx' for the period 2022-01-01 to 05-06. The visualization includes a table with the following data:

Product	TRx
1 Arobi	10.96M
2 Trexine	9.80M
Total	20.76M

Below the table, it states: 'Data: TRx as of 2022-08-05', 'Generated in: 0.61 sec', 'Source: FAS - Automation', and 'Was this helpful? Yes No'. Annotations include a blue box around the title 'Referred Products by TRx', a blue box around the 'TRx' metric in the table header, and a blue box around the 'TRx' column header. A blue arrow points from the 'Metric switched to TRx' text to the 'TRx' column header.

In the above example, as you can see, the contextualized conversation supports the metric switch. This allows you to instantaneously compare the values between two metrics.

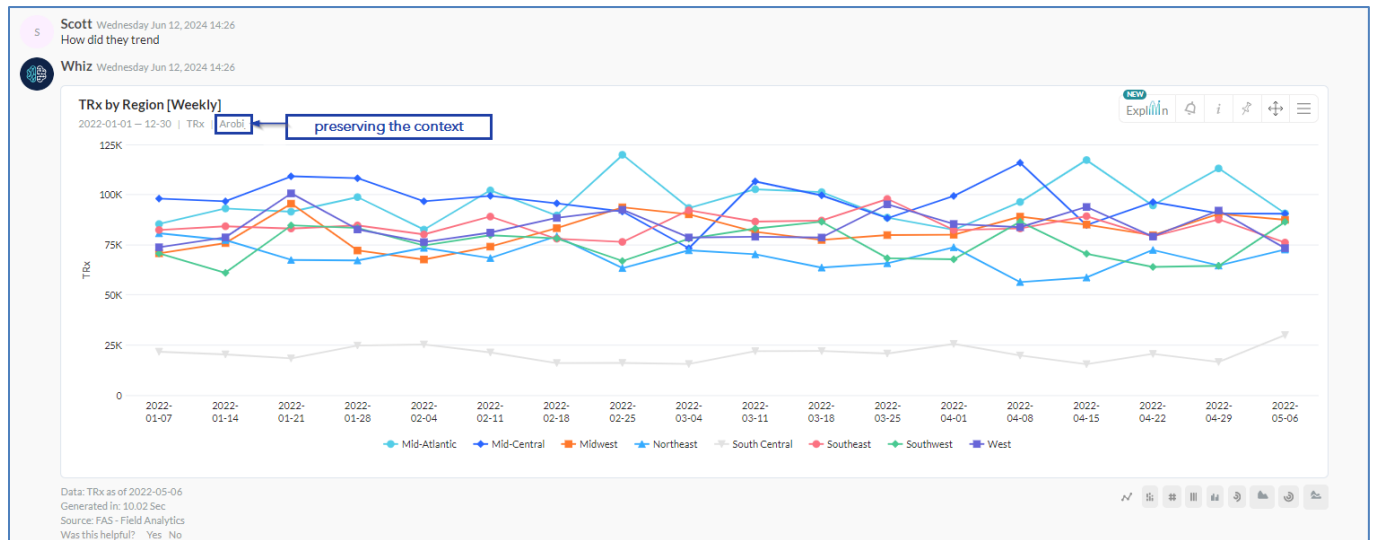
- Show me the top regions by Arobi

The screenshot displays the WhizAI interface. At the top, a chat header shows a user 'Scott' with the message 'Show me the top regions by Arobi' and a timestamp 'Wednesday Nov 20, 2024 19:44'. Below this, the WhizAI logo and another timestamp are visible. The main content area is titled 'Top Regions by TRx' with a subtitle '2022-01-01 – 05-06 | TRx'. A dropdown menu is open, showing 'Arobi' as the selected context. A blue box labeled 'Setting the context' points to the 'Arobi' option. Below the dropdown is a 'Data Controls' button and a search bar. The main table lists regions and their TRx values, sorted in descending order. The regions are: Mid-Atlantic (1.74M), Mid-Central (1.74M), Southeast (1.52M), West (1.51M), Midwest (1.47M), Southwest (1.35M), Northeast (1.25M), and South Central (372.33K). A 'Total' row shows 10.96M. At the bottom, there is a footer with metadata: 'Data: TRx as of 2022-08-05', 'Generated in: 1.10 sec', 'Source: FAS - Automation', and a 'Was this helpful?' prompt with 'Yes' and 'No' options. A row of icons for various functions is also present.

Region	TRx ↓
1 Mid-Atlantic	1.74M
2 Mid-Central	1.74M
3 Southeast	1.52M
4 West	1.51M
5 Midwest	1.47M
6 Southwest	1.35M
7 Northeast	1.25M
8 South Central	372.33K
Total	10.96M

Data: TRx as of 2022-08-05
Generated in: 1.10 sec
Source: FAS - Automation
Was this helpful? Yes No

If you see, the context is set to Arobi. Now, you can ask : *How did they trend*



Thus, in the above-mentioned example, the context set earlier is persevered.

Show me their performance by trexine

Scott Wednesday Nov 20, 2024 19:46
Show me their performance by trexine

whiz.ai Wednesday Nov 20, 2024 19:46

Referred Regions by TRx

2022-01-01 - 05-06 / 2021-01-02 - 05-07 | TRx | Trexine

Data Controls

Switching the context to Trexine

Search

Region	YTD vs Prior YTD			
	YTD	Prior YTD	Abs Chg ↓	% Chg [%]
1 Mid-Central	1.60M	1.57M	+34.77K	+2.22%
2 West	1.32M	1.31M	+6.28K	+0.48%
3 South Central	325.30K	321.35K	+3.95K	+1.23%
4 Southeast	1.31M	1.31M	+3.13K	+0.24%
5 Southwest	1.24M	1.24M	-7.10K	-0.57%
6 Mid-Atlantic	1.54M	1.55M	-7.24K	-0.47%
7 Midwest	1.42M	1.48M	-58.25K	-3.94%
8 Northeast	1.04M	1.12M	-78.23K	-7.00%
Total	9.80M	9.90M	-102.71K	-1.04%

Data: TRx as of 2022-08-05
Generated in: 1.61 sec
Source: FAS - Automation
Was this helpful? Yes No

In this example, the context set to Arobi is replaced with Trexine.

- Show me top regions by TRx.

Scott Wednesday Nov 20, 2024 19:48
Show me top regions by TRx.

whiz.ai Wednesday Nov 20, 2024 19:48

Top Regions by TRx
2022-01-01 – 05-06 | TRx

Data Controls Search

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.50M
3 West	5.00M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

Data: TRx as of 2022-08-05
Generated in: 0.71 sec
Source: FAS - Automation
Was this helpful? Yes No

Show me their NRx

Scott Wednesday Nov 20, 2024 19:49
Show me their NRx

whiz.ai Wednesday Nov 20, 2024 19:49

Referred Regions by NRx
2022-01-01 – 05-06 | NRx

Data Controls Search

Region	NRx ↓
1 Mid-Atlantic	5.47M
2 Mid-Central	5.41M
3 West	4.92M
4 Midwest	4.88M
5 Southeast	4.66M
6 Southwest	4.25M
7 Northeast	3.90M
8 South Central	1.21M
Total	34.72M

Data: NRx as of 2022-08-05
Generated in: 0.61 sec
Source: FAS - Automation
Was this helpful? Yes No

Show me their performance

Referred Regions by NRx
2022-01-01 – 05-06 / 2021-01-02 – 05-07

YTD vs Prior YTD

Region	YTD	Prior YTD	Abs Chg ↓	% Chg [%]
1 Mid-Atlantic	5.47M	5.26M	+210.06K	+3.99%
2 West	4.92M	4.83M	+87.57K	+1.81%
3 Mid-Central	5.41M	5.34M	+79.06K	+1.48%
4 Midwest	4.88M	4.83M	+55.46K	+1.15%
5 Southeast	4.66M	4.64M	+19.01K	+0.41%
6 Southwest	4.25M	4.29M	-44.49K	-1.04%
7 South Central	1.21M	1.27M	-57.77K	-4.54%
8 Northeast	3.90M	4.00M	-103.55K	-2.59%
Total	34.72M	34.47M	+245.34K	+0.71%

Data: NRx as of 2022-08-05
Generated in: 1.45 sec
Source: FAS - Automation
Was this helpful? [Yes](#) [No](#)

In this example, the new response is sorted on the latest NLQ and not the 1st one.



Important! You cannot pin them for your reference, as the pin icon is not available. Also, the entire context is lost if you reset the content, or a fresh question is asked which is out of context. The titles of these responses are always carried forward with the latest intent and metric.

NLQs - Using 'My' expression in queries

WhizAI supports NLQs that contain the expression 'my'. You can use the 'my' expression in your queries in the following scenarios:

There are three ways to customize MY metadata:

1. Rosters (User defaults)
 2. My configuration
 3. Authorization
- You can add and configure a data model, where you (user) are part of the source data. For more information, refer to the following example of source data.
Source data example:

Invoice	Creator	Approver
User A	C	B
User B (You)	A	B
User C	B	A

Example NLQs:

- Show me invoices approved by me',
- 'Show me invoices where I am the creator' etc.



Ambiguous queries are not supported. For example: 'Show me my invoices'.

- You can add and configure a data model, where entities (product, region etc.) from source data are mapped to you (to the user). For more information, refer to the following example of source data.

Source data example:

User	Product	Region	TRx
A	Trexine	Northeast	100
B (You)	Plabenil	West	500
B (You)	Trexine	West	600
C	Crestor	Midwest	300
C	Crestor	South	300

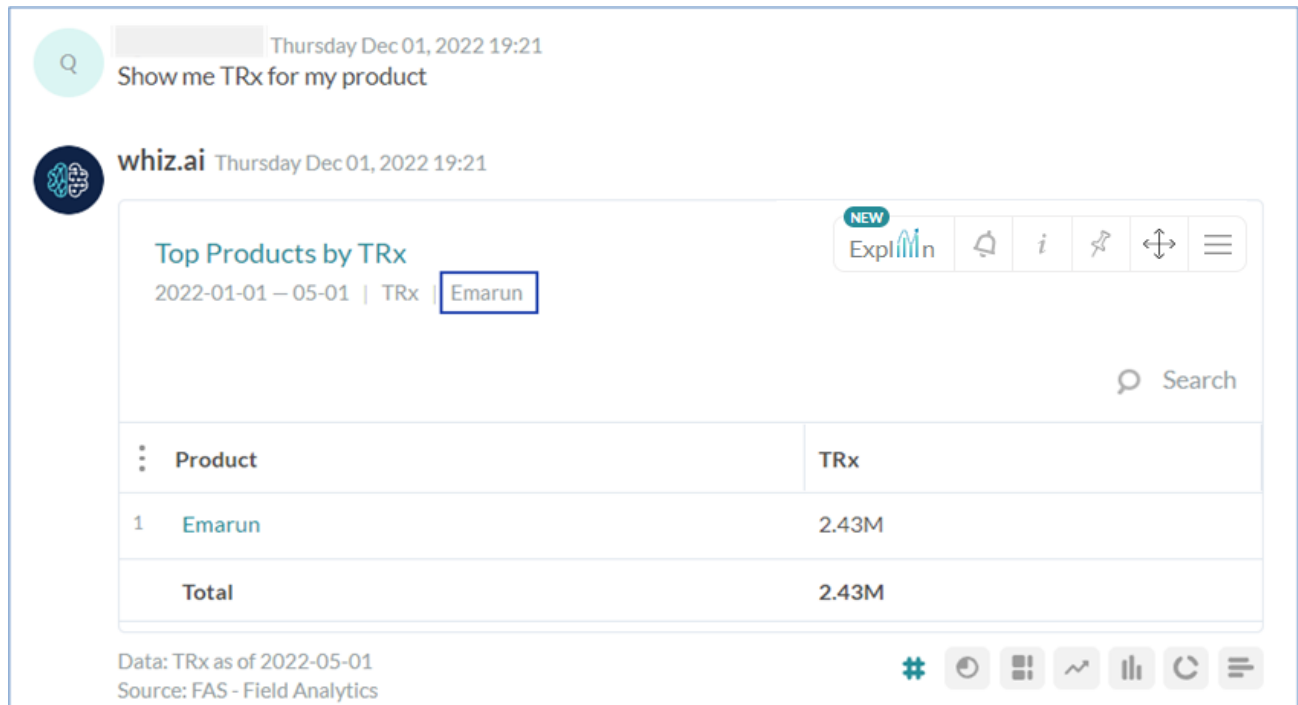
Example NLQs: '

- Show me sales trend in my region', '
- Show me TRx for my product', '
- How is my product growth for last month?',
- 'Show my top performing product' etc.



Note! 'My metric' or 'My performance' queries are not supported, only 'My Metadata' queries (for example: my product, my region, etc.) are supported.

Example query 1: Show me TRx for my product



Example query 2: What is the sales trend in my region?



If my metadata is not set up using any of the methods mentioned above, the system will treat the entire dataset as my data and give a valid response as shown below:

Example query : My products

The screenshot displays the WhizAI user interface. At the top, there's a navigation bar with the WhizAI logo and links to Explorer, Pinboards, Alerts, and Admin. Below this, a search bar contains the query 'my products' and a date range '2022-01-01 - 04-30'. The results section shows a table titled 'Top Product Names by Equivalent Units' for the period '2022-01-01 - 04-30'. The table lists five products: Arobi, Trexine, Plabenil, Emarun, and Ofasan, with their respective equivalent units. A 'Total' row shows 1.95M. Below the table, there's a footer with metadata: 'Data: Equivalent Units as of 2022-05-06', 'Generated in: 0.67 sec', 'Source: NullValue', and a 'Was this helpful?' prompt.

	Product Name	Equivalent Units ↓
1	Arobi	598.62K
2	Trexine	536.91K
3	Plabenil	524.47K
4	Emarun	146.58K
5	Ofasan	139.70K
	Total	1.95M

Data: Equivalent Units as of 2022-05-06
Generated in: 0.67 sec
Source: NullValue
Was this helpful? Yes No

NLQs - Smart Search for Searching and adding entities to queries

We have introduced Smart Search in the conversation box on WhizAI Explorer. Smart Search allows you to search and add entities to your queries.

The screenshot displays the WhizAI Explorer interface. On the left, there's a sidebar with 'Example Conversations' and 'Activity' sections. The main area shows a conversation with 'Scott' dated Sunday Dec 01, 2024 13:01. The conversation includes a query 'Show me top brands of last year' and a response showing a table titled 'Top Products by TRx' for the period 2021-01-02 to 12-31. The table lists products and their TRx values:

Product	TRx ↓
1 Arobi	32.08M
2 Trexine	28.83M
3 Plabenil	27.44M
4 Ofasan	7.48M
5 Emarun	7.10M
Total	102.94M

Below the table, it states 'Data: TRx as of 2022-05-06', 'Generated in: 2.87 sec', and 'Source: FAS - Automation'. There's also a feedback prompt 'Was this helpful?' with 'Yes' and 'No' options. On the right, there's a 'My Pinboard' section showing 'Top Customers by TRx where Age greater...' with a table listing customers and their TRx values:

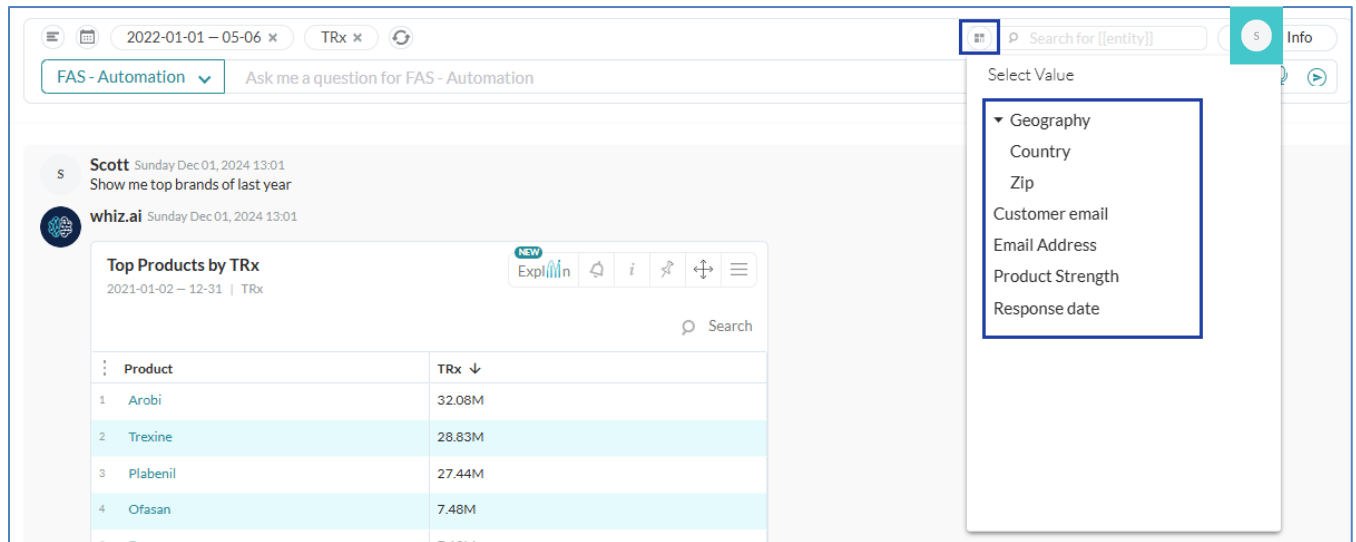
Customer	TRx ↓
1 Tim Phillips	21.86K
2 Michael Moore	12.64K
3 Jeffrey Craig	10.92K
4 McKenzie Surgery...	10.46K
5 Yolanda Tran	10.19K
Total	9.27M

Configuring dimensions for Smart Search

From the admin console, you can choose the dimension to be enabled for Smart Search. To configure the dimension for smart search:

1. Go to WhizAI **Admin** console > **Content Manager** > **Configurations**.
2. From the dropdown, select the data model for which you want to configure the dimensions.
3. Go to **Dimension Selection For Smart Search** and select the desired dimensions from the dropdown list. These selected dimensions appear in the Smart Search on Explorer.
4. Click the Save on the top right corner of the page.
5. To view these configured dimensions, go to **Explorer** > **Conversation box** > Smart **Search**, and click the **select** icon.

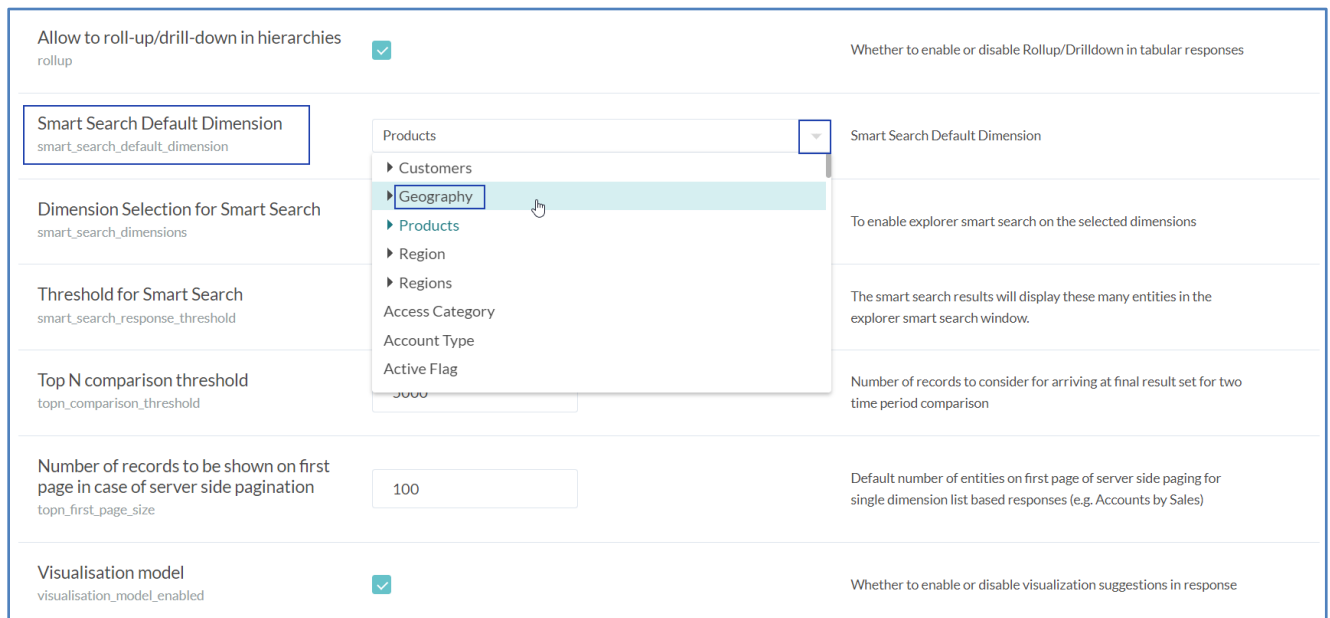
Configured dimensions are displayed as shown in the following figure.



You can search entities from these configured dimensions and add them to your query. For more information, refer to the 'Searching and adding entities to your query' section.

Selecting default dimension for Smart Search

1. You can select the default dimension to be available for Smart Search.
2. To set or change the default dimension:
3. From the WhizAI Admin console go to Content Manager > Configurations.
4. From the dropdown, select the data model for which you want to select the default dimension.
5. Go to the Smart Search Default Dimension and select the desired dimension from the dropdown list.

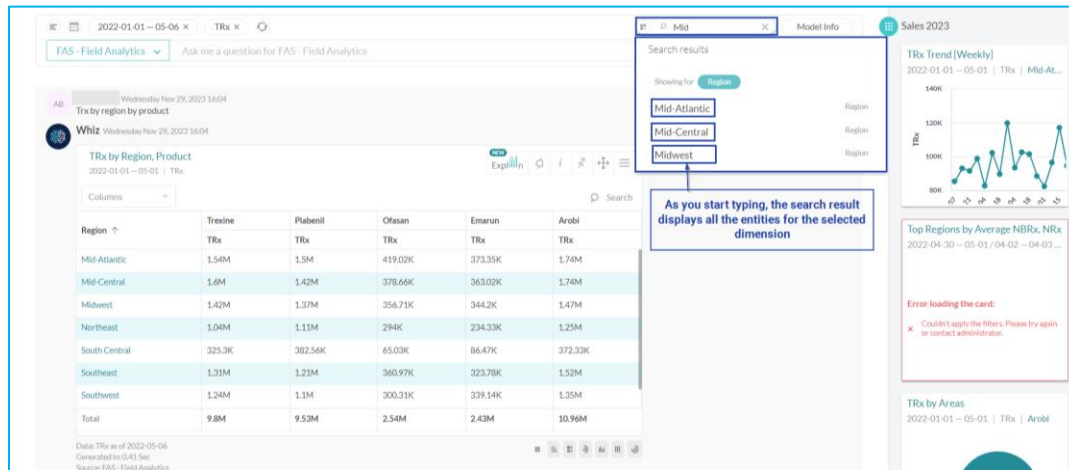


6. Click the Save option on the top right corner of the page.

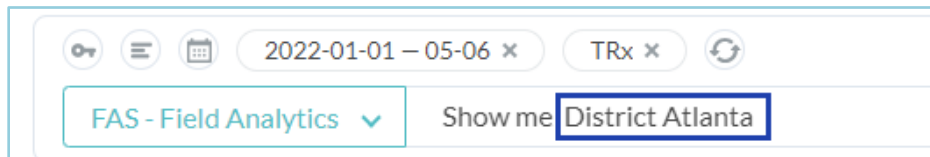
The selected dimension is set as the default search dimension for the Smart Search on Explorer.

Searching and adding entities to your query:

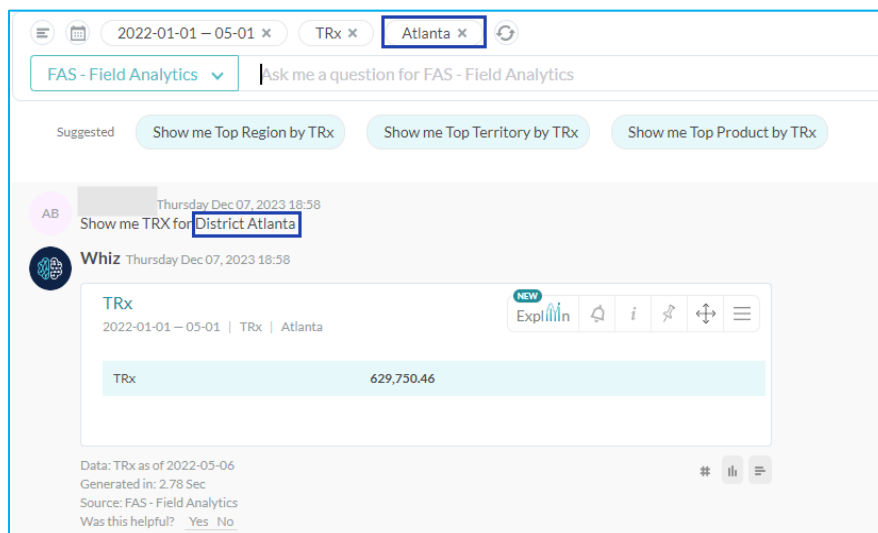
1. Go to the **Workspace > Conversation box > Search** and enter the entity name. As you start typing, the search result displays all the entities for the selected dimension.



2. Select the desired entity from the list, and the selected entity gets added to the query.



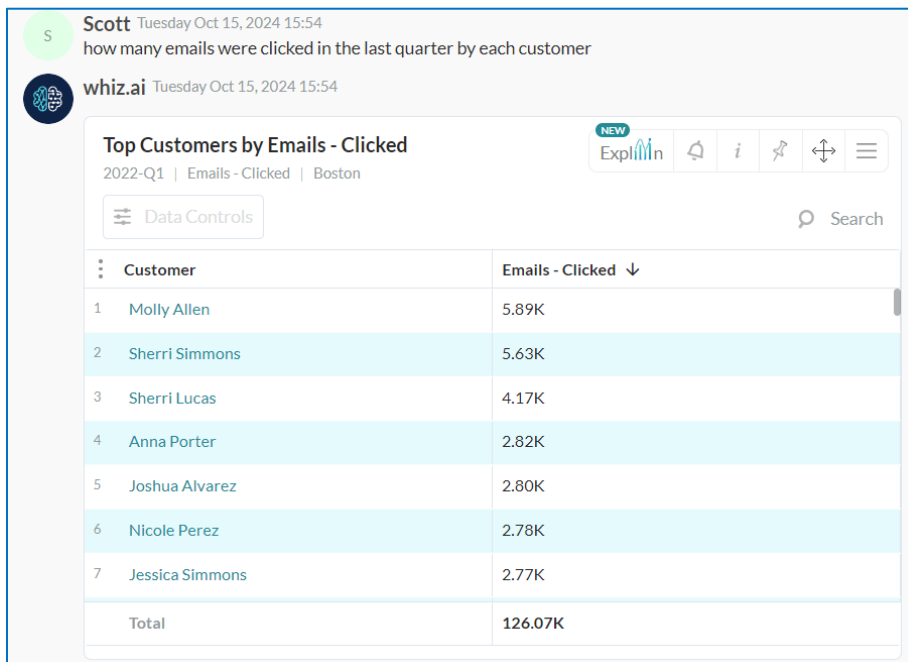
3. Click Enter; WhizAI displays the response to your query and the selected entity gets added to the context. You can continue to ask questions about this added entity.



NLQs - Enhancing natural language query capabilities

WhizAI understands and responds to a wider range of NLQs, accurately interpreting your intent no matter how you phrase your question. This upgrade highlights the NER Mapping - Metric and Metadata, which ensures that extracted entities (e.g., customers, regions, or products) are correctly linked to relevant metrics and data fields. Even if you rephrase or restructure a query, the system consistently maps the same entities to the right metadata and delivers precise and reliable results every time.

For example, if you ask how many emails were clicked in the last quarter by each customer, the system recognizes the metric in the question is Email - Clicked and gives you the right response as below:



In addition to NER mapping, WhizAI has developed a healthcare-specific pre-trained model that understands industry-specific language and provides relevant responses. For example, if you ask to provide the sales performance of all prescriptions in the west region, it will give you a sales performance of all three metrics – TRx, NRx, and NBRx.

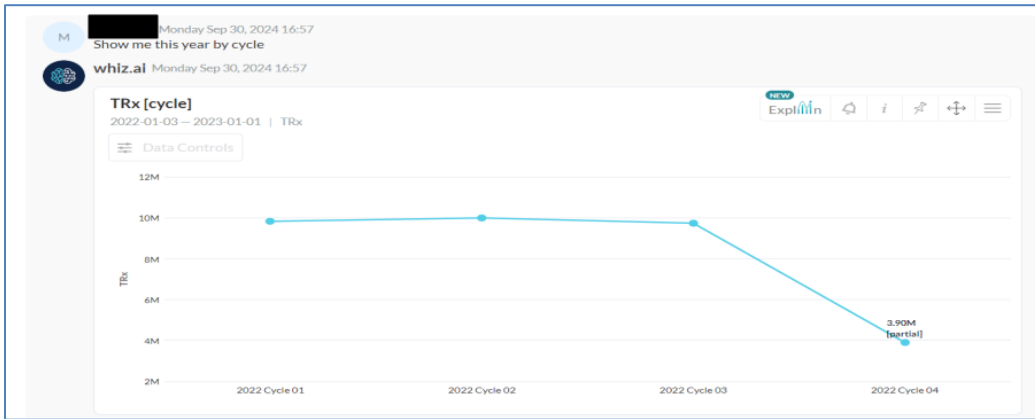
NLQs - Supporting custom period (cycle)

WhizAI now supports custom periods, cycle (similar to month, year, week) in the NLQs.

The custom time period is represented by a name and duration based on the customer's requirements. For example, one cycle can be 5 weeks in the year. This time period (cycle) can be used in NLQs as a standalone expression or can be used with other time periods as well.

Some examples are as below.

- Show me this year by cycle



- cycle1 2022 vs cycle2 2022

The screenshot shows a WhizAI interface with a table titled 'TRx [PoP]'. The table compares the TRx for 2022 Cycle 01 and 2022 Cycle 02. It also includes absolute and percentage changes.

Period	TRx
2022 Cycle 01	9,829,880.16
2022 Cycle 02	9,991,990.93
Abs Chg	-162.11K
% Chg	-1.62%

Additional information at the bottom of the table:

- Data: TRx as of 2022-05-06
- Generated in: 0.64 sec
- Source: FAS - Multical
- Was this helpful? Yes No

Some more NLQ examples are as below:

- sales for first cycle of 2024
- compare cycle 1 yoy
- Compare C1 yoy (C1 means cycle 1)
- cycle 1 vs cycle 2 by brands
- compare 2023 and 2024 by cycles
- show me sales for first cycle of each year
- show me sales for previous cycle

NLQs - Support previous YTD (PYTD) expressions

WhizAI makes trend analysis even smarter with support for Year-to-Date (YTD) comparisons for previous years! With the new Previous Year to Date feature, you can easily see how your current performance stacks up against the same period in previous years. This powerful addition brings deeper insights, helping you spot trends, patterns, and growth opportunities faster than ever. Now, analyzing year-over-year performance is not only more efficient but also more impactful for your decision-making!

For example, if you ask a query *YTD TRx across last 5 years*, the system will provide TRx for last 4 years along with the latest one.

Some examples are as below:

- YTD of current 2 years



- 2022 YTD vs 2021 YTD

The screenshot shows a WhizAI interface with a table titled '2022 YTD vs 2021 YTD'. The table compares two periods: '2022 YTD' and '2021 YTD'. The values are 35,260,480.34 and 35,290,811.20 respectively. The table also shows the absolute change (-30.33K) and the percentage change (-0.09%). The interface includes a search bar at the top, a 'whiz.ai' logo, and various interactive icons on the right.

Period	TRx
2022 YTD	35,260,480.34
2021 YTD	35,290,811.20
Abs Chg	-30.33K
% Chg	-0.09%

- Compare 2022 vs 2021 YTD

Monday Sep 30, 2024 16:51
Compare 2022 vs 2021 YTD

whiz.ai Monday Sep 30, 2024 16:51

TRx [PoP]

2022-01-01 – 12-30 / 2021-01-02 – 05-07 | TRx

2022	35,260,480.34
2021 YTD	35,290,811.20
Abs Chg	-30.33K
% Chg	-0.09%

Data: TRx as of 2022-05-06
Generated in: 6.16 sec
Source: FAS - Automation
Was this helpful? Yes No

For multi-time queries, each time dimension may return different results based on the dataset. This means the records from each dataset might not match. In these cases, pagination and sorting is controlled by the first time period, and the response is aligned accordingly. If you sort on another time period (column), you get a different result set. Refer to example below:

Example query 1: ytd, last year ytd by customers for territory boston south

With YTD sorting, you will get 19 records and with sorting on Last Year YTD, you will get 24 records.

Top Customers by TRx

Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06, 2021-01-02 – 2021-05-07 | Metric: TRx | Territory: Boston South

Data Controls

Search

Customer	YTD ↓	Last Year YTD
9 James Ward	779.32	2,403.31
10 Matthew Williams	704.80	1,184.59
11 Maine Coast Regional Health	688.71	153.79
12 Christie Bullock	581.81	1,518.01
13 Susan Spencer	473.55	199.93
14 Rebekah Gilbert	453.59	1,640.23
15 Timothy Daniels	405.35	1,383.43
16 Kenneth Perez	304.19	1,399.37
17 Cody Cox	172.35	842.44
18 Jennifer Nunez	148.61	1,226.32
19 Eric Newton	134.11	1,205.07
Total	17,047.29	30,215.99

Data Controls

Search

Customer	YTD	Last Year YTD ↓
14 Community Surgery Center East (Fka Indiana Surgery Center - East)	947.49	1,212.64
15 Eric Newton	134.11	1,205.07
16 Matthew Williams	704.80	1,184.59
17 Jocelyn Ruiz	799.18	1,046.22
18 Cody Cox	172.35	842.44
19 Sandra English	-	663.21
20 Vincent Cline	2,159.23	474.97
21 Darryl Flynn	-	471.92
22 Susan Spencer	473.55	199.93
23 William Diaz	-	154.10
24 Maine Coast Regional Health	688.71	153.79
Total	17,047.29	30,215.99

Data: TRx as of 2022-08-05
 Generated in: 1.48 sec
 Source: FAS - Automation

Table
 Stack
 Radial
 Column Group
 Radial (100%)
 Full Stack

NLQs - Support for excluding as an expression

WhizAI understands the usage of **excluding** expressions without accompanying the dimension and you will get the correct results.

For example, you can ask a query to show Trx by products excluding Arobi and you will get result accordingly.

Scott Tuesday Sep 24, 2024 16:18
 show me trx by products excluding Arobi

whiz.ai Tuesday Sep 24, 2024 16:18

Top Products except Arobi by TRx
 2022-01-01 — 05-06 | TRx

Expln

Search

Product	TRx ↓
1 Trexine	9.80M
2 Plabeniil	9.53M
3 Ofasan	2.54M
4 Emarun	2.43M
Total	24.30M

Data: TRx as of 2022-05-06
 Generated in: 2.41 sec
 Source: FAS - Automation
 Was this helpful? Yes No

#

NLQs - Support for AND operators in multi-expression queries

WhizAI supports the use of AND operators in queries that involve multiple metrics or dimensions, offering flexibility in complex data requests. This feature enables users to combine different conditions or criteria within a single query for more comprehensive insights. For further details, users can explore the provided examples to understand how to apply the AND operator effectively.

- Trend of Arobi and Trexine and Plabenil
- TRx and NRx for Trexine vs Plabenil by brands by regions

Pinboards

Pinboards are containers where you can attach/bookmark your important or favorite responses. Later, you can refer to these pinned responses or cards to view the updated details.

WhizAI provides **My Pins** as a default pinboard. You can create new pinboards, as required, and attach your responses to these boards.

WhizAI provides options to manage your boards, that is you can add a board, edit a board's name, delete a board, edit a board's layout to arrange the cards, and share the board with other users. For more information, see Board Settings.

When you try to pin a response to your board, the list of available boards appears. You can select a board to which you want to add that response. For more information, see Pinning a response message.

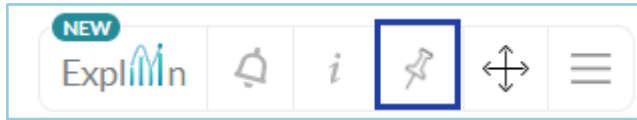


Note: The last pinned response always appears at the top of the pinboard. For more information on pinboards, refer to the section Using Pinboards & Cards.

Pinning a Response to Pinboards

After [Viewing a response](#), you can pin it to a pinboard. This topic provides the steps to pin a response message.

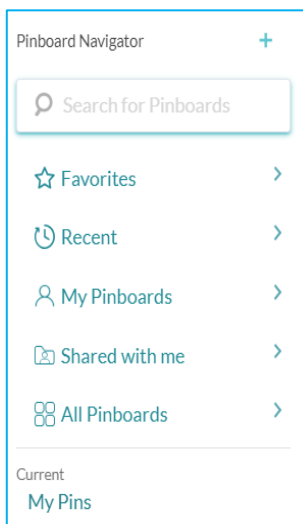
1. Enter your question in the [Conversation box](#). The [Response box](#) displays the response to your question. The response can be in the form of text, table, or chart.
2. Click the **Pin Message** option available from the response options.



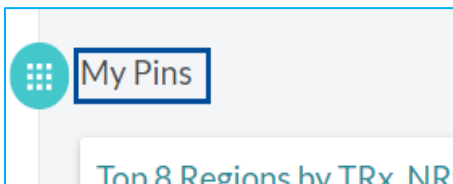
3. Select a board from the available board list. For more information, see [Creating a Pinboard](#).



Note! This drop-down list shows all the boards of which you are the "Owners" or "Editors" only.



4. The pinned message is added to the selected board.



Using WhizAI on the web

This chapter explains WhizAI functionality while accessing it from the web. Also, it explains the concepts that can be applied to understand the functionality:

- [Overview](#)
- [Using voice to ask the question](#)
- [Viewing a response](#)

- [Viewing a response in different formats](#)
- [Response Pinning](#)

Before you proceed, understand the following concepts:

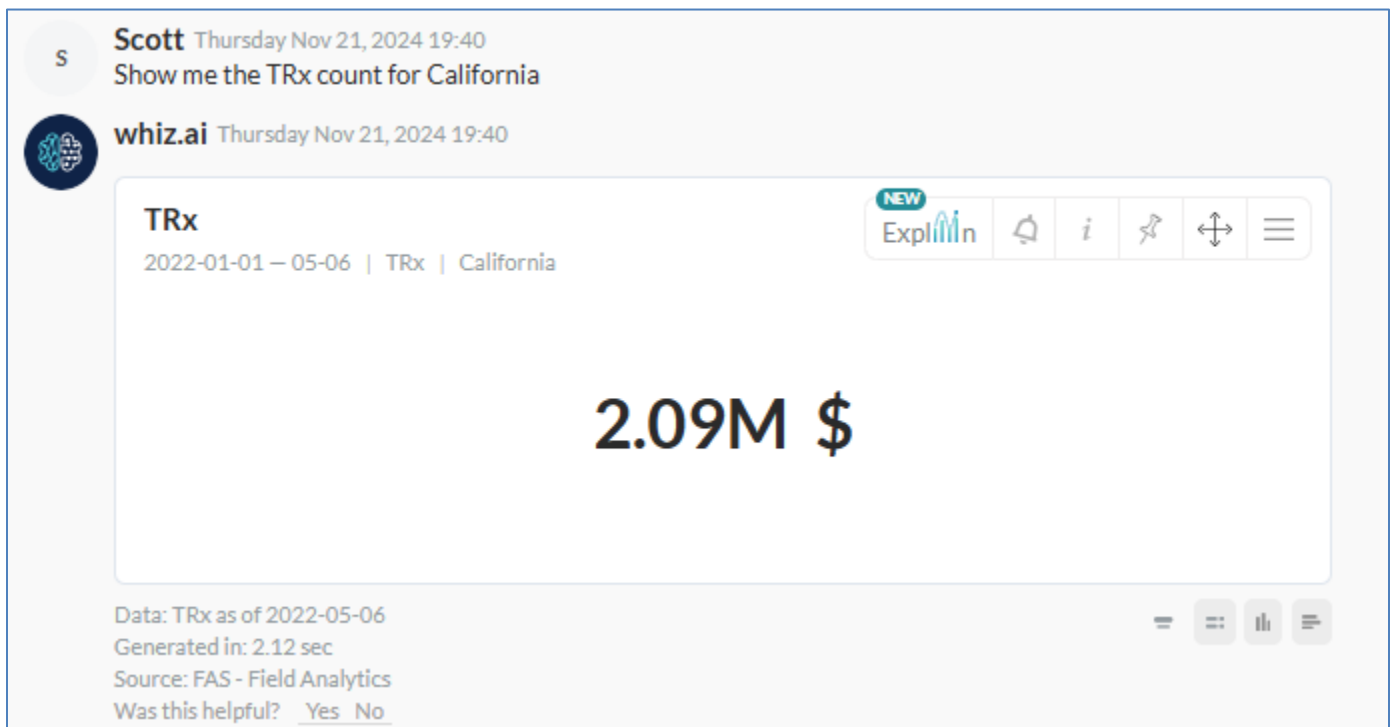
- [Context](#)
- [Follow on](#)
- [Disambiguation](#)

Context

WhizAI is enabled with context establishment. When you ask a question, WhizAI identifies the context of the conversation and remembers it so that you don't have to repeat common things such as the metrics and filters previously used in your question.

Example:

If you ask WhizAI: *Show me the TRx count for California*. WhizAI will show you the response for this, however, it will identify California as the context and remember it for your next question.



Example

Suppose you ask the question "Show me top 10 performing accounts" and get the following response:

Scott Thursday Nov 21, 2024 19:48
Top regions by TRx

whiz.ai Thursday Nov 21, 2024 19:48

NEW

Expli

n

Top Regions by TRx

2022-01-01 — 05-06 | TRx

Data Controls

Search

	Region	TRx (\$) ↓
1	Mid-Atlantic 123	5.58M
2	Mid-Central	5.50M
3	West 12345	5.00M
4	Midwest	4.96M
5	Southeast	4.73M
6	Southwest	4.33M
7	Northeast	3.93M
8	South Central	1.23M
	Total	35.26M

Data: TRx as of 2022-05-06
Generated in: 1.22 sec
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)

Follow Up

Apply to a board

Create Alert

The response is further drilled down to top 25 districts for Mid-Central as shown below:

Scott Thursday Nov 21, 2024 19:51
Top 25 Districts for Region Mid-Central

whiz.ai Thursday Nov 21, 2024 19:51

NEW

Expli

n

Top 12 Districts by TRx

2022-01-01 — 05-06 | TRx | Mid-Central

Data Controls

Search

	District	TRx (\$) ↓
1	Cleveland	746.29K
2	Grand Rapids	727.79K
3	Indianapolis	698.95K
4	Tennessee	644.17K
5	Detroit	629.67K
6	Kentucky	553.83K
7	South Ohio	470.89K
8	Eastern	238.70K
9	Cincinnati	217.76K
10	Nashville	200.18K
	Total	5.50M

Data: TRx as of 2022-05-06
Generated in: 1.79 sec
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)

whiz.ai

126 of 315

According to your input, WhizAI drills-down the on the result and shows the corresponding data details.

Disambiguation

Disambiguation is a feature by which WhizAI identifies the ambiguous terms in your questions and suggests options to clarify those terms. Ambiguous terms in a question may have multiple meanings because of which WhizAI is unable to confirm the question and give a correct response.



Note! WhizAI supports identifying multiple ambiguous terms in the same question. Also, these ambiguous terms can be a metric name or dimension name.

If you ask WhizAI a question about an entity for which you do not have authorization, the system validates if you are authorized to view the details for that particular entity and then responds with a message stating you are not authorized to view the details for that particular entity. Let us consider the following:

- If you do not have authorization to view details for 'Germany' and you ask a question regarding Germany, in this case, the system shows the message.
- If you have the authorization to view data for 'Cluster: Germany' and 'Country: Germany', and you ask a question regarding Germany, in this case, the system shows a disambiguation list asking you to choose the appropriate value.
- For entities having hierarchical relations, you shall see data for the hierarchical level lower than the authorized entity.

How WhizAI resolves ambiguity?


WhizAI, being AI-enabled, suggests options for the identified ambiguous terms. You must manually respond to those options so that WhizAI can complete the question and give a correct response.

Example


Suppose you ask a question. *"Show me sales of California"*.
In this question, WhizAI identifies ambiguity in the word "sales."

S

Scott Thursday Nov 21, 2024 19:54
Show me sales of California



whiz.ai Thursday Nov 21, 2024 19:54




We need some clarifications for the following terms: "sales".
The following response is based on your previous choices.


VIEW OPTIONS DISMISS


TRx
2022-01-01 – 05-06 | TRx | California


NEW


Expln













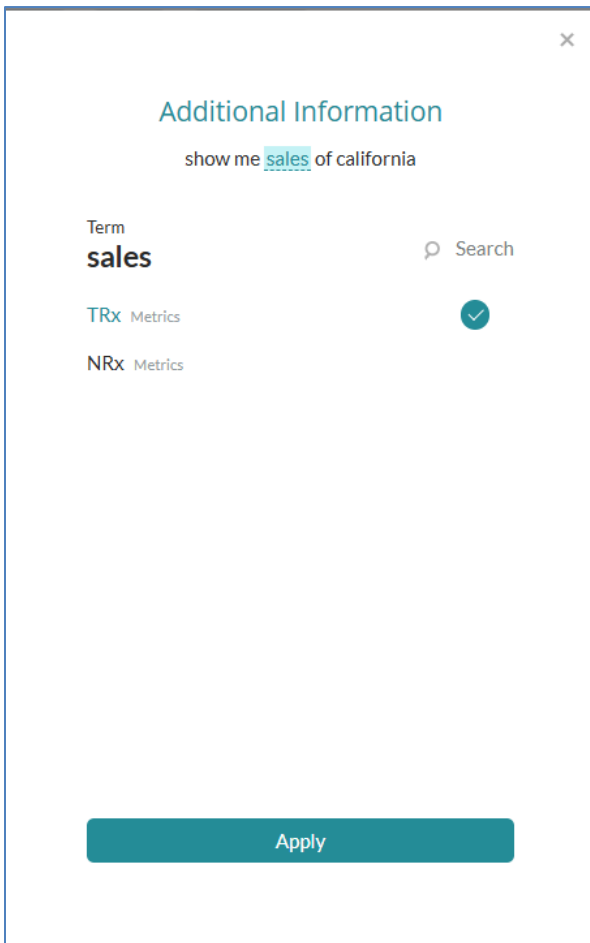


2.09M \$

Data: TRx as of 2022-05-06
Generated in: 0.97 sec
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)



To resolve this ambiguity, WhizAI respond with multiple options, as shown below:



Here, WhizAI is unable to decide if the Term 'Sales' is a TRx metric or NRx metric. You can either click any of the given options, as required, and click **Apply**.

Thus, you clear the ambiguity by specifying the meaning of the ambiguous term, as required. Next time, if the same term appears again in another question, WhizAI remembers your previous response to disambiguation and displays the response accordingly. However, it still takes care by showing appropriate warning messages along with the option to clarify the ambiguity again.

If the given response is not correct to your question in the context, you can click the **View Options** link in the message and again choose the correct option.

If the response is correct, you can click the **Dismiss** link to clear the message. In the disambiguation flow, if you prefer to see multiple options with equal preference, then in the subsequent query, you must disambiguate the terms again from the possible options.

Smarter disambiguation

WhizAI optimizes the ambiguity resolution process by leveraging the metrics dimension compatibility feature to enhance clarity and responsiveness. In NLQ, when both metrics and dimensions or entities are ambiguous, the system will first present options to resolve the metric ambiguity. Once the metric ambiguity is resolved, the system will then display a list of **compatible ambiguous dimensions and entities** for

further resolution. This streamlined approach ensures a more efficient query response, minimizing user clicks and improving overall user experience.

Refer to the below use case:

- Metric - Sales (Reach, TRx)
- Reach which is incompatible with Territory, Products.

You will get responses for the NLQs as below:

- Show me reach for Boston

In this example, Boston is a territory and a district. As Reach is compatible only with the district, the system will understand that you are asking for reach in Boston district and respond without asking you to resolve the Boston ambiguity.

The screenshot shows a chat interface with a user named Scott asking "Show me reach for Boston" on Thursday, Oct 17, 2024 at 14:57. The WhizAI assistant responds with a card titled "Reach" for the period "2022-01-01 – 05-06" in the "Reach" category for "Boston". The result is a horizontal bar chart showing "Reach" at 45.15%. The card includes a "NEW" badge, an "Expl" button, and several icons. Below the card, it states "Data: Reach as of 2022-05-06", "Generated in: 2.32 sec", and "Source: FAS - Automation". At the bottom, it asks "Was this helpful?" with "Yes" and "No" options.

- Show me sales for Houston

In this example, **sales** has ambiguity with TRx and Reach metrics. The system will first ask you to resolve the metrics ambiguity as shown below:

The screenshot shows a chat interface with a user named Scott asking "Show me sales for Houston" on Thursday, Oct 17, 2024 at 15:05. The WhizAI assistant responds with a clarification message: "We need some clarifications for the following terms: 'sales'. The following response is based on your previous choices." with a "VIEW OPTIONS" button. At the bottom, it asks "Was this helpful?" with "Yes" and "No" options.

Click VIEW OPTIONS

Additional Information

show me sales for houston

sales (Metrics / TRx) houston

Term
sales

TRx Metrics ☒

Reach Metrics ☐

Next

If you select TRx metric, you will be asked to resolve the next ambiguity Houston shown below.

Additional Information

show me sales for houston

sales (Metrics / TRx) houston

Term
houston

Houston City

Houston District

Houston Territory

Back Apply

If you select Reach metric, you will be asked to resolve the next ambiguity Houston shown below.

Additional Information

show me sales for houston

sales (Metrics / Reach) houston

Term
houston

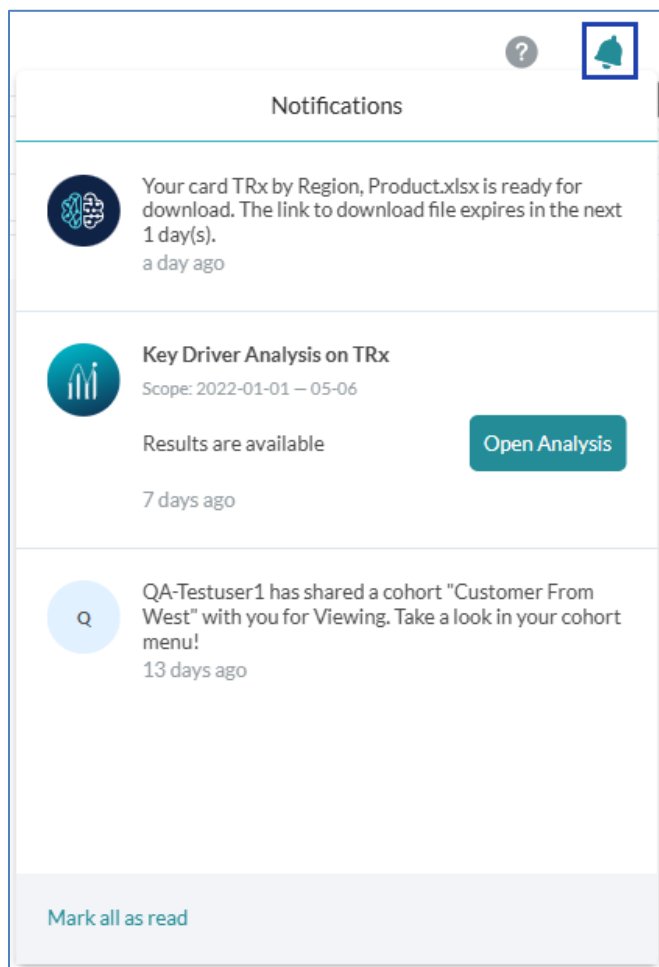
Houston City

Houston District

Houston Territory

Back Apply

Notifications



In the **Notifications** area, you can view all the notifications. The **Notifications** section displays the name of the user along with the corresponding message.

In this section, you see notifications when

- a pinboard or card is shared with you
- a response is shared from the explorer if the ownership of the board is transferred to you
- the access to a board is revoked,
- you are assigned editing rights to a board or these rights are revoked,
- the board is shared with a user group and you are a member of that group.

You can configure WhizAI so that you receive alert notifications while you are logged in on MS Teams. On receiving such an alert, you can click it to view the corresponding response.

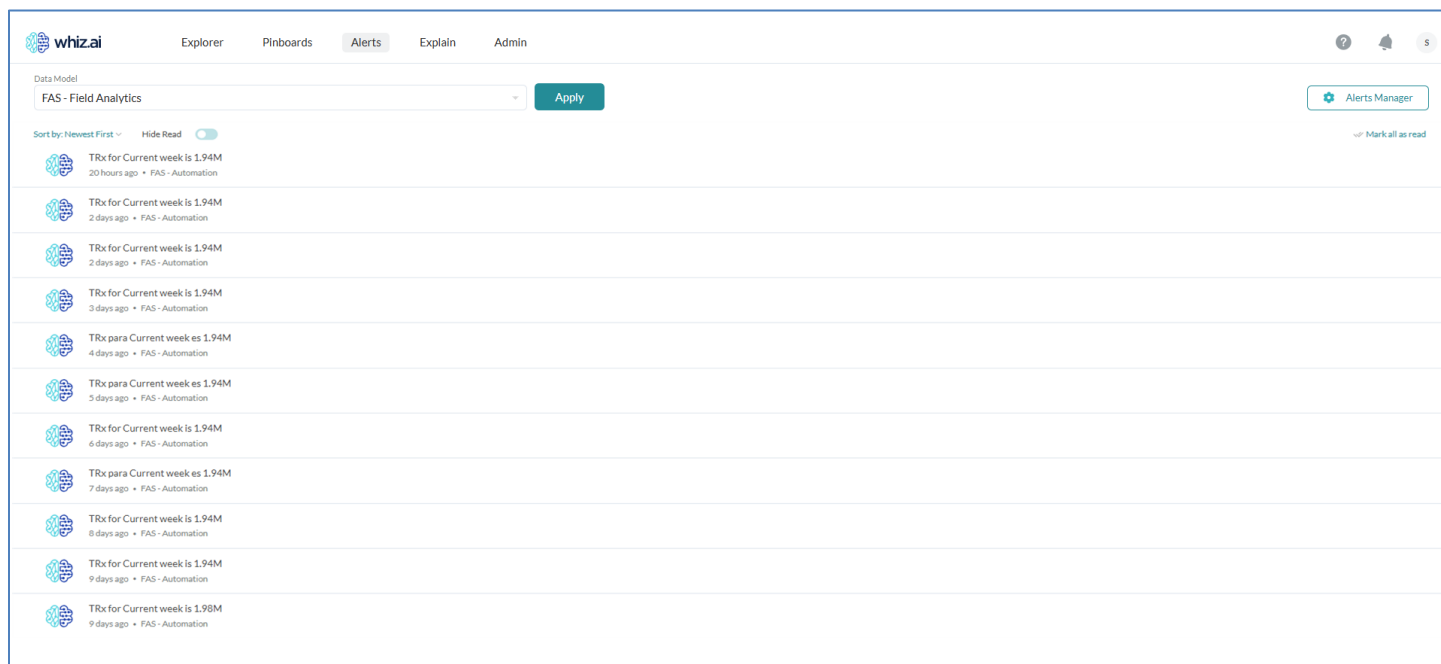


Remember! It is required that you have all the following accounts: WhizAI account, MS-Teams account, and Whiz Teams client ID.

Alerts

You can organize all your alerts under one roof with the **Alerts** menu with multiple data models in the drop-down menu.

When an alert condition is validated, all designated users will receive notifications as per their permissions, and they will have the option to view all records that meet the condition. Enhanced backend infrastructure and validation checks have been implemented to guarantee reliable notification delivery and comprehensive data access.



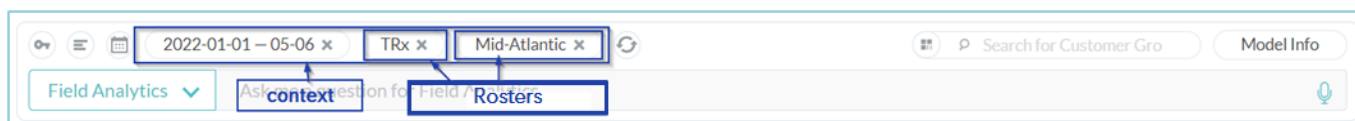
Now you can group all your alerts according to data models (for example, Field Analytics).



Note! The data model name is always displayed at the end of the alert message.



Remember! Alert notifications are closely aligned with your individual context and roster defaults (refer to the image below).



As seen in the above figure, TRx and Mid Atlantic are selected from your roster's defaults.

The alert notifications are directed to you based on a precise match between the context of the alert and your personalized roster defaults. This means that you will receive only those alerts that are directly relevant to your specific responsibilities and tasks as defined in your roster settings.

This roster alerts guarantees that your alert notifications remain targeted, enabling you to focus exclusively on the alerts that matter within your scope.

The **Alerts** section shows messages about changes such as an increase/ decrease in metrics or an alert message pertaining to your role change. On the bell icon, you can view the count of new notifications in red color. This count indicates the number of new notifications you have received. Along with this, WhizAI flashes a tip that shows the notification message. You can always click the bell icon to view the notifications.

After you log in, WhizAI asks for permission to show notifications. If you click **Yes**, then WhizAI shows you a notification when you are in a different tab, i.e. this notification is received when the browser tab in which WhizAI is open is inactive. For example, WhizAI displays a notification when another user shares a **pinboard** with you.




Note! This notification is a clickable link. You can click the link to open the shared pinboard.

Alert Manager - How It Works (For Admin Users)

The **Alert Manager** allows admin users to schedule single or multiple alerts across selected data models in addition to data load triggers.

Following are the details for the Alert Manager:

1. Accessing the Alert Manager:

- Login as an Admin user.
- Click the **Alerts** tab on the top navigation bar of the interface.
- Click **Alert Manager** to view the list of existing alerts.
- Under **Data Model** column, click  to filter the list of data models.

2. Viewing Existing Alerts:

- The alert list displays critical information such as:
 - **Alert Name:** Name of the alert.
 - **Last Triggered At:** The most recent time the alert was executed.
 - **Last Triggered Status:** Displays the outcome of the last alert execution, either "Success" or "Failed".
 - **Data Model:** The data model corresponding to the alert.
 - **Trigger on Data load:** You can disable automatic alert triggering each time data load is ingested.
 - The **Enabled** toggle allows you to trigger alerts when data load is ingested.
 - **Schedule:** Displays whether a recurrence field of the schedule set (daily, weekly, etc.), or "None" if not scheduled.
 - **Trigger:** Allows manual launching of the alert with a **Launch** button.
 - **Subscribe:** Enables users to toggle subscriptions to the alert.
 - **Enabled:** A toggle to enable or disable the alert.

3. Creating or Editing Alerts:

- To create a new alert, click on the **Scheduler** button.
- To edit an existing alert:
 - Click the **pencil icon** in the **Actions** column to modify the alert details, parameters, and conditions.
 - Update schedules, criteria, and alert triggers as needed.

4. Launching Alerts:

- Admin users can manually launch an alert at any time by clicking the **Launch** button in the **Trigger** column.
- This is helpful if an immediate execution of an alert is needed outside of its regular schedule.

5. Trigger Alerts on Data Load:

- You can disable automatic alert triggering each time data load is ingested.
- The **Enabled** toggle allows you to trigger alerts when data load is ingested.

6. Scheduling Alerts:

- You can set a specific time and frequency for alerts by configuring the schedule. Click on the **Scheduler** button to define the frequency(e.g., daily, weekly, monthly).
- Alerts without schedules will display "None" in the **Schedule** column.

7. Enable/Disable Alerts:

- The **Enabled** toggle allows you to activate or deactivate an alert.
- If an alert is not required temporarily, switch it off to prevent it from being triggered.
- Disabled alerts cannot be triggered manually, by data load, or through schedulers.

8. Subscriptions:

- Alerts can be subscribed to by other users, meaning they will receive notifications when the alert is triggered.
- Admin users can manage their subscription preferences by toggling the **Subscribe** switch.

9. Managing Actions:

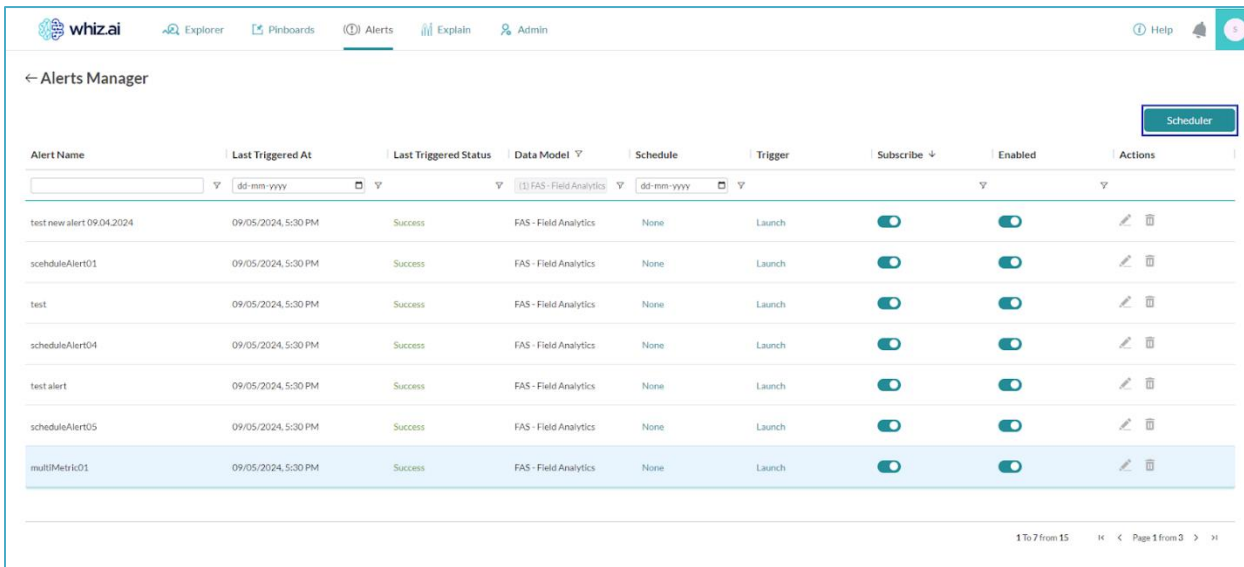
- **Edit:** Click on the **pencil icon** to update an alert's settings.
- **Delete:** Click on the **trash icon** to permanently remove an alert from the system.

10. Monitoring Alert Execution:

- The **Last Triggered At** and **Last Triggered Status** columns help monitor when the alert was last executed and whether it was successful.
- If an alert fails, the status will be "Failed," and you may need to investigate the cause by reviewing the alert settings or logs

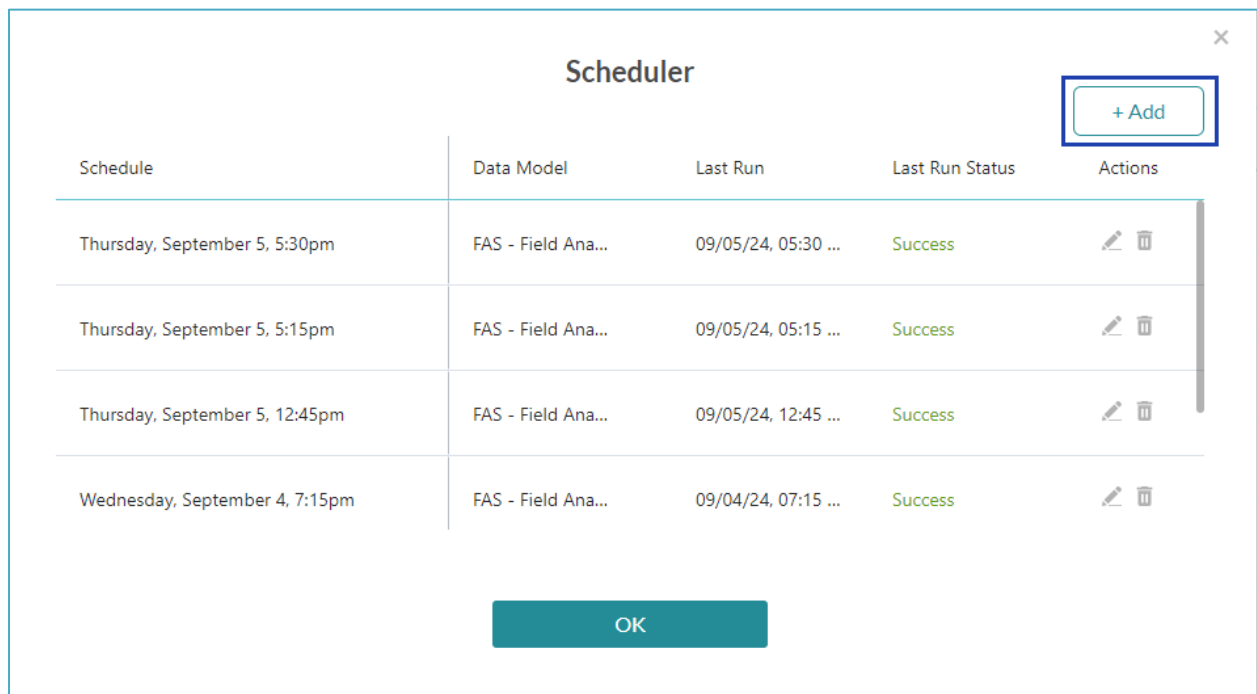
Steps to Add a Scheduler from Alerts Manager as Administrator

To add a scheduler for alerts in the Alert Manager, follow these steps:



1. Open the Scheduler:

- Click the **Alerts** tab at the top of the screen > **Alert Manager** > **Scheduler** button located at the top right corner of the Alerts Manager page to open the scheduler window.
- The scheduler window will display the current schedules and their details, including the alert name, last run time, and last run status.



2. Add a New Schedule:

- Click the **+ Add** button in the scheduler window (as shown in the image).
- This will prompt you to configure a new schedule for the selected alert.

3. Configure the Schedule:

- **Data Model:** Ensure the correct data model/s are selected for the alert.
Note! When multiple data models are selected, the enabled alerts from all those selected models are launched on the scheduled time.
- **Date & Time:** Choose the date and time when the alert should be triggered.
- **Recurrence:** Set the frequency for how often the alert should trigger (e.g., daily, weekly, monthly, do not repeat etc.)

4. Save the Schedule:

- Once you've set the desired date, time, and frequency, click **OK** to confirm and activate the schedule.

5. View or Edit Existing Schedules:

- To view or modify existing schedules, click the **pencil icon** under the Actions column to edit the schedule.
- You can delete a schedule by clicking the **trash icon**.

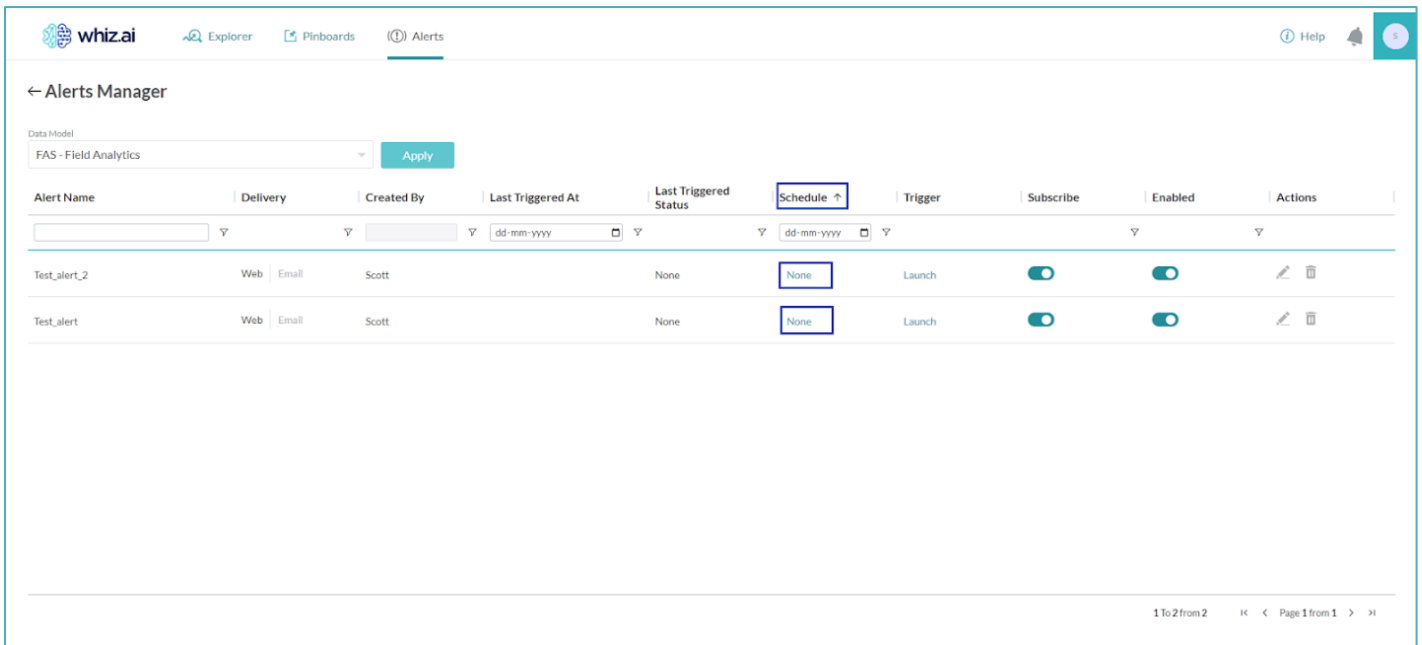
6. Complete Scheduling:

- After adding or updating schedules, click **OK** to close the scheduler window and return to the main Alerts Manager page.

Your alerts will now trigger automatically based on the configured schedule, without the need for manual activation.

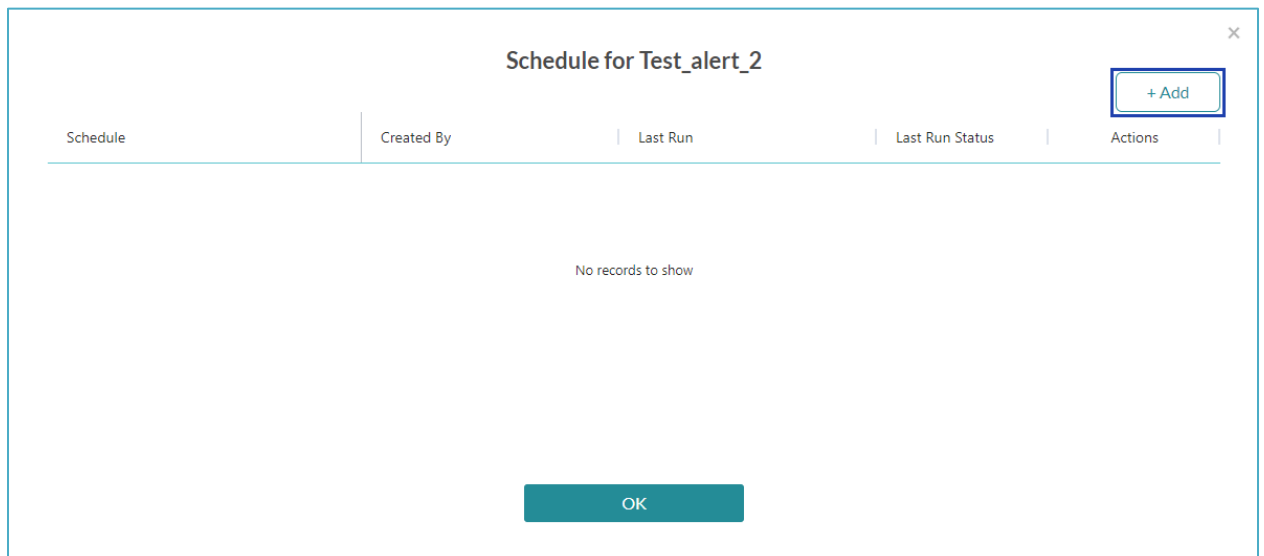
Steps to Add a Scheduler from Alerts Manager as User

To add a scheduler for alerts in the Alert Manager, follow these steps:



1. Open the Scheduler:

- Click the **Alerts** tab at the top of the screen > **Alert Manager** > click the **None** hyperlink under the Schedule column for the Alert you wish to schedule.
- The scheduler window will display the current schedules and their details, including the user who created the schedule, last run time, and last run status.



2. Add a New Schedule:

- Click the **+ Add** button in the scheduler window (as shown in the image).
- This will prompt you to configure a new schedule for the selected alert.

3. Configure the Schedule:

- **Date & Time:** Choose the date and time when the alert should be triggered.
- **Recurrence:** Set the frequency for how often the alert should trigger (e.g., daily, weekly, monthly, do not repeat etc.)



Note! For Admin User you can configure **Data Model:** Ensure the correct data model/s are selected for the alert. When multiple data models are selected, the enabled alerts from all those selected models are launched on the scheduled time.

4. Save the Schedule:

- Once you've set the desired date, time, and frequency, click **OK** to confirm and activate the schedule.

Schedule	Created By	Last Run	Last Run Status	Actions
Wednesday, September 25, 1:00pm	Scott		None	

5. View or Edit Existing Schedules:

- To view or modify existing schedules, click the **pencil icon** under the Actions column to edit the schedule.
- You can delete a schedule by clicking the **trash icon**.

6. Complete Scheduling:

- After adding or updating schedules, click **OK** to close the scheduler window and return to the main Alerts Manager page.

Your alerts will now trigger automatically based on the configured schedule, without the need for manual activation.

Creating condition-based alerts from a Response

You can configure alerts from the responses on WhizAI Explorer or from the cards on pinboards. With this functionality, you can define a condition, and if the data reflects that the configured condition is satisfied, an alert notification is triggered.

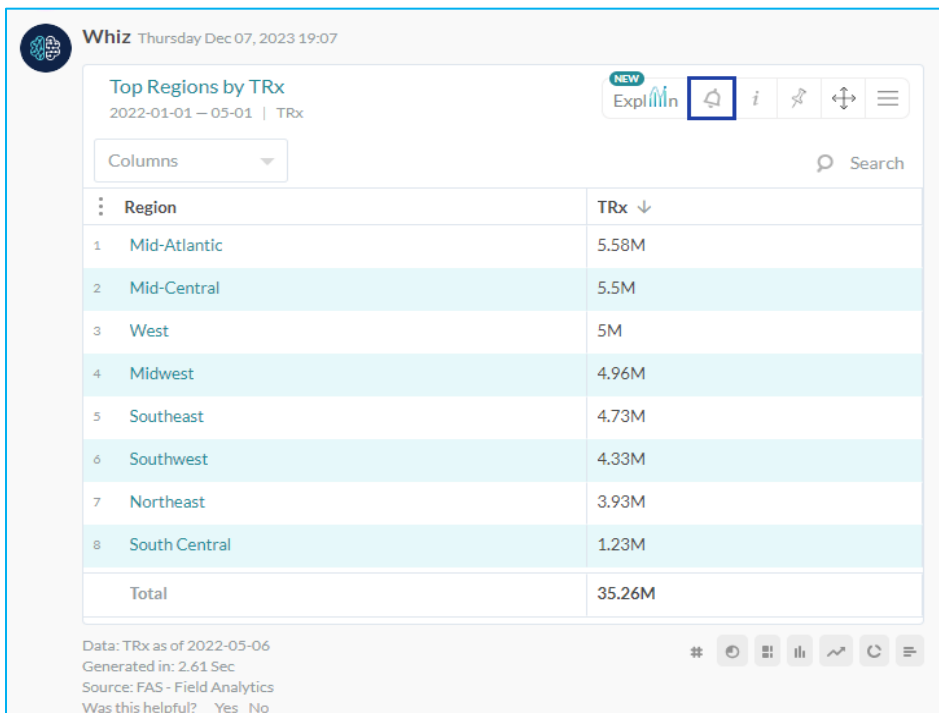
For example, you may configure an alert to be triggered when the TRx market share drops by 1%. As soon as the data suggests this drop, the recipient(s) receive an alert notification.

Alerts can be enabled for each data refresh. Also, you can subscribe or unsubscribe from alerts and choose to receive the alert notifications through the web or email, depending on your preferences.

Let's consider an example where you have asked WhizAI 'Top regions by TRx' and you want to create an alert from the generated response.

To create an alert:

- Click the **Create Alert** icon 



Whiz Thursday Dec 07, 2023 19:07


Top Regions by TRx
2022-01-01 – 05-01 | TRx

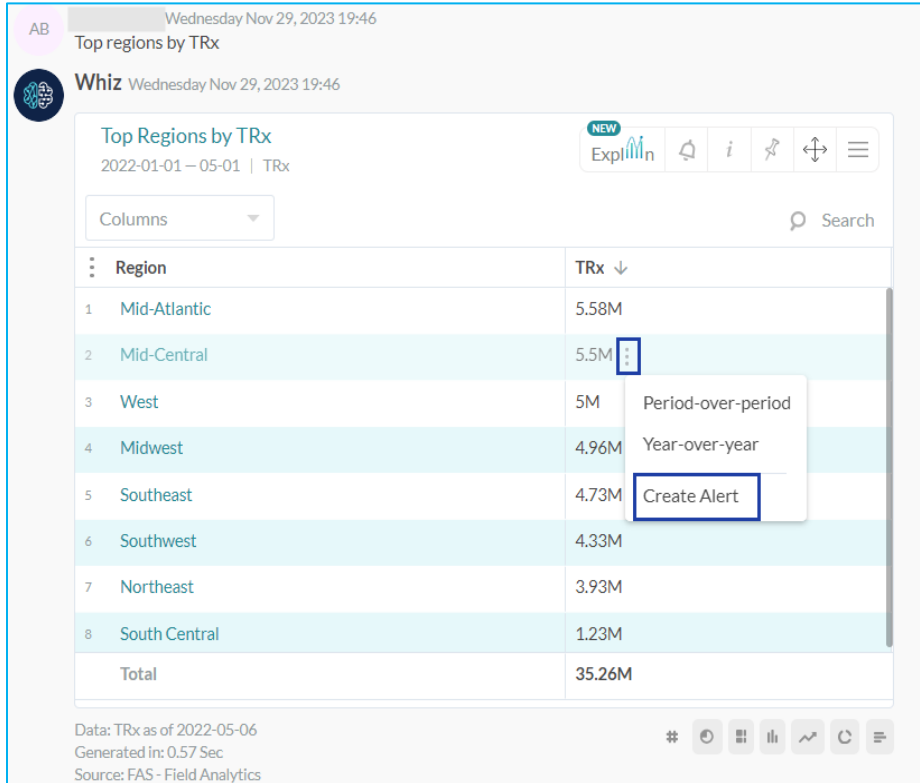
Columns Search

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

Data: TRx as of 2022-05-06
Generated in: 2.61 Sec
Source: FAS - Field Analytics
Was this helpful? Yes No

OR

Hover the cursor on the data point for which you want to create an alert, and then click the vertical ellipsis icon  > **Create Alert**. The alert configuration dialog is displayed.



Wednesday Nov 29, 2023 19:46

Top regions by TRx

Whiz Wednesday Nov 29, 2023 19:46

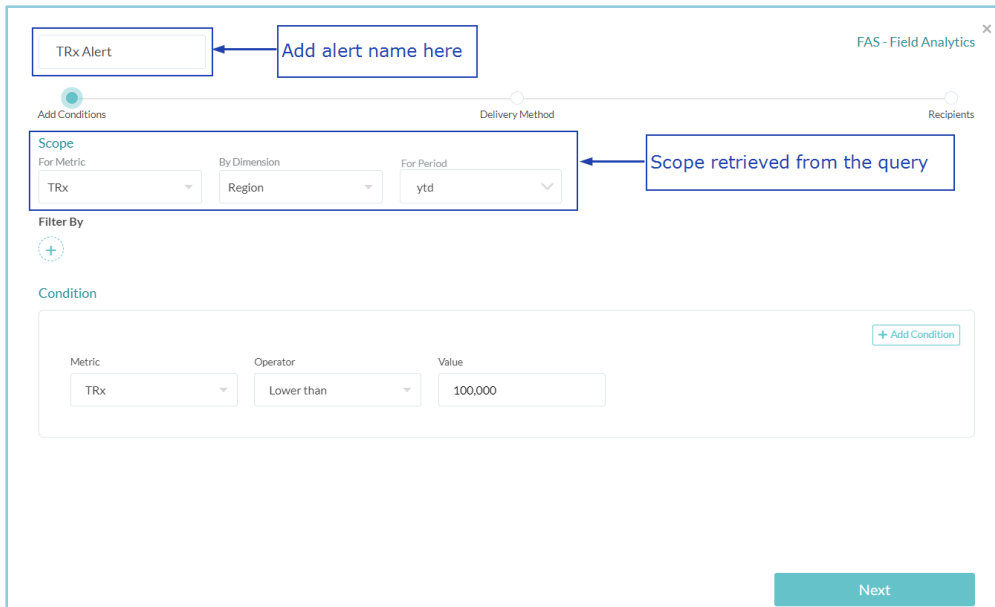
Top Regions by TRx
2022-01-01 – 05-01 | TRx

Columns Search

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

Data: TRx as of 2022-05-06
Generated in: 0.57 Sec
Source: FAS - Field Analytics

- On the alert configuration dialog, give the appropriate name for the alert.



TRx Alert

Add alert name here

FAS - Field Analytics

Add Conditions Delivery Method Recipients

Scope

For Metric: TRx By Dimension: Region For Period: ytd

Scope retrieved from the query

Filter By

Condition

Metric: TRx Operator: Lower than Value: 100,000

+ Add Condition

Next



Note! The scope for the alert is retrieved from the query. Also, the time period can be changed.



Note! You can use the Filter By option to drill down or roll up for the retrieved scope to set the condition.

- In the **Conditions** section, you must add and define a condition that shall trigger the alert.

If you have multiple metrics in your question, for example, if you ask *show me top regions by TRx, NRx*:

To define alert condition:

- Select a metric from the dropdown. You can add multiple conditions using the **AND/OR** options.

- **Note!** If the AND condition is selected, it means that all three conditions must be satisfied. If the OR operator is selected, it means either one of the conditions must be met to trigger the alert.
- b. Select the **Operator** and enter metric **Value** as required.
You can compare between two metrics, for example, 'If TRx equal to NRx', trigger an alert. This is called a **Metric** alert.
OR
Select the metric from the drop-down, select the operator, and then enter a value at which you want to trigger an alert. This is called a **Value** alert.
- 4. Click **Next**. The **Delivery Method** configuration options are displayed.
- 5. To define the alert delivery method:
 - a. Select **Alert Channel**. You can select Web or Email or both. Alerts will be delivered through the selected channel(s).
 - b. Alert **Message** is auto configured with defined condition(s)/scope. You can customize this message as required.
 - c. Select **Action** for your alert. You can select either **Explorer**, **Pinboard**, or **N/A**.
 - **Explorer:** If you select Explorer, you must add the query in the Natural Language Query field. When you open the alert notification, this query gets triggered on Explorer.
 - **Pinboard:** You have to select the pinboard from the dropdown, When you open the alert notification, this pinboard is opened.
 - **N/A:** No action taken, when you open the alert notification.

TRx Alert

FAS - Field Analytics

Add Conditions Delivery Method Recipients

Alert Channel

☒ Web

☒ Email

Message

<Metrics.code> for <Dimensions.Name Dimensions.Values> <Filter.Name Filter.Values> for <TimePeriod> is <Condition.Type Conditions.Value>

Action

Not Applicable

Not Applicable

Explorer

Pinboard

Cancel Previous Next

6. Click **Next**. Options to select recipients are displayed.



Note! To enable the recipients' section, you need to configure it. For more details refer to the topic [Configuring recipients for alerts in the WhizAI Configuration guide](#).

7. Choose the recipients with whom you want to share the alert with.



Note! You can select user groups to share the alert with users within that group.

TRx Alert

FAS - Field Analytics

Add Conditions Delivery Method Recipients

Users Groups

Search by name

Select all

NK NK

PB PB

A A

A A

A A

AP AP

AD AD

AK AK

Previous Create

8. Click **Create**. WhizAI displays the message '<Alert name> Alert successfully created'.
9. For alert management, go to **Profile > Alerts > Alerts Manager**. You can see the alert(s) created by you.

whiz.ai Explorer Pinboards Alerts Explain Admin

Help

Data Model

FAS - Field Analytics

Apply

Sort by: Newest First

Hide read

Mark all as read

Alerts Manager

There are no alerts yet

← Alerts Manager

Data Model
FAS - Field Analytics Apply

Alert Name	Delivery	Created By	Last Modified At ↓	Trigger	Subscribe	Enabled	Actions
TRx Alert	Web Email		05/31/2024, 3:59 PM	Launch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1 To 1 from 1 < > Page 1 from 1



Note! You can Subscribe or Unsubscribe from the alerts directly through the user

interface.



Note! The launch option is used when you want to send out customized message alerts for a set of users or user groups for a special update.



Note! From the **Actions** column you can edit or delete the alerts.

Below are a few more examples of Alerts:

- TRX Trend for Arobi or TRX for Arobi (Alert on a metric with filter)
- TRX by region for Plabenil (Alert on a metric affecting all regions)
- Arobi vs Plabenil (Alert on comparison between two entities)
- TRX Growth, NRX growth by region for Arobi (Alert comparing two different metrics of the same scope)
- TRX PoP for Arobi (Alert comparing metrics across different periods)

Create custom alerts using script

WhizAI now enables you to create customized alerts using existing alert creation functionality by selecting the Script as a condition. Complex conditions can now be handled using script-based alerts.

Follow the below steps to create and enable script-based alerts.

1. To create script-based alerts
2. To create the script using Editor.

Setup Script-based Alerts

- Create a new alert from Explorer or Pinboard. Click **Alerts -> Alerts Manager** and create a new alert.
- Enter **alert name**, **Scope**, and **Filter By**
- Select the **Script** radio button and select the desired script from the drop-down list.

The screenshot shows the WhizAI Alerts Manager interface. The 'Alert Test' dialog box is open, showing the 'Script' configuration. The 'Alert Test' field is at the top. Below it, there are three tabs: 'Add Conditions', 'Delivery Method', and 'Recipients'. The 'Scope' section has 'For Metric' set to 'TRx' and 'For Period' set to 'Current week'. The 'Filter By' section has 'Product' set to 'Arobi'. The 'Script' radio button is selected, and the 'Script' dropdown menu is open, showing 'ScriptForAlert'. A 'Next' button is at the bottom right. The background shows a dashboard with various charts and tables.

- Click **Next** and complete the alert setup.



Note! When defining the script, the alert message will be generated based on the toggle switch status (enabled or disabled). If the toggle switch is disabled, the default message will be displayed.

If the script is generating the message, the message box is disabled.

The screenshot shows the 'Alerts Name Here' field at the top. Below it is a progress bar with three steps: 'Add Conditions', 'Delivery Method', and 'Recipients'. The 'Add Conditions' step is currently active. Under 'Alert Channel', there are two radio buttons: 'Web' and 'Email'. The 'Message' field contains a template: '<Metrics.name> for <Dimensions.Name Dimensions.Values> <Filter.Name Filter.Values> for <TimePeriod> is <Condition.Type Conditions.Value>'. Below the message field is an 'Action' dropdown menu with 'Not Applicable' selected. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

Access control on alert notification actions

You may not have access to the Explorer or pinboard section. When an alert notification redirects you to these areas, the information is not displayed, leading to confusion about the content. To avoid such issues, below access controls measures are implemented on the Alert page.

- Changes to **Action drop-down list**
 - a. If you do not have access to Explorer, the **Action drop-down list** will show only Not Applicable and Pinboard.

This screenshot is similar to the previous one but with the 'Action' dropdown menu open. The dropdown list shows three options: 'Not Applicable', 'Not Applicable', and 'PinBoard'. The 'Web' radio button is selected under 'Alert Channel'. The message template and other fields remain the same. The 'Next' button is highlighted in teal.

- b. If you do not have access to Pinboards, the **Action drop-down list** will show only Not Applicable and Explorer.

Trxlowltrend Alert

FAS - Automation

Add Conditions Delivery Method Recipients

Alert Channel

☒ Web ☐ Email

Action

Not Applicable

Not Applicable

Explorer

<Metrics.name> for <Dimensions.Name Dimensions.Values> <Filter.Name Filter.Values> for <Cohort.Name> for <TimePeriod> is <Condition.Type Conditions.Value>

Cancel Previous Next

- c. If you do not have access to both Explorer and Pinboard, Action column is disabled.

Trxlowltrend Alert

FAS - Field Analytics

Add Conditions Delivery Method Recipients

Alert Channel

☐ Web ☒ Email

Action

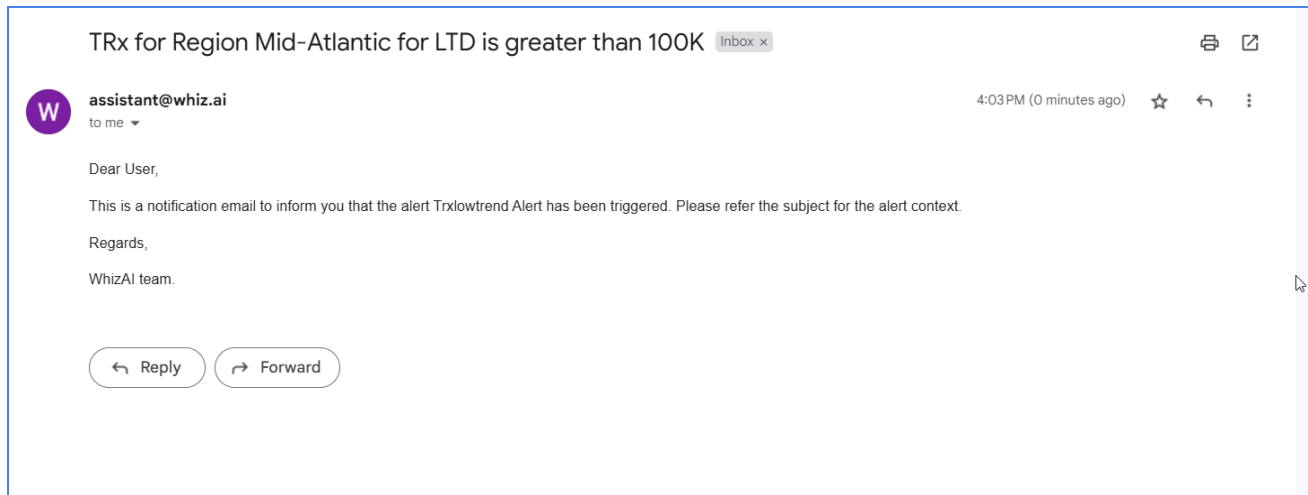
Not Applicable

Message

<Metrics.name> for <Dimensions.Name Dimensions.Values> <Filter.Name Filter.Values> for <Cohort.Name> for <TimePeriod> is <Condition.Type Conditions.Value>

Cancel Previous Next

- Changes to **alert notification**
If you do not access the action (Explorer or Pinboard) specified in the alert, the hyperlink on the individual alert message and the rows in the grouped alert popup are disabled.



Alerts audit log

Alert management and actions on alerts are tracked in the system. Below information is captured as part of the audit log.

Alert Management (Create/Edit)

- Unique Alert id
- Alert name
- Request Id
- Operation type - Create/Update/Delete
- Created by
- Last modified by
- Creation timestamp
- Last modified timestamp
- Entire new alert object - Scope, Filter, condition, message format, channel, receivers etc.

Alert Management (Delete)

- Unique Alert id
- Alert name
- Request Id
- Operation type - Delete

Actions on alert

- Enabled / Disable
 - Unique Alert id
 - Alert name
 - Request Id
 - Action - Enabled/Disable
 - Last modified by
 - Last modified timestamp
- Subscribe / Unsubscribe

- Unique Alert id
- Alert name
- Request Id
- Action - Subscribe/Unsubscribe
- Last modified by
- Last modified timestamp
- Triggering the alert (Via data load or Launch)
 - Unique Alert id
 - Alert name
 - Request Id
 - Source - Data Load / Launch
 - User Id
 - Timestamp
 - Success/Failure
 - List of users notified
 - Web Channel - Success/Failure/NA
 - Email Channel - Success/Failure/NA

You can view the audit log from the Admin module

The screenshot displays the WhizAI Admin module's Audit Logs page. The interface includes a top navigation bar with links to Explorer, Pinboards, Alerts, Explain, and Admin (highlighted). A left sidebar contains a menu with options like Performance Monitor, Dashboard, User Logs, Audit Logs (highlighted), User & Security, Data Modeler, Content Manager, and NLP Workbench. The main content area shows the Audit Logs table with filters for date range (2024-05-21 to 2024-06-19) and users. The table has columns for USERNAME, TIMESTAMP, MODULE, ACTIONS, REQUEST ID, LANGUAGE, and METADATA. A dropdown menu is open for the ACTIONS column, listing various actions such as 'Select all', 'Axis Un-Merge', 'Clicked', 'Create', 'DataLoad Trigger', 'Delete', 'Delete Model Schedule', 'Disable', 'Download CSV', and 'Download PNG'. The table contains several rows of data, including usernames, timestamps, and actions like 'Create'.

Audit log for Visualization actions

WhizAI logs all the user actions on the **Admin** module. The audit log will have key components such as **event logging, username, and timestamping details**. The audit log will help analyze the user actions and provide insights on important actions on Explorer & Pinboard module. The visualization logs is listed under the Explorer and Pinboard modules in the Audit Log.

Below visualization activities will be logged in the audit log:


Workspace Module	Info icon
	Info icon - Copy query
	Column reorder
	Column wrap
	Model-info View
	Model-info : Switch business category
	Model-info : Sample query click
	Smart search
	Smart search- Select dimension
	Card expand
	Card Image export
	Product help
	What's new content
	Profile settings
	About us
	Notification
Pinboard Module	Pinboard filters hide
	Section filter addition
	Section filter lock
	Card filter lock
	Board Navigation : Favourites
	Pinboard Navigation : Recent
	Pinboard Navigation : My Pinboards
	Pinboard Navigation : Shared with Me
	Pinboard Navigation : All Pinboards
	Pinboard Navigation : Labels

	Pinboard Navigation : Select Label
	Pinboard Navigation : Pinboard Manager
	Pinboard Info
	Section Expand
	Section Collapse
	Card default view
	Card scroll view
	Summarize this Board -> Refresh the Pinboard Summary
	Summarize this Board -> Expand
	Design Mode
	Pinboard narratives
	Add filter
	View Narratives


Slot Filling for incomplete queries

In case you enter incomplete information in your query, to complete the query, WhizAI intelligently displays a prompt containing probable data values. You can choose from these data values and fill in the incomplete details in your query so that a correct data response can be rendered.


For example, if you ask a question, *Show me TRx market share*. (Without adding information of the brand for which this data is required.) In this case, WhizAI prompts you to complete the query by adding the information of the brands for which TRx market share should be displayed, as shown in the following figure:



Scott Friday Feb 09, 2024 16:03
TRx marketshare

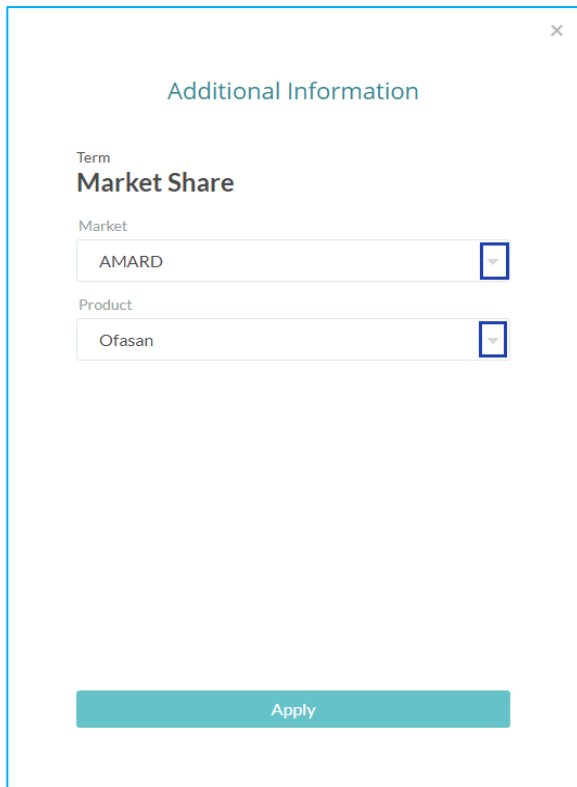


Whiz Friday Feb 09, 2024 16:03



Your query looks incomplete. We need more inputs to resolve your question.
[VIEW OPTIONS](#)

Was this helpful? [Yes](#) [No](#)



Additional Information

Term
Market Share

Market
AMARD

Product
Ofasan

Apply

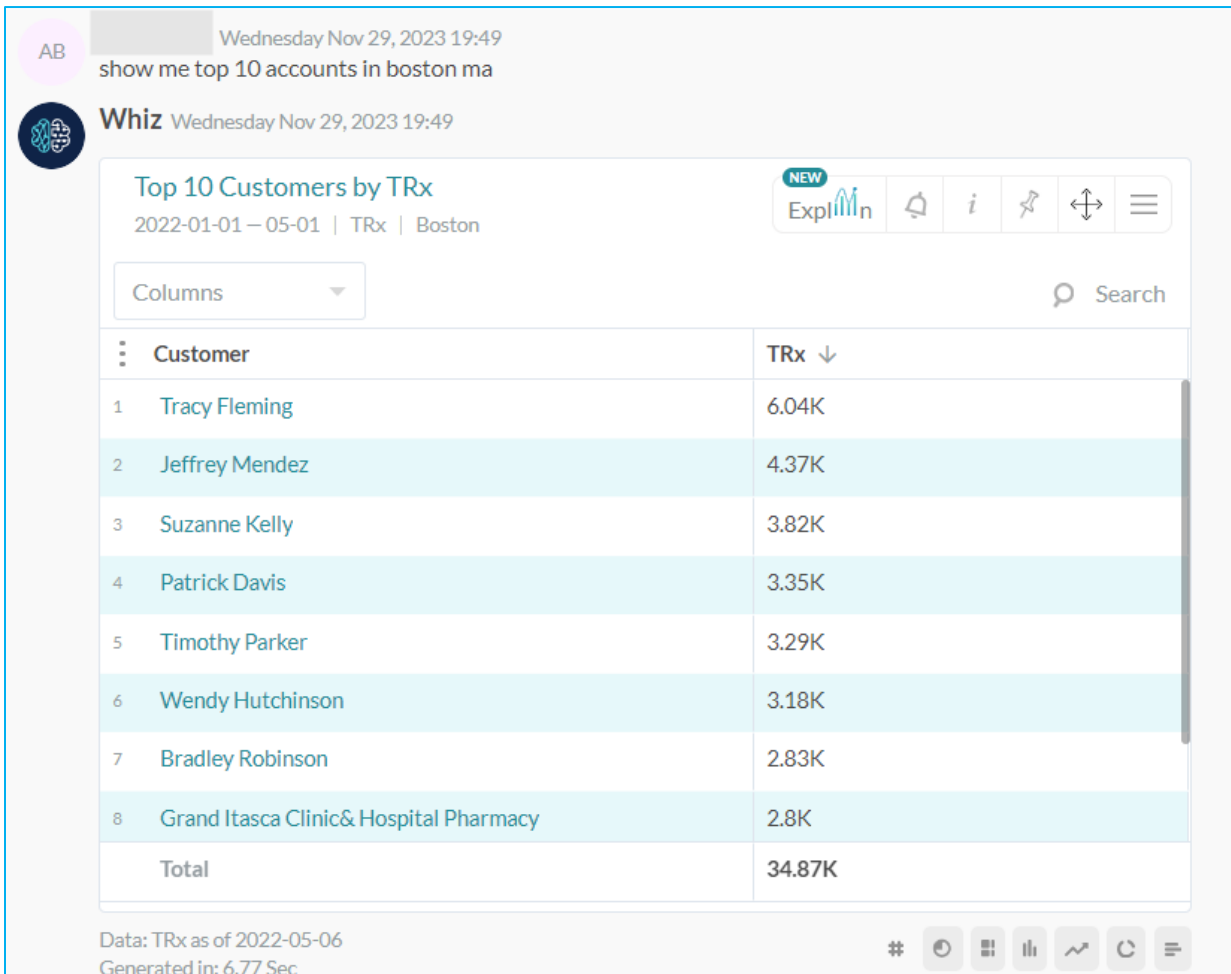
Channel Portability

You can access WhizAI from multiple channels. In all the channels WhizAI offers similar experiences, based on the framework supported by the corresponding channel. With the support of multiple channels, it is possible that you begin conversation with WhizAI in one channel but shift to another channel in between and continue the work from that new channel. Considering this scenario WhizAI is designed and developed as a platform that retains the last interactions and responses so that you can refer to these interactions on any new channel and work without losing the context of the interaction with WhizAI.

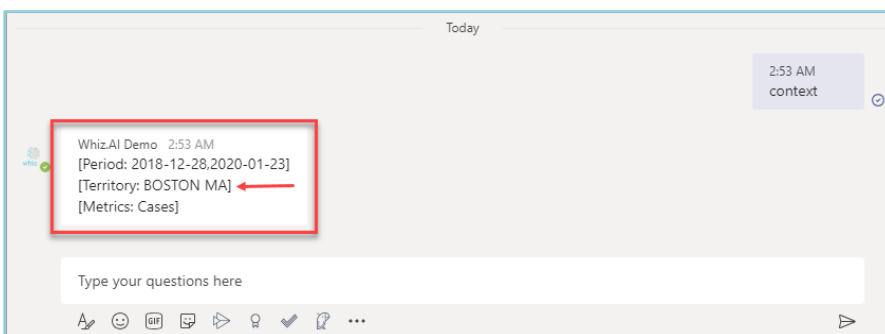
Using WhizAI with Microsoft Teams

On the web interface, ask WhizAI the following question:

"Show me top 10 accounts in Boston ma". Based on the data, you may get the following response:



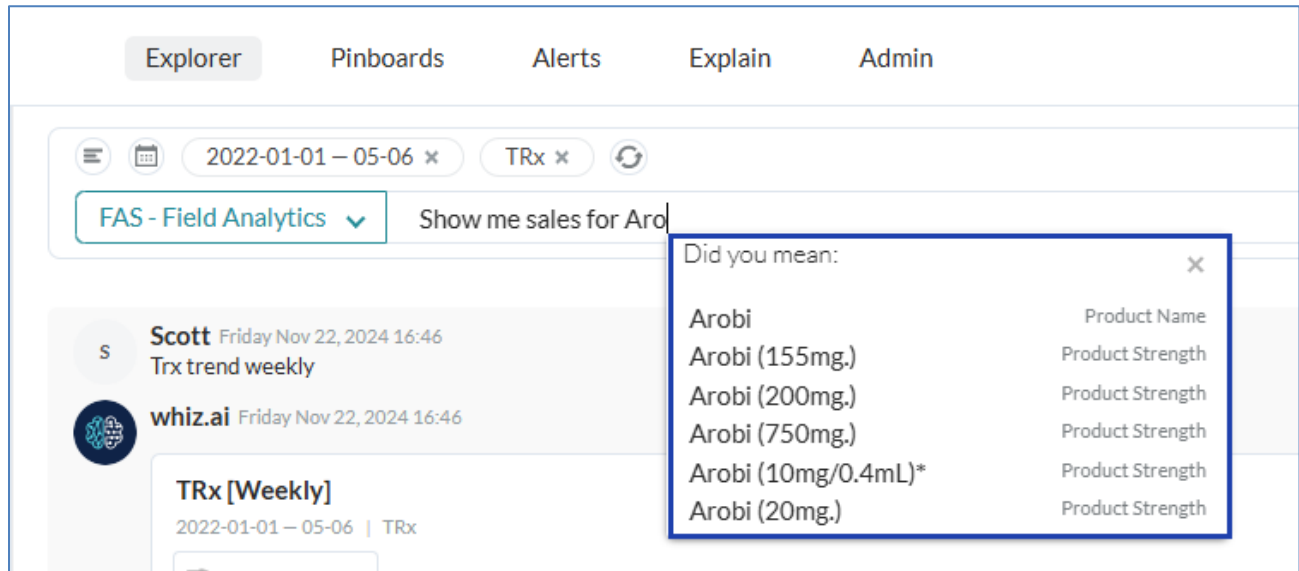
Now, you shift to another interface, like Microsoft Teams, and enter the command **context**. In Microsoft Teams, you can see that *Boston MA* is present in the context.



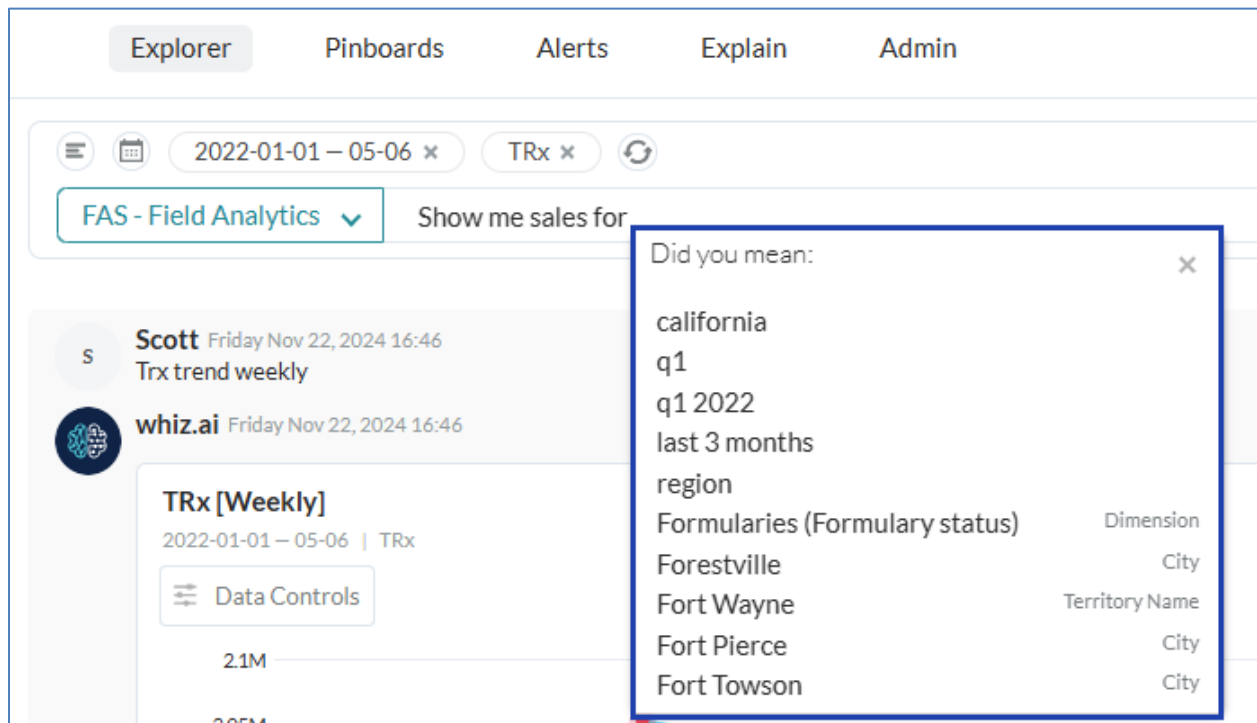
Asking a question

- Enter your question in the [Conversation box](#). For example: *Show me the top 10 accounts by cases*.
- (Optional) Use the Voice option to specify the question. For more information, see [Using voice to ask the question](#).
- After specifying your question, press **Enter** on your keyboard. WhizAI displays the response in either text, table, or chart format.

- As you enter your questions in the Conversation box, WhizAI provides real-time assistance in the following ways:
- Entity suggestions** to help you build your query. When typing your questions, when you enter a few letters of any entity name, WhizAI suggests the matching entities. You can click on these suggestions, as required, to add them to your query. These suggestions include dimensions, metrics, and computations available in the selected data model.

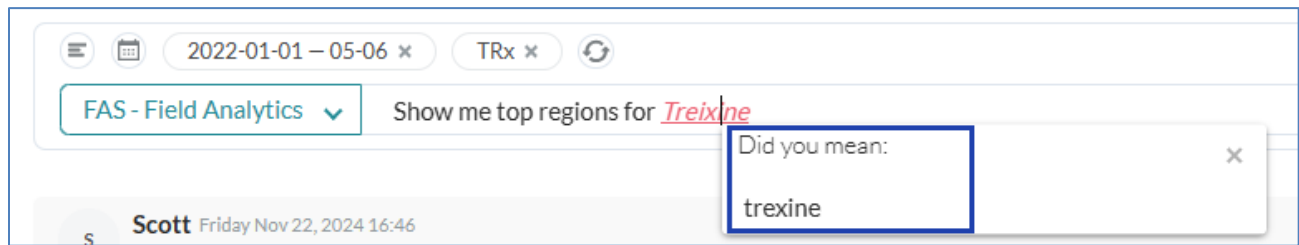


- Predictive suggestions** for the next word: When typing your questions, when you add a 'space' after a word, WhizAI suggests words that you can use to complete the question.



- **Spell checks:**

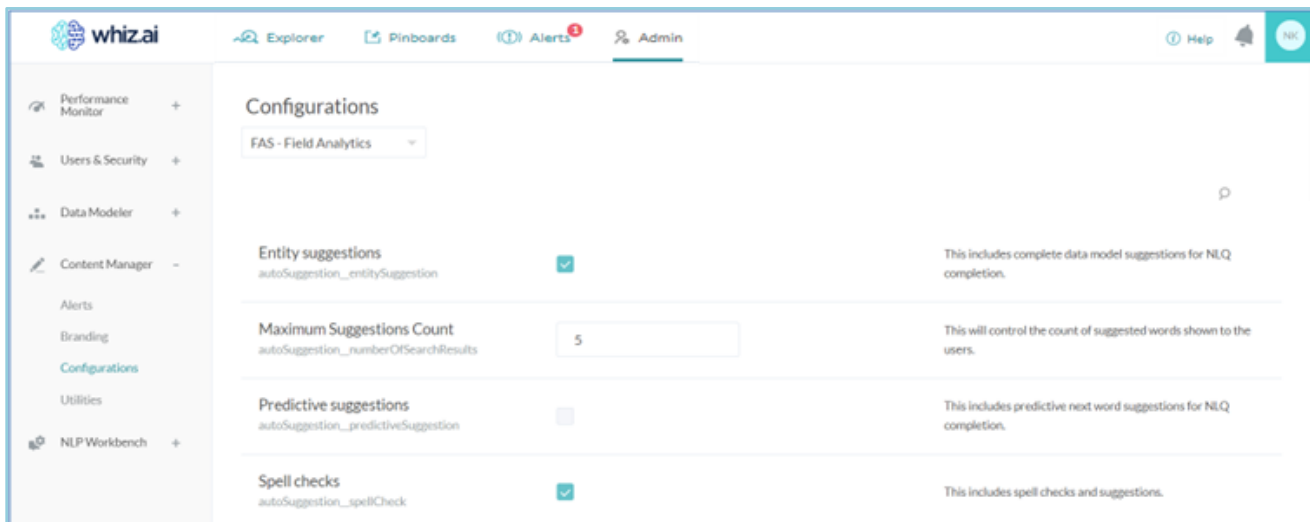
When typing your question, if you mistype or misspell a word, the NLP engine identifies such words and then marks and underlines it with a red line.



You can click the word to get a list of suggested correct spellings.

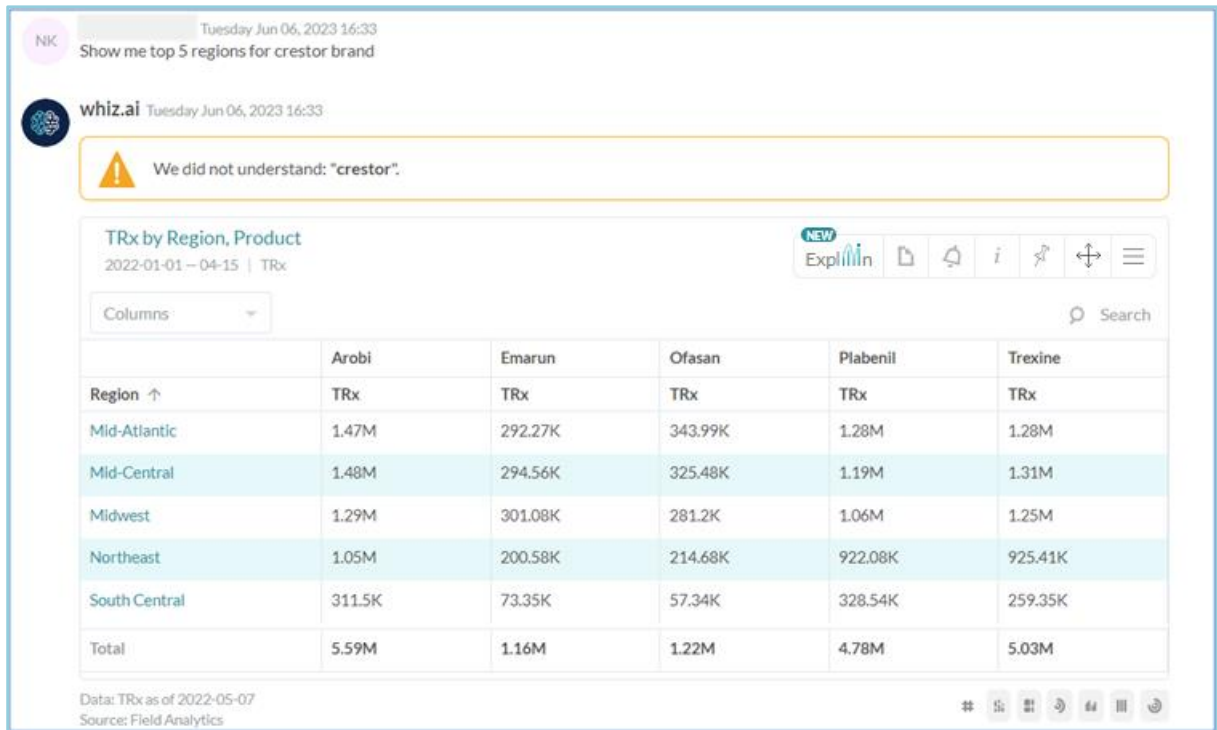
All these suggestions help you in the process of typing a query by offering relevant suggestions as you type. This reduces the time and effort required to enter the complete query, especially for longer or complex queries. Thus, these suggestions help you to frame your queries more precisely. These suggestions can also be helpful for users who are less familiar with or have limited experience with entities from the data model.

You can manage (enable/disable) these features from **Admin console > Content Manager > Configurations**.



Also, when you submit your query with a misspelled word, entity name, or with an entity name that is not part of the data model or with incomplete details, in this case, WhizAI assists you in the following ways:

- If you submit a query with a misspelled word or with a misspelled entity name; in this case, WhizAI displays a message "**We did not understand: <misspelled word or entity name>**". Along with this message, WhizAI provides a response considering the other entities, metrics from the query. See below example:

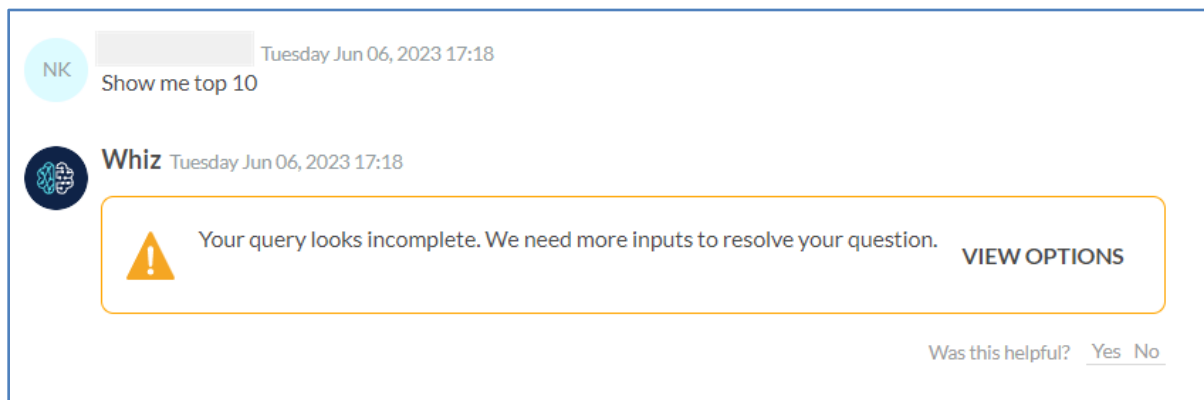


In the above example, top regions by brands are displayed.



Note! If there are no entities/metrics in the query, WhizAI considers the entities/metrics from the context and delivers the response.

- If you submit a query with incomplete details, in this case, WhizAI displays a message **"Your query looks incomplete. We need more inputs to resolve your question"**. Along with this message, WhizAI provides a few options. You can select from these options and complete the question.



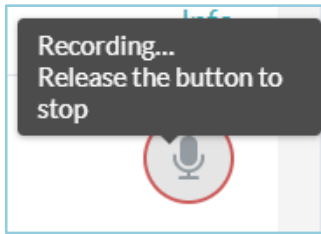
Using voice to ask a question

WhizAI provides a voice input option to enter your question by speaking in the English language.



Note: Ensure that you have configured your microphone in the browser in which you are accessing WhizAI.

1. From the [Conversation box](#), click and hold the **Voice Input** icon . The icon changes to red color  and WhizAI shows a message as shown in the following figure:

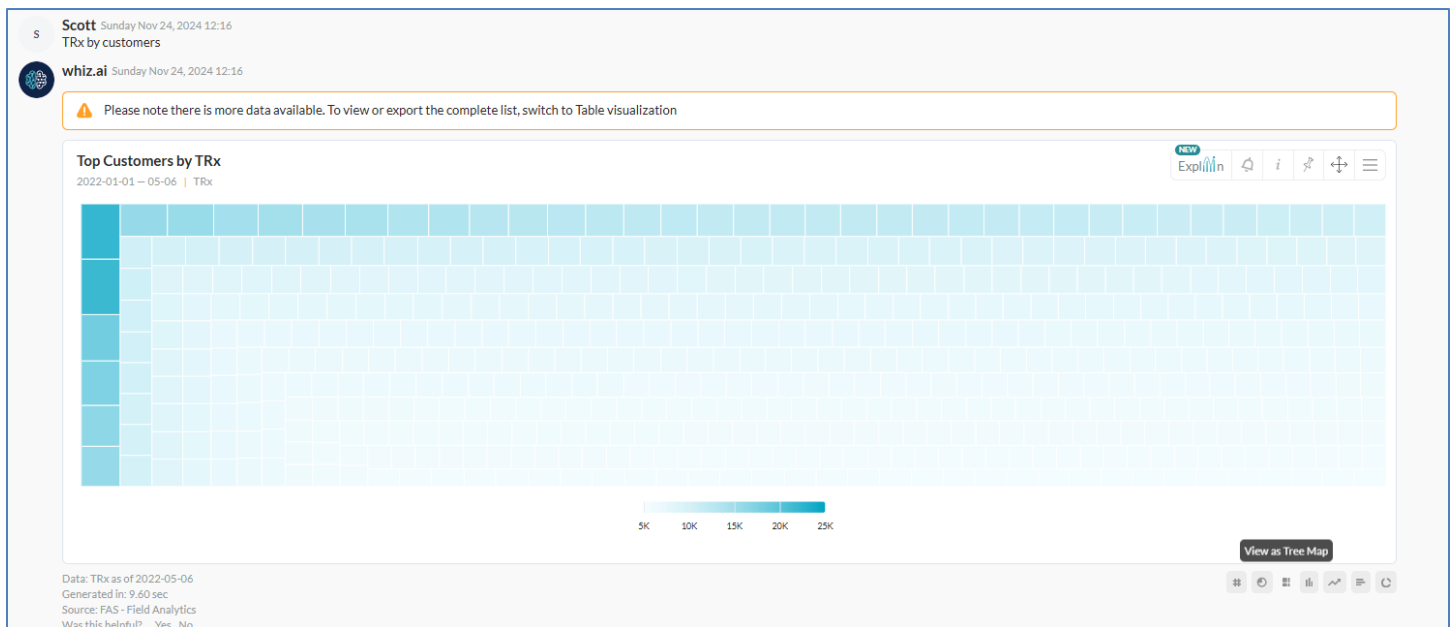


Note! You must hold the click till you finish speaking your question.

2. Ask your question. The words you speak are reflected in the Question area.

Viewing the response

1. In the [Conversation box](#), enter a question for which you want to see the response and press **Enter**.
The [Response box](#) displays a response to your question. For each response, you can view different information ([Viewing response in different formats](#)) and perform different tasks ([Response Pinning](#)) on the response.



In a comparison response, the percentage (%) increase or decrease in values are indicated by arrows and colored numbers as shown in the following figure:

- Green color indicates a rise in percentage change or absolute change compared to previous values.
- Red color indicates a fall in percentage change or absolute change compared to previous values.

Whiz Thursday Sep 28, 2023 23:32

Top 8 Regions by TRx, NRx
2022-01-01 — 05-06 / 2021-01-02 — 05-07 | TRx, NRx

Columns Search

		TRx				NRx			
		YTD vs Prior YTD				YTD vs Prior YTD			
Region		Curr	Prev	Abs Chg ↓	% Chg [%]	Curr	Prev	Abs Chg	% Chg [%]
1 Mid-Atlantic		5.58M	5.43M	147.69K	+2.72%	5.47M	5.26M	210.06K	+3.99%
2 West		5M	4.91M	93.01K	+1.90%	4.92M	4.83M	87.57K	+1.81%
3 Southwest		4.33M	4.33M	5.82K	+0.13%	4.25M	4.29M	-44.49K	-1.04%
4 Mid-Central		5.5M	5.5M	5.07K	+0.09%	5.41M	5.34M	79.06K	+1.48%
5 Midwest		4.96M	5.01M	-46.24K	-0.92%	4.88M	4.83M	55.46K	+1.15%
6 Southeast		4.73M	4.78M	-50.95K	-1.07%	4.66M	4.64M	19.01K	+0.41%
7 South Central		1.23M	1.29M	-57.37K	-4.45%	1.21M	1.27M	-57.77K	-4.54%
8 Northeast		3.93M	4.05M	-127.35K	-3.14%	3.9M	4M	-103.55K	-2.59%
Total		35.26M	35.29M	-30.33K	-0.09%	34.72M	34.47M	245.34K	+0.71%

Data: TRx, NRx as of 2022-05-06
Generated in: 2.54 Sec
Source: FAS - Field Analytics
Was this helpful? Yes No

Also, in a comparison response, WhizAI shows the percentage value instead of only numbers. Also, large numbers are shortened with abbreviations, for example, 1,163,310 is displayed as 1.1 M or 447,334--> 447K.

Whiz Thursday Sep 28, 2023 23:32

Top 8 Regions by TRx, NRx
2022-01-01 — 05-06 / 2021-01-02 — 05-07 | TRx, NRx

Columns Search

		TRx				NRx			
		YTD vs Prior YTD				YTD vs Prior YTD			
Region		Curr	Prev	Abs Chg ↓	% Chg [%]	Curr	Prev	Abs Chg	% Chg [%]
1 Mid-Atlantic		5.58M	5.43M	147.69K	+2.72%	5.47M	5.26M	210.06K	+3.99%
2 West		5M	4.91M	93.01K	+1.90%	4.92M	4.83M	87.57K	+1.81%
3 Southwest		4.33M	4.33M	5.82K	+0.13%	4.25M	4.29M	-44.49K	-1.04%
4 Mid-Central		5.5M	5.5M	5.07K	+0.09%	5.41M	5.34M	79.06K	+1.48%
5 Midwest		4.96M	5.01M	-46.24K	-0.92%	4.88M	4.83M	55.46K	+1.15%
6 Southeast		4.73M	4.78M	-50.95K	-1.07%	4.66M	4.64M	19.01K	+0.41%
7 South Central		1.23M	1.29M	-57.37K	-4.45%	1.21M	1.27M	-57.77K	-4.54%
8 Northeast		3.93M	4.05M	-127.35K	-3.14%	3.9M	4M	-103.55K	-2.59%
Total		35.26M	35.29M	-30.33K	-0.09%	34.72M	34.47M	245.34K	+0.71%

Data: TRx, NRx as of 2022-05-06
Generated in: 2.54 Sec
Source: FAS - Field Analytics
Was this helpful? Yes No

Switching between multi-calendars

You can configure and switch between different calendar types to tailor responses based on specific requirements.

To configure the default calendar:

1. Navigate to **Content Manager > Configurations > Data Model > Data Modelling (Default Calendar)**.

2. Choose the calendar type suited to your needs.

Available calendar options include:

- **Gregorian:** The standard calendar format.
- **Custom:** A configurable format where the week runs from Saturday to Friday.
- **Cycle:** A format where five weeks form a single cycle.

This flexibility ensures responses align with your organization's preferred calendar system.

Viewing response in different formats

WhizAI has options to change the format in which you can view a response. Below the response, WhizAI lists the different visualization formats available for a particular response. Broadly, you can change the format from table to chart and vice versa. The highlighted display format ('**Table**' in the following image) is the format in which the platform has responded. You can select a different option, as required, to view more display formats.



For example:



In chart format, WhizAI supports various chart types, like, bar chart, treemap, column chart, pie chart, Pareto chart, donut chart, bubble chart, stack chart, full-stack chart, map chart, variwide chart, radial chart, and so on. The chart options are shown for the response fully depends on the nature of the query and the prediction from the visualization AI model about its suitability score.

Exporting a Response to MS-Excel or XLS format

You can export to MS- Excel the following:

- Tabular responses from WhizAI Explorer
- Cards having tabular data from pinboards

The exported Excel file contains all the data exactly as seen on WhizAI UI, i.e. as seen in the response or the card in the pinboard. Post the export, you can perform all operations supported in MS Excel.



Note! You can export responses with single dimensions to XLS. For example, if you ask WhizAI the question: *Show me top regions for TRx*. In this case, the response contains a single dimension and WhizAI allows you to export this response to XLS.

Comparing data in a Response

If you have more than two entities in a response within Explorer or in a card within a pinboard, you can select one of these entities as a base metric to compare with the other two for absolute and percentage change. You can compare the hierarchical as well as non-hierarchical entities. For example: if you ask WhizAI:

- Compare Boston MA vs Chicago IL vs Philadelphia by months
- Compare Boston MA, Chicago IL, Philadelphia by months
- Boston MA, Chicago IL, Philadelphia comparison by months

Viewing List of Suggested Queries on Explorer

After you ask a query to WhizAI, you can see a list of suggested queries on Explorer.

Currently, this list of suggestions is drawn from the query history of a particular user. These are queries that might guide or be helpful for you. You can click any of these queries to generate the corresponding response.


Viewing Narratives along with a Response

Now, when you ask a query, along with the response, WhizAI also provides text narratives from your data. These narratives prove to help derive meaningful insights from the data shown in the response. They guide you in making informed decisions.

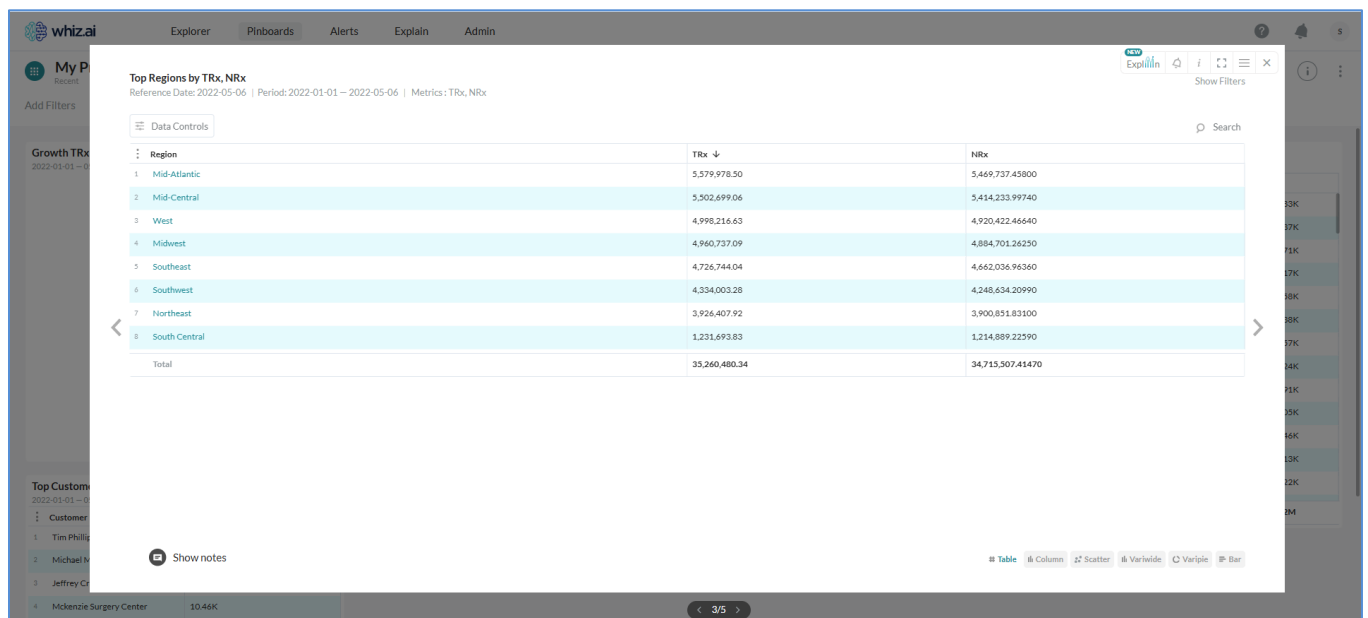
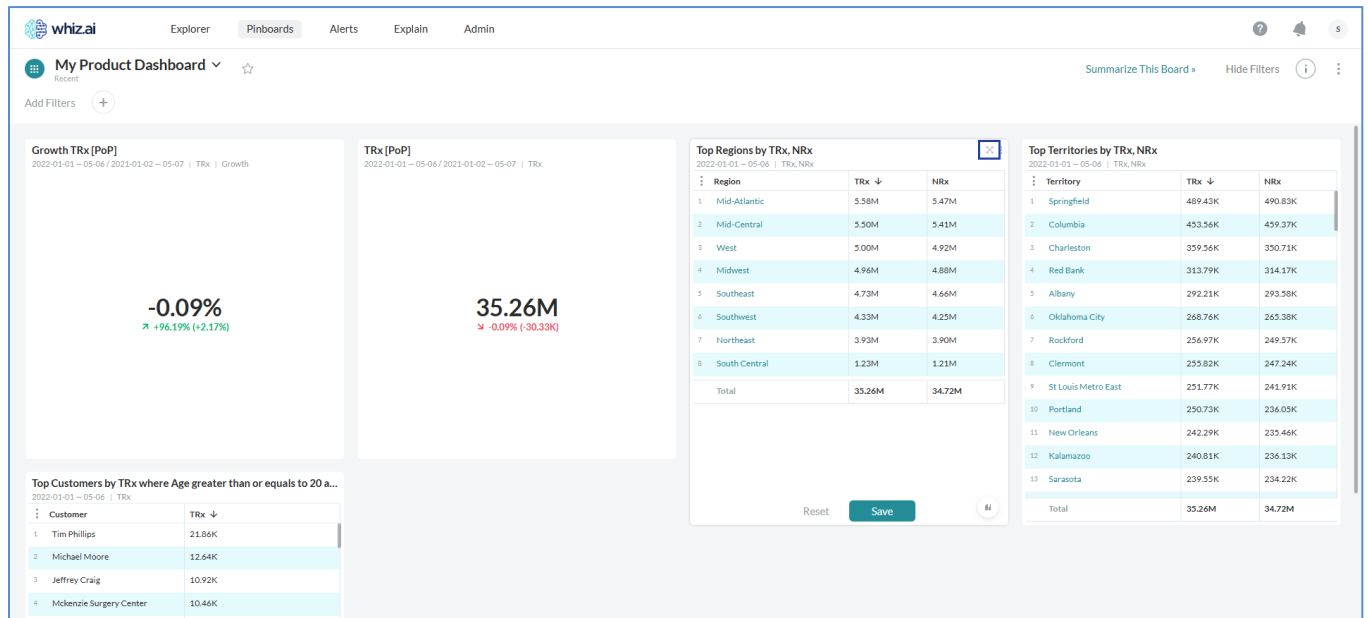
Narratives - Viewing card level narratives on pinboards

You can view card-level narratives on pinboards.

To view the narratives:

1. Click the  Expand icon from the top-right corner on the card. The card is displayed in fullscreen.

Understanding WhizAI User Interface



- Click the **Explain** > enable the **'Narratives'** toggle as shown in the following figure. The Narratives are displayed under the Narratives panel on the right.

Top Regions by TRx, NRx
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metrics: TRx, NRx

Data Controls

Region	TRx ↓	NRx
1 Mid-Atlantic	5,579,978.50	5,469,737.45800
2 Mid-Central	5,502,699.06	5,414,233.99740
3 West	4,998,216.63	4,920,422.46640
4 Midwest	4,960,737.09	4,884,701.26250
5 Southeast	4,726,744.04	4,662,036.96360
6 Southwest	4,334,003.28	4,248,634.20990
7 Northeast	3,926,407.92	3,900,851.83100
8 South Central	1,231,693.83	1,214,889.22590
Total	35,260,480.34	34,715,507.41470

Show notes

Table Column Scatter Varwide Variple Bar

Top Regions by TRx, NRx
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metrics: TRx, NRx

Data Controls

Region	TRx ↓	NRx
1 Mid-Atlantic	5,579,978.50	5,469,737.45800
2 Mid-Central	5,502,699.06	5,414,233.99740
3 West	4,998,216.63	4,920,422.46640
4 Midwest	4,960,737.09	4,884,701.26250
5 Southeast	4,726,744.04	4,662,036.96360
6 Southwest	4,334,003.28	4,248,634.20990
7 Northeast	3,926,407.92	3,900,851.83100
8 South Central	1,231,693.83	1,214,889.22590
Total	35,260,480.34	34,715,507.41470

Show notes

Table Column Scatter Varwide Variple Bar

Reset Save

Narratives
Powered by GPT

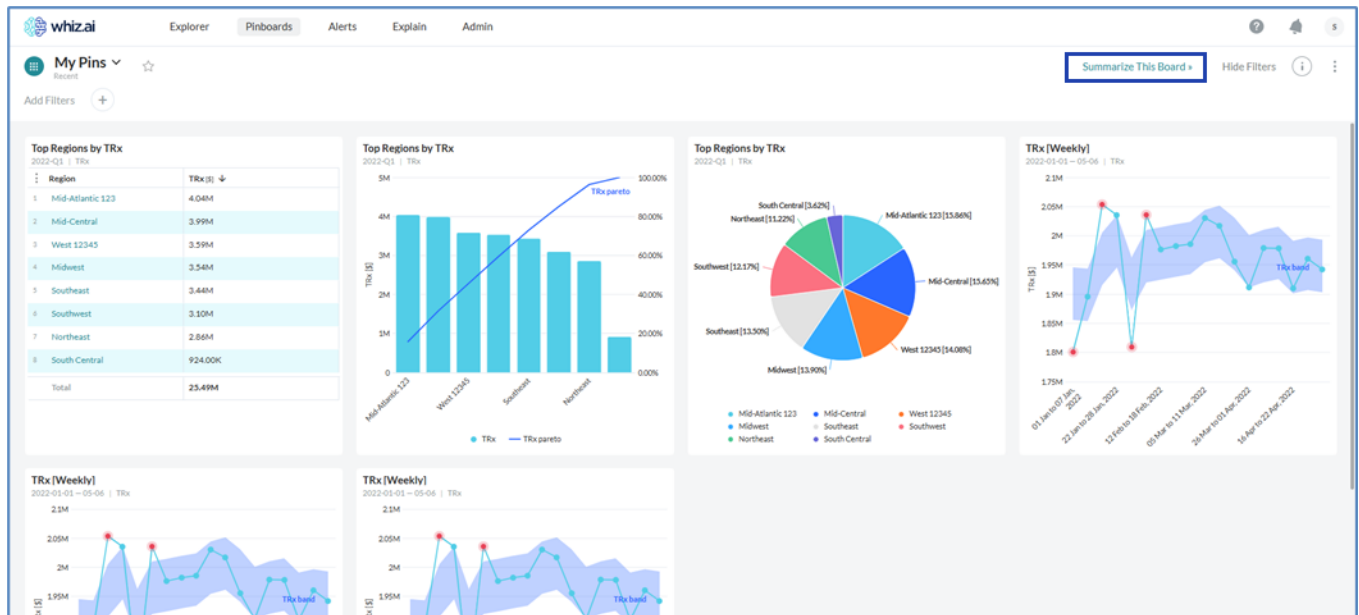
1. The Mid-Atlantic region recorded the highest values in both TRx and NRx metrics with 5.58M and 5.47M respectively, indicating a strong performance in prescription volume in this area.
2. In contrast, the South Central region showed the lowest performance, with the minimum values for TRx and NRx at 1.23M and 1.21M respectively, suggesting challenges or lower demand in this region.
3. The total TRx across all regions summed up to 35.26M, while the total NRx was slightly lower at 34.72M, indicating a slight discrepancy between total prescriptions written and those that are new.
4. The average TRx across regions was calculated at 4.41M, whereas the average NRx was slightly less at 4.34M. This suggests a consistent pattern across regions with new prescriptions trailing total prescriptions.

Summarize Board Narratives

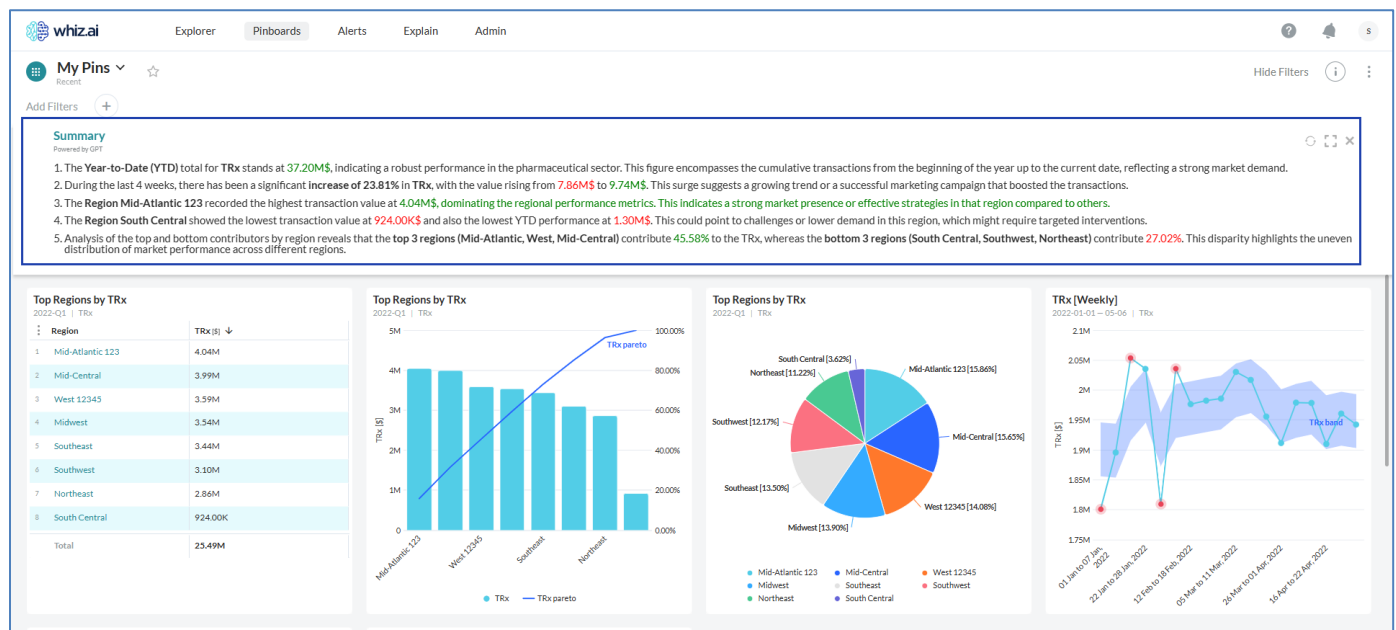
Summarize Board Narratives displays a comprehensive summary of Pinboard narratives. This allows you to instantly summarize complex pinboards on-demand and extract key insights from dense datasets effortlessly, saving time and effort in data analysis.

To Summarize Board Narratives:

1. Click **Summarize This Board** link on the top-right corner of the Pinboards page.



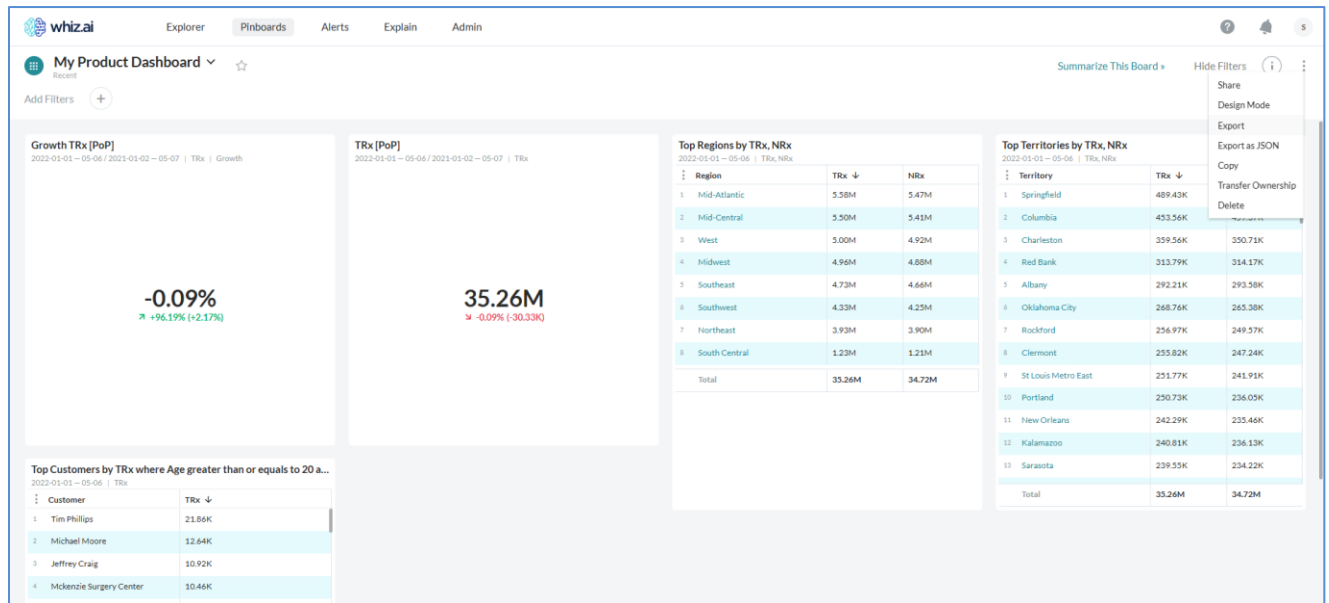
2. The narratives summary is generated as below:



Narratives - Exporting narratives as a part of card

When you export a pinboard to PDF or PPT format, you can export the narratives too along with the cards on the board. To export the narratives:

- Open the pinboard and click  icon, then click **Export**.



- Select the **Narratives** checkbox as shown in the following figure and then click **Export**.

The export dialog for 'My Product Dashboard' (5 pages) shows the following options:

- Select all**: ☒
- Orientation**: Portrait (selected), Landscape
- Destination**: Save as a PDF (selected)
- Narratives**: ☒ (highlighted with a red box)


Buttons: Cancel, Export



Note! You can export the Narratives along with the cards in Save as a PDF or Save as a PPT format.


Introducing Business Data Descriptions

Business Data Descriptions are brief descriptions of dimensions and metrics. These descriptions provide basic and important information about the dimensions and metrics in the configured data model. Refer to the following table for examples of Business Data Descriptions.

Dimension / Metric	Description
Product	Any medicine intended for human use, presented in its finished dosage form is subject to control by pharmaceutical legislation (registered).
NRx	A new prescription, defined as dispensed prescriptions given a new number by the pharmacy, is not necessarily new therapy for the patient.
TRx	 Abbreviation of total prescriptions. $TRx = NRx + Refills$. After the first time a prescription is filled, when it is refilled, the pharmacy refers to the previous drug ID number and notes this as a refill.
NBRx	New brand prescriptions.



Note: Business Data Descriptions are specific to the data model that is selected.

Business Data Descriptions are displayed on the user interface when you hover the cursor on a dimension/metric on the Info page or when you click on the Info option  on the response. For more information on how to access data descriptions, refer to the following sections.

Accessing Business Data Descriptions on the Info page

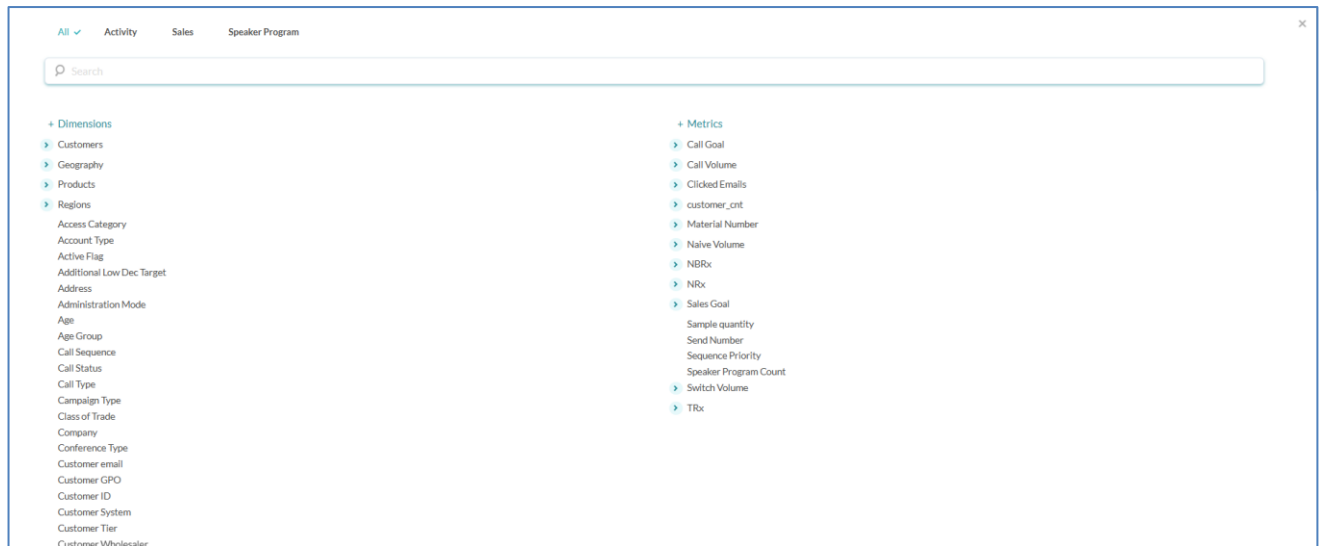
The **Info** page displays a list of all the dimensions and metrics configured for the selected data model. You can access descriptions for these dimensions and metrics.

To access Business Data Descriptions:

1. On the conversation box on WhizAI explorer, click **Info**.



The following data model information page appears.



2. Hover the cursor over any dimension or metric, and the Data Description is displayed as a tooltip.

Restricted access to dimensions based on authorization

WhizAI Administrators can set authorization for users so that they cannot view specific dimensions in the entire product. Such users can view the details for the rest of the dimensions, except these 'hidden' dimensions. In case you are not authorized to view certain (hidden) dimensions, then, you get a corresponding message on WhizAI Explorer and on the cards on the pinboard.



Note! For more information on how to restrict the dimension access, please refer to the Users and Security article, Authorization section.

Viewing Example Queries for each business category on the Model Info page

Example Queries on the **Info** page is categorized according to the business categories on the **Info** page. For more information, refer to the following figures.

Example Queries for **All** business categories:

FAS - Field Analytics data model information

Example Queries

- Show me my weekly trend by product
- Show me count of customers and total calls by engage willingness
- Which territories have highest calls in Northeast?
- Show me the prescribing pattern for Aaron King
- Show me TRx by product for Dr. Michelle Johnson
- Show switch volume for Pamela Miller
- What is the overall sales goal for Willie Martinez?
- What are the top plans for Dr. Pamela Miller?
- Show me account by West
- How is my geography performing PoP
- Show me sales of Trexine for last 26 weeks
- What are the 2020 TRx for regions?
- Show me TRx for Alabama versus Alaska
- Show me count of customers by decile group

All Activity Sales Speaker Program

Search

+ Dimensions

- Lot
- Customers
- Departments
- Geography
- Products
- Regions
- Access Category
- Account Type
- Active Flag
- Additional Low Dec Target
- Address
- Administration Mode
- Age
- Age Group
- Approver
- Assignee
- Availability JNJ Flag
- BubbleChart_Address

+ Metrics

- Call Goal
- Call Volume
- customer_cnt
- Emails - Clicked
- HCP_Count
- invoice_flow
- Naive Volume
- NameCount
- NBRx_NAME
- NRx
- Sales Goal
- Sample quantity
- Speaker Program Count
- Status
- Status_hidden
- Switch Volume
- TRx

Reports

- Additional Resource Links Dashboard
- Customer Report

Example Queries for the business category **Activity**:

FAS - Field Analytics data model information

Example Queries

- What are my total calls by region?
- Show me the distribution of sales of specialty group across the regions
- What is frequency for Angel Olsen
- Show me YTD NBRx by product

All **Activity** Sales Speaker Program

Search

Dimensions

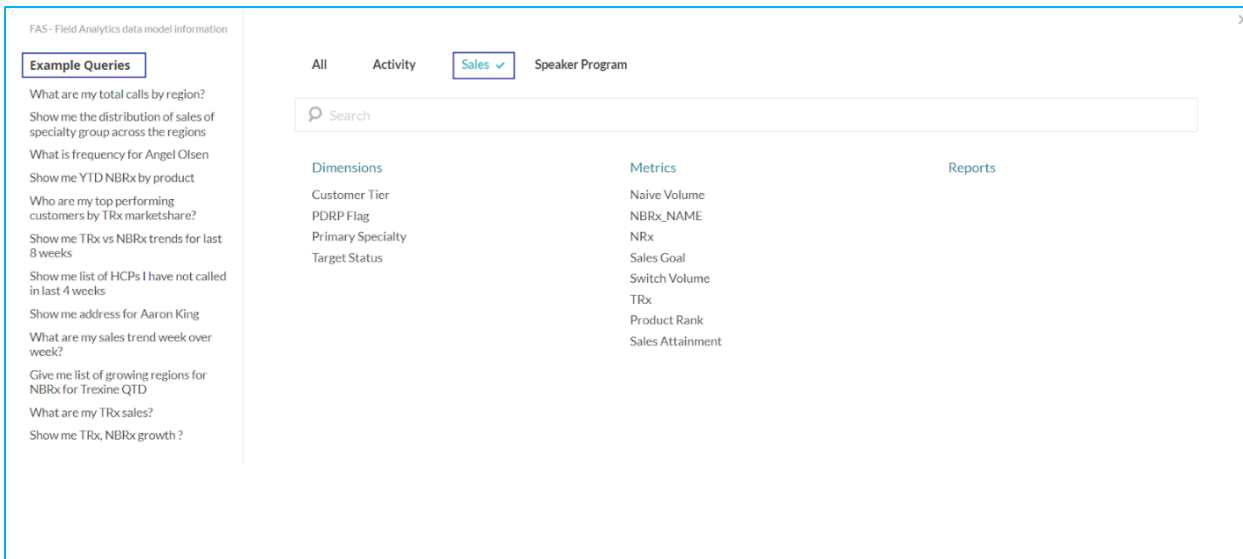
- Customer Tier
- PDRP Flag
- Target Status

Metrics

- Call Goal
- Call Volume
- Sales Goal
- Sample quantity
- Call Attainment
- Call Frequency
- Reach

Reports

Example Queries for the business category **Sales**:



Example Conversations panel on Explorer

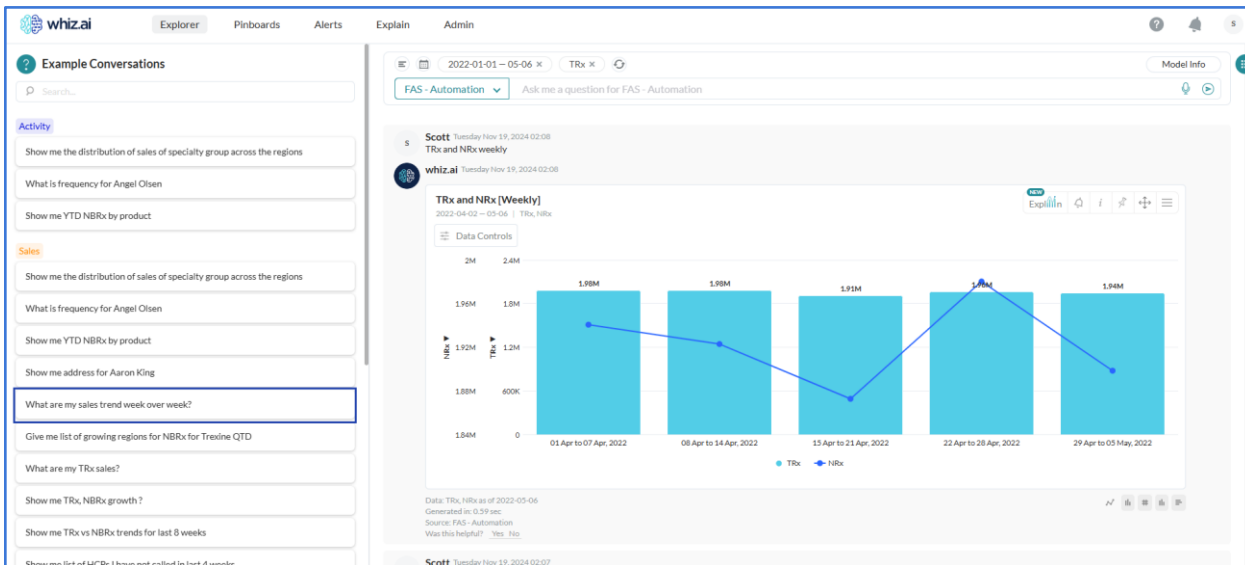
A configurable Example Conversations panel is available in the Explorer workspace, offering users pre-defined queries that serve as starting points for common analysis tasks. Administrators can set the display location of this panel—either in the Explorer or Info panel—through a new configuration option.

A configurable **Example Conversations** panel in the Explorer workspace helps users start their analysis with predefined queries. It serves as a starting point for common analysis questions.

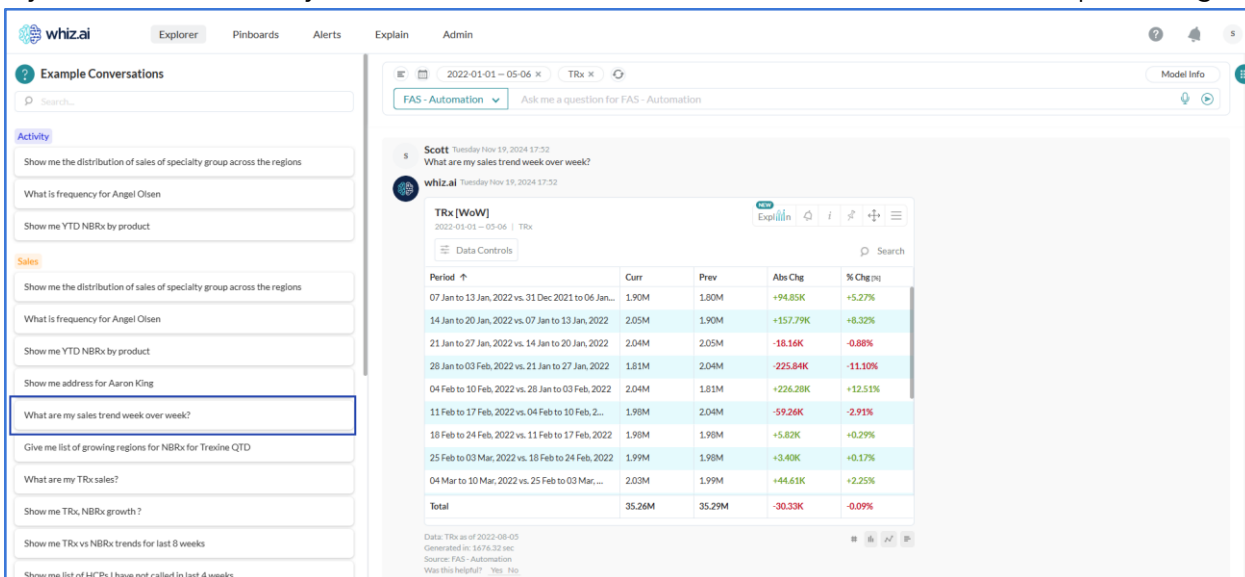


Note! Administrators can set the display location of this panel either on the **Explorer** or **Model Info** panel.

When a user clicks on a query from this panel, the context resets before generating the response in the Explorer, ensuring accurate results



If you click What are my sales trend over week? The context will reset and the response is generated.



Example Queries on the **Example Conversations** panel is categorized according to the business categories such as Activity, Sales, Speaker Program, Misc etc.

? Example Conversations

🔍 Search...

Activity

Show me the distribution of sales of specialty group across the regions

What is frequency for Angel Olsen

Show me YTD NBRx by product

Sales

Show me the distribution of sales of specialty group across the regions

What is frequency for Angel Olsen

Show me YTD NBRx by product

Show me address for Aaron King

What are my sales trend week over week?

Give me list of growing regions for NBRx for Trexine QTD

What are my TRx sales?

Show me TRx, NBRx growth ?

Show me TRx vs NBRx trends for last 8 weeks

Show me list of HCPs I have not called in last 4 weeks

? Example Conversations

🔍 Search...

What are my TRx sales?

Show me TRx, NBRx growth ?

Show me TRx vs NBRx trends for last 8 weeks

Show me list of HCPs I have not called in last 4 weeks

Speaker Program

What is my TRx marketshare by region?

What is my call goal attainment for this quarter?

Which doctors have clicked emails in last week and their NBRx?

What are the top 50 retail customers by Arobi TRx?

Show me my TRx marketshare by brand

What is the absolute change 13x13 for Alabama?

Misc

What are my total calls by region?

trx for last 5 weeks

Accessing Business Data Descriptions from a response

You can access the descriptions of dimensions and metrics which are in the card context of the response, these descriptions help better comprehend the dimensions and metrics in the card context response. To access business data descriptions:

1. On the NLQ response, click on the **Info** icon. A new **Information** window appears. This window displays descriptions of metrics and dimension metadata from the response.

S

Scott Thursday Nov 21, 2024 20:32
Top products by TRx, NRx

whiz.ai

Thursday Nov 21, 2024 20:32

NEW

Expln

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Data Controls

🔍 Search

	Product	TRx [\$] ↓	NRx [\$]
1	Arobi	10.96M	10.79M
2	Trexine	9.80M	9.64M
3	Plabenil	9.53M	9.35M
4	Ofasan	2.54M	2.52M
5	Emarun	2.43M	2.41M
	Total	35.26M	34.72M

Data: TRx, NRx as of 2022-05-06
Generated in: 1.44 sec
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)

#

📊

🔍

🔄

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Information

Reference Date: 2022-05-06 [sales]
Period: 2022-01-01 — 2022-05-06 [Ytd]
Metrics : TRx, NRx

Data: TRx, NRx as of 2022-05-06
Source: FAS - Field Analytics

Original Query : Top products by TRx, NRx
Request ID : 70046895

Info

Metric

Dimension

Metric	Description
NRx	NRx
TRx	TRx

To view definitions associated with dimension metadata, click **Dimension**.

Information

Reference Date: 2022-05-06 [sales]
Period: 2022-01-01 — 2022-05-06 [Ytd]
Metrics : TRx, NRx

Data: TRx, NRx as of 2022-05-06
Source: FAS - Field Analytics

Original Query : Top products by TRx, NRx
Request ID : 70046895

Metric

Dimension

Dimension	Description
Product	Product - Any medicine intended for human use, presented in its finished dosage form that is subject to control by pharmaceutical legislation (registered). A product may be sold under a brand name or under the generic name

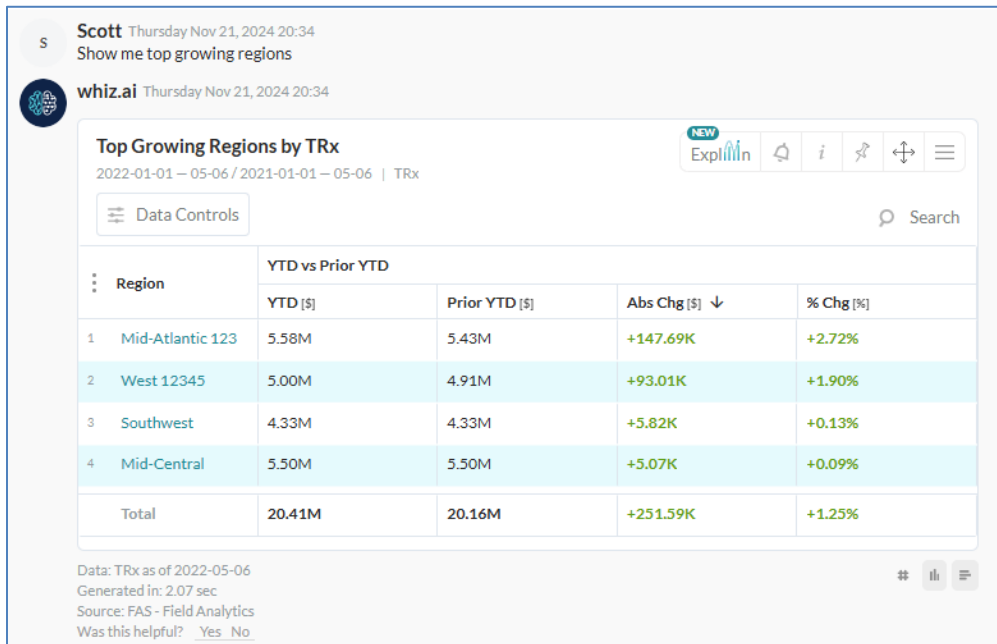
For more information on how to use these options, refer to the Business Data Descriptions document: support@whiz.ai



Note: For optimal performance, it is advised that a description of the dimension or a metric should contain 255 characters only.

Viewing the NLQ on the card

You can view the original query on the card that was used for generating the response. Therefore, if you want to regenerate the response using the original query, you can copy it from the Information dialog of the card and paste it into the context. For example, when you ask WhizAI 'Show me top growing regions' then you get the following response.



When you click the 'Info' icon the **Information** dialog opens where you can see the Original Query as shown in the following figure.

Information

Reference Date: 2022-05-06 [sales]

Period: 2022-01-01 — 2022-05-06 / 2021-01-01 — 2021-05-06 [Ytd]

Metric: TRx

Data: TRx as of 2022-05-06

Source: FAS - Field Analytics

Original Query : [Show me top growing regions](#)

Request ID : 19402765

Copy

Metric

Dimension

Metric	Description
TRx	TRx

You can click **Copy** and **Paste** in the context to regenerate the response.

Hyperlinked Card Query - Integration of Pinboards and Explorer Environments

The original query that you see in the response > **Info** icon > **Information** dialog is hyperlinked, that is, if you click the query, WhizAI Explorer opens in a new tab and the response is regenerated for the query - without having to manually copy and paste the query in the WhizAI Explorer.

It simplifies navigation to the WhizAI Explorer. Also, when you click the hyperlinked query from the card in a pinboard, the pinboard data model is passed to Explorer.

Information

Reference Date: 2022-05-06 [sales]
Period: 2022-01-01 – 2022-05-06 / 2021-01-02 – 2021-05-07 [ytd]
Metric: Call Volume
Country: USA

Data: Call Volume as of 2022-05-06
Source: FAS - Automation

Original Query: show me top growing regions

Hyperlinked query

Metric

Dimension


Metric	Description
Call Volume	Call volume is a measure of how many inbound calls are coming into a contact center. It can be measured in various time increments, such as every fifteen minutes, every hour, or each day.

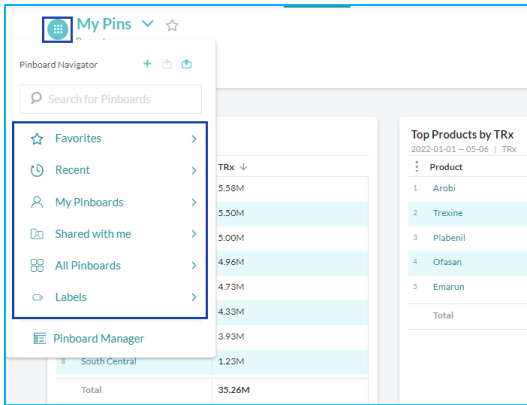
Using Pinboards & Cards



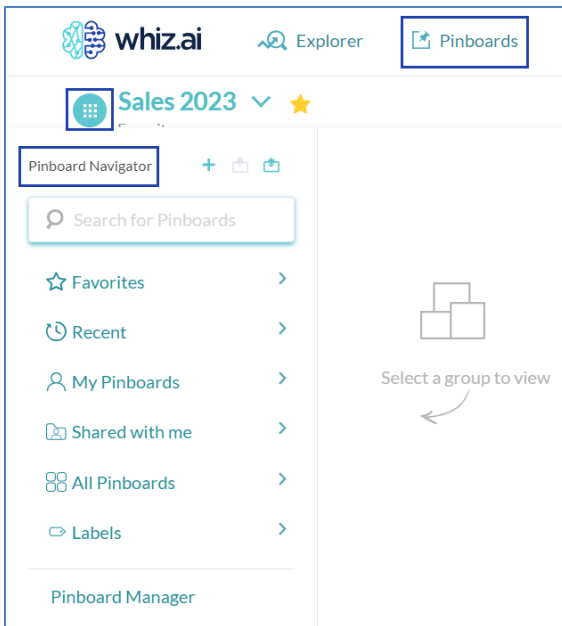
Note! Pinboards and cards show only the data for which you have authorization. You may see cards in pinboards with a message that says: *"You are not authorized to view this data"*. This is the case when the card contains data that you are not authorized to view.


Pinboard Navigator



You can click the  icon to see the Pinboard Navigator that contains multiple intuitive labels and all the pinboards grouped under multiple categories as shown in the following figure:



Tip! You can use the left and right navigation arrows to switch between the boards of your preference or navigate between the next or previous boards of the selected category or label.




When you click the  icon from the main pinboards panel (or from the top-right corner of the **Explorer**), the **Pinboard Navigator** is displayed that contains the following options:

- **+** icon that allows you to add a new pinboard
- **Export**  and **Import**  options to migrate the pinboards within environments

Multiple pinboards grouped under the following categories

- **Favorites** - boards that you might want to frequently have a look at, you can pin directly to the board, marked as favorites.



Note! From the Explorer top navigation options, when you click  **Pinboards**, by default the pinboard from the **Favorites** category is displayed. When you click that pinboard's name or the arrow against it, you can see the complete list of the boards in the **Favorites** category.


- **Recent** - shows the last accessed and updated board(s)
- **My Pinboards** - shows the boards owned by you.
- **Shared with me** - list of pinboards shared with you.
- **All Pinboards** - list of all the pinboards
- **Labels** - labels are tags that group the boards for easy identification.
- **Pinboard Manager** - opens the **Pinboard Manager** page

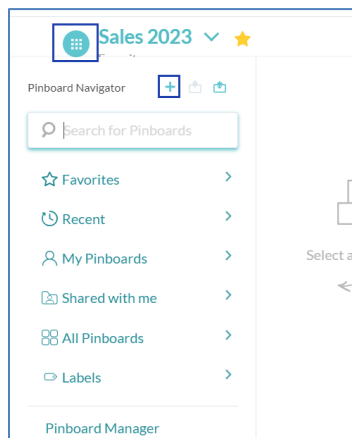
From the Pinboard Navigator, you can:

- Create a new pinboard
- Import or Export a pinboard to move it within different environments
- Search a board using the search box
- Navigate to a pinboard by clicking any of the categories (**Favorites**, **Recent Boards**, **Shared with me**, **My Pinboards**, and **All Pinboards**)
- Navigate to a pinboard by clicking **Labels**. WhizAI shows all the boards associated with a particular label.
- Navigate within the category of the currently opened board.

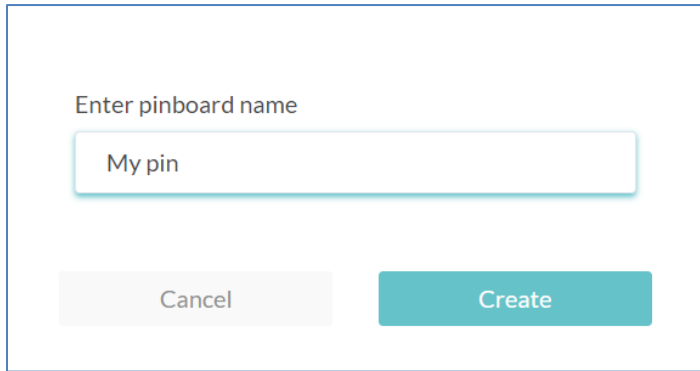
Creating a Pinboard

Method 1: To add a board, from the Pinboard Navigator:

1. Click  from the main pinboards panel. The Pinboard Navigator is displayed.



2. To add a pinboard, click **+** icon (Create New Pinboard icon). WhizAI displays a dialog to enter a name for the board.




Enter pinboard name

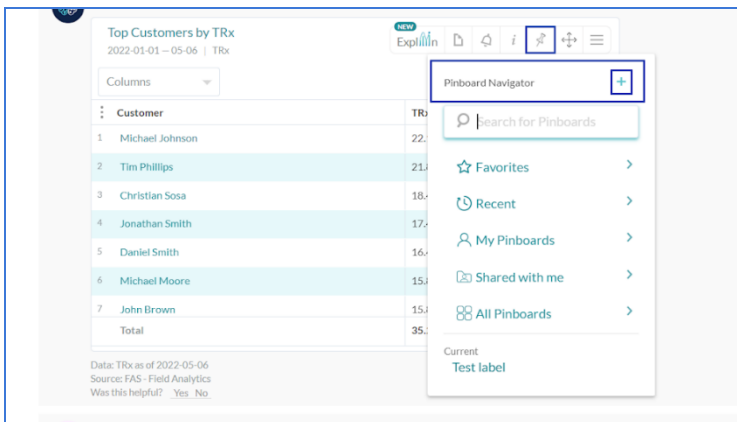
My pin

Cancel Create

3. Click **Create** to add a pinboard. The pinboard gets added. You can access this board from the categories on the Pinboard Navigator.

Method 2: To add a board, from the from the response.

1. From the top right corner of a response, click the  pin icon. **Pinboard Navigator** is displayed.



Top Customers by TRx
2022-01-01 – 05-06 | TRx

Customer	TRx
1 Michael Johnson	22.0
2 Tim Phillips	21.0
3 Christian Sosa	18.0
4 Jonathan Smith	17.0
5 Daniel Smith	16.0
6 Michael Moore	15.0
7 John Brown	15.0
Total	35.0

Data: TRx as of 2022-05-06
Source: FAS - Field Analytics
Was this helpful? Yes No

Pinboard Navigator

Search for Pinboards

- Favorites
- Recent
- My Pinboards
- Shared with me
- All Pinboards

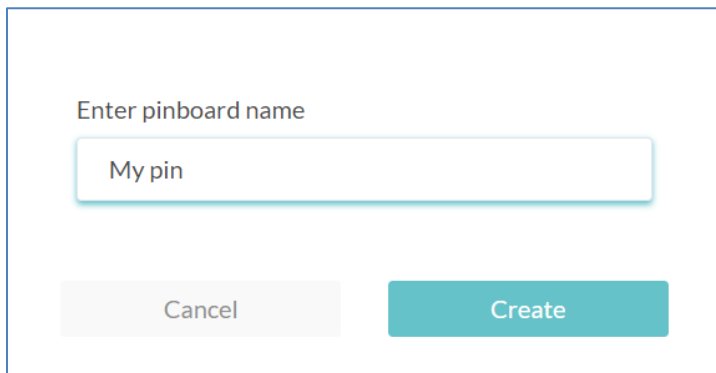
Current
Test label



only.

Note! This drop-down list shows all the boards of which you are the "Owners" or "Editors"

2. To add a pinboard, click **+** icon (Create New Pinboard icon). WhizAI displays a dialog to enter a name for the board.



Enter pinboard name

My pin

Cancel Create



Note ! Create pinboards in the target user's default language to ensure seamless functionality.

- Click **Create & Pin** to add a pinboard. The pinboard gets added, opened on the right side of the explorer, and the response gets pinned to it. You can access this board from the categories on the Pinboard Navigator.

Or

If Pinboard Manager is configured for you, then click **My pinboards** from the left side navigation, and from the bottom right side click **+ Create New Pinboard**.

The screenshot shows the 'Pinboard Manager' interface. At the top, it says 'Pinboard Manager' and '45 Pinboards'. There is a search bar on the right that says 'Search a pinboard or label'. On the left, there is a navigation menu with 'Favorites', 'Recent', 'My Pinboards' (highlighted), 'Shared with me', and 'All Pinboards'. The main area shows 'My Pinboards' with '42 Pinboards'. It displays a table with the following data:

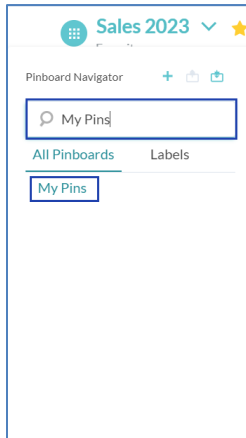
Name	Labels	Model	Last Updated	Action
Design mode		FAS - Field Analytics	2023-02-24	Share, Star, More
Spring Demo		FAS - Multica,FAS - Field ...	2023-02-22	Share, Star, More
LazyInitialization		FAS - Field Analytics	2023-02-07	Share, Star, More
ApplyToBoard		FAS - Field Analytics	2023-02-07	Share, Star, More
Defaults		FAS - Field Analytics	2023-02-07	Share, Star, More
SagarP		FAS - Field Analytics	2023-02-07	Share, Star, More
ApplyToBoard1		FAS - Field Analytics	2023-02-07	Share, Star, More

At the bottom left, there is an 'Import' button. At the bottom right, there is a 'Create New Pinboard' button.

- In the **Enter pinboard name** field, enter a name for the pinboard, as required.
- Click **Create**. WhizAI creates the new board and opens it as the active pinboard. Also, you can click **All Pinboards** from Explorer to view all the pinboards.

Search a board using the search box

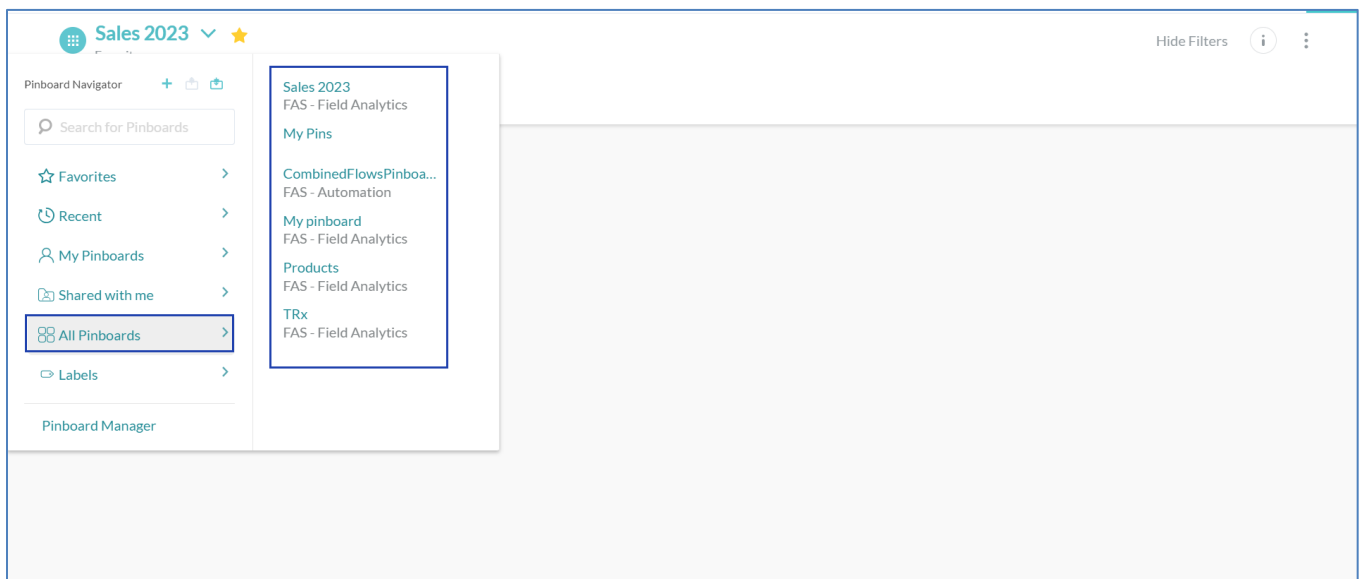
- Go to the **Pinboard Navigator** and click inside the search box.
- Type the pinboard name or label name you want to search. The pinboard is displayed below the All Pinboards or Labels as per the category.



3. Select the pinboard. The pinboard opens in the main pinboards page.

Navigating to a pinboard

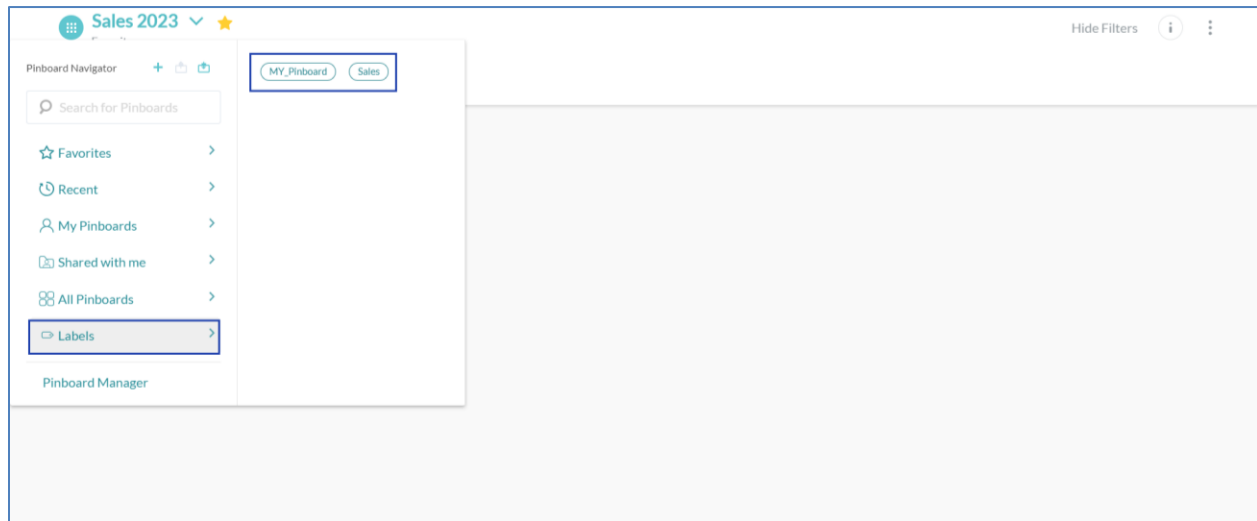
1. Go to the Pinboard Navigator and click any category you want to select (**Favorites**, **Recent Boards**, **Shared with me**, **My Pinboards**, and **All Pinboards**). All the boards are displayed on the right side.



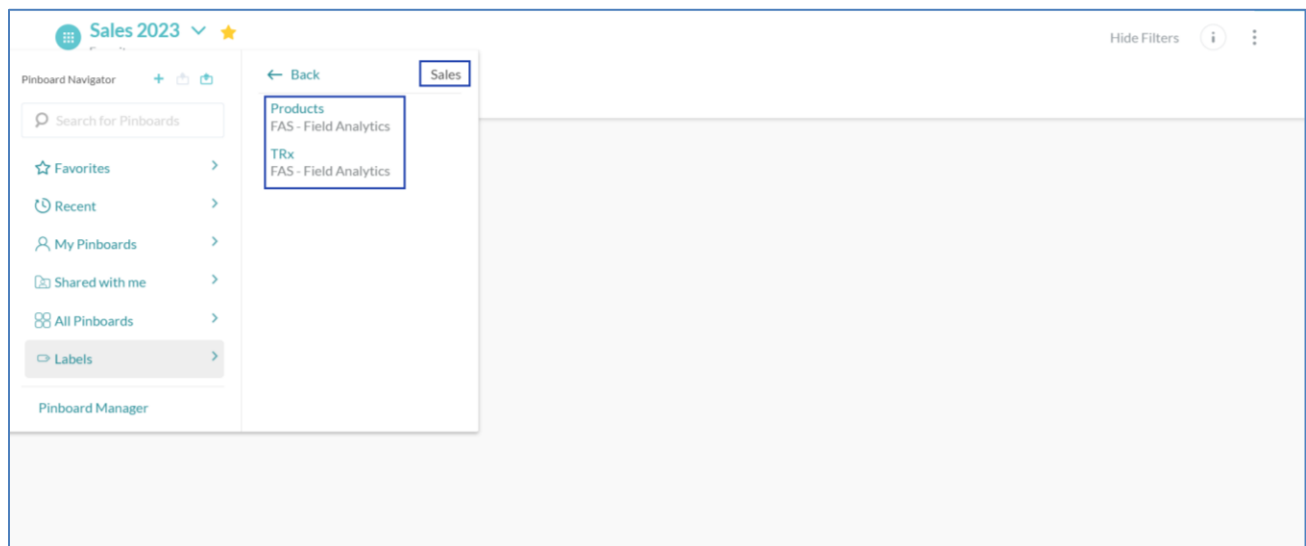
2. You can select the pinboard to open it or open it in JSON.

Navigating to a pinboard from the Labels Category

1. Go to the **Pinboard Navigator** and click **Labels**. All the labels are displayed on the right side.



2. Click the **Label** as required. The pinboard(s) associated with the label are displayed.



Note! You can select the pinboard to open it or export it in JSON.



Note! You can search the labels directly from the search box below the **Pinboard Navigator** arranged alphabetically.



Note! Viewers see the labels of the boards shared with them and owners see the labels of the boards created by them.

If you access **Labels** from the **Pinboard Manager**; along with the pinboards list, additional details are displayed on the right side.


The screenshot shows the 'Pinboard Manager' interface. On the left, there's a sidebar with 'Favorites' and 'Recent' sections. The 'Recent' section is active, showing a list of pinboards: 'Sales 2023', 'My pinboard', 'Products', and 'TRx'. A 'Labels' tab is selected, showing labels for each pinboard: 'MY_Pinboard' for 'Sales 2023' and 'My pinboard', and 'Sales' for 'Products' and 'TRx'. The main area displays a table with columns: Name, Model, Owner, Last Updated, and Action. The table lists the same four pinboards, all owned by 'Apurva Bhalariao' and using the 'FAS - Field Analytics' model. The 'Labels' column is highlighted with a blue box, and the labels are shown in green buttons next to each pinboard name.

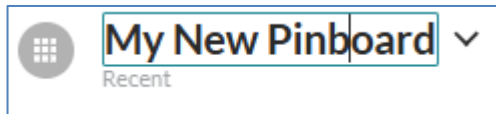
Understanding Owner, Editor, and Viewer rights on Pinboard

Behavior	Board Owner	Editor	Viewer
Editing Pinboard name	Yes	Yes	No
Change the background color, border color, font color, font size, and font style of the card	Yes	Yes	No
Changing the layout and card size for pinboards	Yes	Yes	No
Reorder columns, pin columns, pagination, roll-up, drill-down, expand all/collapse all	Yes	Yes	Yes
Add annotation/notes in the cards	Yes	Yes	Yes
Creating sections in pinboard	Yes	Yes	No
Editing sections in Pinboard	Yes	Yes	No
Deleting sections in the pinboard	Yes	Yes	No
Add labels to pinboards	Yes	Yes	No
Adding filters to Pinboard, Cards and Sections	Yes	Yes	No
Apply Slicers to the Pinboard	Yes	Yes	Yes
Apply Cohorts to the Pinboard	Yes	Yes	Yes
Saving sorting order on cards of pinboard	Yes	Yes	No
Change card formats at runtime	Yes	Yes	No
Download data from cards	Yes	Yes	Yes
Exporting pinboards to PDF or PPT	Yes	Yes	Yes
Copying pinboards	Yes	Yes	Yes
Drag and drop filters on the pinboards	Yes	Yes	No
Setting different reference date on the pinboard	Yes	Yes	No
Share pinboard	Yes	No	No

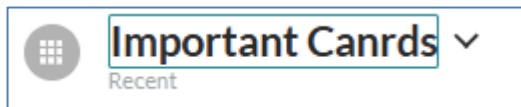
Renaming cards from the pinboards	Yes	Yes	No
Adding Cards from Explorer	Yes	Yes	No
Delete a card/s from pinboards	Yes	No	No
Delete pinboard	Yes	No	No
Unfollow pinboard	No	Yes	Yes

Editing Pinboard name

1. From Explorer, click **All Pinboards** to open the main pinboard's layout page.
2. Open the pinboard to update the pinboard name.
3. Click the ellipse icon  at the right side of the window screen > **Design Mode**. Click the pinboard name. WhizAI allows you to edit the name, as required.




4. Update the pinboard name, as required, and click outside the textbox. WhizAI saves the updated pinboard name as shown in the following figure:



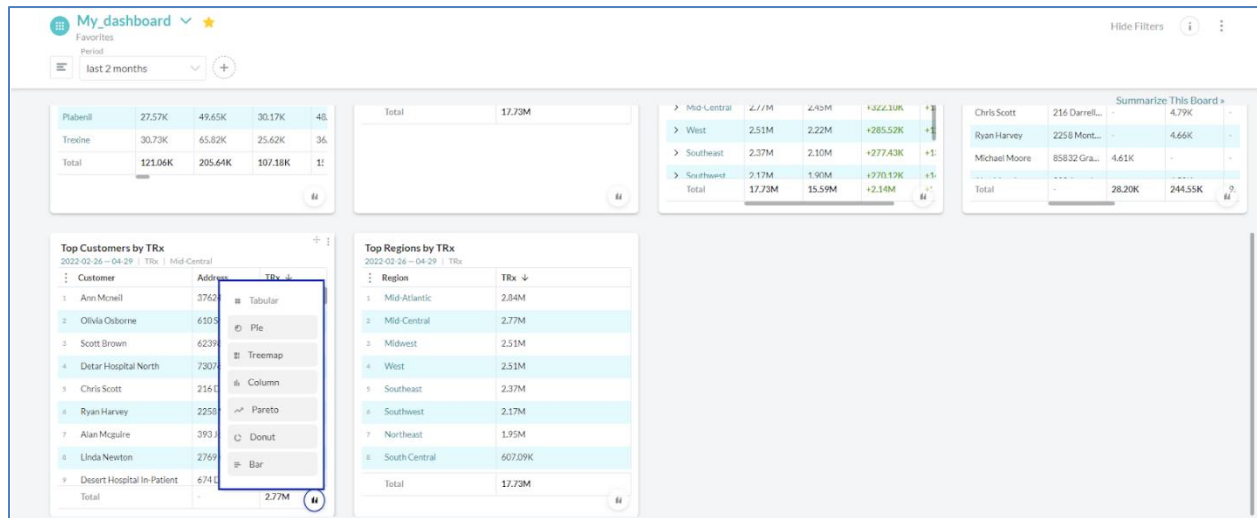
Changing Visualization on Pinboards cards

Follow the steps given below to change the visualization of your pinned cards on your pinboard without expanding the cards:

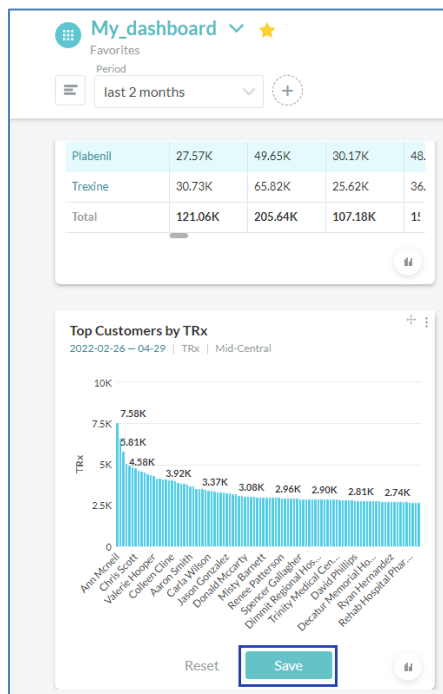
1. Hover on the card and click the  icon at the bottom right corner of the card. This will display a list of visualization types such as ., Tabular, Pie, Treemap, Column, Pareto, Donut, Bar, etc.).



Note! For ipad users the icon is available by default.



- Click the desired visualization type from the list.
- The collapsed card shows the newly selected visualization type. Click **Save** to keep the new visualization, or **Reset** to revert to the previous visualization.



Note! Board owners or editors can **Save** or **Reset** the visualization changes. Board viewers can only make temporary changes.

Managing Pinboards with Design Mode




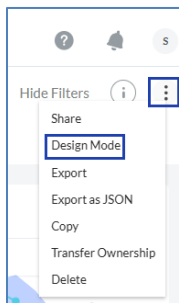
Note! This feature is only available for board owners and not for board viewers.

You can format your pinboards using the new design mode option. You can change the layout for:

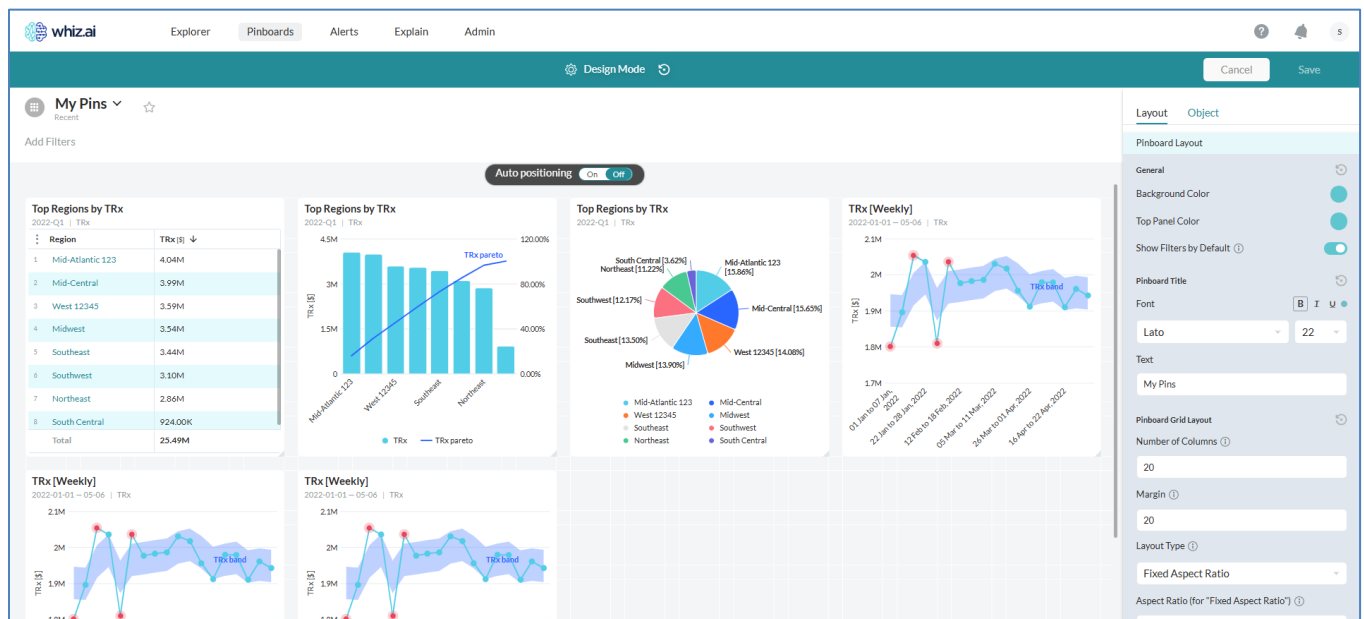
- Pinboards and cards pinned to these boards.
- Filters
- Narratives on Pinboards

Changing the layout for pinboards:

1. Open the pinboard and click this  icon.



2. Click **Design Mode**. The pinboard design mode is displayed.



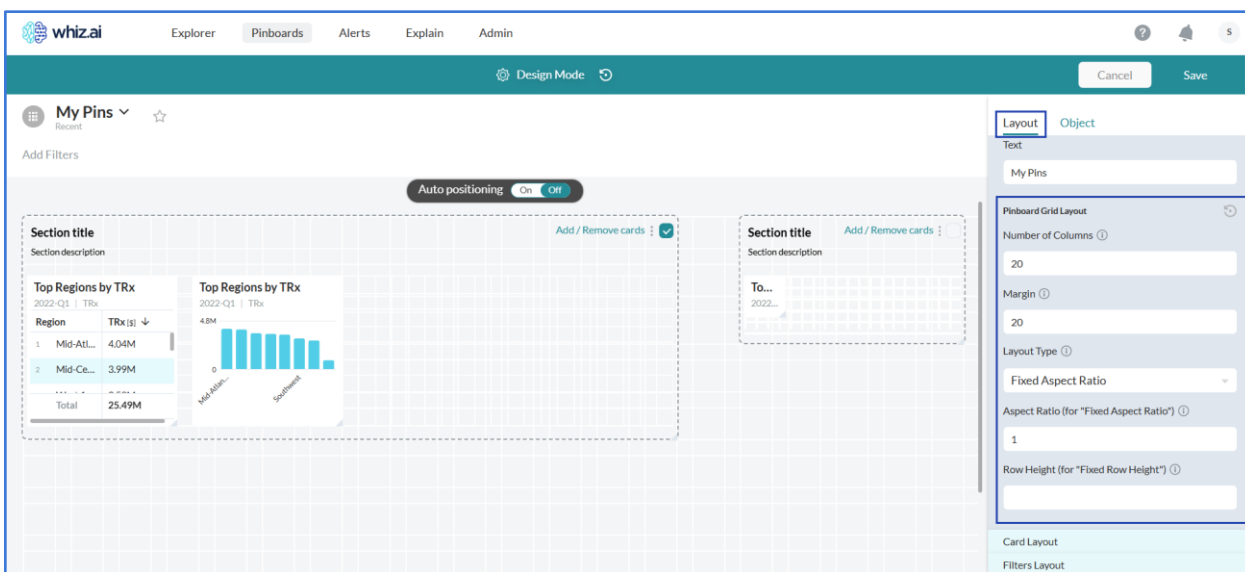
From **the Pinboard Layout** tab, you can change the:

- Background color of the pinboard
- Font Color
- Font Size
- Font style of the pinboard name

- Rename the title of the boards
- Resize the pinboard grid layout
- Format Card Layout
- Format Filters layout

Changing the Grid Layout for Pinboards

You can create a granular and tailored grid design for pinboards ensuring consistency and control over the appearance of your data visualizations. As a pinboard designer you can change the Grid layout of pinboards using the following customizations options:



Pinboard Grid Layout section offers the following customization options:

- **Number of Columns:** Define the number of columns for the grid using a numeric textbox. Tooltip explains that increasing the value makes the pinboard more granular.
 - Values: an integer from 1 to 2000
 - Default: 20
- **Margin:** Controls the space between cards in pixels via a numeric textbox.
 - Values : an integer from -10 to 100
 - Default: 20
- **Layout Type:** Choose from:
 - **Fixed Aspect Ratio:** Cards increase proportionally with screen size.
 - **Fixed Row Size:** Cards maintain consistent height while adjusting width based on screen size.
 - **Single Page View:** Eliminates scrollbars and resizes cards to fit the screen.
- **Aspect Ratio (For Fixed Aspect Ratio):** Define the ratio of card height to width using a numeric textbox, allowing fractions.
 - Values: a decimal from 0 to 100


- Default: 1
- **Row Height** (For Fixed Row Height): Specify the fixed height of rows in pixels using a numeric textbox.
 - Values: an integer from 1 to 100
 - Default: 20
- **Reset Option**: A reset option allows users to revert to the last saved settings.

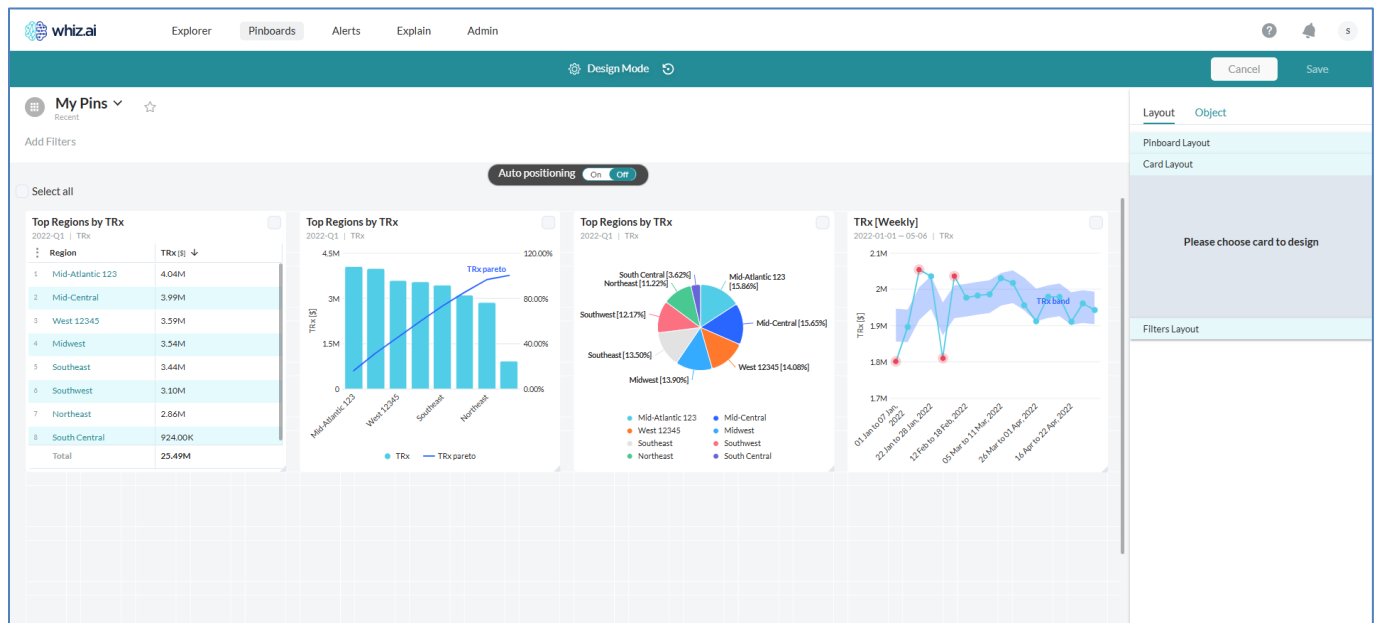
Backward Compatibility



Note! Existing pinboards retain their current layouts unless the user makes changes to any of the new properties. Upon modifying and saving, the new grid properties are applied.

Changing the Layout for cards:

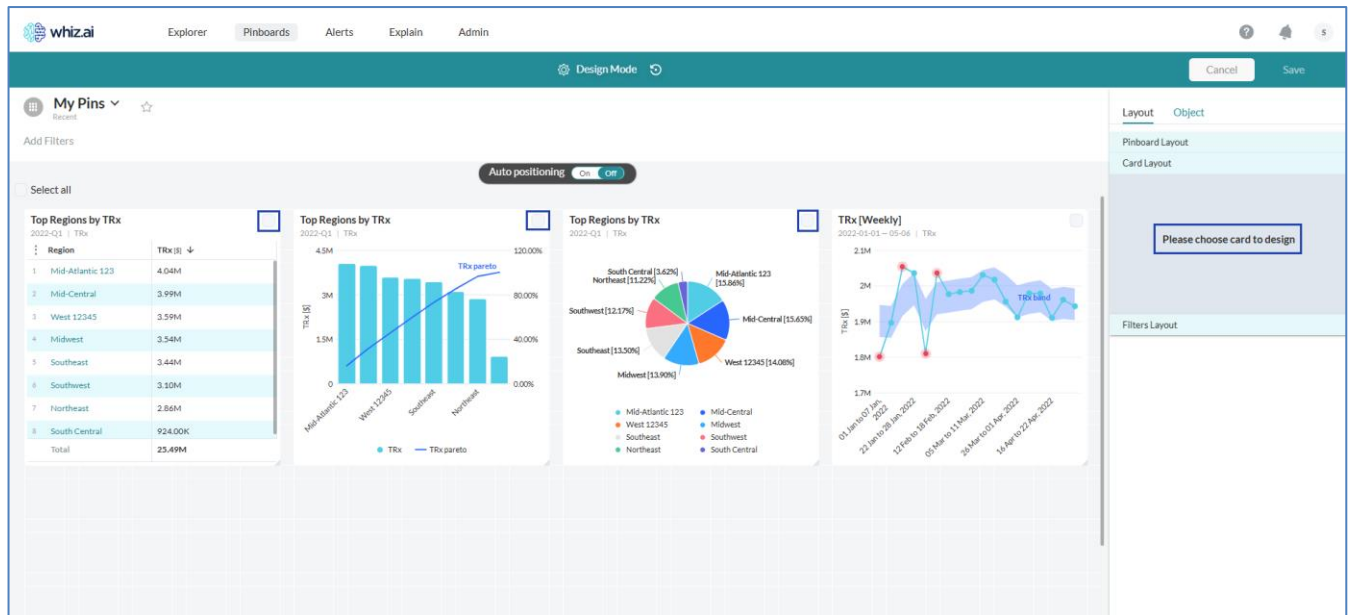
1. Open the pinboard and click this  icon.
2. Click **Design Mode**. The pinboard design mode is displayed.



3. From the bottom right side, click **Card Layout**. You can then change the layout for cards.



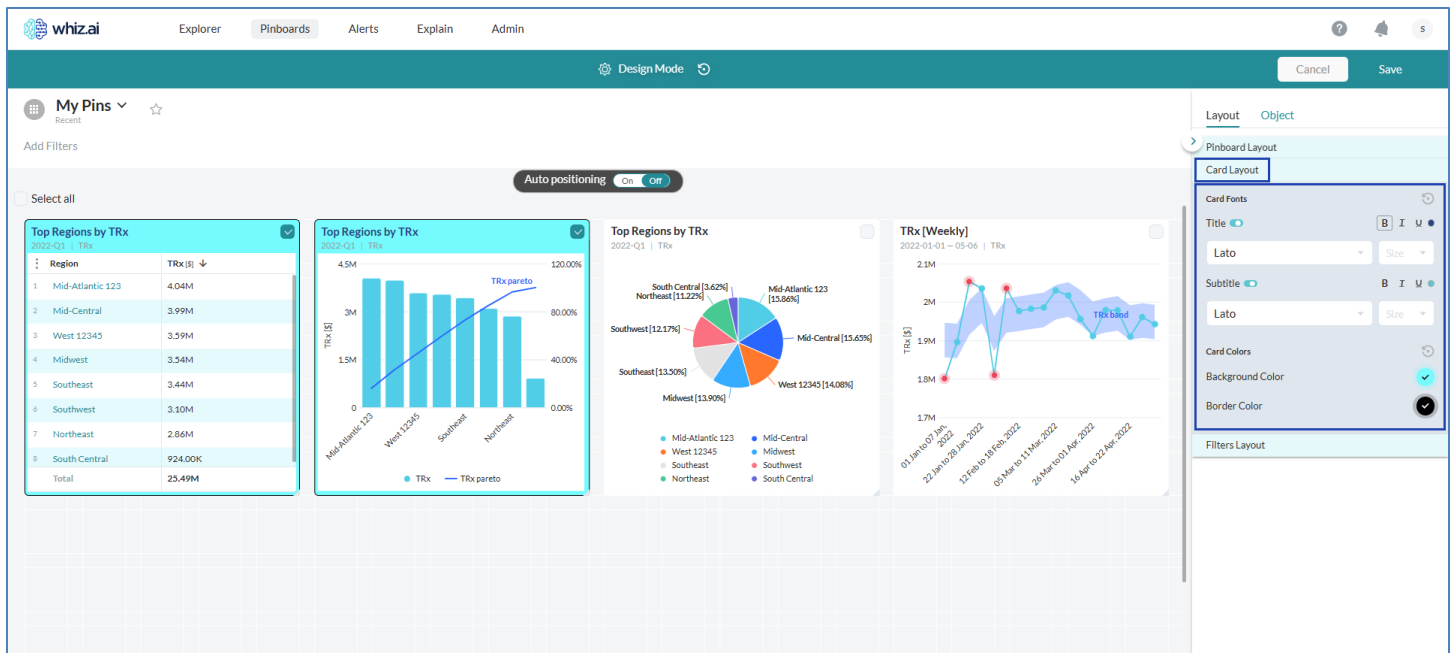
Note! On the top-right corner of every card, you can see a check box. When you select that checkbox, WhizAI displays options to edit the card on the right side.




From this tab, you can change:

- Background color
- Border color
- Font color
- Font size
- Font style of the card

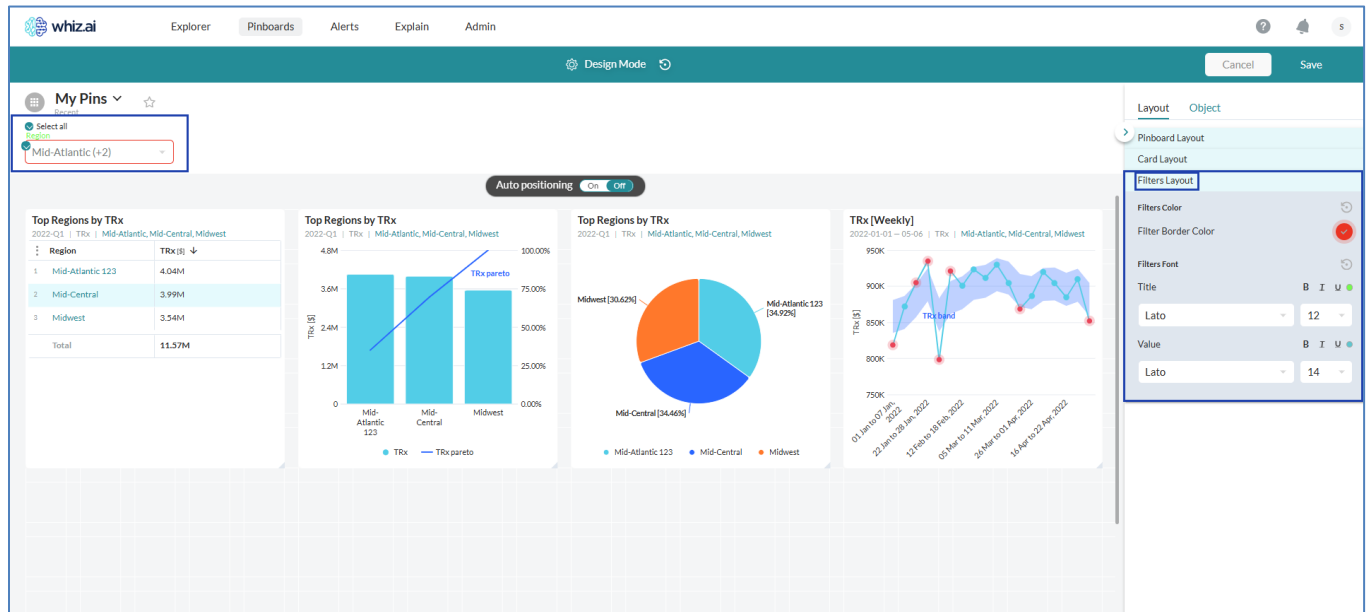
You can also hide the title and the card context. After you finish changing the layout, you can click the **Save** button to save all the changes.



Changing the Filters Layout:

1. Open the pinboard and click this  icon.

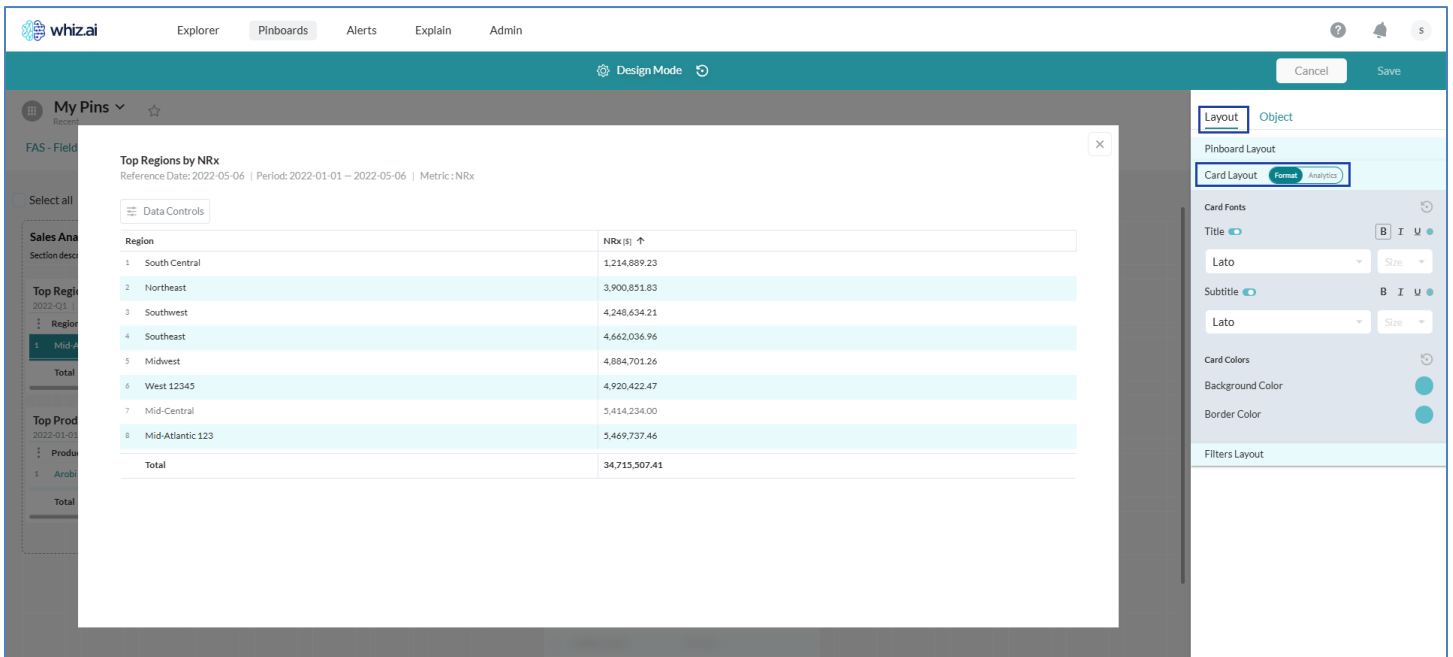
2. Click **Design Mode**. The pinboard design mode displays.
3. Click **Filters Layout**. You can edit the layout for filters. From this tab, you can change font, font color, and size of the filter title and filter values.






'Analytics' tab in Pinboard Design mode

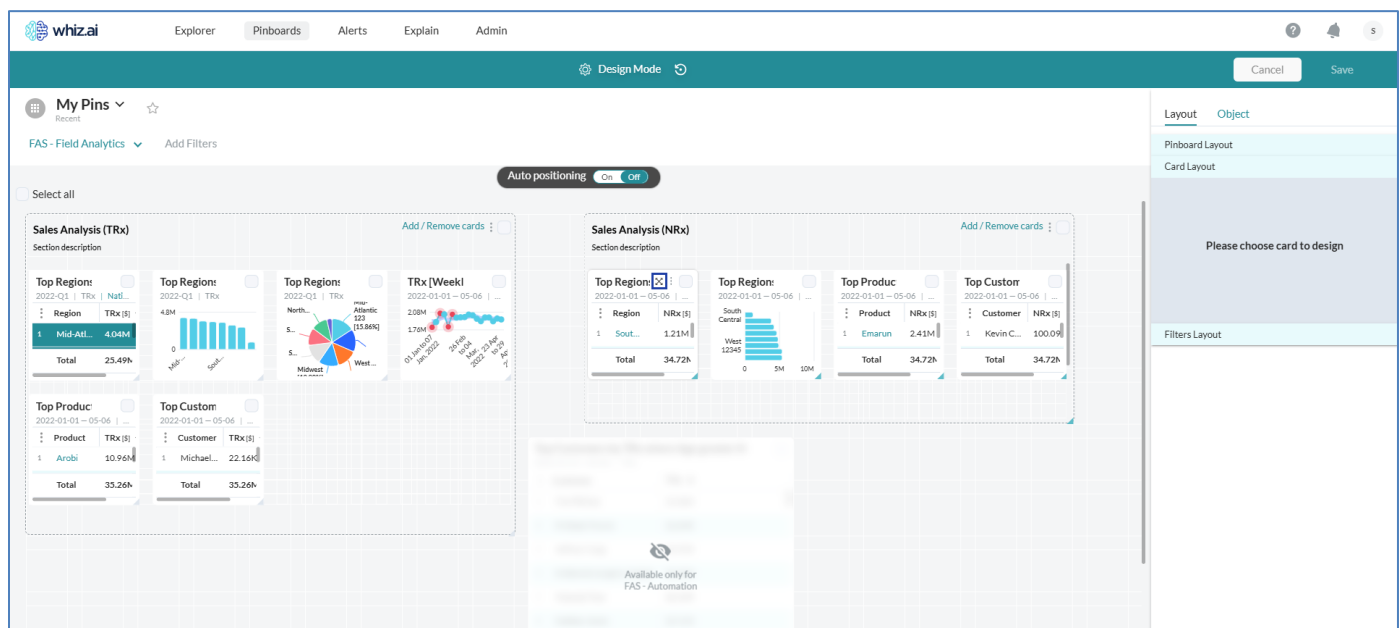
While designing the layout for cards (for tabular or trend data) in a pinboard design mode, you can see a slider that contains two tabs:

- **Analytics:** explore various data display options, apply conditional formatting to highlight important insights, and utilize comparison formatting to make meaningful comparisons between data points. Additionally, you can leverage spotlighting capabilities on tables and trend charts to draw attention to specific areas of interest.
- **Format:** customize the appearance of your cards, that is, apply various formatting options, including changing the color of values, borders, and backgrounds. Additionally, you have the flexibility to adjust the style, font size, and color of titles and subtitles. A format tab is available for all the responses.




Accessing the 'Analytics' tab

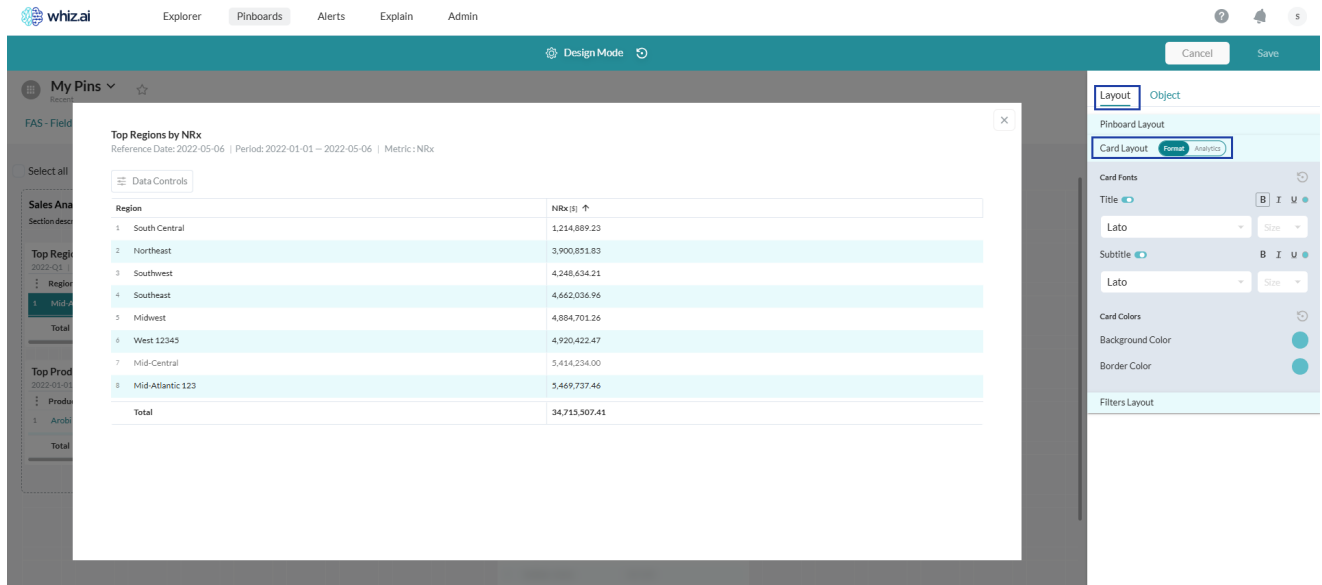
1. Open a pinboard and from the top-right corner of the window click the vertical ellipsis icon  > **Design Mode**. The **Design Mode** is displayed.
2. From the right side, click **Card Layout**. WhizAI displays a checkbox on individual cards on the pinboard.
3. Hover over the card you wish to format. WhizAI displays  icon on that card.
4. Click the  icon on the card you want to format. It will expand to show you more details and options in the layout tab.





Note! If you select multiple cards, the expand icon  is not available for those cards.

- After expanding the card, you will see an option to toggle between the **Format** and **Analytics** tabs.



Note! This toggle will only be available when you have selected a single card. If you select multiple cards, the toggle will not be displayed.

- From the **Analytics** tab you can change:
 - Data Display
 - Conditional Formatting
 - Comparison
 - Spotlight



Note! For more information on the options available on the Analytic tab refer to the section **"The options available on the Analytics tab."**

Options available on the Analytics tab

The **Analytics** tab displays different options for different types of responses.

Analytics options for table response:

- **Data Display:** You can use this option to choose how data is represented in the metric column. The data display style options are included.
 - **Value** (default)
 - **Value With Indicator:** If you choose Value with Indicator, a default triangle indicator is added before the data values. You can also choose a different indicator from the indicator dropdown and Placement value.
 - **Value With Bars:** Selecting Value with Bars displays bars in the metric column.

Example 1: **Value With Indicator** displays the indicator icon on the selected metric.

The screenshot shows the WhizAI interface with a table titled "TRx by Region, Product, Customer Tier". The table has columns for Region, Arobi, Emarun, and Ofasan. The 'Arobi' column is highlighted, and the 'Value With Indicator' formatting is applied to it. The right sidebar shows the 'Data Display' settings with 'Value With Indicator' selected.

Region	Arobi	Emarun	Ofasan
Mid-Atlantic 123	692.56K	552,993.39	342,401.49
Mid-Central	703.05K	495,182.17	355,868.78
Midwest	594.20K	475,142.97	254,171.86
Northeast	497.34K	407,576.28	221,684.51
South Central	157.35K	102,818.56	72,078.79
Southeast	612.93K	362,175.27	334,542.55
Southwest	514.80K	407,510.76	269,493.72
West 12345	617.60K	452,647.83	261,862.16
Total	4,389,833.59	3,256,047.24	2,112,103.86

Example 2: **Value With Bar** displays the bars on the selected metric.

The screenshot shows the WhizAI interface with a table titled "TRx by Region, Product, Customer Tier". The table has columns for Region, Arobi, Emarun, and Ofasan. The 'Arobi' column is highlighted, and the 'Value With Bar' formatting is applied to it. The right sidebar shows the 'Data Display' settings with 'Value With Bars' selected.

Region	Arobi	Emarun	Ofasan
Mid-Atlantic 123	692.56K	552,993.39	342,401.49
Mid-Central	703.05K	495,182.17	355,868.78
Midwest	594.20K	475,142.97	254,171.86
Northeast	497.34K	407,576.28	221,684.51
South Central	157.35K	102,818.56	72,078.79
Southeast	612.93K	362,175.27	334,542.55
Southwest	514.80K	407,510.76	269,493.72
West 12345	617.60K	452,647.83	261,862.16
Total	4,389,833.59	3,256,047.24	2,112,103.86

- **Conditional Formatting:** To add rules and colors to enhance data analysis.
 - You can select a metric and choose the formatting type: **Rules** or **Gradient**. The formatting will respect the data representation chosen for each metric (e.g., indicator or bars).
 - You can set rules based on operators and values and assign colors to reflect those rules.
 - When you switch toggles off, changes are temporarily turned off, and the response reverts to default values or representation.

whizai

ExplorerPinboardsAlertsExplainsAdmin

Design Mode

CancelSave

My Pins

FAS - Field

Sales Ana

Top Regi

2022-01

Region

Mid-

Total

Top Prod

2022-01-03

Prode

Arabi

Total

TRx by Region, Product, Customer Tier

Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: TRx

Data Controls

Region ↑	Arabi				Emarun				Ofasan		
	Tier 1 [5]	Tier 2 [5]	Tier 3 [5]	Tier 4 [5]	Tier 1 [5]	Tier 2 [5]	Tier 3 [5]	Tier 4 [5]	Tier 1 [5]	Tier 2 [5]	Tier 3 [5]
Mid-Atlantic 123	692,363.29	352,993.39	342,401.49	154,997.77	152,110.03	111,961.86	71,228.82	38,047.81	184,326.01	122,607.66	85,335.08
Mid-Central	703,054.52	495,182.17	355,868.78	186,283.38	137,959.22	126,870.14	65,840.47	32,553.66	134,444.55	99,619.67	95,729.17
Midwest	594,203.58	475,142.97	254,171.86	149,912.21	149,851.31	95,716.98	66,810.99	31,821.89	138,118.83	87,874.89	87,177.00
Northeast	497,338.83	407,576.28	221,684.51	120,880.06	78,718.16	86,391.00	48,098.29	19,118.91	124,616.63	87,758.24	57,502.63
South Central	157,349.78	102,818.56	72,078.79	40,086.88	34,598.33	27,824.74	19,070.48	4,979.96	24,285.23	20,867.67	14,314.57
Southeast	512,926.68	362,175.27	334,542.55	209,508.14	125,293.37	102,756.17	66,719.80	29,009.00	164,737.27	110,844.35	56,241.22
Southwest	514,796.92	407,510.76	269,493.72	162,889.58	125,748.09	81,452.87	84,530.85	47,404.76	113,413.61	81,288.19	75,088.42
West 12345	617,599.98	452,647.83	261,862.16	180,529.22	156,371.37	114,599.60	66,220.66	30,805.76	119,392.67	134,567.85	82,024.84
Total	4,389,833.59	3,256,047.24	2,112,103.86	1,205,167.24	960,649.89	749,373.36	488,520.37	233,741.75	1,003,334.81	745,428.52	553,412.93

LayoutObject

Pinboard Layout

Card LayoutNormalAnalytics

Select Metric to apply the analytics

Arabi / Tier 1/Tier 1

Data Display

Conditional Formatting

Format Style

Gradient

Minimum

Lowest Value

Maximum

Highest Value

Comparison

Spotlight

Table Configurability

Filters Layout

whizai Explorer Pinboards Alerts Explain Admin

Design Mode

Cancel Save

My Pins

FAS - Field

Select all

Sales Ana

Section des

Top Regi

2022-01

Region

Mid-C

Total

Top Prod

2022-01-01

Product

Arabi

Total

TRx by Region, Product, Customer Tier

Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: TRx

Data Controls

Region ↑	Arabi				Emarun				Ofasan		
	Tier 1 (S)	Tier 2 (S)	Tier 3 (S)	Tier 4 (S)	Tier 1 (S)	Tier 2 (S)	Tier 3 (S)	Tier 4 (S)	Tier 1 (S)	Tier 2 (S)	Tier 3 (S)
Mid-Atlantic 120	992,56K	552,993.39	342,401.49	154,997.77	152,110.03	111,961.86	71,228.82	38,047.81	184,326.01	122,607.66	85,335.08
Mid-Central	912,05K	495,182.17	355,868.78	186,283.38	137,959.22	126,670.14	65,840.47	32,553.66	134,444.53	99,619.67	95,729.17
Midwest	594,20K	475,142.97	254,171.86	149,912.21	149,851.31	95,716.98	66,810.99	31,821.89	138,118.83	87,874.89	87,177.00
Northeast	897,24K	407,576.28	221,684.51	120,880.06	78,718.16	88,391.00	48,098.29	19,118.91	124,616.63	87,758.24	57,502.63
South Central	827,35K	102,818.56	72,078.79	40,086.88	34,598.33	27,824.74	19,070.48	4,979.96	24,285.23	20,867.67	14,314.57
Southeast	612,99K	362,175.27	334,542.55	209,588.14	125,293.37	102,756.17	66,719.80	29,009.00	164,797.27	110,844.35	56,241.22
Southwest	614,80K	407,510.76	269,493.72	162,889.58	125,748.09	81,452.87	84,530.85	47,404.76	113,413.61	81,288.19	75,088.42
West 12345	617,60K	452,647.83	261,862.16	180,529.22	156,371.37	114,599.60	66,220.66	30,805.76	119,392.67	134,567.85	82,024.84
Total	4,389,833.59	3,236,047.24	2,112,103.86	1,205,167.24	960,649.89	749,373.36	488,520.37	233,741.73	1,003,334.81	745,428.52	553,412.93

Gradient bar indicating highest value

Gradient bar indicating lowest value

Layout Object

Pinboard Layout

Card Layout Format Analytics

Select Metric to apply the analytics

Arabi / Tier 1/Tier 1

Data Display

Conditional Formatting

Format Style

Gradient

Minimum

Lowest Value

Maximum

Highest Value

Comparison

Spotlight

Table Configurability

Filters Layout

Comparison: To superimpose one metric on another (as data bars) for visual comparison.

The screenshot shows the WhizAI interface with a table titled "TRx by Region, Product, Customer Tier". The table displays data for various regions (Mid-Atlantic, Mid-Central, Midwest, Northeast, South Central, Southeast, Southwest, West) and products (Aroclor, Emuram, Ofasan). The table is organized by Customer Tier (Tier 1, Tier 2, Tier 3). The interface includes a sidebar on the left with navigation options and a settings panel on the right for configuring the table's appearance and behavior.

- You can select primary and Comparison Metrics and choose how the comparison is displayed (bars or ticks). You can hide the Comparison Metric column using the table configurability dialogue.
- You can select metrics from a list, and existing settings will be pre-populated.
- When you switch toggles off, changes are temporarily turned off, and the response reverts to default values or representation.




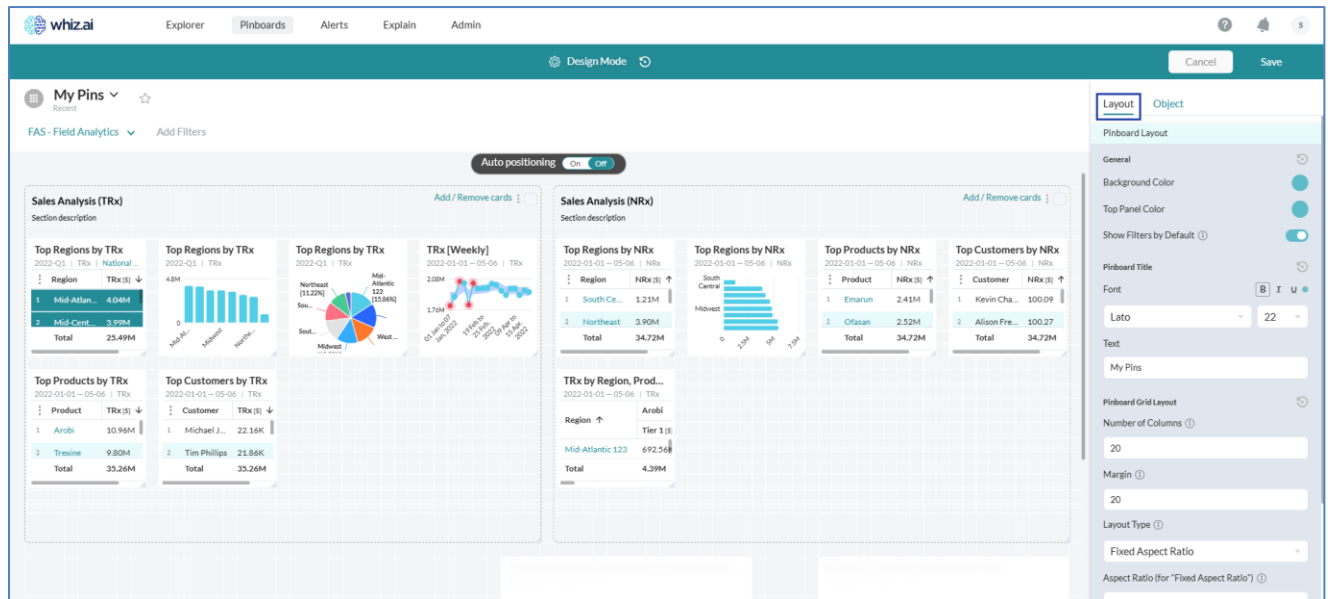
Note! Please note that the Conditional Formatting and Comparison features are mutually exclusive. If one is turned on, the other will be turned off.



Analytics options for trend response:

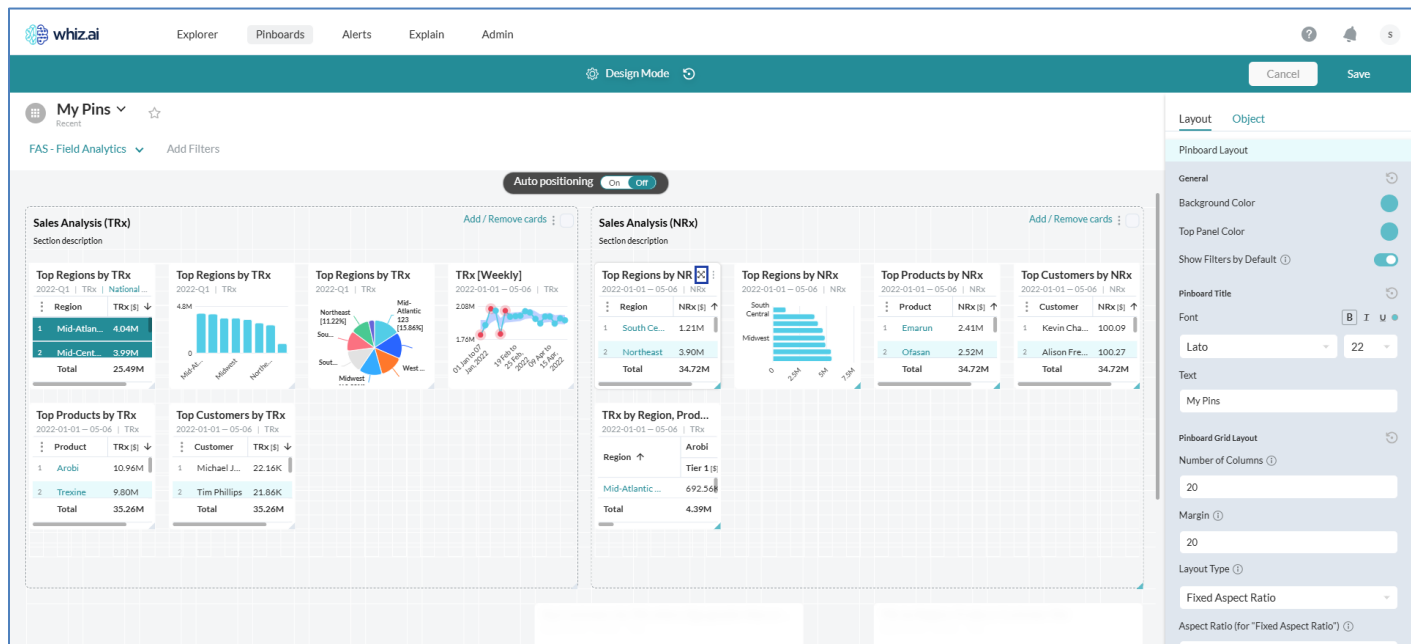
- **Enable Spotighting** helps you highlight specific data points on the chart.

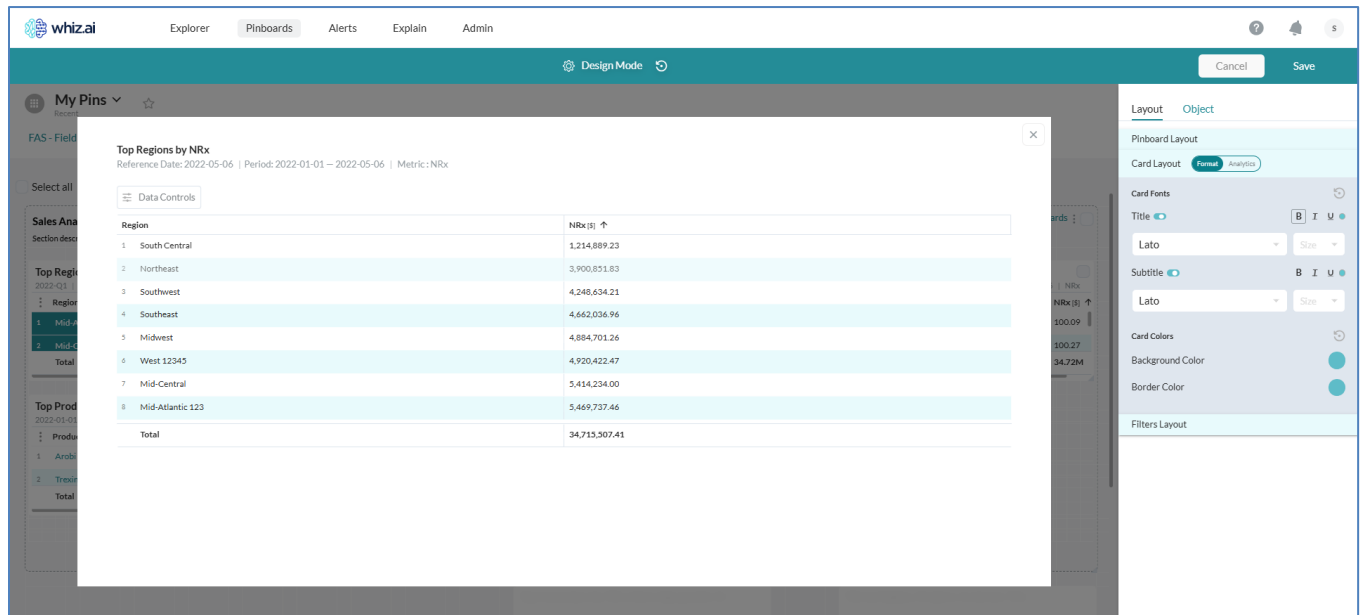
Accessing the 'Format' tab:

1. Open a pinboard and from the top-right corner of the window click the vertical ellipsis icon  > **Design Mode**. The **Design Mode** is displayed.




- From the right-side, click **Card Layout**. WhizAI displays a checkbox on individual cards on the pinboard.
- Hover over the card you wish to format. WhizAI displays  icon on that card.
- Click the  icon on the card you want to format. It will expand to show you more details and options in the layout tab.

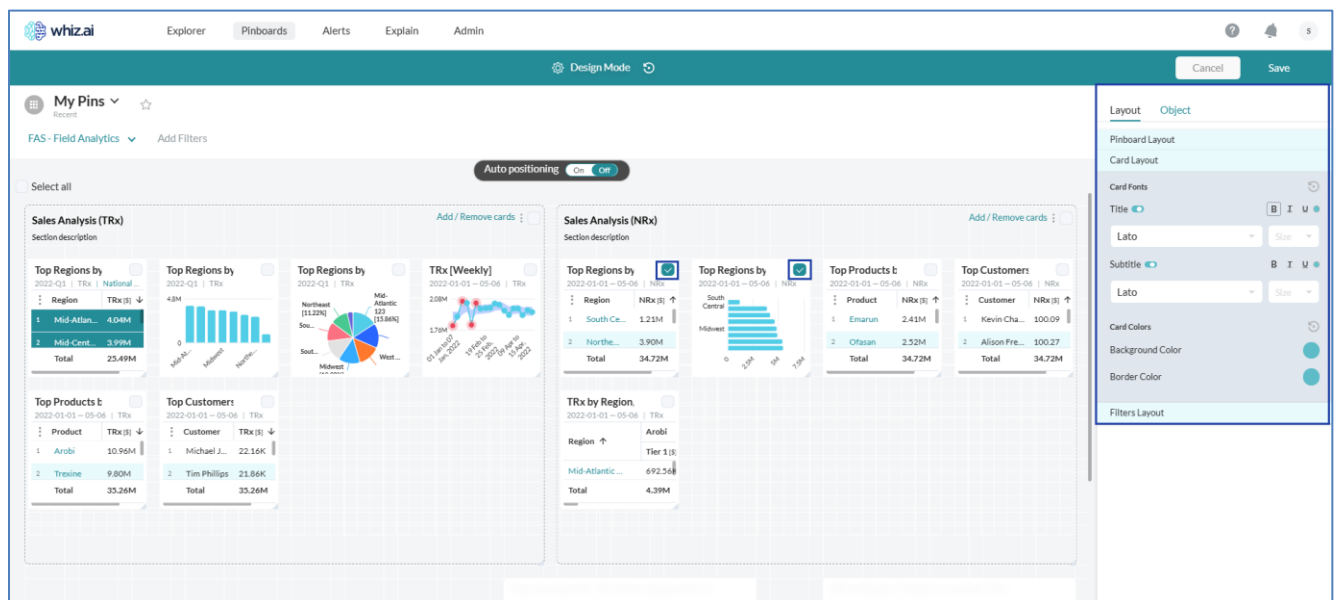




Note! If you want to select multiple cards, close the expanded icon and select multiple cards.



Note! if you select multiple cards, the expand icon  is not available for those cards.



- Once you select a card and expand it, on the right side, you can see a slider that contains two tabs: **Format** and **Analytics**.



Note! These tabs are displayed under the **Layout tab** in **Card Layout**.



Important! The **Analytics** tab is only visible for trend and table response.

The screenshot shows the WhizAI interface with a table titled "Top Regions by NRx". The table has two columns: "Region" and "NRx (M)". The data is as follows:

Region	NRx (M)
1 South Central	1,214,889.23
2 Northeast	3,900,851.83
3 Southwest	4,248,634.21
4 Southeast	4,662,036.96
5 Midwest	4,884,701.26
6 West 12345	4,920,422.47
7 Mid-Central	5,414,234.00
8 Mid-Atlantic 123	5,469,737.46
Total	34,713,307.41

The right-hand sidebar shows the "Layout" tab selected, with options for "Card Layout" and "Card Fonts". The "Card Fonts" section includes options for "Title" and "Subtitle" font, size, and style, as well as "Card Colors" for background and border.

Using different options in the Format tab:

The **Format** tab shows you all the common formatting options that are available for all cards. From the **Card layout** tab, you can format:

- Title font, size, style, and color
- Subtitle font, size, style, and color.
- Border and background color of the card.



Note! The common formatting options are the ones you see when you select multiple cards together.

The screenshot shows the WhizAI interface with a table titled "Top Regions by NRx". The table has two columns: "Region" and "NRx (M)". The data is as follows:

Region	NRx (M)
1 South Central	1,214,889.23
2 Northeast	3,900,851.83
3 Southwest	4,248,634.21
4 Southeast	4,662,036.96
5 Midwest	4,884,701.26
6 West 12345	4,920,422.47
7 Mid-Central	5,414,234.00
8 Mid-Atlantic 123	5,469,737.46
Total	34,715,507.41

On the right, the "Object" settings panel is open, showing options for "Card Fonts" (Title, Subtitle) and "Card Colors" (Background Color, Border Color).

For specific visuals or legends, you can change the color of the metric time period, or dimensions which is reflected in the legend. Use the **Values Color** option to change the colors of the legends.

You can change the value color in three ways:

- Click the legend
OR
- Click the visual, such as a Trendline or Bar
OR
- Select the value from the drop-down label **Values Color** under the **Format** tab.

This screenshot shows the same "Top Regions by NRx" table, but with a pink background. The "Object" settings panel on the right is open, and the "Format" tab is selected. The "Values Color" options are highlighted:

- Title**: Times New Roman
- Subtitle**: Lato
- Background Color**: (checked)
- Border Color**: (blue)

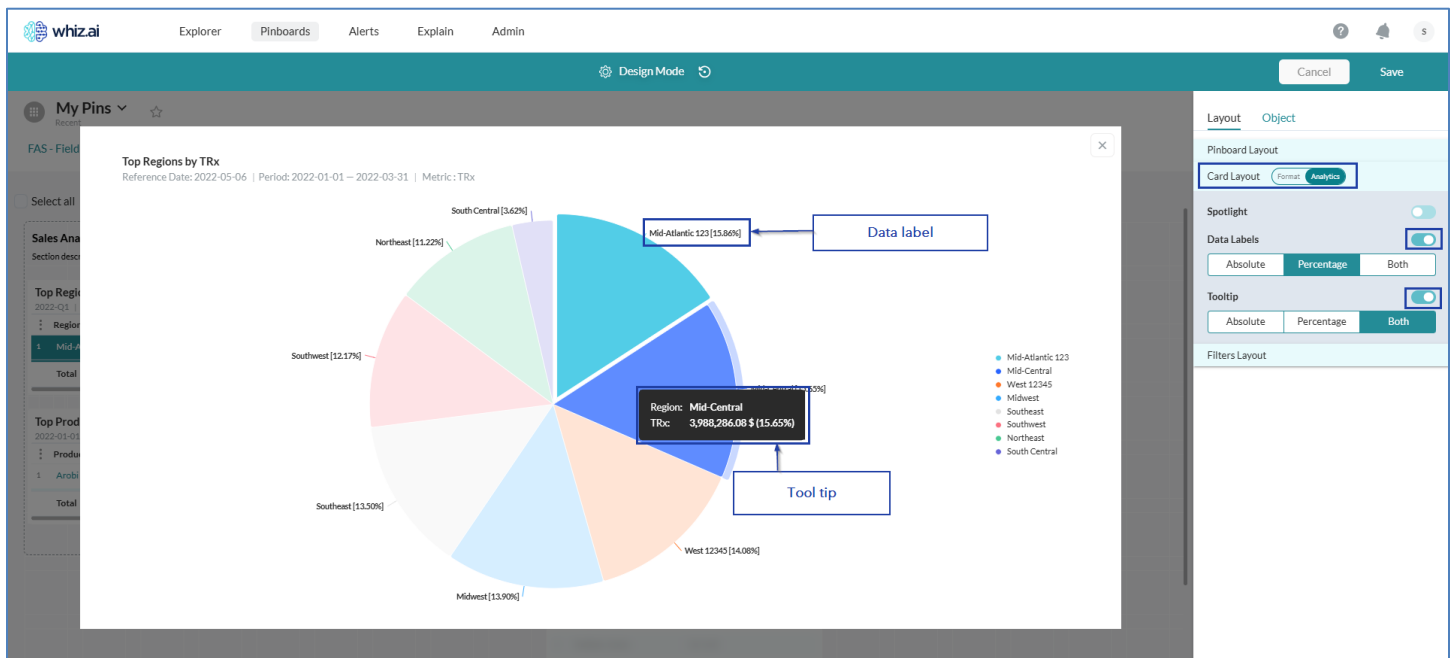


Important! Any changes you make to the color of the metric or time period will be saved and maintained even when you perform other actions, apply filters, or export images as PDF or PPT files.

Data Labels and Tooltip


Using the pinboard design mode you can now customize and manage labels and tooltips of the data points on the cards. For a particular data point, you can set the tooltip or the label as:

- Absolute
- Percentage
- Both



Note! The default label for Pie/Donut/Radial/100 stack/ 100 area chart etc. is always a percentage. Also, you can choose to enable a tooltip for your chart. Similarly, for Tooltip, you can choose between **Absolute**, **Percentage**, or **Both**.

To manage the data labels and tooltip:

1. Click the  expand option for the card (chart) you want to enable data labels. The card is opened in the **Layout** tab.
2. Click the **Analytics** tab.
3. The **Data Labels** and **Tooltip** are enabled as per your previous chart representations. Edit the **Data Labels** and **Tooltip** as required.
4. Click **Save**.



Note! Data labels are supported as per the visual chart space and pie charts.

Creating Sections on Pinboards

In pinboard design mode, board owners can logically group and organize all the cards in different 'sections'. Sections are components that can be dragged from the Object tab and dropped on the pinboard. Having these sections allows the board owners to apply section-level filters. Such section-level filters override the card-level filters. However, if the section level filters are not present or the section filters are present but not locked, then the cards inside the section do get impacted by the global filters.



Note! Section-level filters have a locking mechanism that prevents these filters from getting overwritten by board (global) filters.




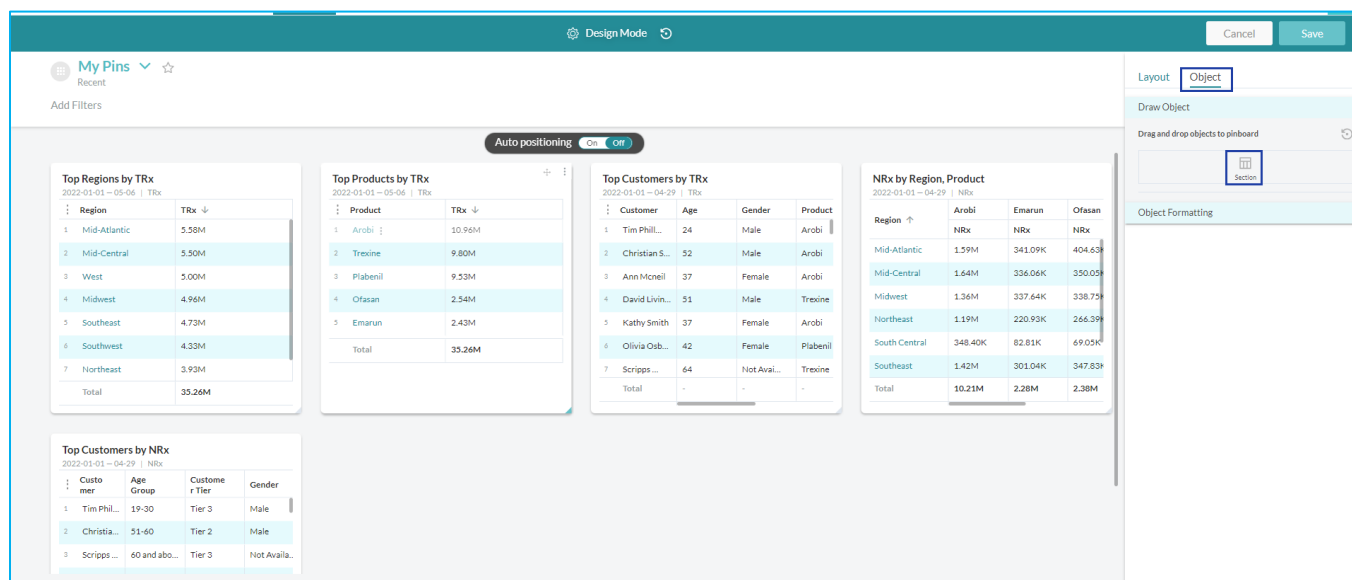
Note! Filters are applied in a specific order; pincards, sections, and then pinboards. The rank determines the priority unless filters are locked.


This helps you update the filters of only the desired cards grouped in sections to ignore global filters, and those that are not grouped in sections read the global filters.

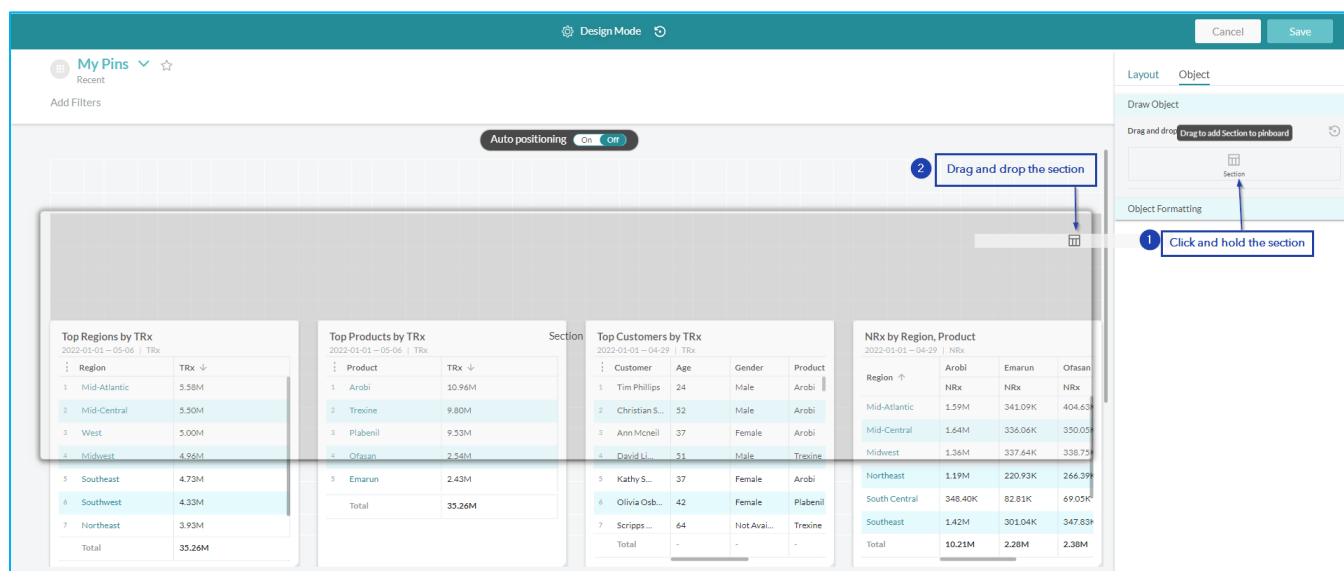
Also, you can add annotations and titles to these grouped cards and format the sections by selecting the desired section and it will open in the **Object** tab.

To add a section to a pinboard:

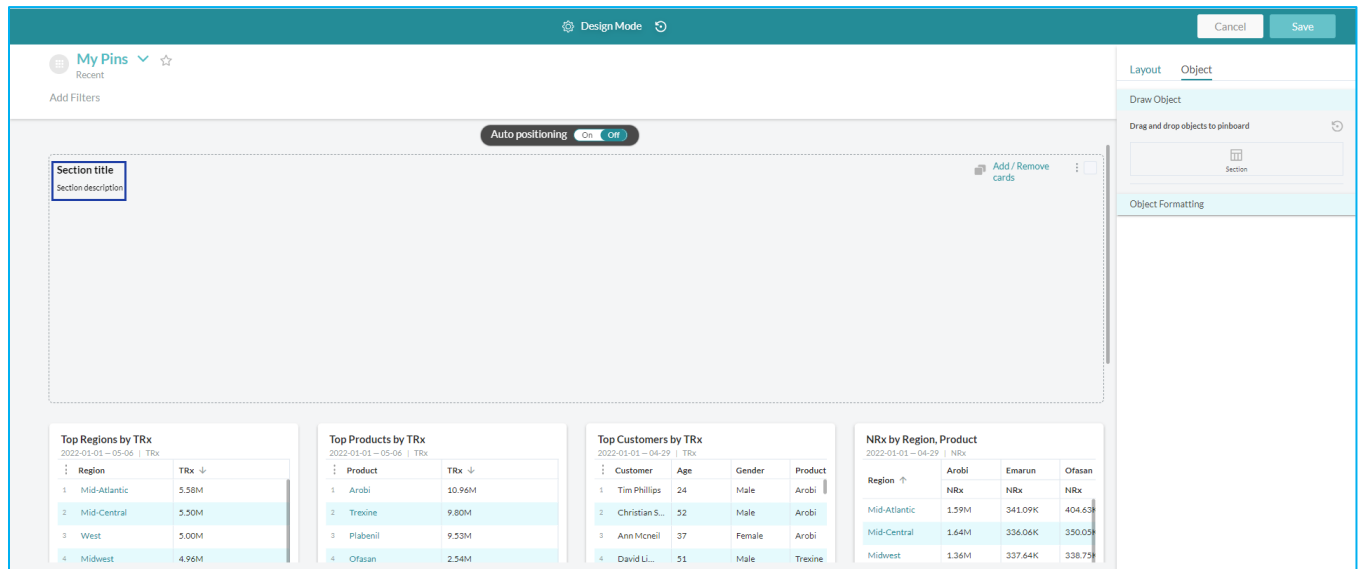
1. Open a pinboard. From the top-right corner of the board, click on the vertical ellipsis icon  > **Design Mode**. The **Design Mode** is displayed.
2. Click the **Object** tab. You can see the **Section** icon.



3. Click and hold the **Section** icon , and drag it to the pinboard to create a section as shown in the figure below.

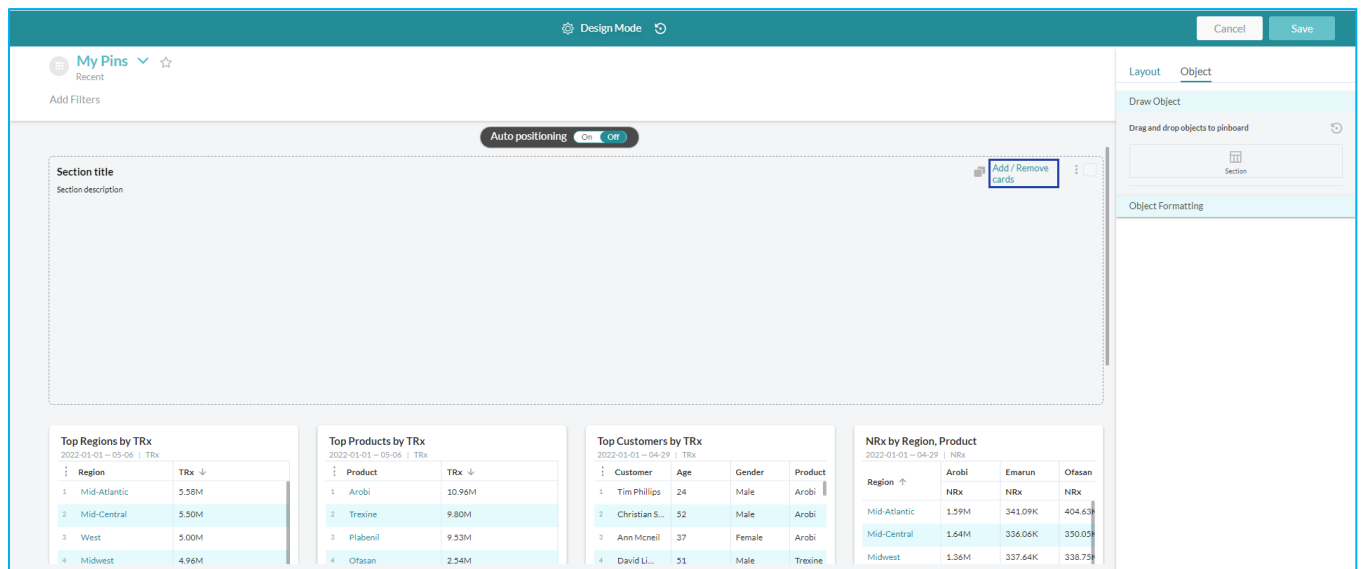


4. Add the **Section title** and **Section description**, as required.

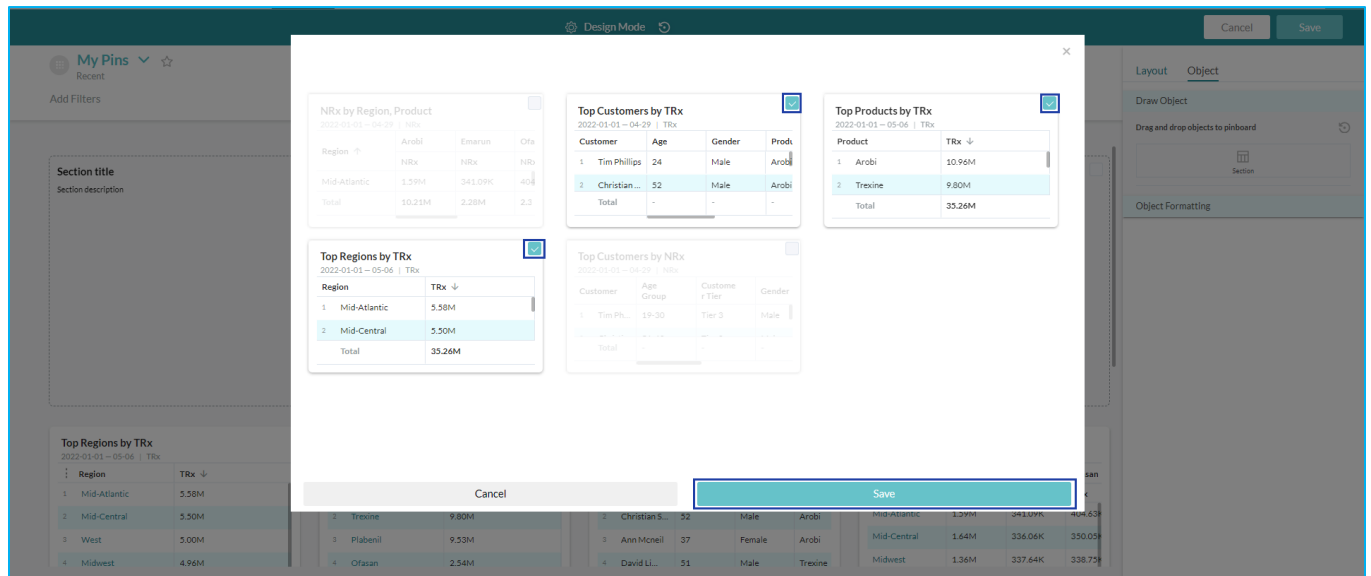


To add and remove cards from the section

1. From the top-right corner of the section, click the **Add / Remove cards** link. A new window opens which contains all the cards on the pinboard.



2. Select the card(s) that you must add to the section.



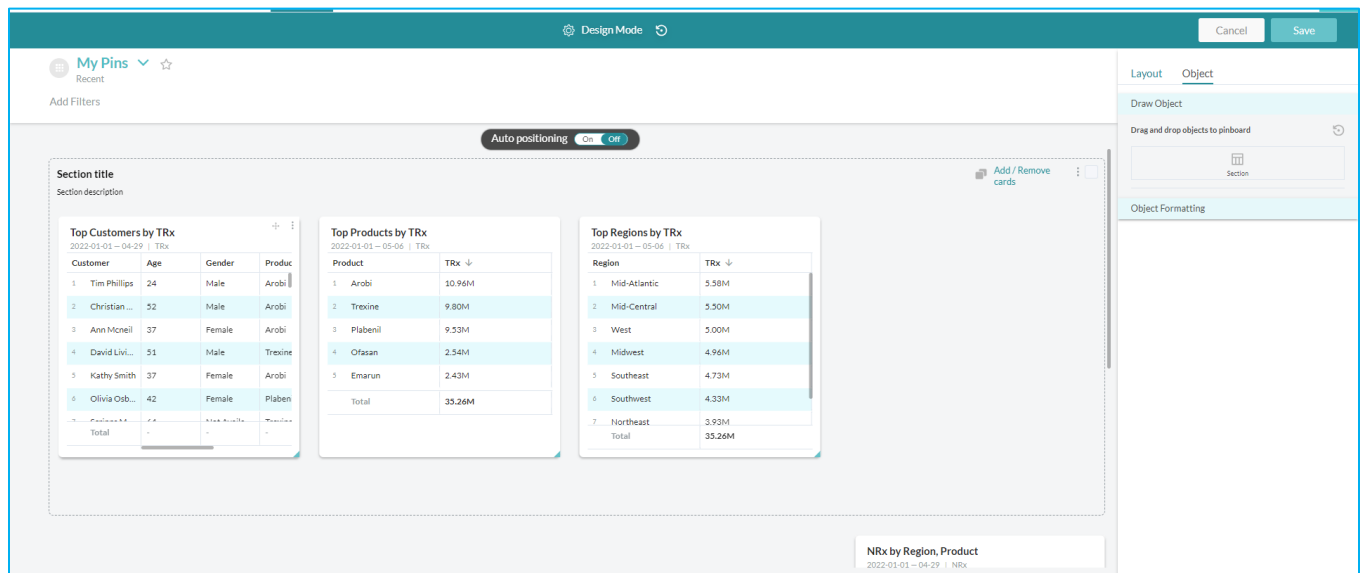
3. Click **Save**. Selected cards are added to the section.



Note! To rearrange the cards, you can drag them along the canvas of the section and drop them at the desired location, as required. You can also resize the cards by dragging them by the edges or corners.



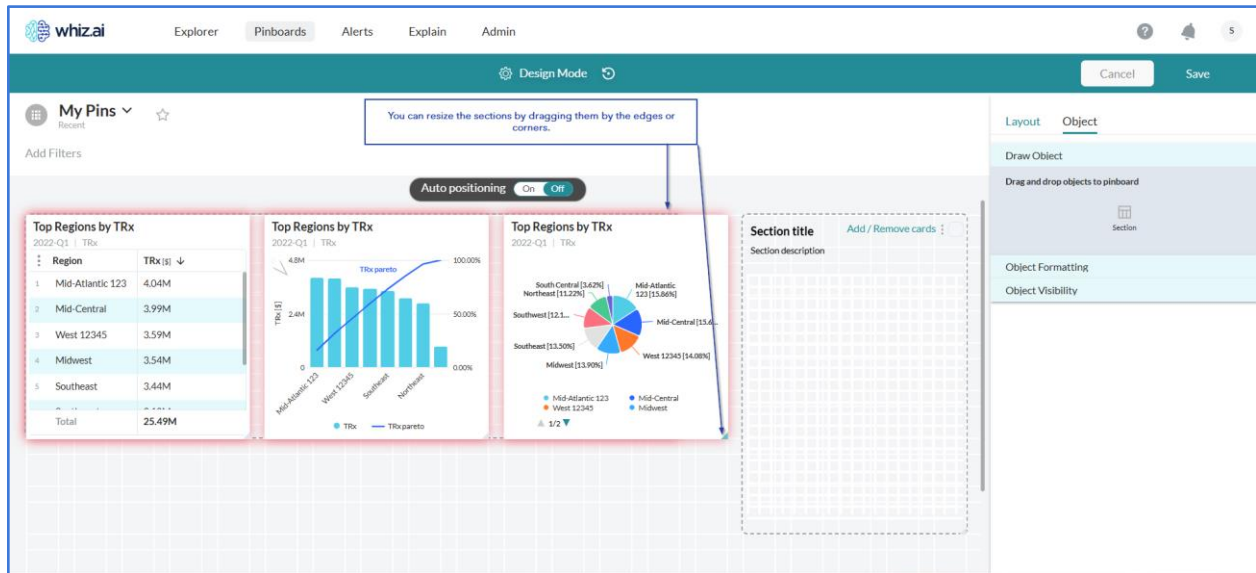
Note! Users will not be able to create sections on an empty pinboard if there are no cards available.



Note! To remove the card from the section, click the Add/Remove cards; clear the checkbox of the cards that you want to remove, and then click Save.

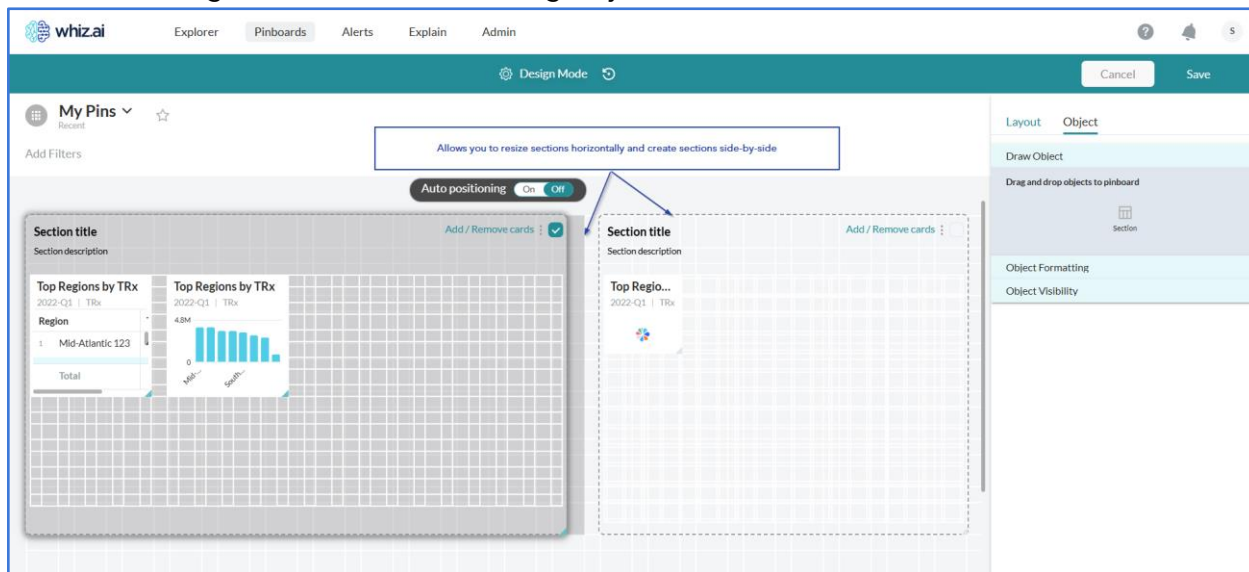
To resize a Section

1. To resize a section dragging it by the edges or corner.



Section Resizing and Layout Flexibility in Pinboard

Section Resizing can be done in following ways:

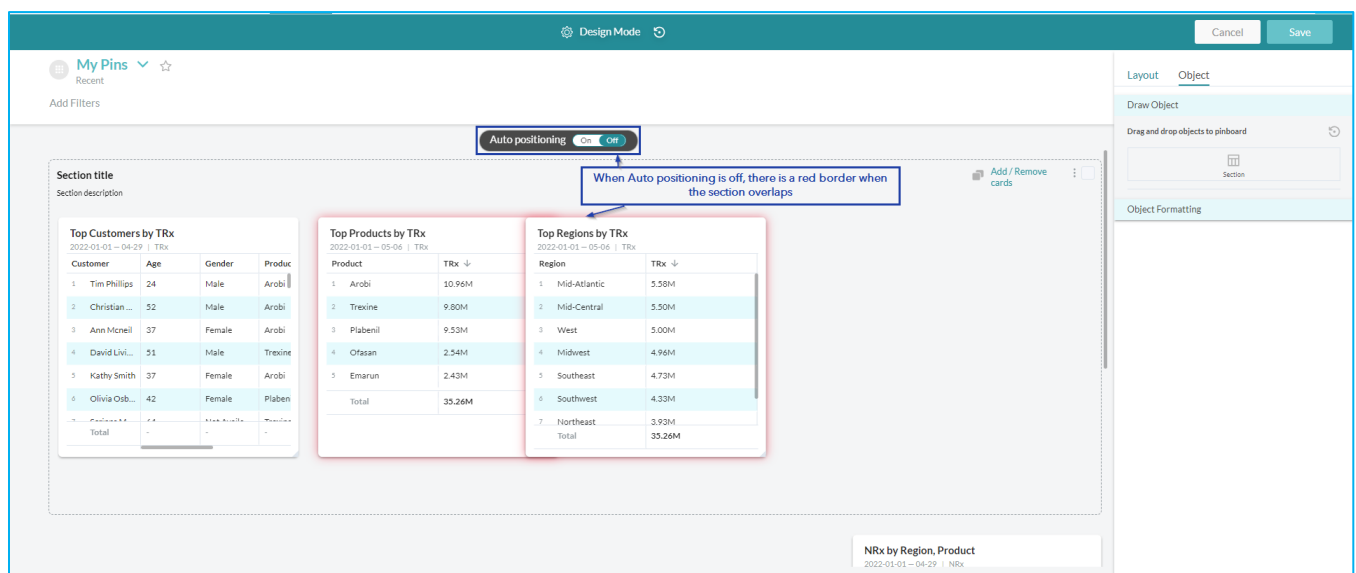


- **Flexible Resizing:** Pinboard sections can be adjusted horizontally and vertically, offering designers precise control over layout dimensions.
- **Custom Layouts:** Designers can place multiple sections side-by-side or stack them, creating highly customizable layouts that fit their data display needs.
- **Independent Sizing:** Each section size remains independent, ensuring no restrictions based on the presence of other sections nearby.
- **Backward Compatibility:** All existing pinboards maintain their original layout and sizing, ensuring no disruption to previous configurations.

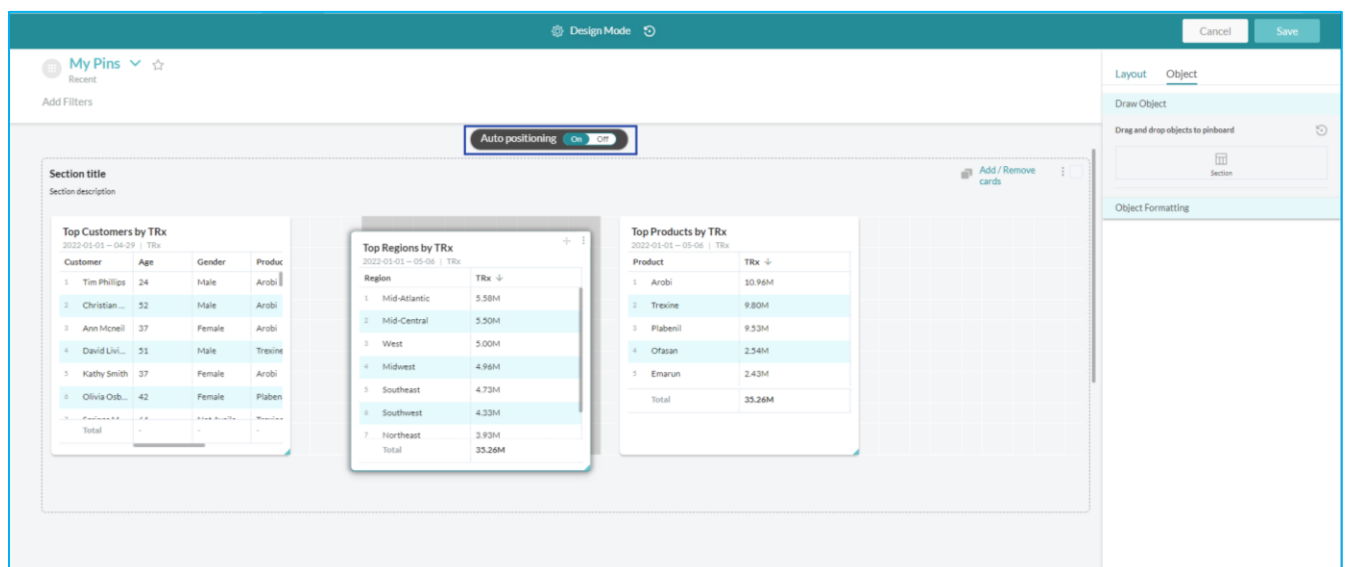
- **Validation and Compatibility:** Sections automatically prevent overlap with one another, ensuring a clean, organized appearance. The enhanced layout capabilities extend to exported pinboards, maintaining consistent output.

Auto-positioning in design mode and expand-collapse in view mode

Under **Pinboards > Design Mode > Object** in the **Sections** layout, WhizAI has now added an **Auto-Position** toggle button at the top center of the screen. When you turn off **Auto-Position**, the cards are overlapped with subtle red borders (indicating they are overlapped) and then the cards can be moved easily, as shown in the figure below:



When you turn on **Auto-Position**, and then try to move the cards, they can be reordered, as shown in the figure below:





Note! Auto-position is available in design mode only.



Tip! You can now auto-scroll, while dragging the card or section. You can expand-collapse your cards in 'View' mode using the small down arrow key at the top-left corner of each section, as shown in the figure below:

The screenshot displays a dashboard titled 'My Pins' with a 'Recent' section. It features five data cards arranged in two rows. The top row includes 'Top Customers by TRx', 'Top Regions by TRx', and 'Top Products by TRx'. The bottom row includes 'Top Customers by NRx' and 'NRx by Region, Product'. Each card has a small down arrow icon in the top-left corner, indicating it can be expanded or collapsed.

Customer	Age	Gender	Product	TRx
1 Tim Phillips	24	Male	Arobi	10.96M
2 Christian Sosa	52	Male	Arobi	9.80M
3 Ann Mcneil	37	Female	Arobi	9.53M
4 David Livingston	51	Male	Trexine	2.54M
5 Kathy Smith	37	Female	Arobi	2.43M
6 Olivia Osborne	42	Female	Plabenil	-
7 Scripps Memori...	64	Not Availa...	Trexine	-
8 Meadville Medi...	74	Not Availa...	Arobi	-
9 Mckenzie Surge...	33	Not Availa...	Trexine	-
Total	-	-	-	-

Region	TRx
1 Mid-Atlantic	5.58M
2 Mid-Central	5.50M
3 West	5.00M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

Product	TRx
1 Arobi	10.96M
2 Trexine	9.80M
3 Plabenil	9.53M
4 Ofasan	2.54M
5 Emarun	2.43M
Total	35.26M

Customer	Age	Customer Tier	Gender	Product
1 Tim Phillips	24	Male	Arobi	10.96M
2 Christian Sosa	52	Male	Arobi	9.80M
3 Ann Mcneil	37	Female	Arobi	9.53M
4 David Livingston	51	Male	Trexine	2.54M
5 Kathy Smith	37	Female	Arobi	2.43M
6 Olivia Osborne	42	Female	Plabenil	-
7 Scripps Memori...	64	Not Availa...	Trexine	-
8 Meadville Medi...	74	Not Availa...	Arobi	-
9 Mckenzie Surge...	33	Not Availa...	Trexine	-
Total	-	-	-	-

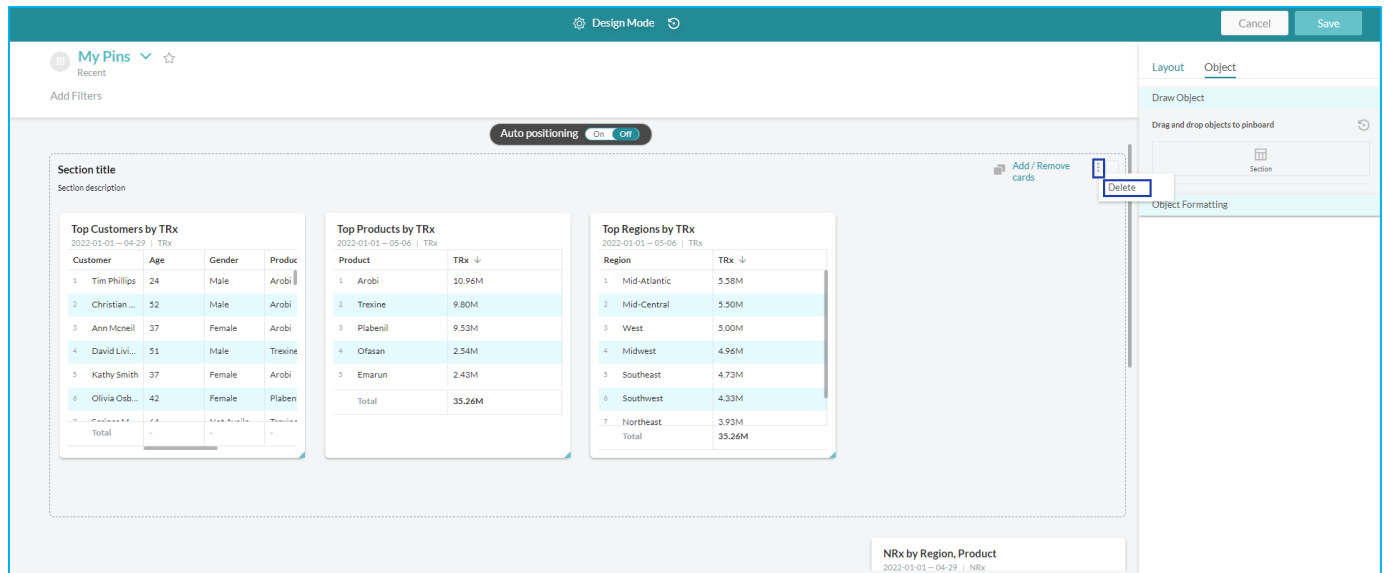
Region	Arobi	Emarun	Ofasan	Plabenil
1 Mid-Atlantic	5.58M	-	-	-
2 Mid-Central	5.50M	-	-	-
3 West	5.00M	-	-	-
4 Midwest	4.96M	-	-	-
5 Southeast	4.73M	-	-	-
6 Southwest	4.33M	-	-	-
7 Northeast	3.93M	-	-	-
8 South Central	1.23M	-	-	-
Total	35.26M	-	-	-

Best practices:

1. Turn the default Auto positioning to ON.
2. Firstly, create blank sections in boards anywhere in the pinboard.
3. With auto-positioning ON, add cards in the respective sections (to avoid overlapping issues with cards that are outside of the section)
4. Turn the Auto-positioning OFF and now rearrange the sections appropriately.

To delete a section

1. Click the ellipsis icon and click **Delete**. WhizAI confirms whether you want to proceed with the action.



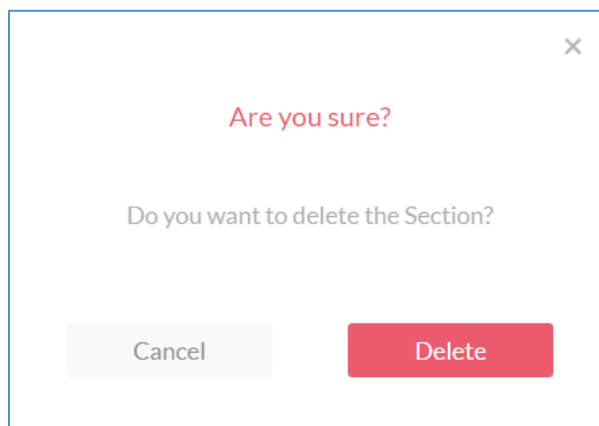
2. Click **Delete**.



Note! If you delete the section, the cards in the section are moved at the end of the pinboard without disturbing the board layout.




Note! You can select multiple sections by selecting the check boxes, and format (customize) them at the same time.

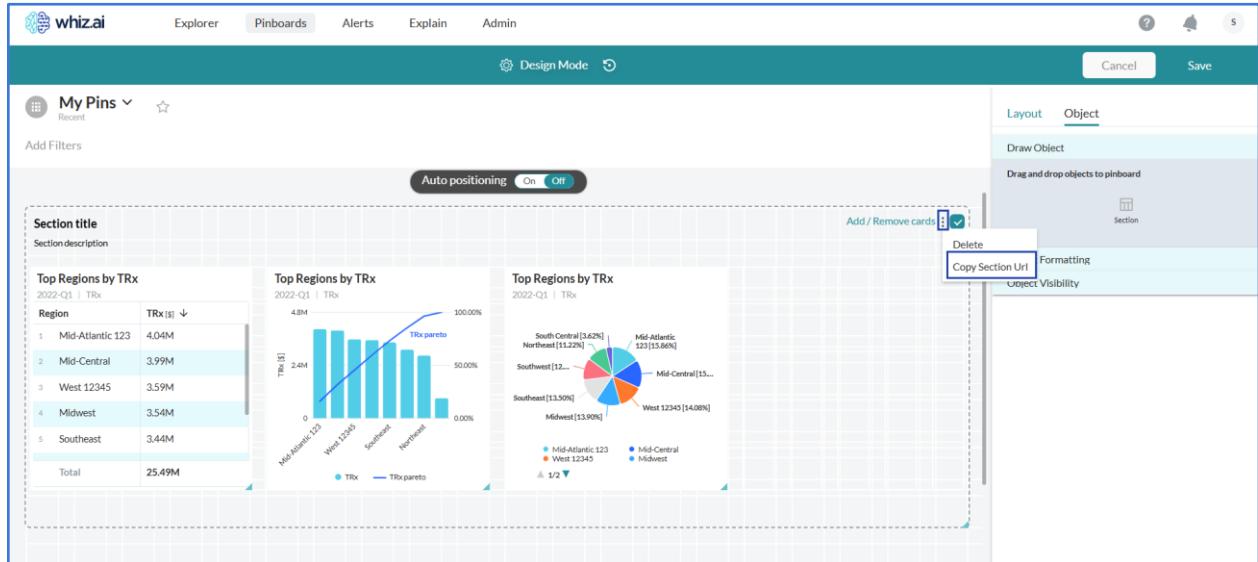


To Navigate directly to the section using a URL

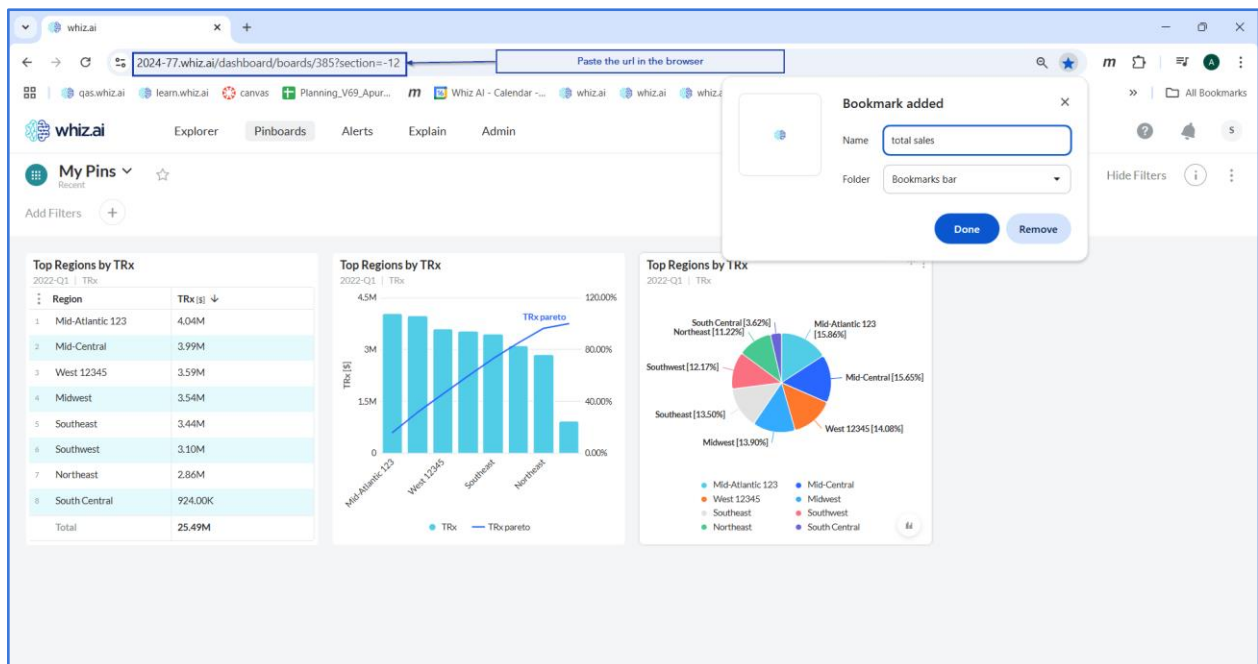
You can navigate directly to any section by copying and pasting its URL into your browser. This allows you to share links or bookmark them that provide direct access to specific sections. By bookmarking the section links, you can easily navigate across multiple sections and pinboards.

To copy a section url:

1. Hover on the Ellipsis icon  at the top right side of the section, click **Copy Section Url**. The url section is copied.



2. Paste the copied url to your browser and bookmark it for future reference. Write the name of the bookmark and click **Save**.



Object Formatting

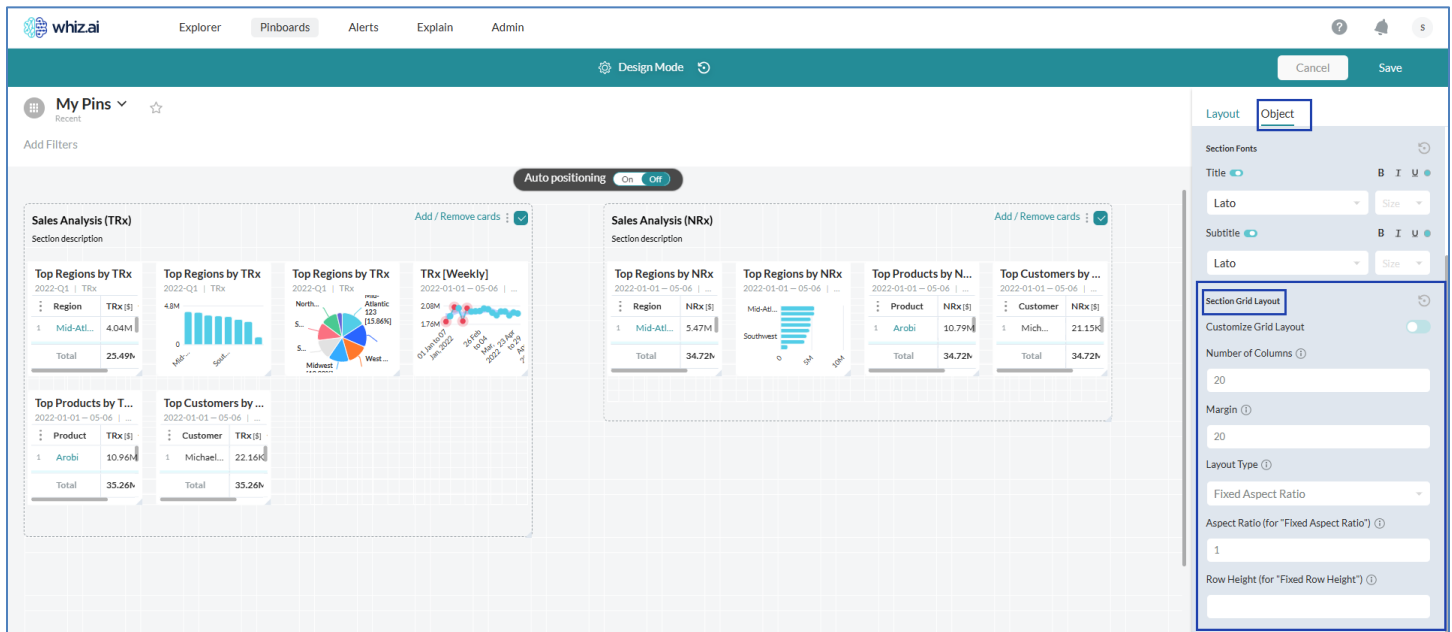
You can format your sections using the design mode option. You can change the layout for Sections Using the **Object > Object Formatting**:

From the **Object Formatting** tab, you can change the:

- Background color of the section
- Section Border
- Section Fonts
 - Font Size
 - Font style
- Rename the section boards
- Resize the Section Grid Layout

The screenshot displays the Whiz.ai dashboard in Design Mode. The interface includes a top navigation bar with 'Explorer', 'Pinboards', 'Alerts', 'Explain', and 'Admin' tabs. The main content area shows two 'Sales Analysis' sections. The left section, 'Sales Analysis (TRx)', contains four sub-sections: 'Top Regions by TRx', 'Top Regions by TRx', 'Top Regions by TRx', and 'TRx [Weekly]'. The right section, 'Sales Analysis (NRx)', contains four sub-sections: 'Top Regions by NRx', 'Top Regions by NRx', 'Top Products by N...', and 'Top Customers by ...'. A right-hand panel titled 'Object Formatting' is open, showing settings for 'Section background', 'Section border', 'Section Fonts', and 'Section Grid Layout'. The 'Section background' and 'Section border' settings are currently set to a teal color. The 'Section Fonts' settings show 'Title' and 'Subtitle' both set to 'Lato' font. The 'Section Grid Layout' settings show 'Customize Grid Layout' as 'On', 'Number of Columns' as '20', 'Margin' as '20', and 'Layout Type' as 'Fixed Aspect Ratio'.

Changing the Section Grid Layout for Pinboards



Section Grid Layout offers the following customization options:

- **Customize Grid Layout Toggle:** By default, sections inherit pinboard-level grid settings. When toggled ON, it enables customized layout settings for a section.
- **Number of Columns:** Define the number of columns for the grid using a numeric textbox. Tooltip explains that increasing the value makes the pinboard more granular.
 - Values: an integer from 1 to 2000
 - Default: 20
- **Margin:** Controls the space between cards in pixels via a numeric textbox.
 - Values : an integer from -10 to 100
 - Default: 20
- **Layout Type:** Choose from:
 - **Fixed Aspect Ratio:** Cards increase proportionally with screen size.
 - **Fixed Row Size:** Cards maintain consistent height while adjusting width based on screen size.
 - **Single Page View:** Eliminates scrollbars and resizes cards to fit the screen.
- **Aspect Ratio (For Fixed Aspect Ratio):** Define the ratio of card height to width using a numeric textbox, allowing fractions.
 - Values: a decimal from 0 to 100
 - Default: 1
- **Row Height (For Fixed Row Height):** Specify the fixed height of rows in pixels using a numeric textbox.
 - Values: an integer from 1 to 100
 - Default: 20
- **Reset Option:** A reset option allows users to revert to the last saved settings.

Backward Compatibility



Note! Existing pinboards retain their current layouts unless the user makes changes to any of the new properties. Upon modifying and saving, the new grid properties are applied.

Object Visibility

Conditional Hide/Show for Sections in Pinboards

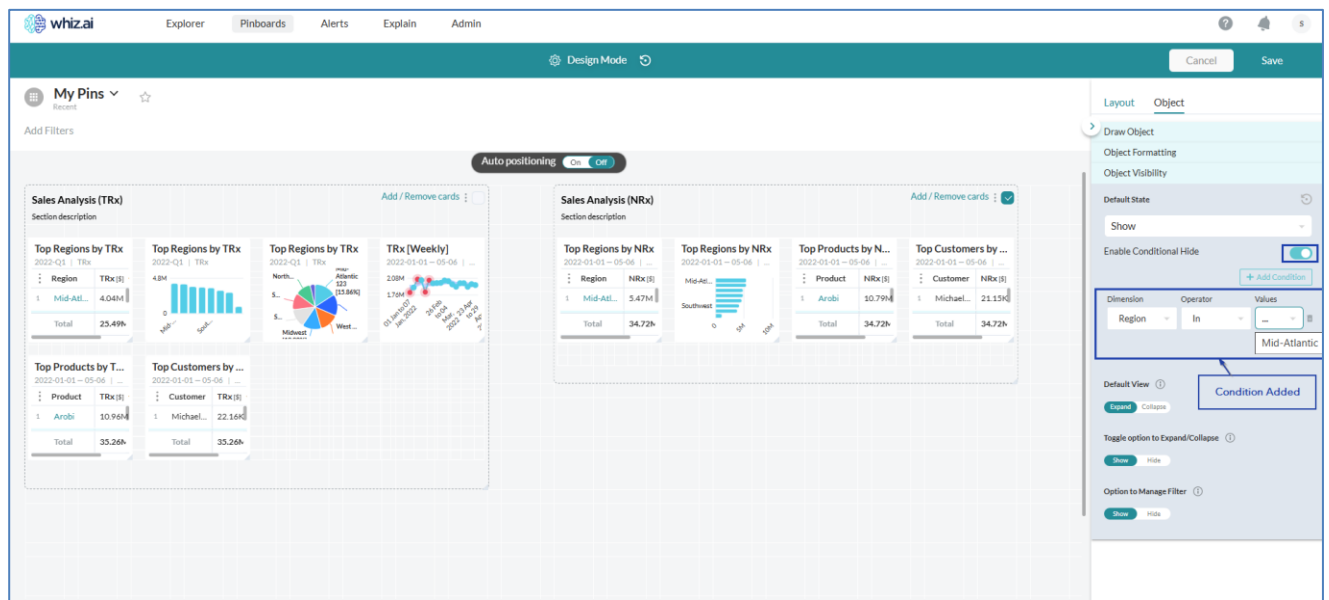
In the pinboard **Design Mode** > **Object** tab > **Object Visibility** section, the **Default State** allows you to **Show** or **Hide** a particular section on a pinboard when the enabled conditions match pinboard filter values.

The screenshot shows the WhizAI Design Mode interface. The top navigation bar includes 'Explorer', 'Pinboards', 'Alerts', 'Explain', and 'Admin'. The main area displays a pinboard layout with several sections: 'Sales Analysis (TRx)', 'Sales Analysis (NRx)', 'Top Regions by TRx', 'Top Regions by NRx', 'Top Products by N...', and 'Top Customers by ...'. The 'Object Visibility' panel is open on the right, showing the 'Object' tab. It includes a 'Default State' dropdown set to 'Show', an 'Enable Conditional Hide' toggle, and a '+ Add Condition' button. Below these are sections for 'Default View' (Expanded/Collapsed), 'Toggle option to Expand/Collapse' (Show/Hide), and 'Option to Manage Filter' (Show/Hide).

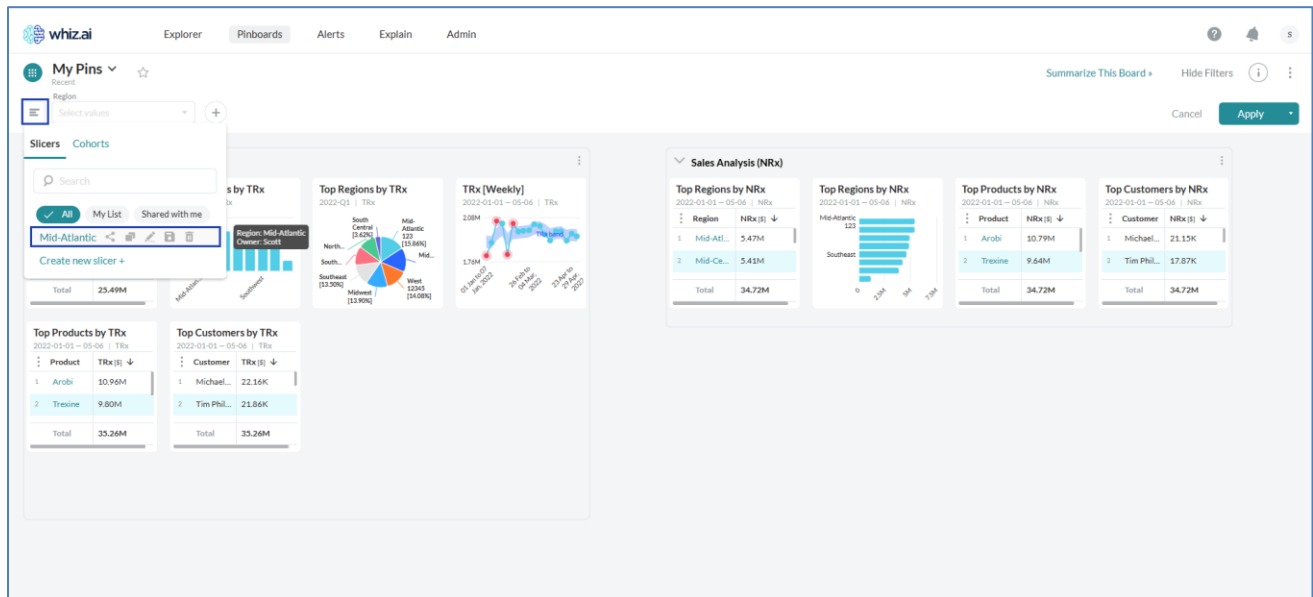
The **Object Visibility** contains the following options:

- **Default View:** You can define whether you want to **Show** or **Hide** the section. When the default state is **Show**, then WhizAI displays **Enable Conditional Hide** toggle. If you set the default state as **Hide**, then WhizAI displays the **Enable Conditional Show** toggle.
- **Enable Conditional Hide:** Enable this toggle and add conditions. If these conditions are satisfied at a dashboard, WhizAI hides the section.
- **Enable Conditional Show:** Enable this toggle and add conditions. If these conditions are satisfied on a pinboard, then WhizAI displays the section.
- **+ Add Condition:** This condition has three parameters, viz **Dimensions** in the data model, the **Operators** (**In** and **Not In**), and the **Values** of the dimension. Considering the default state as Show, Enable Conditional Hide is satisfied when:

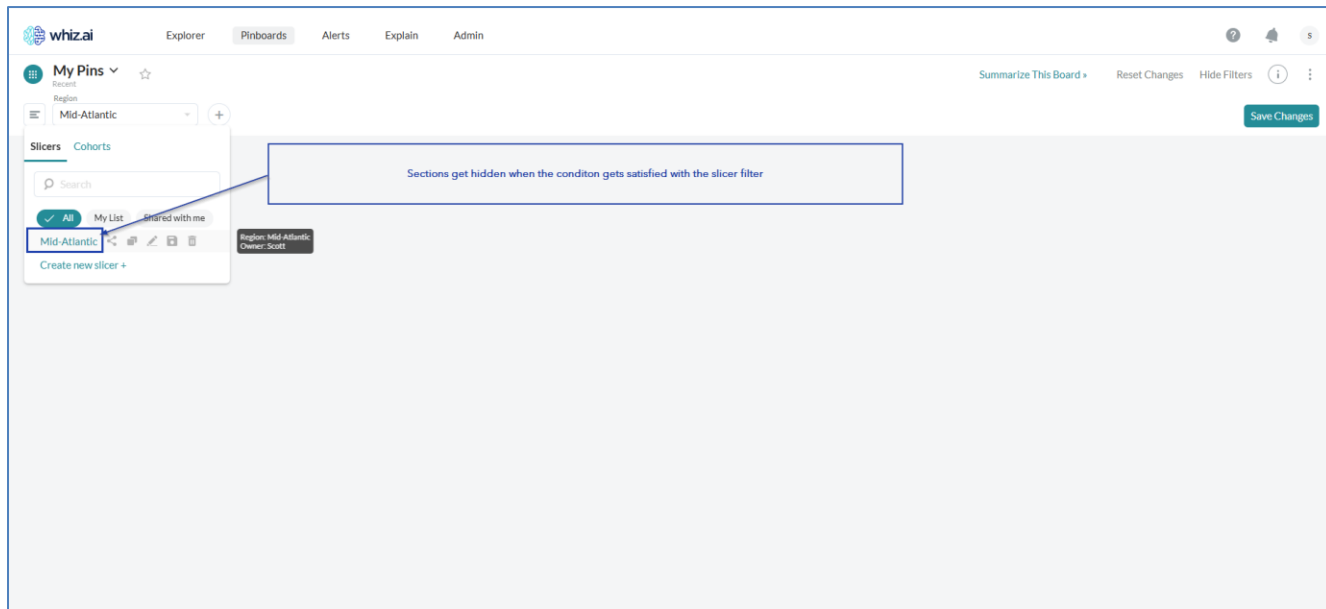
Understanding WhizAI User Interface



- Dimension **In/ Not In** section value matches the pinboard filter.
- Or
- Dimension **In/ Not In** section value matches the slicer.

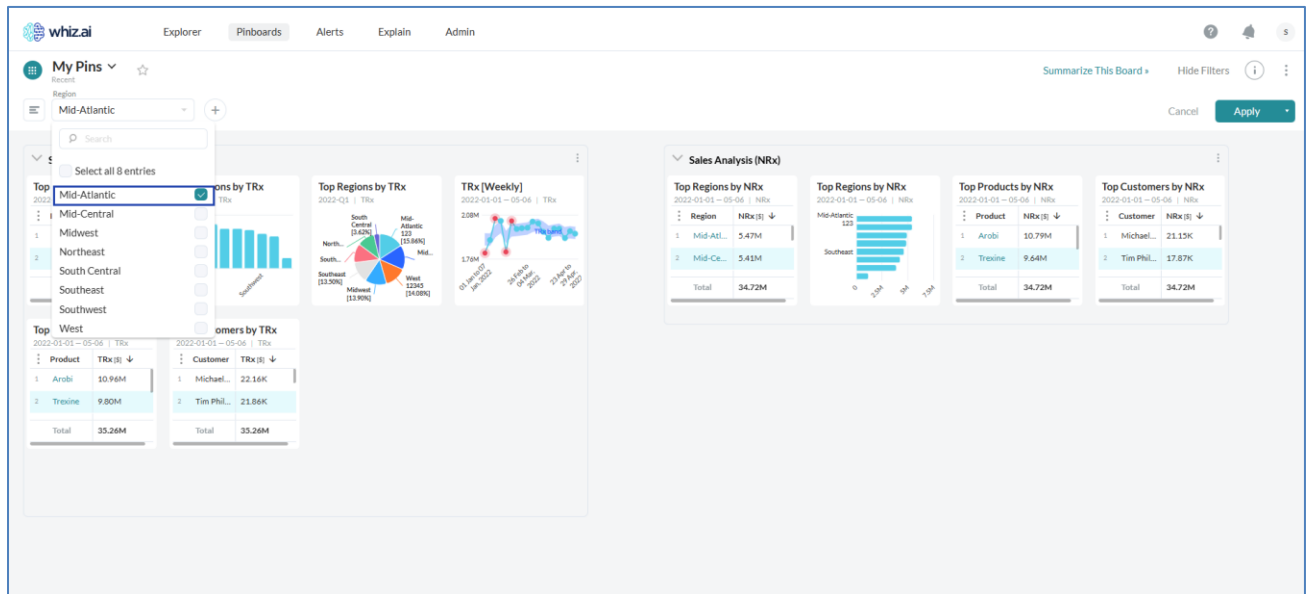


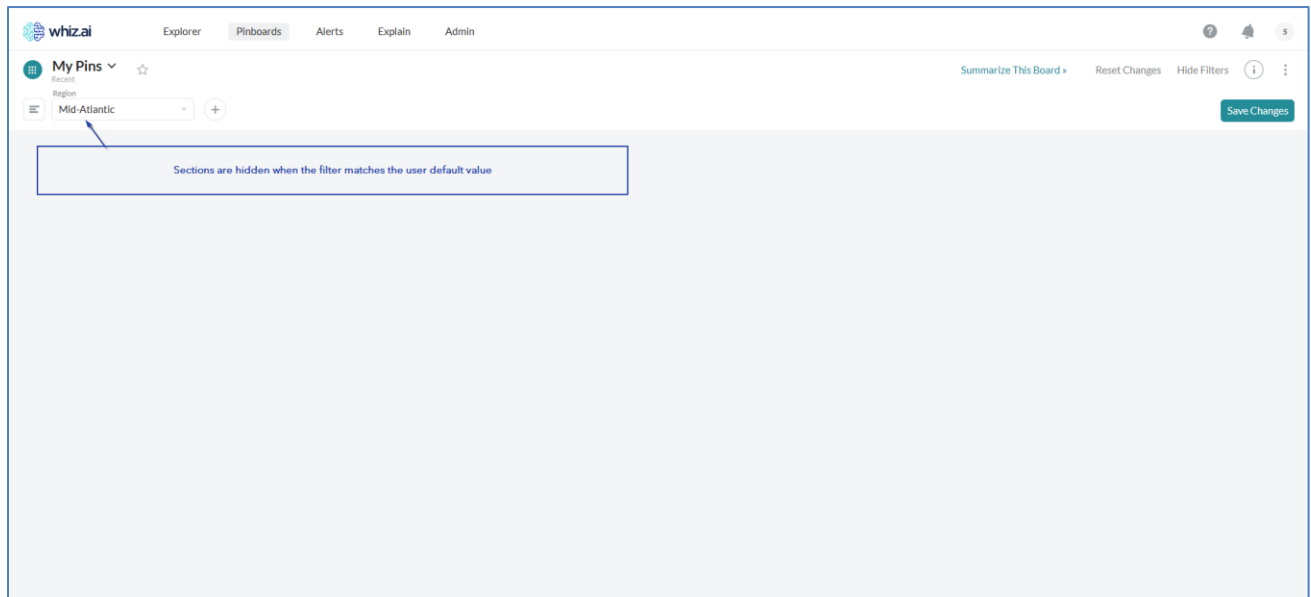
Understanding WhizAI User Interface



Or

- Dimension **In/ Not In** section value matches default filter value.





Tip! If **In** operator hides the section for a certain dimension value then it will show the section for the **Not In** operator for the same dimension value



Note! You can see the **Section Layout** section when one or more section/s exist on the board.



Note! You will always see the section by default.

Note: You must define the conditions based on the following set of rules:

- Select one or multiple conditions to set the show/hide state.
- As per multiple conditions only the AND operator is applied.
- You can select multiple sections and apply common rules.
- When there are conflicting conditions in multiple selected sections, the conditions are reset when you try to make some changes to the section layout.
- When you select the individual section, the common rules are displayed, and you can add more conditions to it.
- If conditions on individual sections are applied and now if you multi-select the sections, the previous rules are overridden.



Note! User authorization is considered when you apply dimensional filter values for the conditional drop-downs.

Hiding Section on Pinboard

You can hide pinboard sections as board owners:

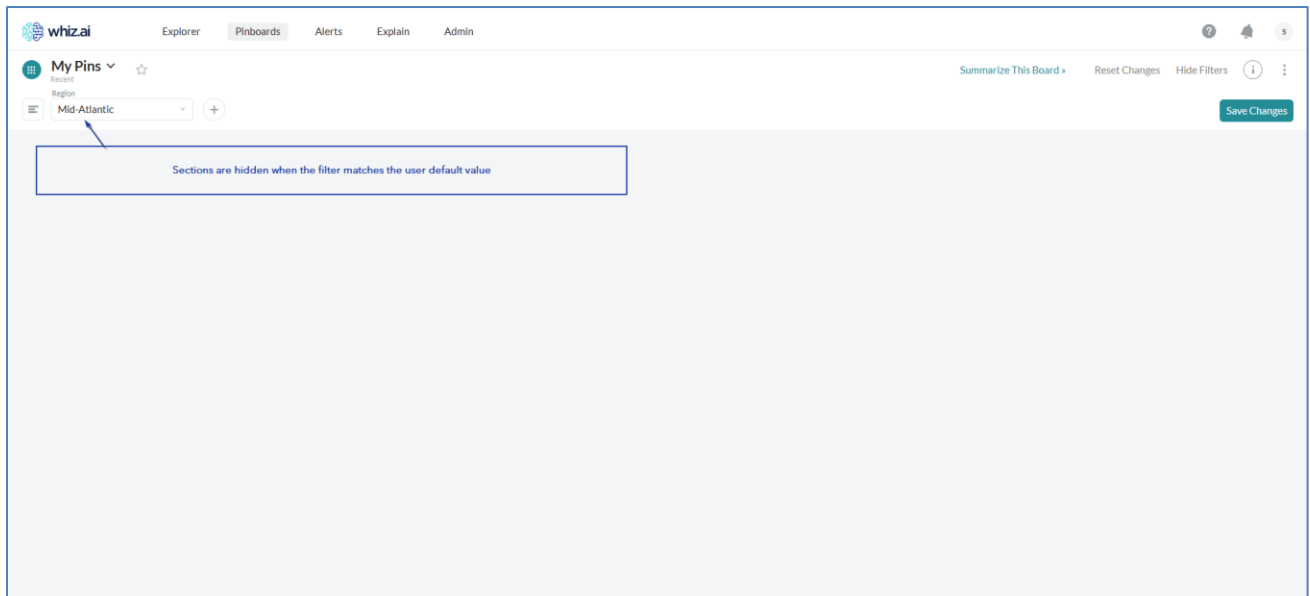
1. Select the section you want to hide. Go to **Object** tab > **Object formatting** > **Section Layout**
2. The **Default State** is **Show**. WhizAI **Hides** the section when the condition is enabled.
3. Click the **Enable Conditional Hide** toggle. The **+ Add Conditions** button becomes available.
4. Click **+Add Conditions**. The options to define the conditions to hide the section are displayed. Refer to defining sections to understand how to set the conditions.
5. Select the **Dimension** as **Region**, **Operator** as **In**, and **Values** as **Mid-Atlantic** for the 1st condition.

The screenshot shows the WhizAI interface with the 'Object formatting' panel open. The 'Section Layout' section is selected, and the 'Default State' is set to 'Show'. The 'Enable Conditional Hide' toggle is turned on. A condition is added: Dimension 'Region', Operator 'In', and Values 'Mid-Atlantic'. The 'Condition Added' button is visible.

6. Select **Save**. The Recent Pinboard is displayed.
7. Add Filters (+) as **Region**. Choose **Mid-Atlantic** from the drop-down.

The screenshot shows the WhizAI interface with the 'Recent' pinboard. The 'Region' filter is set to 'Mid-Atlantic'. The pinboard displays various charts and tables, including 'Sales Analysis (TRx)', 'Top Regions by TRx', 'TRx [Weekly]', 'Sales Analysis (NRx)', 'Top Regions by NRx', 'Top Products by NRx', and 'Top Customers by NRx'. The 'Mid-Atlantic' region is highlighted in the charts.

8. Select **Apply**. The Section gets hidden when the condition is satisfied with the pinboard filter.




9. Click **Save Changes**.

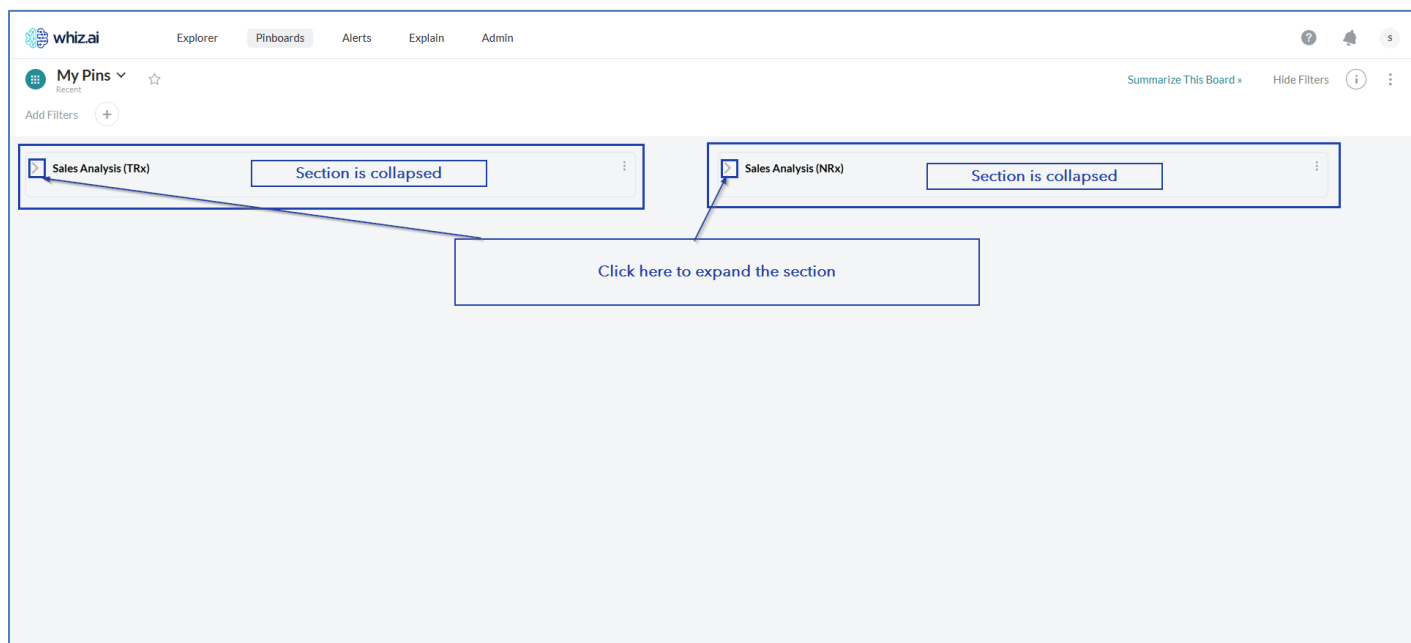
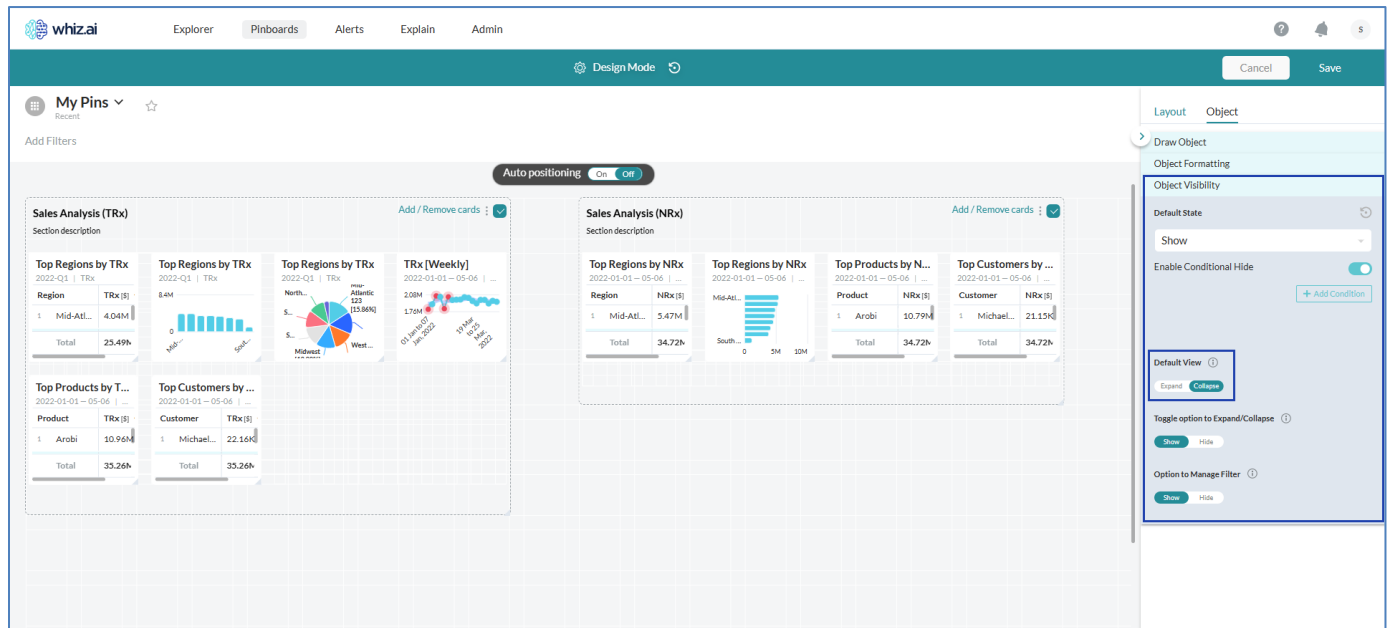
Setting Default section view as expanded **or** collapsed

In the pinboard **Design Mode** > **Object** tab > **Object Visibility** section, the **Default View** toggle allows you to set your default preference to **Expand** or **Collapse** sections on pinboards.



Note! Regardless of the preferences set by the pinboard owner, the section will always be in Expand mode for the shared viewer.

- **Default View:** This toggle allows the board owners to set their default preferences as expand or collapse for each section. Viewers can easily expand or collapse the section the pinboard via .
- **Expand:** Enable this toggle and click **Save**, WhizAI sets the default view of the section on the pinboard in the Expand mode.
- **Collapse:** Enable this toggle and click **Save**, WhizAI collapses the section on the pinboard.



Hide/Show filters for Sections in Pinboard

In the pinboard **Design Mode** > **Object** tab > **Object Visibility** section, the **Option to Manage Filter** allows you to **Show** or **Hide** the **Show Filters** link on a pinboard section.

The **Option to Manage Filter** contains the following options:

- **Enable Hide:** Enable this toggle, WhizAI hides the **Show Filters** link for the selected section.
- **Enable Show:** Enable this toggle, WhizAI displays **Show Filters** link for the selected section.

Hide show filters link disabled for this section

Auto positioning ☐ On ☒ Off

Hide show filters link enabled for this section

Layout Object

Draw Object

Object Formatting

Object Visibility

Default State

Show

Enable Conditional Hide

+ Add Condition

Default View

Expand Collapse

Toggle option to Expand/Collapse

Show Hide

Option to Manage Filter

Show Hide

Show filters link hidden for this section

Summarize This Board

Hide Filters

Show Filters

Managing Pinboards from Pinboards Manager



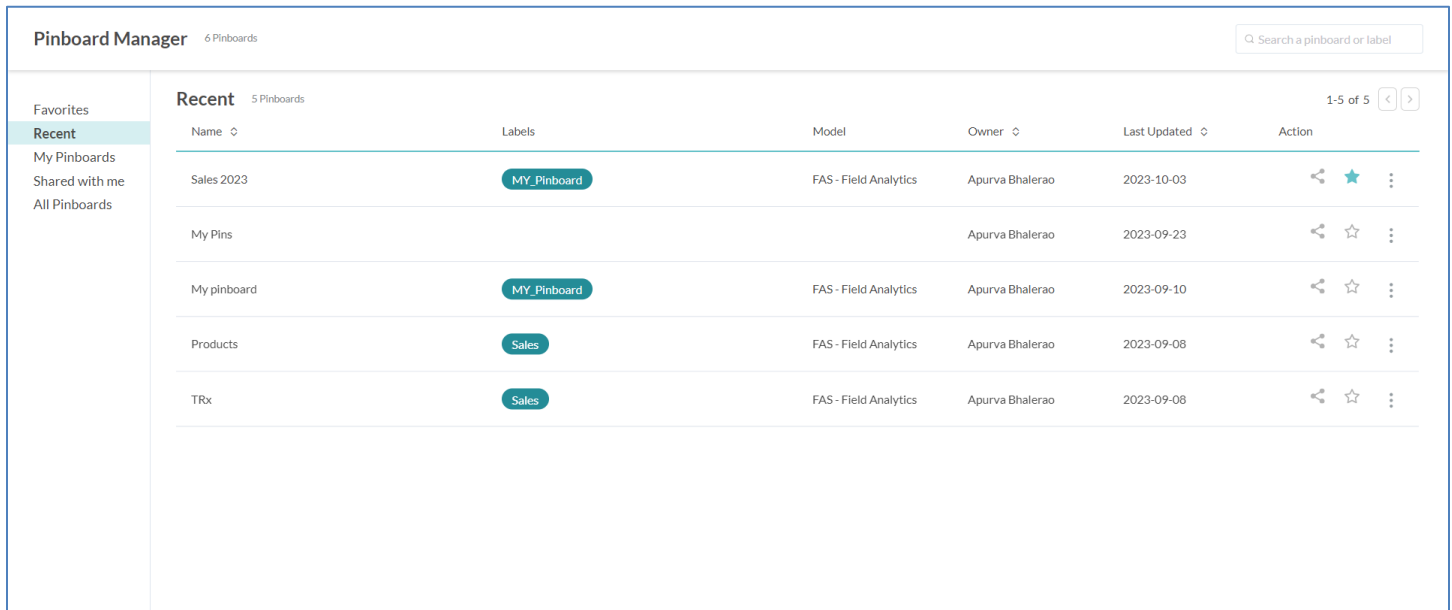
Note! Pinboards manager is a configurable feature. In case, it is not configured for you, you see the main pinboards page.

From the pinboards manager page, you can view pinboards organized in different categories.

- **Favorites**

- **Recent**
- **My Pinboards**
- **Shared**
- **All Pinboards**

This categorization of the pinboards helps you manage the boards and easily navigate to the boards, as required. When you click **All Pinboards** on the Explorer, you will be redirected to the **Pinboard Manager** page. By default, the **Recent** section opens as shown in the following figure.




The screenshot shows the 'Pinboard Manager' interface. On the left is a sidebar with 'Favorites' and 'Recent' (selected). The main area displays a table of 5 pinboards under the 'Recent' tab. The table has columns for Name, Labels, Model, Owner, Last Updated, and Action. The first pinboard is 'Sales 2023' with label 'MY_Pinboard', model 'FAS - Field Analytics', owner 'Apurva Bhalerao', and last updated '2023-10-03'. The second is 'My Pins' with owner 'Apurva Bhalerao' and last updated '2023-09-23'. The third is 'My pinboard' with label 'MY_Pinboard', model 'FAS - Field Analytics', owner 'Apurva Bhalerao', and last updated '2023-09-10'. The fourth is 'Products' with label 'Sales', model 'FAS - Field Analytics', owner 'Apurva Bhalerao', and last updated '2023-09-08'. The fifth is 'TRx' with label 'Sales', model 'FAS - Field Analytics', owner 'Apurva Bhalerao', and last updated '2023-09-08'. Each row has a share icon, a star icon, and a three-dot menu icon in the Action column.

Name	Labels	Model	Owner	Last Updated	Action
Sales 2023	MY_Pinboard	FAS - Field Analytics	Apurva Bhalerao	2023-10-03	Share Star Menu
My Pins			Apurva Bhalerao	2023-09-23	Share Star Menu
My pinboard	MY_Pinboard	FAS - Field Analytics	Apurva Bhalerao	2023-09-10	Share Star Menu
Products	Sales	FAS - Field Analytics	Apurva Bhalerao	2023-09-08	Share Star Menu
TRx	Sales	FAS - Field Analytics	Apurva Bhalerao	2023-09-08	Share Star Menu

From the left-hand side of the **Pinboard Manager** page, you can see various categories. You can group the boards in these categories for easy access.

- **Favorites:** lists the pinboards that are starred in the Pinboard Manager section
- **Recent:** displays the pinboards that you have recently visited and created
- **My Pinboards:** create pinboards and import the pinboard as required.
- **Shared:** shows the pinboards that are shared by other board users
- **All Pinboards:** displays the list of all pinboards

Adding 'Labels' to Pinboards

1. Go to the pinboard and click the  icon. The pinboard information dialog is displayed.

The screenshot displays the WhizAI Pinboard interface. At the top left, there's a 'My Pins' section with a 'Recent' tab and an 'Add Filters' button. The main area contains three data tables:

- Top Customers by TRx** (2022-01-01 - 04-29 | TRx): A table with columns Customer, Age, Gender, Product, and TRx. It lists 9 customers, with Tim Phillips at the top.
- Top Regions by TRx** (2022-01-01 - 05-06 | TRx): A table with columns Region and TRx. It lists 8 regions, with Mid-Atlantic at the top.
- Top Products by TRx** (2022-01-01 - 05-06 | TRx): A table with columns Product and TRx. It lists 5 products, with Arobi at the top.

At the bottom, there are two more tables:

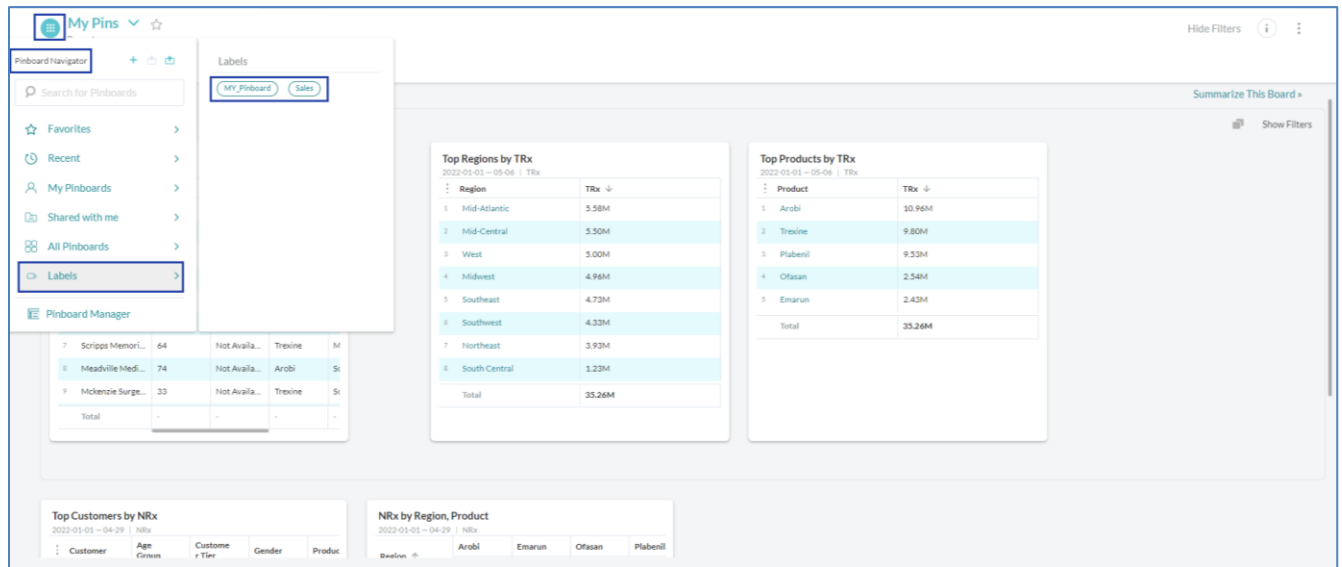
- Top Customers by NRx** (2022-01-01 - 04-29 | NRx): A table with columns Customer, Age, Customer Tier, Gender, and Product.
- NRx by Region, Product** (2022-01-01 - 04-29 | NRx): A table with columns Region, Product, and NRx.

On the right side, there's a 'Hide Filters' sidebar. It shows the owner 'Scott (You)' and a 'Labels' section with an '+ Add Label' button. Below the labels, there's a list of sections: Sales, Sections, Call Activity, Field Engagement, and MY_Pinboard.

- Click **+ Add Label**, enter a name for the label in the input field, and press enter. The label is created under **Pinboard Navigator > Labels**.

This close-up screenshot shows the 'Add Label' dialog box. It has a title bar 'Hide Filters' and a close button. The dialog contains the following information:

- Owner:** Scott (You)
- Access:** As an owner, you have full access to this pinboard
- Created:** 6 Oct 2023
- Last Modified:** 14 Jun 2024
- Labels:** A section with an '+ Add Label' button and a text input field containing 'Type the label name x'.
- Sections:** A list of sections: Sales, Sections, Call Activity, Field Engagement, and MY_Pinboard.



Adding Filters to Cards and Pinboards



Remember! WhizAI allows you to apply filters, view the updated data, and reset the board back to its original state, if required.

After you (as a board owner or editor) apply filters or slicers to pinboards, you can view the updated data on cards, and later revert the changes so that there is no change in data for the users with whom the board was shared.

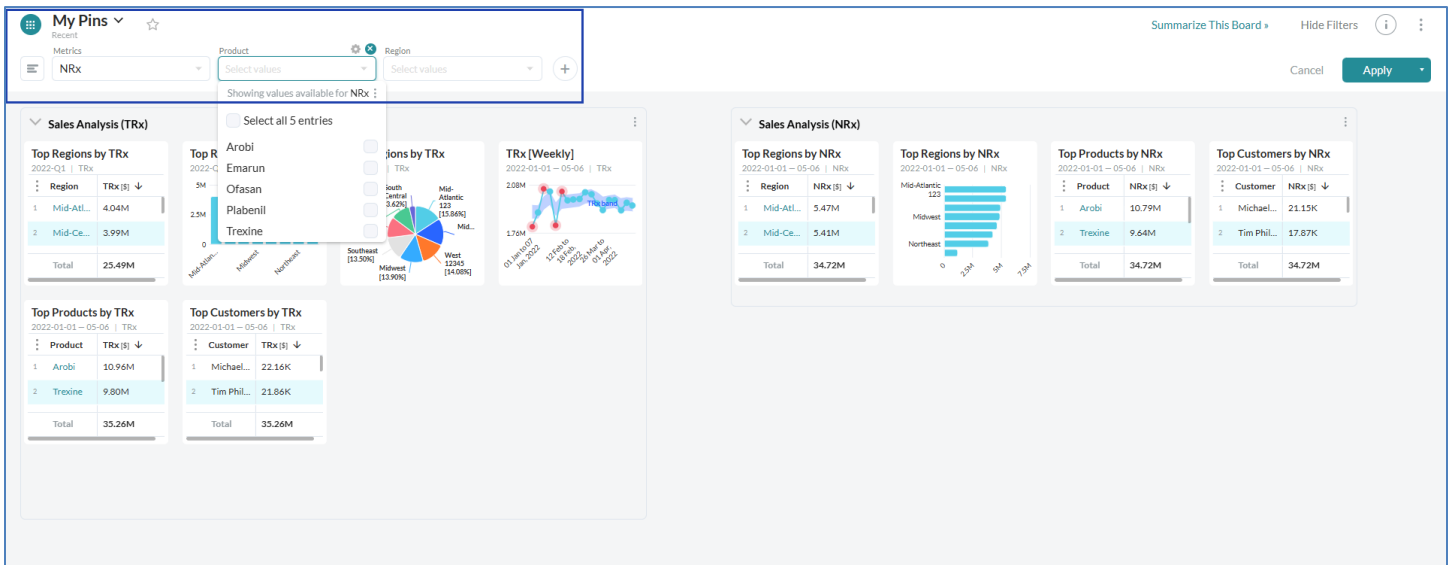


Remember! When you (as a board owner or editor) 'apply' filters, the data is updated only for you.

After you 'apply' filters, you see the following two buttons on the UI:

- **Save Changes:** If you click this button, WhizAI updates the data for all the users with whom the board is shared.
- **Reset Changes:** If you click this button, WhizAI reverts to the original state of the board.

While applying filters to pinboards, the values you see in the dimension filters depend upon the value selected in the Metrics filter, as shown in the following figure:



When the selected metric value is changed, the corresponding values in Dimension filters also change. The values that are no longer applicable get greyed out. To reset this metric-dimension filter relationship, click



and then click **Reset Cascade**.

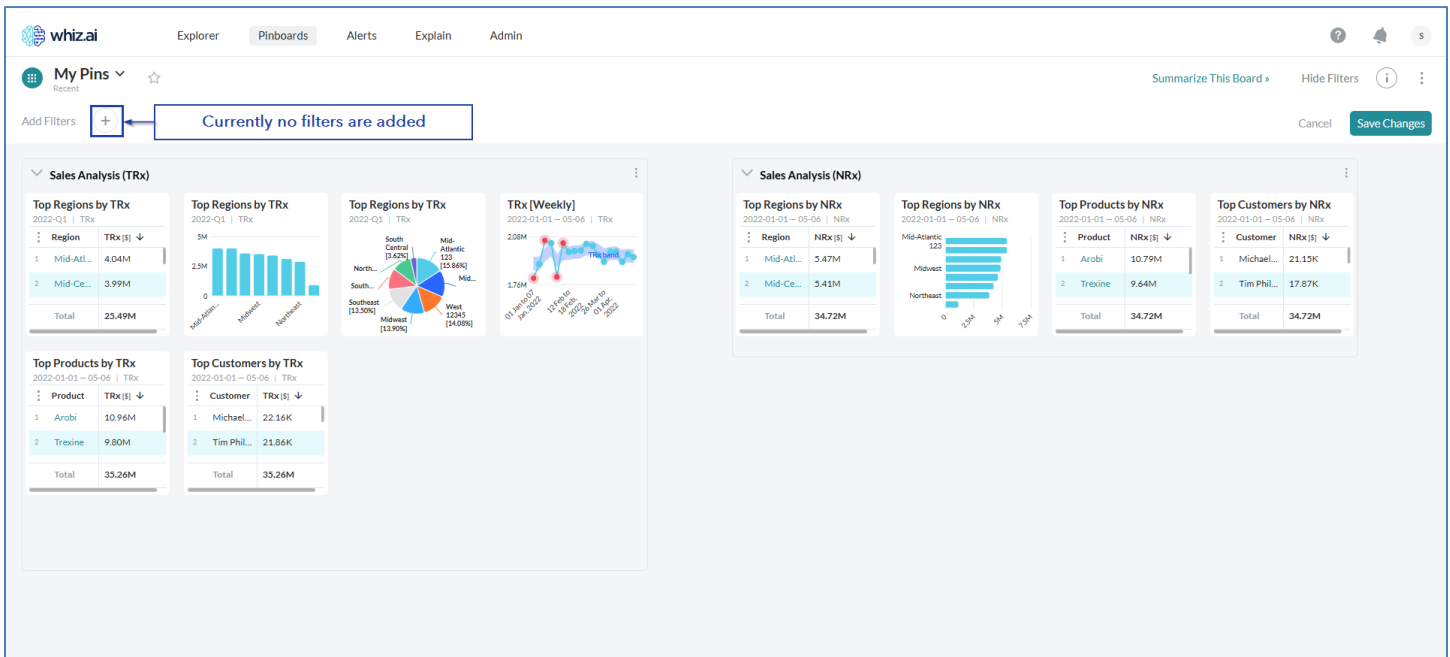


Remember! The values set in filters on a pinboard affect the values in the cards pinned to that board. For example, if you select a particular metric from the Metrics filter on Pinboard, and a dimension filter on one of the cards. In this case, the dimension filter shows values according to the metric selected in the Metrics filter on the pinboard.

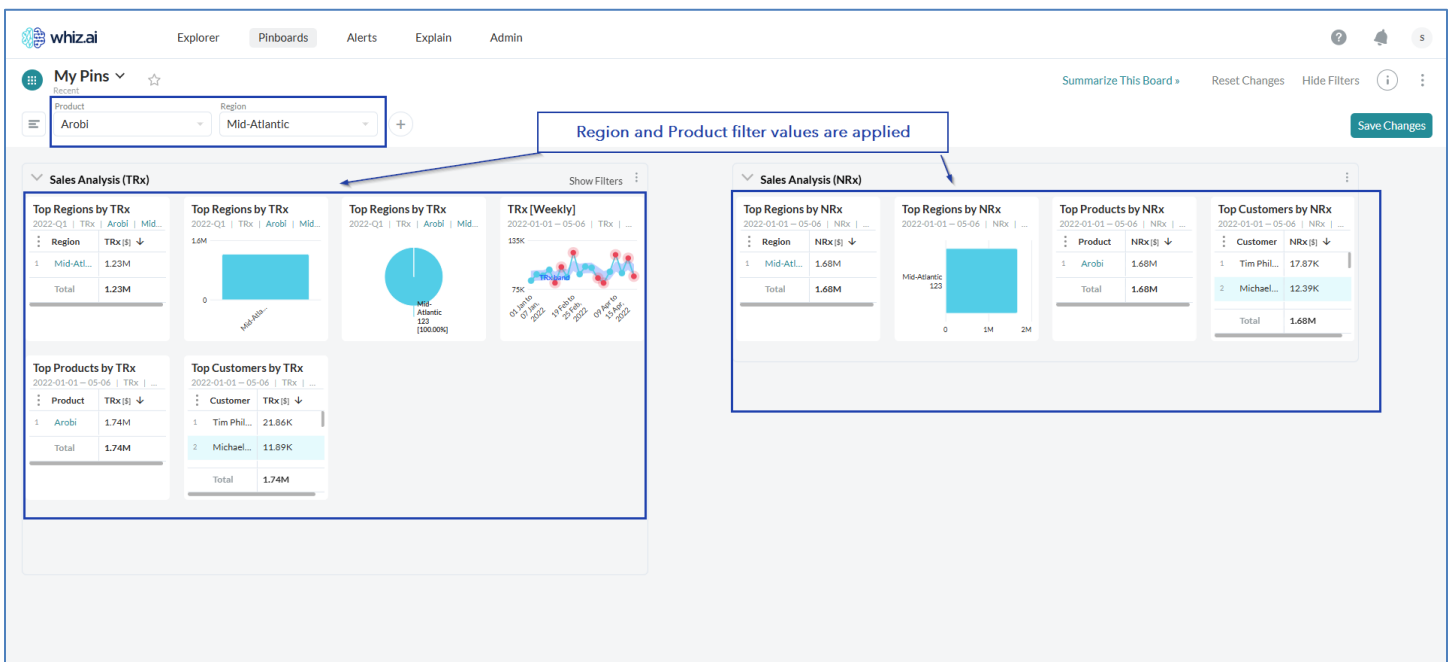



Note! When you apply filters to cards, you can see 'Computations' as an option to filter the data on cards. The values you see in the 'Computation' filter depend on whether this filter is applied independently or in combination with another filter.

When you apply filters to cards, the existing filters are retained, and the newly added filters are highlighted. For example, if you ask WhizAI the following question "Show me the top growing accounts". WhizAI displays the response as shown in the following figure:



As you can see in the above figure, no filters are added. Now, if you add the 'Region' and 'Product' filter to the card, then WhizAI filters and shows the corresponding data. The context shows the original metrics and the new filters are highlighted as shown in the following figure:



To highlight the applied filter values, expand each card, go to  icon and switch on enable spot lighting toggle and click **Save**.

The filter values get highlighted as shown below.

The screenshot shows the WhizAI interface with a navigation bar at the top containing 'Explorer', 'Pinboards', 'Alerts', 'Explain', and 'Admin'. On the left, there's a sidebar with 'My Pins' and 'Sales Analysis'. The main content area displays a table titled 'Top Regions by TRx' with the following data:

Region	TRx (\$)
Mid-Atlantic 123	1,231,059.40
Total	1,231,059.40

A context menu is open over the table, showing options: 'Enable Spotighting', 'Download image', 'Download as XLSX', 'Download as CSV', 'Share', and 'Create slicer'. The 'Enable Spotighting' option is highlighted. At the bottom of the table, there are icons for 'Table', 'File', 'Tree Map', 'Column', 'Pareto', 'Bar', and 'Donut'. A 'Show notes' button is also visible.

The screenshot shows a pinboard titled 'My Pins' with filters for 'Product: Arobi' and 'Region: Mid-Atlantic'. It contains several charts and tables under the 'Sales Analysis (TRx)' section:

- Top Regions by TRx**: A table showing regions and their TRx values.
- Top Regions by TRx**: A pie chart showing the distribution of TRx across regions.
- TRx [Weekly]**: A line chart showing TRx over time.
- Top Products by TRx**: A table showing products and their TRx values.
- Top Customers by TRx**: A table showing customers and their TRx values.

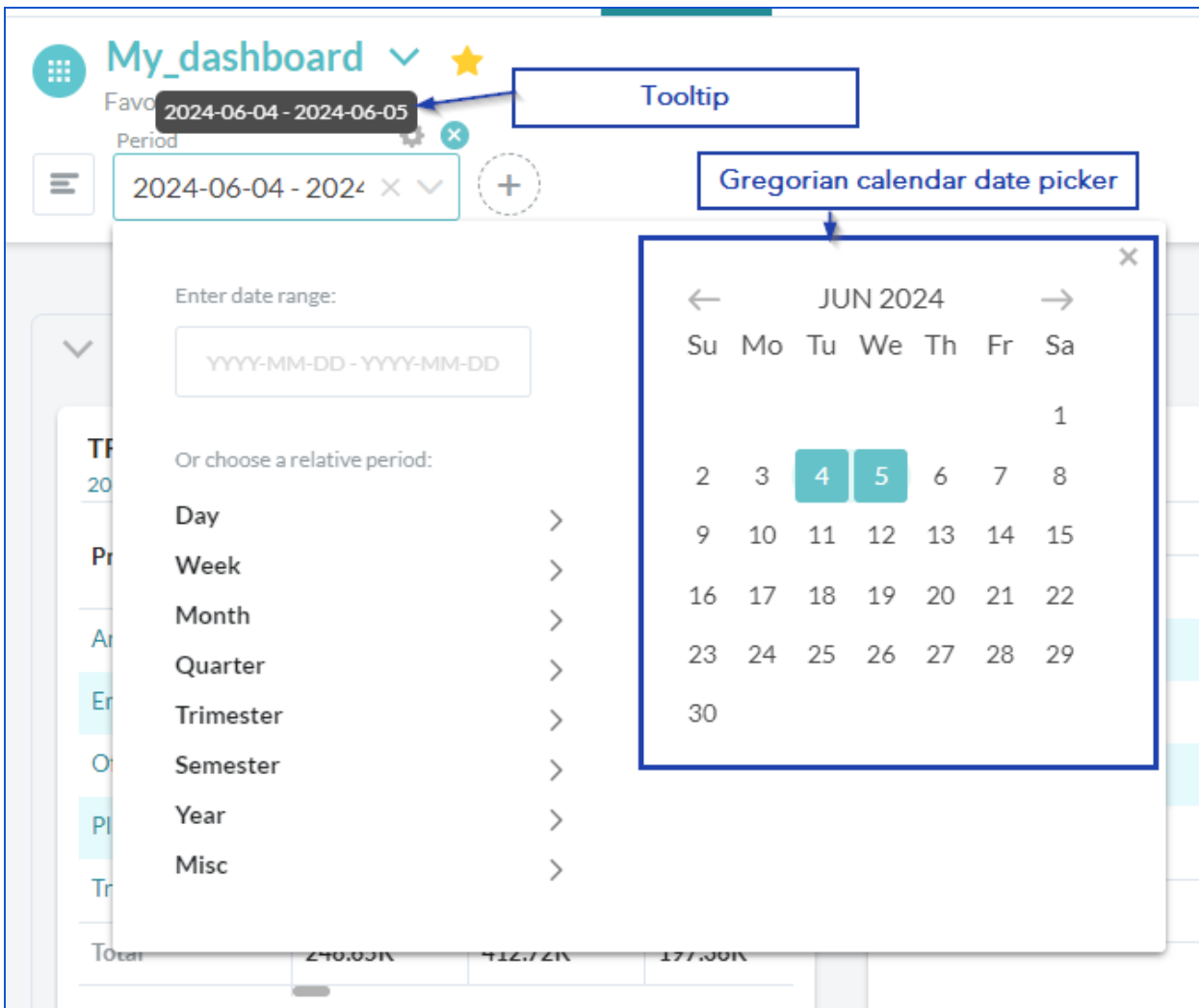
A callout box with the text 'Filter values are highlighted by enabling spotighting' points to the 'Mid-Atlantic' filter value in the 'Region' dropdown.



Remember! While applying filters to pinboards, the system displays the filter values according to the authorizations set for a particular user, thereby allowing the user to query relevant data, only. These are data-driven dimensional filters and help a user narrow down the search. After you apply cascaded filters, WhizAI validates the user's authorization and displays corresponding data in the cards.

In the 'Period' filter, you can see a date input field where you can select the date range using Gregorian calendar date picker.

The date range entered (YYYY-MM-DD - YYYY-MM-DD) is displayed in the manual input field and includes validation to ensure that the "From" date is less than the "To" date. If the date range is truncated, it is fully displayed on hover as a tooltip.



Tip! On applying this date range on a pinboard or a card, it is displayed in the card's context.



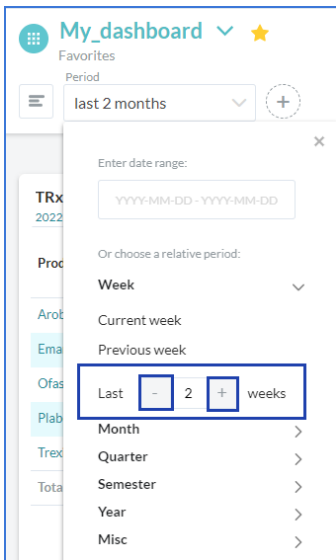
Tip! If the 'Period' filter is applied on a card, WhizAI allows you to lock the filter, that is, you can lock the date range entered in the filter.

In the 'Period' filters on Pinboard there are various time buckets such as Month to Date (MTD), Current Month, Previous Month, Last 'x' months. Also, for 'Quarter' there are time buckets such as Quarter to Date (QTD), Current Quarter, etc. You can find similar time buckets for 'Year' as well.



Note! When you add a **Period** filter in WhizAI, you have the option to filter data by weeks, months, quarters, and years. For each of these options, you can select relative dates. For example, to filter data on Week basis: you can input the data for the current week, the previous week, or last 'n' weeks

with '+', and '-' buttons. Also, the custom date is configurable. You can show or hide the custom date range from the Admin > Content Manager > Configurations > Period time buckets > date range.



Remember! If required, Administrator users can configure WhizAI to make any of the above-mentioned time buckets unavailable. Thus, these filter values do not get displayed in the 'Period' filter.

If pinboards contain cards that show data for a fixed time period and if you set filters to view data for a period that is outside this range, WhizAI shows a message that highlights the time-period of the data shown in the card.

For example, if a card always shows data only until 13 weeks and you apply filters to view data for period greater than 13 weeks, say 18 weeks. In this case, although the selected period is 18 weeks, WhizAI continues to show data for 13 weeks only. This can lead to confusion and to avoid it, WhizAI specifically shows a warning message that highlights the time-period of the data; thus, you get a clear idea about the date range for which the data is being displayed in the card.

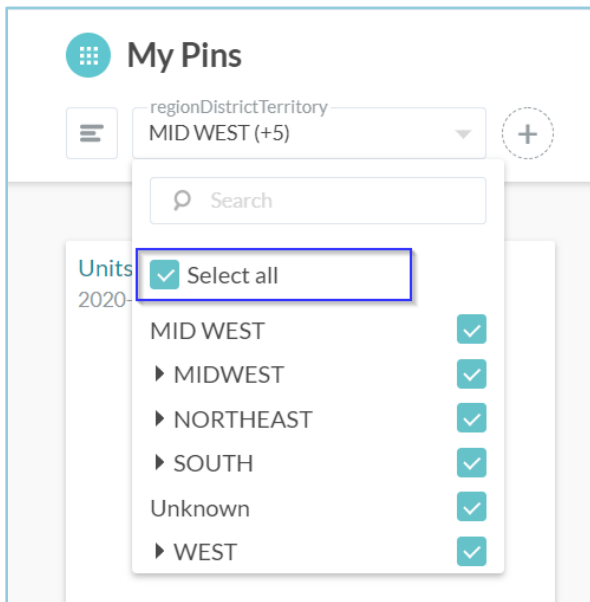
In the 'Period' filters on Pinboard there are various time buckets such as Month to Date (MTD), Current Month, Previous Month, Last 'x' months. Also, for 'Quarter' there are time buckets such as Quarter to Date (QTD), Current Quarter, etc. You can find similar time buckets for 'Year' as well.




Remember! If required, Administrator users can configure WhizAI to make any of the above-mentioned time buckets unavailable. Thus, these filter values do not get displayed in the 'Period' filter. For more information on the different configuration options, check the configurations section in WhizAI Administrator's Guide.

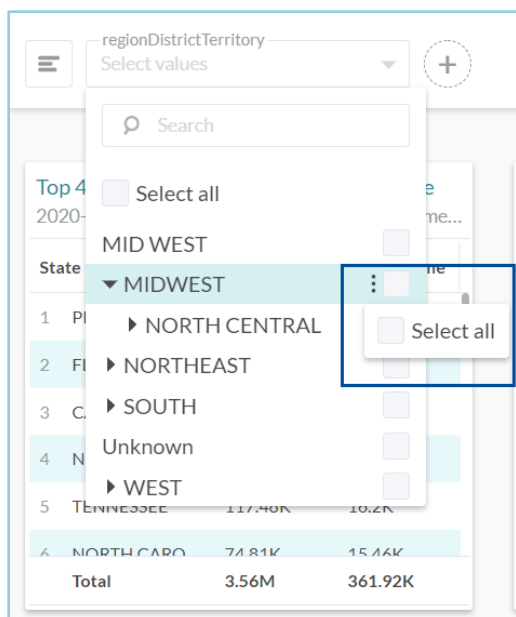
When you add dimensional filters to pinboards, you can click the **Select all** check box to select all the filter options together (refer to the figure below). Thus, instead of selecting individual options from a very long list, now, you can click just one check box.

For example, if you add a region, District, or Territory filter to a pinboard, you can click the **Select all** check box to select all the regions, districts, and territories included in the filter list.




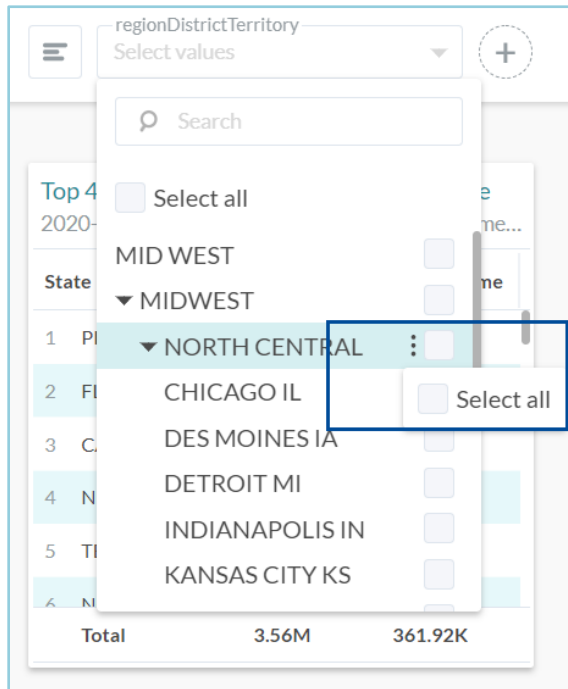
If you want to select all the districts and territories only for a specific **Region** level.

1. Click on the navigation bar of that **Region** and hover the mouse over this  icon, you can see the **Select all** check box as shown in the following figure.

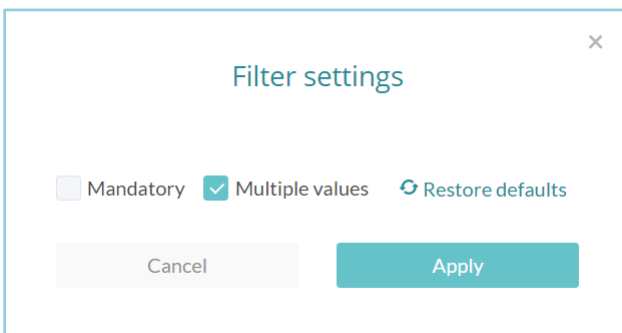


If you want to select all the territories only for a specific **District** level.

1. Click on the navigation bar of that **District** and hover the mouse over this  icon, you can see the **Select all** check box as shown in the following figure.



Important! The **Select all** check box can be seen only if the **Multiple values** option is enabled for a filter. Refer the product user manual for details on how to enable the multi-select option.



Note! This checkbox is enabled only for those dimensional filters that have values less than or equal to 10K. For values more than 10K, the following error message is displayed: "To enable this option, please refine search results by adding a filter before the current one" Please refine the search criteria".

Similar to pinboards, you can click the select all checkbox in a tabular response to select all the metrics and dimension columns. From the Columns dropdown list, you can click the Select all checkbox to select all the options.

Whiz Tuesday Oct 03, 2023 16:24

TRx by Region, Product Group, Product
2022-01-01 – 05-06 | TRx

Columns Search

Columns ☒ Dimensions ☐

MyBrands ☒ Customer ☐

Competitor ☒ District ☐

		Competitor			
		Trexine	Plabenil	Ofasan	Emarun
		TRx	TRx	TRx	TRx
		1.16M	1.5M	419.02K	373.35K
		1.18M	1.42M	378.66K	363.02K
Midwest	346.8K	1.07M	1.37M	356.71K	344.2K
Northeast	282.79K	756.74K	1.11M	294K	234.33K
South Central	79.08K	246.22K	382.56K	65.03K	86.47K
Southeast	275.79K	1.04M	1.21M	360.97K	323.78K
Total	2.42M	7.37M	9.53M	2.54M	2.43M
					10.96M

Data: TRx as of 2022-05-06
Generated in: 2.48 Sec
Source: FAS - Field Analytics

To add filters to cards:

1. Open the card from **pinboard** and then click **Show Filters**.

whiz.ai Explorer Pinboards Alerts Explain Admin Help

Sales 2023 Favorites

1 Expand the card and click Show Filters

Show Filters

My Section TRx

Top Customers by TRx
2022-01-01 – 05-06 | TRx | Mid-Atlantic | Arobi
Customer TRx

Top Products by TRx
2022-01-01 – 05-06 | TRx | Mid-Atlantic | AMARD
Product TRx

Top Regions by TRx
2022-01-01 – 05-06 | TRx | National Area | Arobi
Region TRx

whiz.ai Explorer Pinboards Alerts Explain Admin Help

Sales 2023 Favorites

Reference Date 2022-05-06

2 Click + to Add Filters

Hide Filters


Cancel Apply

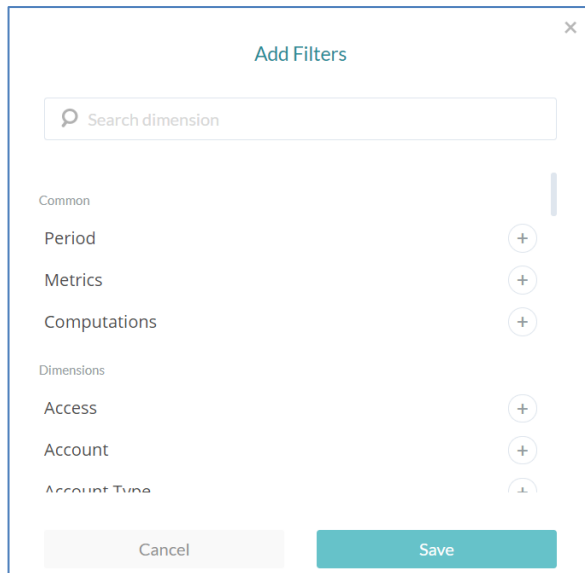
My Section TRx

Top Customers by TRx
2022-01-01 – 05-06 | TRx | Mid-Atlantic | Arobi
Customer TRx

Top Products by TRx
2022-01-01 – 05-06 | TRx | Mid-Atlantic | AMARD
Product TRx


Top Regions by TRx
2022-01-01 – 05-06 | TRx | National Area | Arobi
Region TRx

2. After a card is pinned to a board, by default, the card has no filters. To add filters, click . WhizAI shows the **Add Filters** dialog.



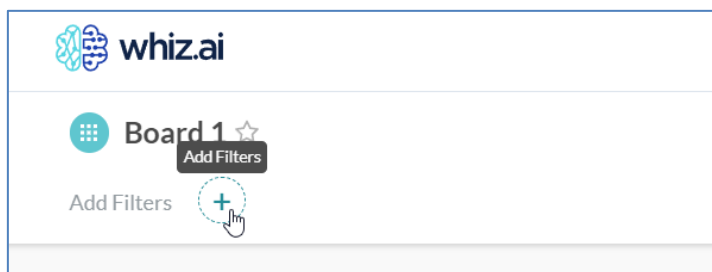
3. You can search for the dimension or select the dimension from the list and then click **Save** to add the filter to the card.

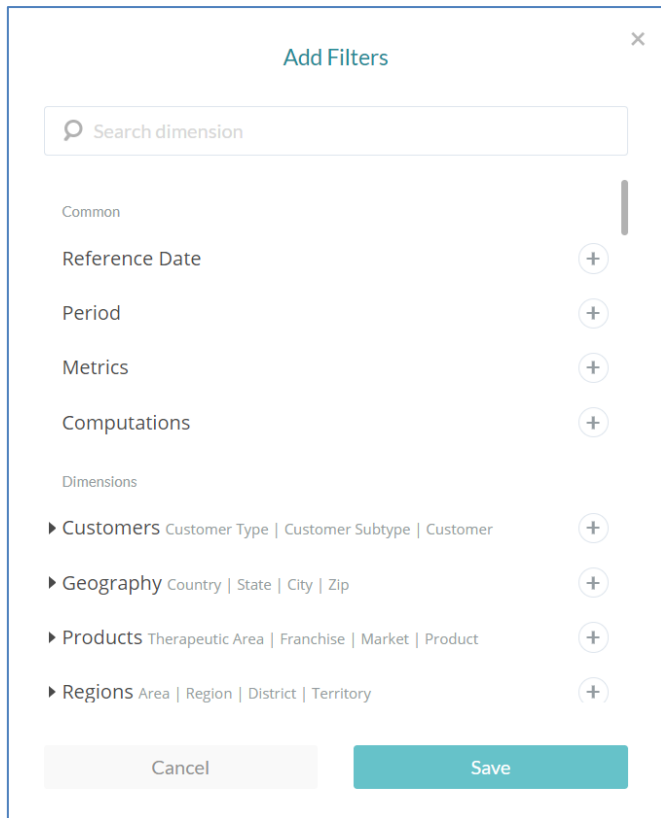
To add filters to Pinboards:

1. Open the **pinboard** and then click  to add filters to the **pinboard**. WhizAI shows the **Add Filters** dialog.



Note! While applying filters to pinboards, the system displays the filter values according to the authorizations set for a particular user, thereby allowing the user to query relevant data, only. These are data-driven dimensional filters and help a user narrow down the search. After you apply cascaded filters, WhizAI validates the user's authorization and displays corresponding data in the cards.





2. You can search for the dimension or select the dimension from the list and then click **Save** to add the filter to the **pinboard**.



Note! User authorization is considered when you apply filters to pinboards, cards, and sections.

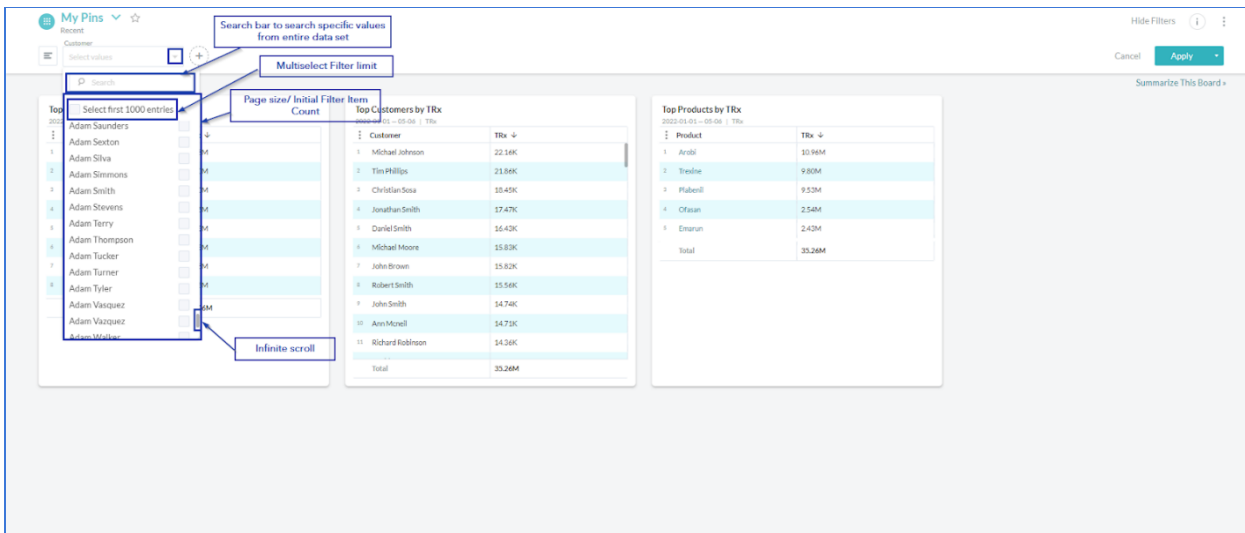


Note! For more information refer to the Admin manual

Infinite scroll option for filters using lazy loading

Using lazy loading the filter displays the first N number of records in ascending order where N is configurable in the dropdown with an infinite scroll option.

For example, Add the filter **Customer** and click the drop downtown as shown below:



The dimension value dropdown displays the members with an infinite scroll option to improve performance. You can also directly search a specific value from the entire data set using the search bar for quicker access.



Note! The maximum number of values to be fetched for selection in a dropdown is a model level configuration named **Initial Filter Item Count** set through the admin panel

Selecting first <no. of records> entries

Here's how the '**Multiselect filter limit**' behaves based on various data loading, no. of records, and filtering conditions:

If 5000 records are loaded, but the Multiselect filter limit is 2000:

- The checkbox is enabled, and labeled as "Select first 2000 entries".
- When clicked, it selects only the first 2000 entries out of the 5000 loaded records.

If 5000 records are loaded and the Multiselect filter limit is greater than or equal to 5000:

- The checkbox is enabled with the label "Select first 5000 entries".
- Clicking it, selects all 5000 records.

If the page size is 5000, but only 750 records are available:



- The checkbox is enabled, and the label says "Select all 750 entries".
- Clicking the checkbox selects all available entries.

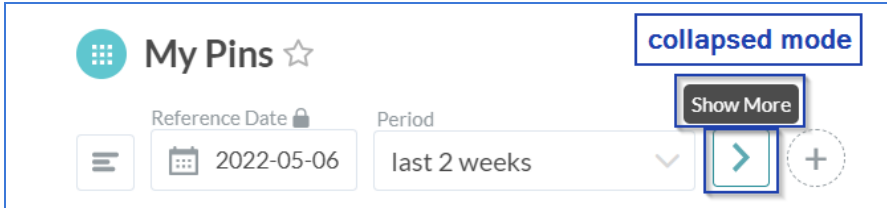
If the number of records exceeds the multiselect filter limit in any scenario:

- The label always reflects the maximum selectable limit, e.g., "Select first <max. select all limit> entries".
- Clicking this selects only the defined maximum number of records.

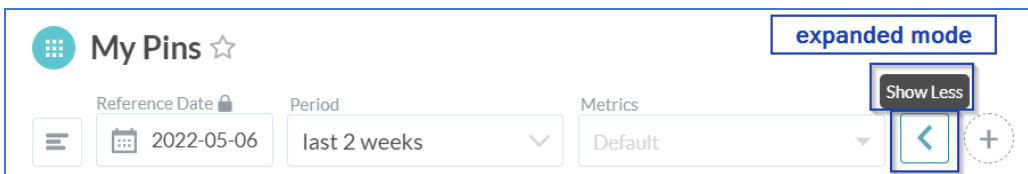
Tip! Keep '**Multiselect filter limit**' value equal to or lower than the '**Initial Filter Item Count**' value.

Smart board filters

Using the 'Show More' button  and 'Show Less' button  against the filters on a pinboard you can expand or collapse the filters applied to the pinboards. As the filters can collapse, you get more space on the pinboards to add additional pinboard filters and explore different insights from the data.



In the expanded mode, you can click the 'Show Less'  button to declutter the filters.



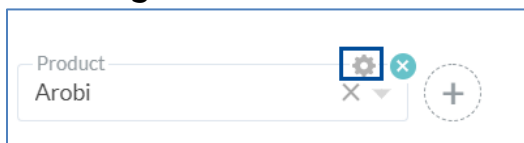
In the 'collapsed' mode, WhizAI displays the following types of filters, always:

- Filters that are tagged as 'Mandatory'
- Filters with values selected in them and applied
- Filters that are tagged as 'Pin'

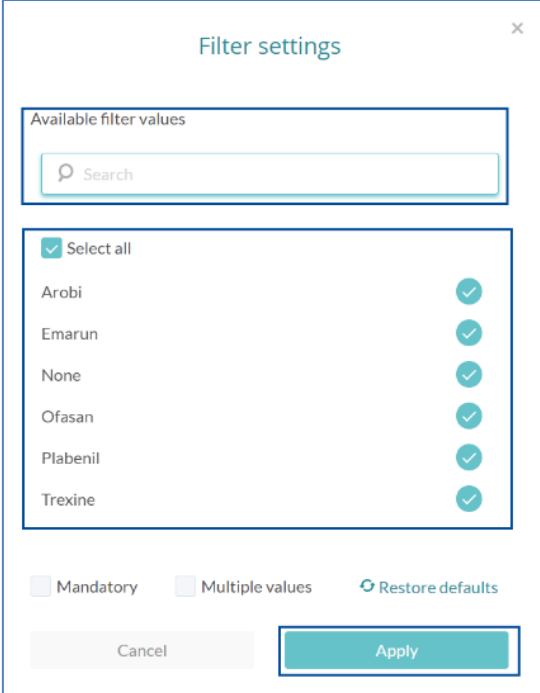
When you apply a slicer or when you select a value in an empty filter to the board, the applicable hidden filters that are empty (values not selected in them) are moved to the visible filter area once you click **Apply**.

Configuring Pinboard Filters

1. Hover the cursor over the filter, the values of which you want to configure, and then. WhizAI shows the **Configure Filter** icon.



2. Click the **Configure filter** icon. WhizAI opens the **Filter settings** dialog. By default, the **Select All** check-box is selected. Clear this checkbox.



The image shows a 'Filter settings' dialog box with a close button (X) in the top right corner. It contains a search bar labeled 'Available filter values' with a magnifying glass icon and the text 'Search'. Below the search bar is a list of filter values: 'Select all' (checked), 'Arobi', 'Emarun', 'None', 'Ofasan', 'Plabenil', and 'Trexine'. Each value has a green checkmark icon to its right. At the bottom of the dialog, there are three checkboxes: 'Mandatory' (unchecked), 'Multiple values' (unchecked), and 'Restore defaults' (checked). Below these checkboxes are two buttons: 'Cancel' and 'Apply'.

- From the list of available filter values, select the value, as required, and then click **Apply**. WhizAI populates the values in the drop-down list.

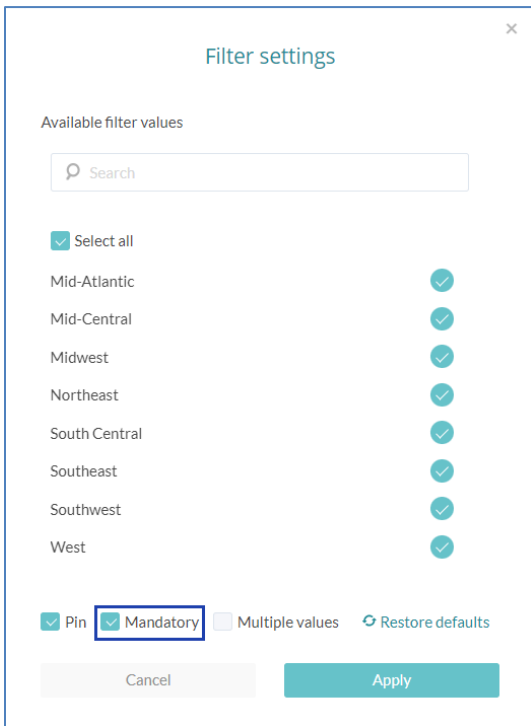


Tip! If you select **Restore defaults**, WhizAI overrides your selections and returns to the default settings.

Configuring Mandatory Pinboard Filters

You can configure Pinboard filters and set them as 'Mandatory'. To configure a filter as 'Mandatory', click the settings icon to open the **Filter Settings** dialog.

At the bottom of this dialog, select the **Mandatory** checkbox as shown in the following figure and then click **Apply**.



Filter settings

Available filter values

Search

☒ Select all

Mid-Atlantic ☒

Mid-Central ☒

Midwest ☒

Northeast ☒

South Central ☒

Southeast ☒

Southwest ☒

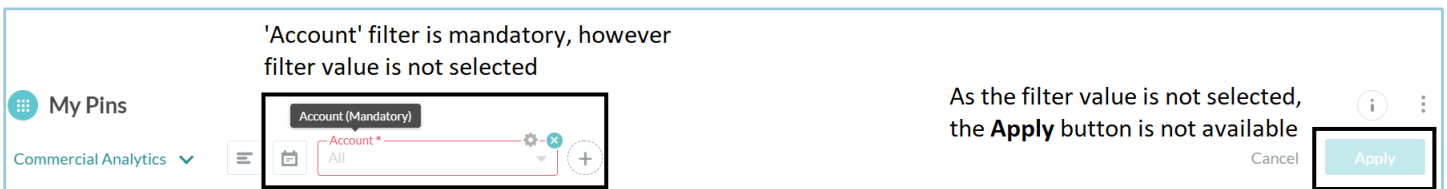
West ☒

☒ Pin ☒ **Mandatory** ☐ Multiple values [Restore defaults](#)

Cancel Apply



Remember! After a filter is configured as 'Mandatory', it is required to have some value selected in the filters. Mandatory filters cannot be empty. The button to apply the filters on pinboards is available only if the Mandatory filters contain values, as shown in the following figure:



'Account' filter is mandatory, however filter value is not selected

My Pins

Commercial Analytics

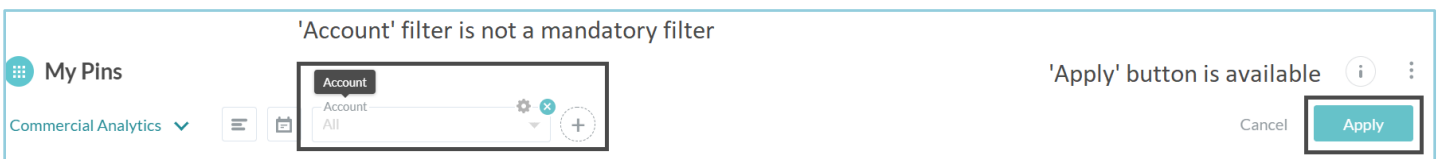
Account (Mandatory)

Account *

All

As the filter value is not selected, the **Apply** button is not available

Cancel Apply



'Account' filter is not a mandatory filter

My Pins

Commercial Analytics

Account

Account

All

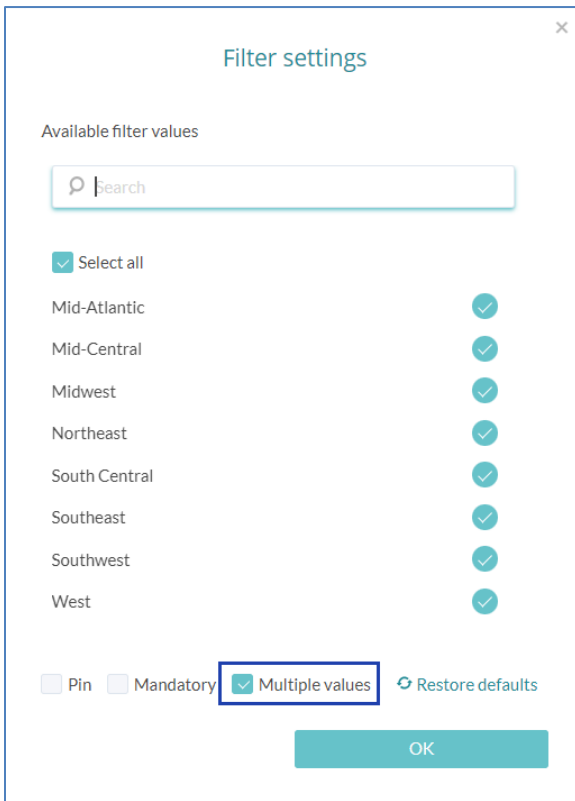
'Apply' button is available

Cancel Apply

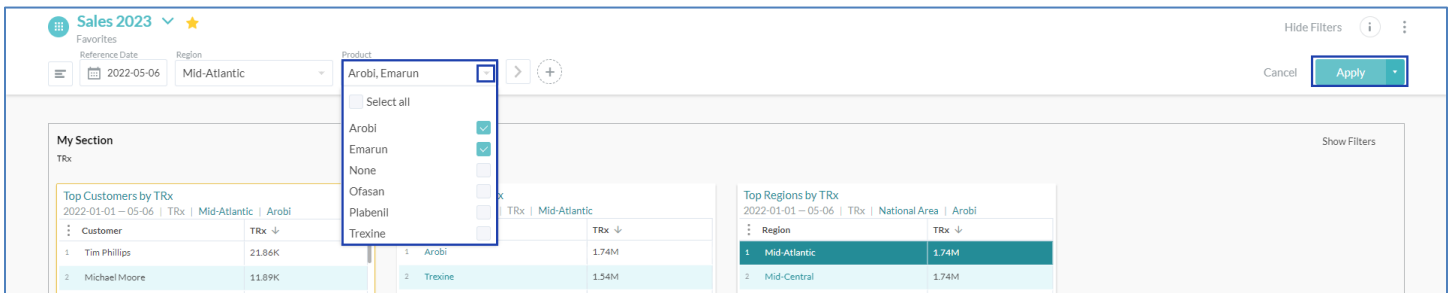
Configuring filters to have multiple values

You can configure a pinboard filter or card filter so that multiple values can be selected, and the filter can be applied.

To complete this configuration: Hover the cursor on the filter and click the settings icon to open the **Filter settings** dialog. Select the values to be displayed in the filter and from the bottom, click **Multiple values** as shown in the following figure:



After this configuration, WhizAI shows a checkbox against each filter value. You can select either one or multiple filter values and click **Apply** to filter the data.



When data is filtered by applying multiple filter values, we would like to point out how some of the other features would behave:

- **Slicers:** When a filter is configured to allow the selection of multiple values, the slicer also allows multiple values to be selected for that filter.
- **Annotations:** You can add notes to cards that include multiple values (for example: two values) in the context. To view the notes, the card must have all the values in the context. If the context is changed to include only one of the values, WhizAI does not show the added notes.
- **Authorization:** Even if the filters contain multiple values, you shall be able to see only the data for which you are authorized.
- **Locked Filters:** If you select multiple values in a filter and then lock it, the values cannot be overridden by pinboard-level filters or card-level slicers.

- **Hierarchy Filters:** You can select multiple values that belong to the same hierarchy level, only. According to the first value selected in the filter, WhizAI allows you to select the corresponding filter values of the same hierarchy level. Remember! In case you add multiple values falling under the same hierarchy, the card displays data for the lowest hierarchy entity.
- **Cascaded Filters:** The values in the corresponding cascaded filters depend upon the selection you make in the first filter. For example: If you configure the **Region** filter for multiple value selection and select **Mid-West** and **North-East** regions, then the **District** filter shows values for **Mid-West** and **North-East** regions, only.

Applying Filters to All Pinboards

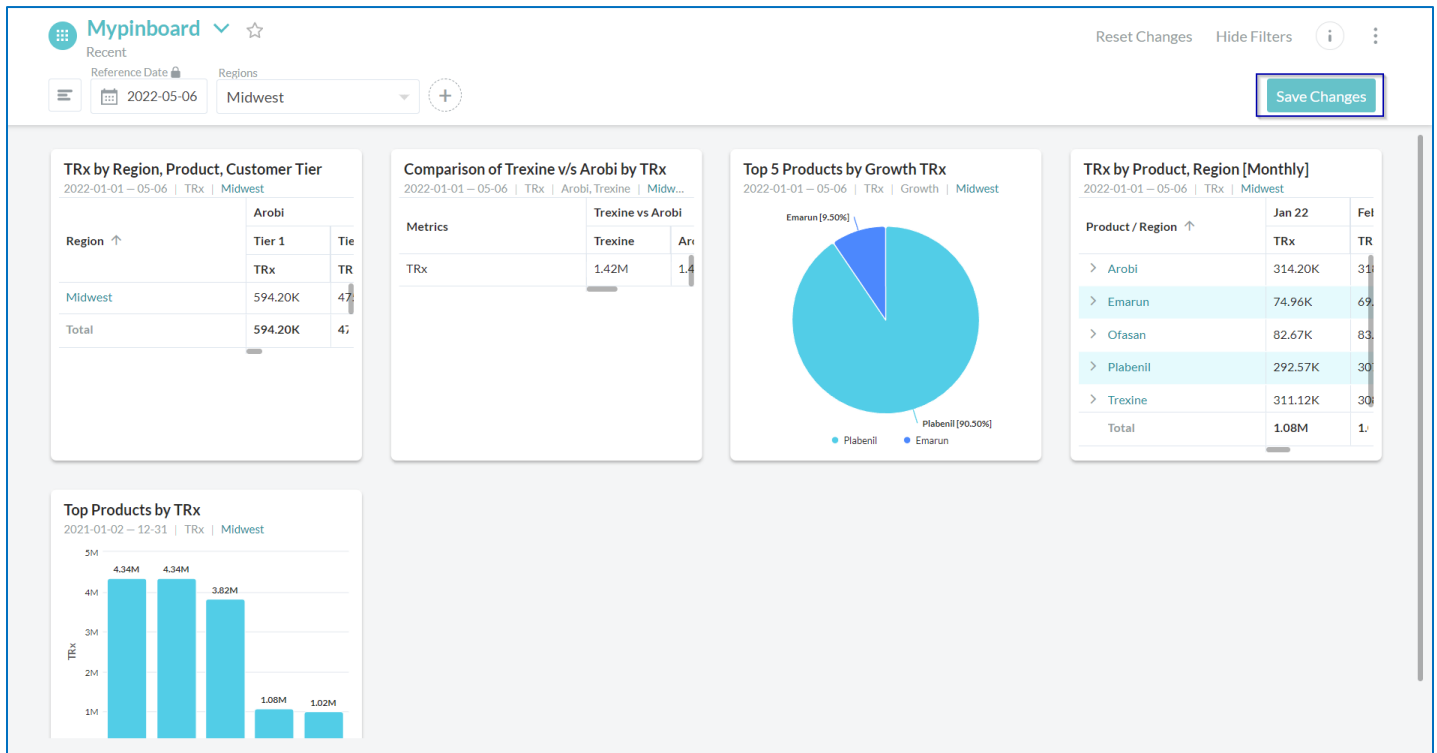
WhizAI allows you to set filters for one pinboard and apply the same context to all pinboards. By this action, the same set of filter values is applied to all pinboards (owned and shared).

For example, for **Mypinboard**, you can add a new filter, **Regions**, and select **Midwest**. Click on **Apply to all boards**.

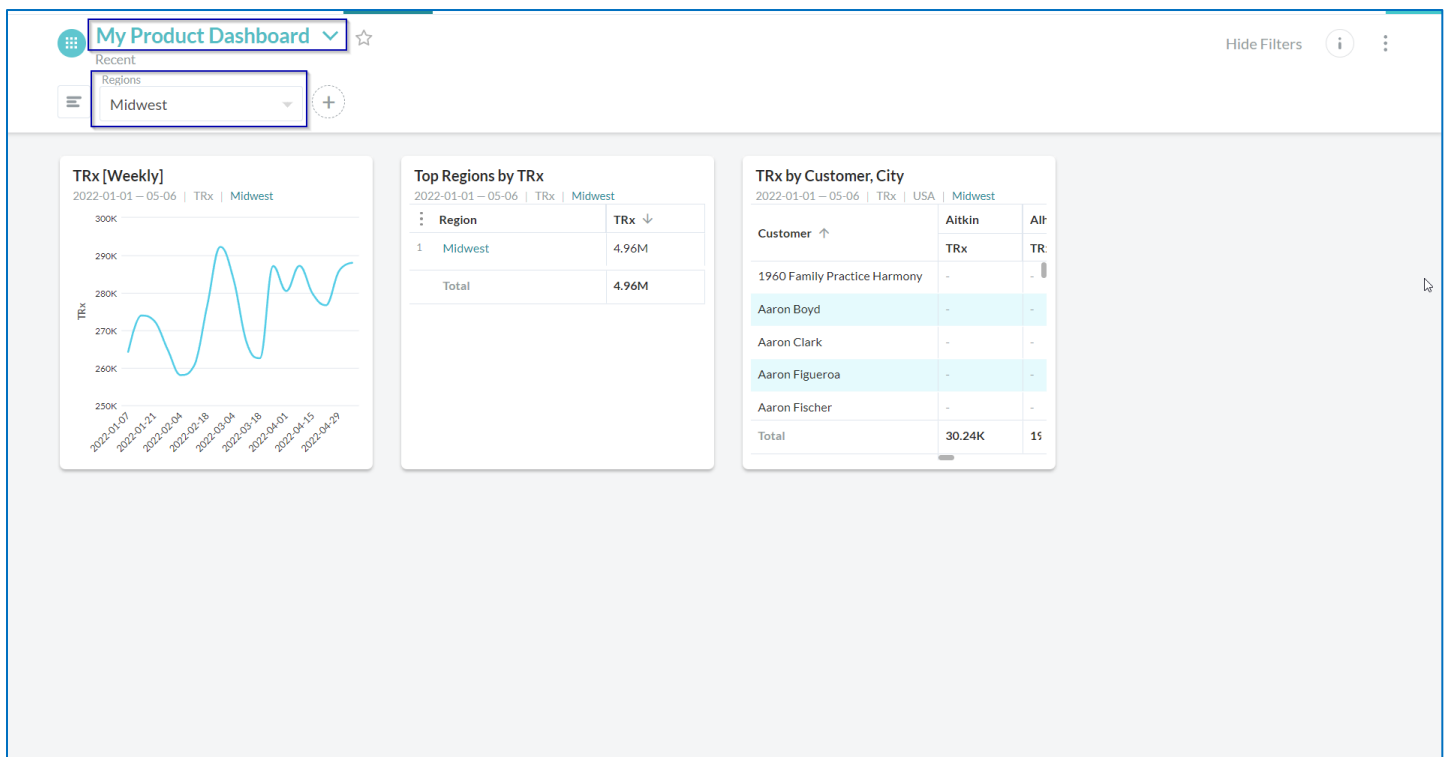
The screenshot displays the WhizAI Mypinboard interface. At the top, there's a header with 'Mypinboard' and a star icon. Below it, a 'Reference Date' is set to '2022-05-06'. A filter for 'Regions' is selected with 'Midwest' as the value. A dialog box is open, showing the 'Apply to all boards' option. The main area contains several data cards:

- TRx by Region, Product, Customer Tier:** A table showing TRx values for Arobi, Tier 1, and Tier 2 across different regions.
- Comparison of Trexine v/s Arobi by TRx:** A table comparing Trexine and Arobi TRx values.
- Top 5 Products by Growth TRx:** A pie chart showing the distribution of TRx for five products: Plabeniil (90.50%), Emarun (9.50%), and three others.
- TRx by Product, Region [Mor...]:** A table showing TRx values for various products across different regions.
- Top Products by TRx:** A bar chart showing the top products by TRx value.


Click on **Save Changes**.

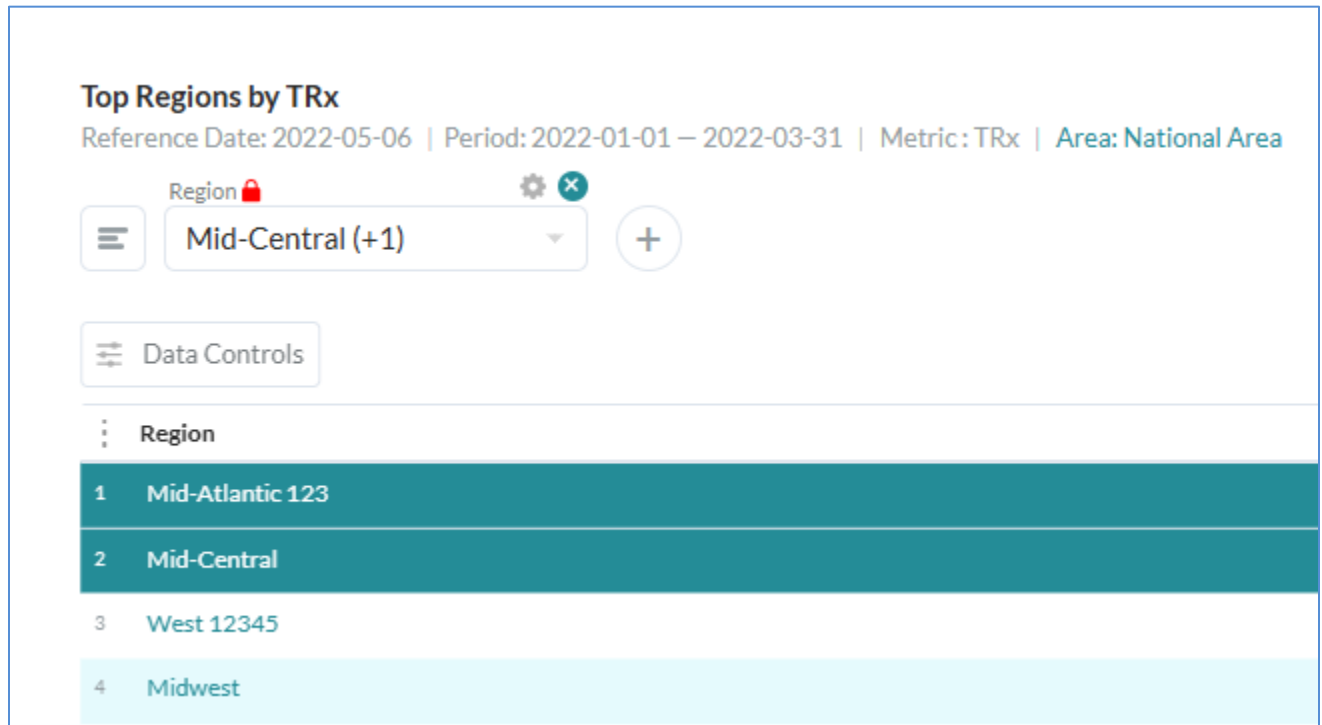


All pinboards with **Regions** as a filter will be automatically filtered on **Midwest**. For example, see below **My Product Dashboard** pinboard.



Locking Filters in Cards

1. Open the card from the **pinboard** and click **Show Filters** to view the filters on the **cards**.
2. Click  to add filters. WhizAI shows the **Add Filters** dialog.
3. Add the filters to cards and then click **Lock** icon as shown in the following figure:



The filter is added to the card. Note that this filter has a lock symbol next to it.



Tip! To unlock this filter, you can click the lock icon and then click '**Apply**'.



Note! Now, if the same filter is added (at board level) but with a different value, WhizAI will not override the data for this card; it retains this filter and applies the additional filter to other **cards**.





Tip! The lock symbol means that the value you select in this filter is locked. After locking the filter value, if the same board-level filter is added but has a different value, WhizAI does not override this card-level filter; it retains this filter and applies the additional filter to other cards.

Actions supported on card/s in collapse mode

WhizAI supports some of the common actions on card/s in **Collapse** mode for all the tables and charts. To perform these actions, you are not required to expand the card/s. You can perform the below actions in the collapsed mode:

- **Reorder the column/s:** drag and drop the columns to manually reorder.
- **Pin Column/s:** lock column/s to the left side so that when you scroll either to the left or right, the pinned column/s remains at the same location.
- **Pagination:** scroll through the response all the way to the last row irrespective of the number of records in the response.
- **Roll Up/Drill Down:** roll up or drill down through the response details to get more information.
- **Expand All and Collapse All:** expand or collapse the data in the nested tables.

Adding Cascading Filters to Pinboards

1. Open the pinboards and click  to add filters to the pinboard.
2. From the filters, apply the filter, as required. For example, you apply the '**Location**' filter and select '**Mid-West**' value.
3. Again, click  to apply a second filter. If you open the drop-down list for this filter, you can see that WhizAI displays the values in the second filter depending upon the value you have selected in the previous filter. For example, you select '**Location by regions**' filter and select '**District**' value. Thus, as you have selected **Mid-West** as the **Region** in the previous filter, now, WhizAI shows all the **Districts** under **Mid-West** region.
4. Select any district, as required, and click **Apply** to filter the data.

Adding Hierarchy Pinboard Filters

You can apply 'Hierarchy' filters not only to pinboards but also to the cards within pinboards. If the same filter (for example: Location filter) is applied to cards and pinboards, the filter applied last is used to update the data.


Thus, if you apply filter on boards, first, and then apply filter on cards, the value in card filter is used to update the data or if you apply filter on boards (after applying filter on cards), the data is filtered according to the value in board filter.

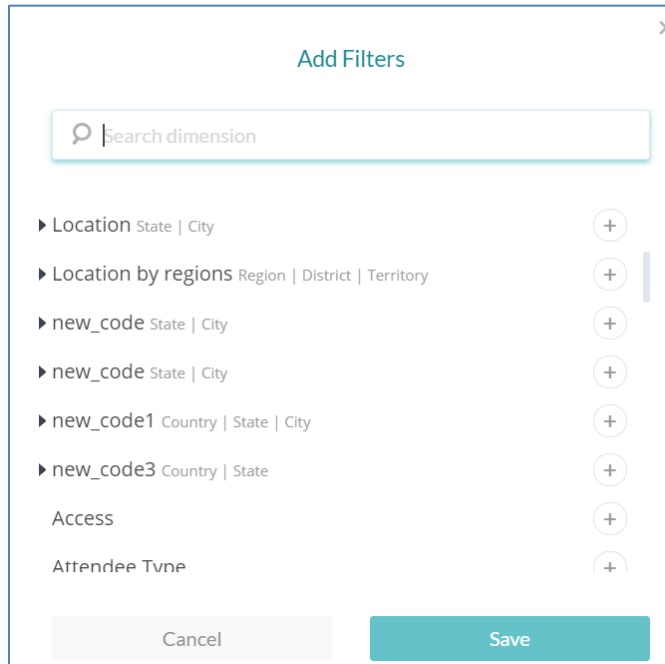
In case there are different filters on cards and boards, for example, the board contains a hierarchical filter, and the card contains a dimensional filter or vice-e-versa, in this case, the system understands the difference between hierarchical filters and dimensional filters and shows the correct data without any conflict.

For example: If a card contains a simple dimensional filter (Region, District, and Territory), and a hierarchical filter is applied to the pinboard (Location: South), the card's dimensional filters are updated accordingly: District and Territory are reset, and the result contains data for 'South' (because it was the latest applied value).

In case a card has a 'location' filter applied to its data and then multiple dimensional filters are applied to the board (for example: 'Region: South' and 'Territory: Boston MA') in this case, the system updates the data on the card to reflect the narrowest applied filter value which in this case is: Territory 'Boston MA'. Thereby, the location filter in the card shows the updated value as 'Boston MA'.

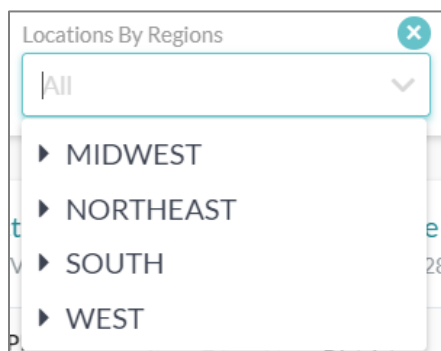
To apply hierarchy filters:

1. Open the **pinboard** and click  icon to add filters. WhizAI shows the **Add Filters** dialog.



Note! Under **Dimensions**, you can see the **Locations by regions** filter. This filter has a hierarchy tree. You may click the arrow to view the values in the hierarchy tree.

2. Under **Dimensions**, select the entire filter as shown in the figure.
3. Click **Save**. The **Location by Regions** filter is added to the **pinboard**. If you open this filter drop-down list, you can see a hierarchy of filter values.



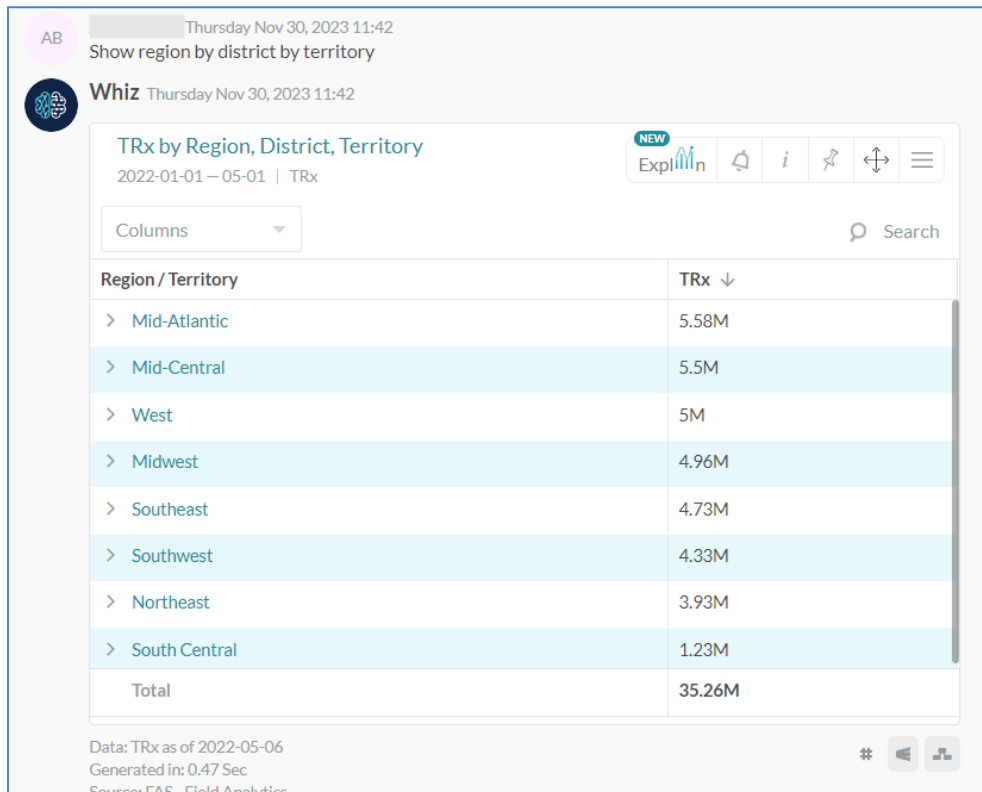
Auto-expansion of rows for Hierarchy filters

Earlier, after you applied a filter of lower hierarchy dimension to your card, the sub-categories or sub-levels of data were not visible. Now, we support auto-expansion of rows with hierarchy filters, in design mode with spotlight feature enabled. The expanded rows are highlighted, and the relevant subcategories or sub-levels can be seen.

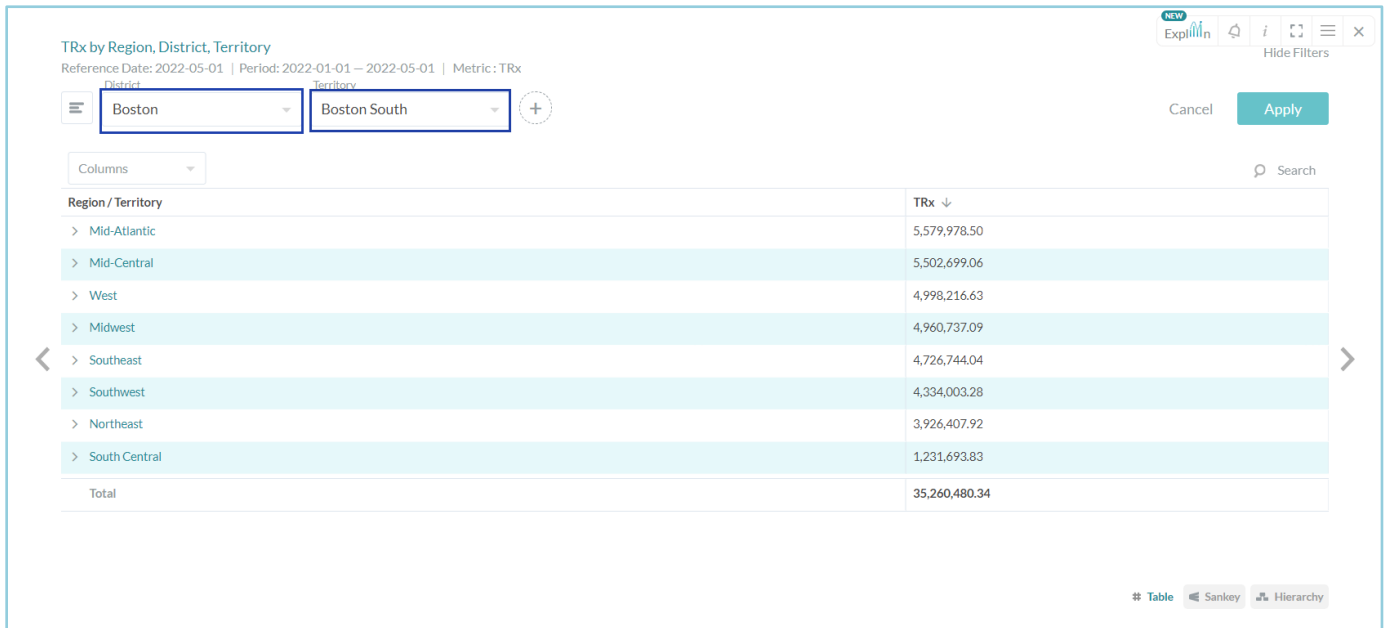


Note! After the hierarchy filters are applied, you can directly view the highlighted and automatically expanded rows, only if the **Enable Spotighting** feature is already enabled.

Example query: 'Show Region by District by Territory'



1. Add the following filters:
 - o Territory: Boston South
 - o District: Boston



TRx by Region, District, Territory
Reference Date: 2022-05-01 | Period: 2022-01-01 — 2022-05-01 | Metric: TRx

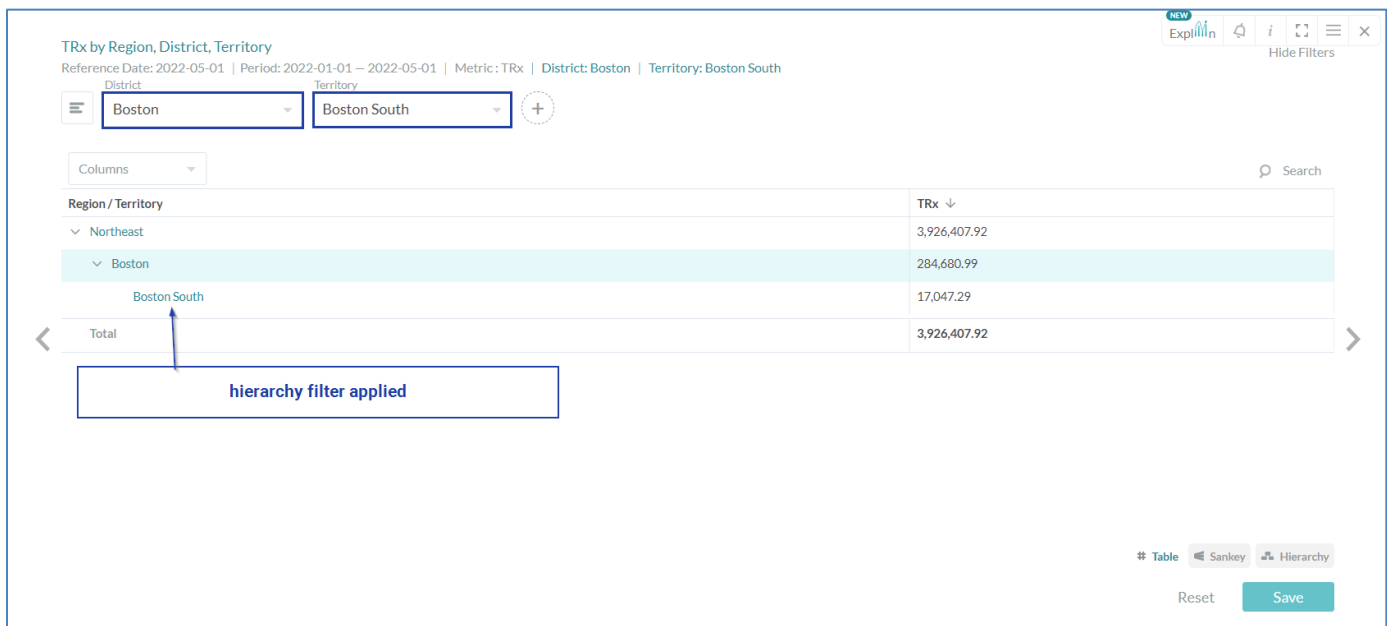
District: Boston Territory: Boston South

Columns

Region / Territory	TRx ↓
> Mid-Atlantic	5,579,978.50
> Mid-Central	5,502,699.06
> West	4,998,216.63
> Midwest	4,960,737.09
> Southeast	4,726,744.04
> Southwest	4,334,003.28
> Northeast	3,926,407.92
> South Central	1,231,693.83
Total	35,260,480.34

Table Sankey Hierarchy

2. Click **Apply**.



TRx by Region, District, Territory
Reference Date: 2022-05-01 | Period: 2022-01-01 — 2022-05-01 | Metric: TRx | District: Boston | Territory: Boston South

District: Boston Territory: Boston South

Columns


Region / Territory	TRx ↓
> Northeast	3,926,407.92
> Boston	284,680.99
Boston South	17,047.29
Total	3,926,407.92

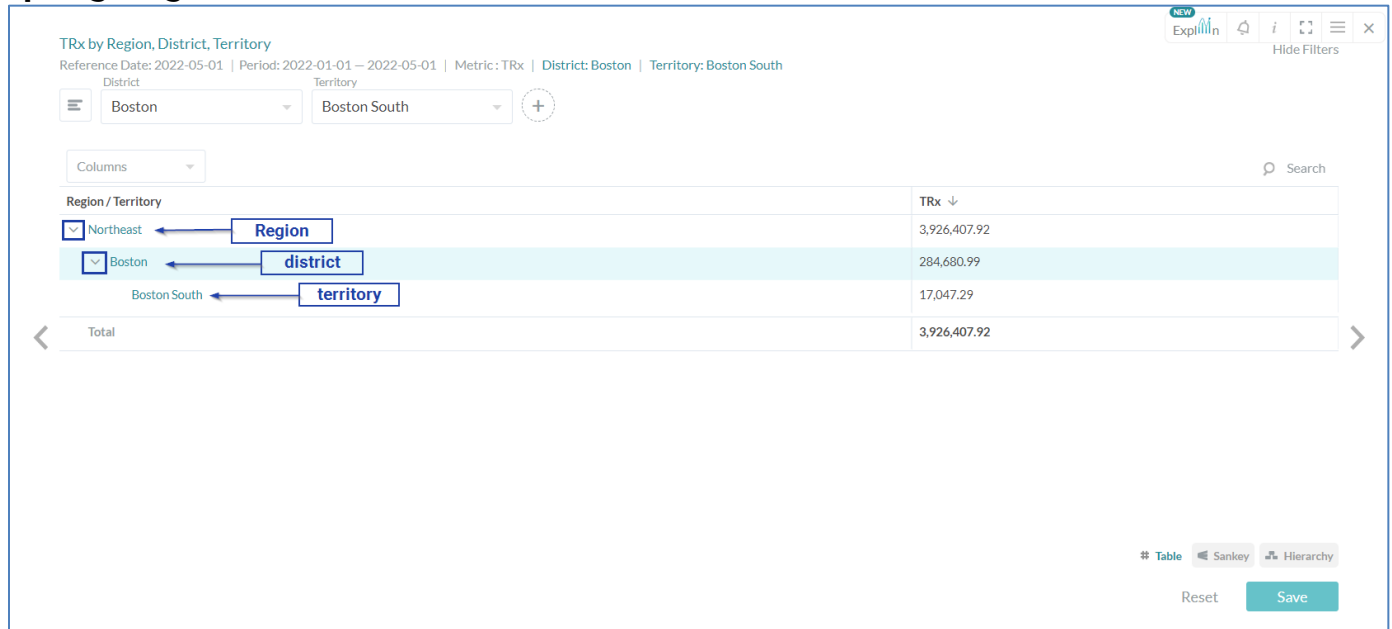
hierarchy filter applied

Table Sankey Hierarchy

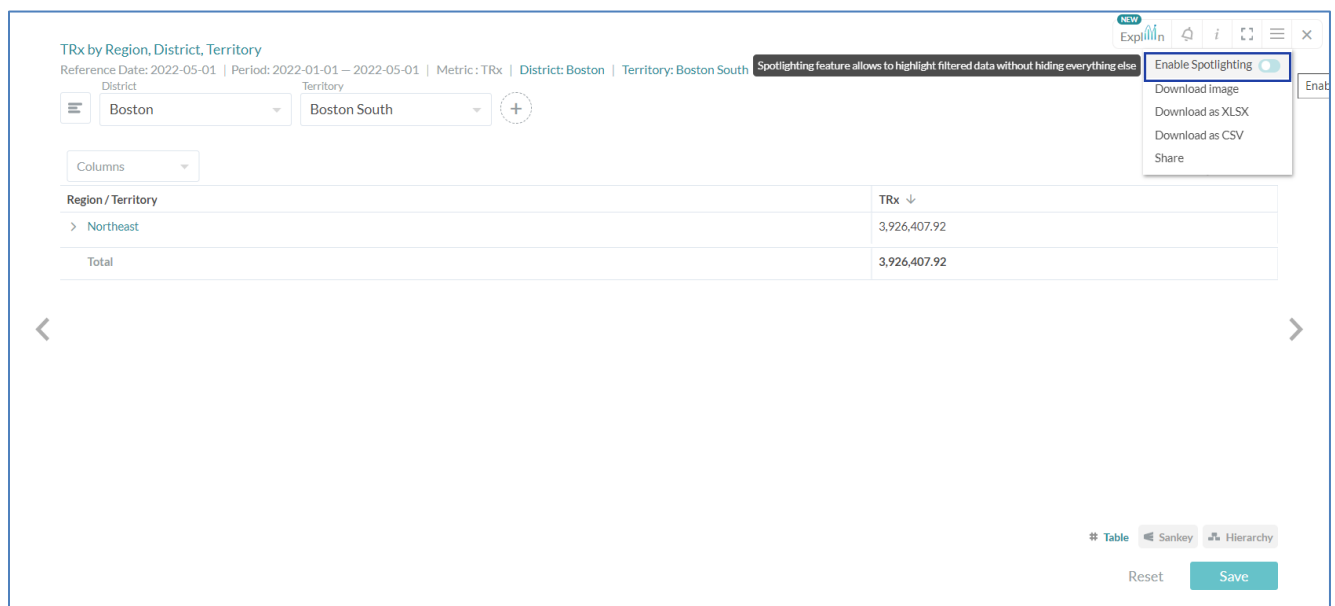
Reset Save

3. You see the filter is applied to regions, and when you expand the drop-down you can drill down the lower hierarchy dimension filters such as **District** and **Territory**.

- Go to the hamburger icon  from the top-right corner of the window and click **Enable Spotlighting**.





- The filtered lower dimensions such as District and Territory are dynamically expanded and highlighted as shown in the figure below.



TRx by Region, District, Territory

Reference Date: 2022-05-01 | Period: 2022-01-01 – 2022-05-01 | Metric: TRx | Area: National Area

District: Territory: 

Columns  Search

Region / Territory	TRx ↓
▼ Northeast	3,926,407.92
▼ Boston	284,680.99
Boston South	17,047.29
Boston	102,768.53
Boston Metrowest	84,963.86
Worcester	46,722.99
Salem	33,178.31
> Southern New England	661,796.46
> Northern New England	635,057.10
Total	35,260,480.34

Table Sankey Hierarchy

Reset Save



Tip! If you want to disable the spotlight feature, go to **Admin > Content Manager > Configurations**. From the drop-down list click **Field Analytics**. Set **Enable Row Highlighting** to **false**.



Note! If multiple territories are selected in the filter, then the alphabetically first filter will be expanded and highlighted, and other territories will only be highlighted.



Note! Even when the table and hierarchy data are loaded lazily (i.e., progressively as needed), the totals will always be displayed upfront. These totals represent the aggregate values of all hierarchies in the data, regardless of lazy loading.



Note! The XLS/CSV files retain the format of the response while exporting.


Performance enhancement - Lazy loading

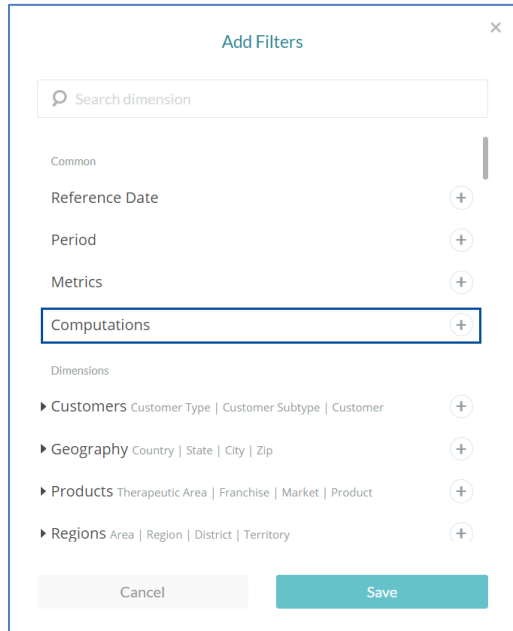
As a part of the performance, lazy loading optimizes your pinboard and nested hierarchy pinboard. On a pinboard with multiple cards, only the cards within your viewport are fetched and loaded. As you scroll down, and start seeing more cards, the data dynamically loads in tandem with your view. Thus, you do not load the data for the pinboard in one go.

For nested hierarchy cards, we fetch the data on demand, that is when you expand the hierarchy, we expand only the 1st node through the entire hierarchy. When you click on expand all, 1st node is expanded to the last unit until its hierarchy.

Adding Computation Filters to Pinboards

WhizAI allows you to filter data on all the cards in a pinboard by applying computation filters. You can apply the contribution filter to view the average metric values, the contribution, the growth values, or the market share.

1. Open the **pinboard** and click  icon to add filters. WhizAI shows the **Add Filters** dialog.



2. Select **Computations** and then click **Save**. The Computations filter is added to the pinboard as shown in the following figure:
3. Select a computation filter value, as required, and then click **Apply**. WhizAI filters the data on all the cards in the pinboard according to the selected filter value.

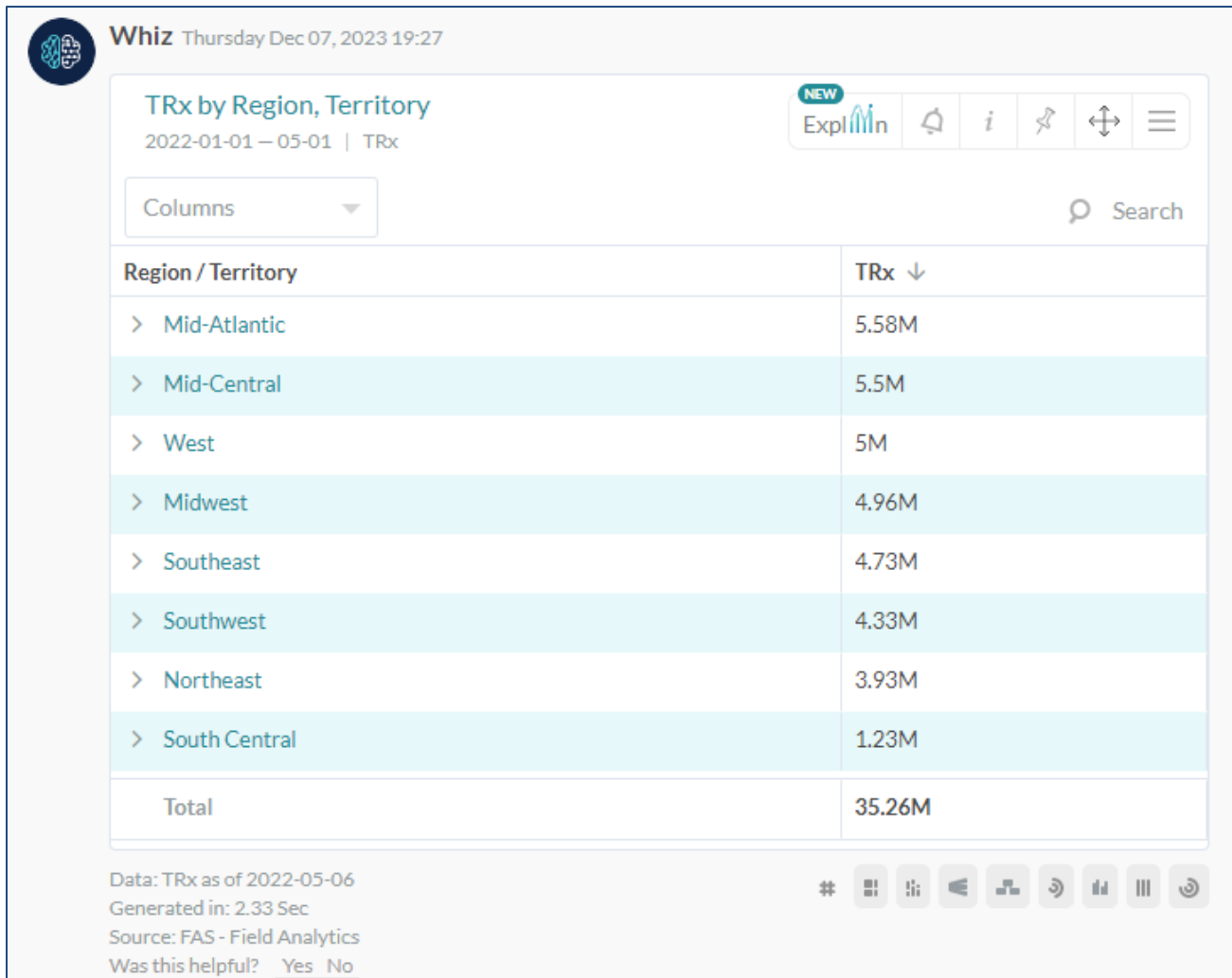


Note! After WhizAI filters the data based on computation values, the card context shows the corresponding computation value. For example, if you apply the 'Average' filter the card context shows 'Average TRx volume'.

Spotlighting of Parent Nodes in the Absence of Data for Filtered Dimensions

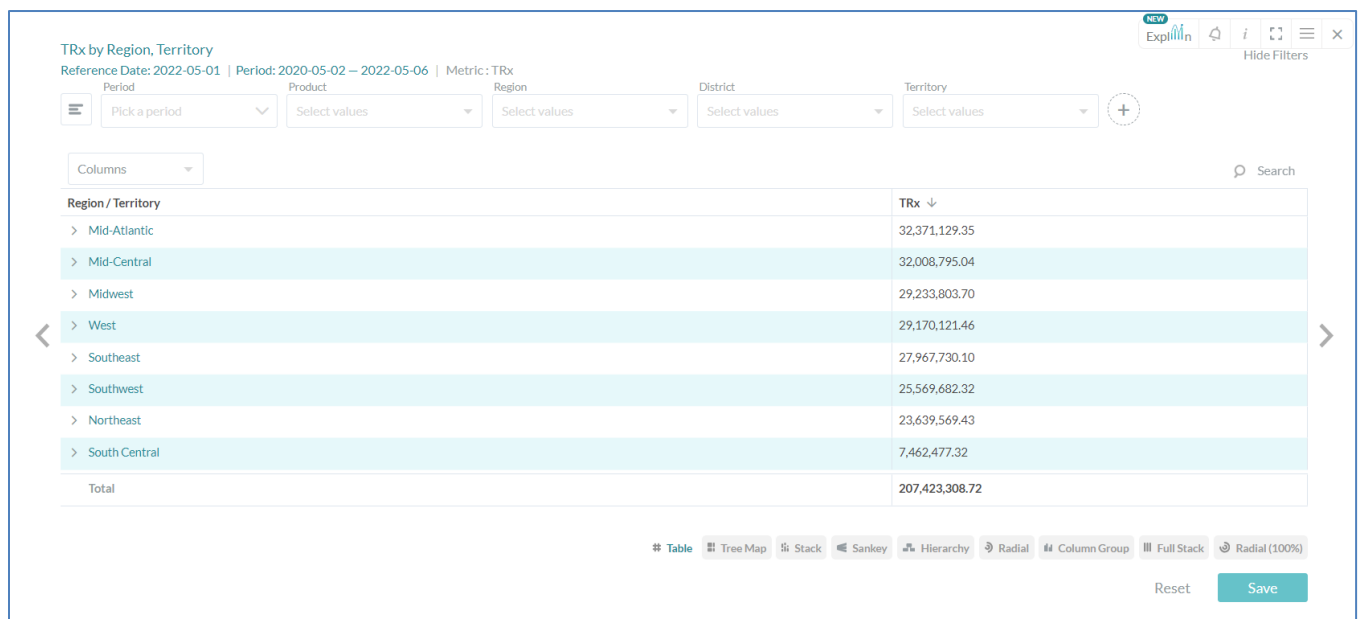
When there is no data in the filtered dimension of the column, its parent nodes get highlighted when the spotlight feature is enabled.

Example query: *"Trx by region, territory"*

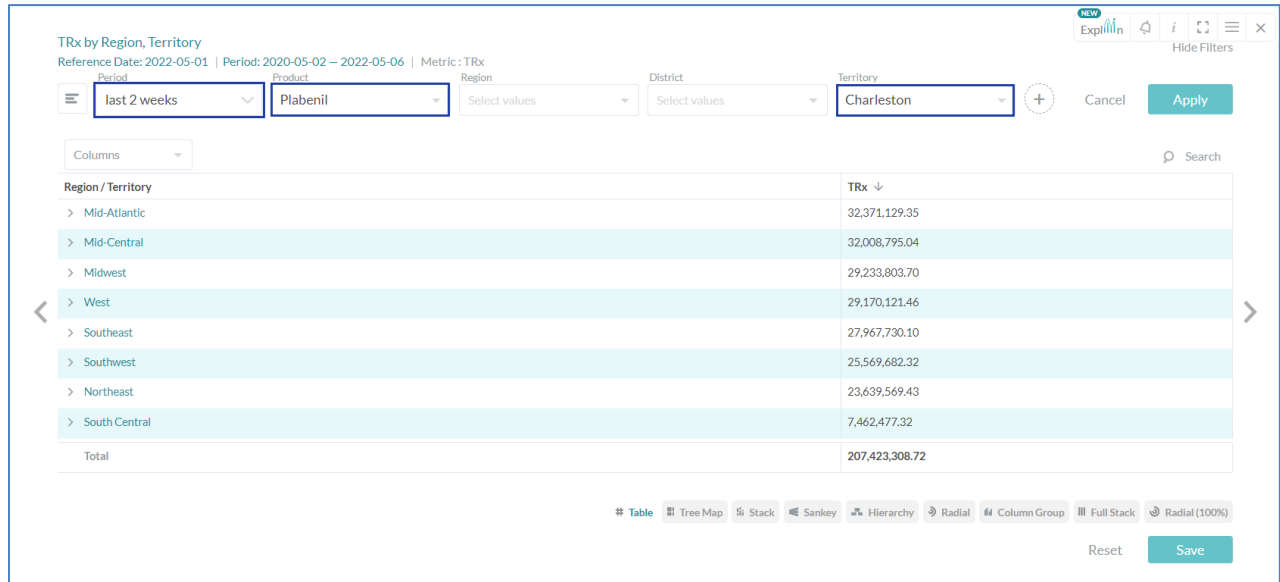


To enable the spotlighting:

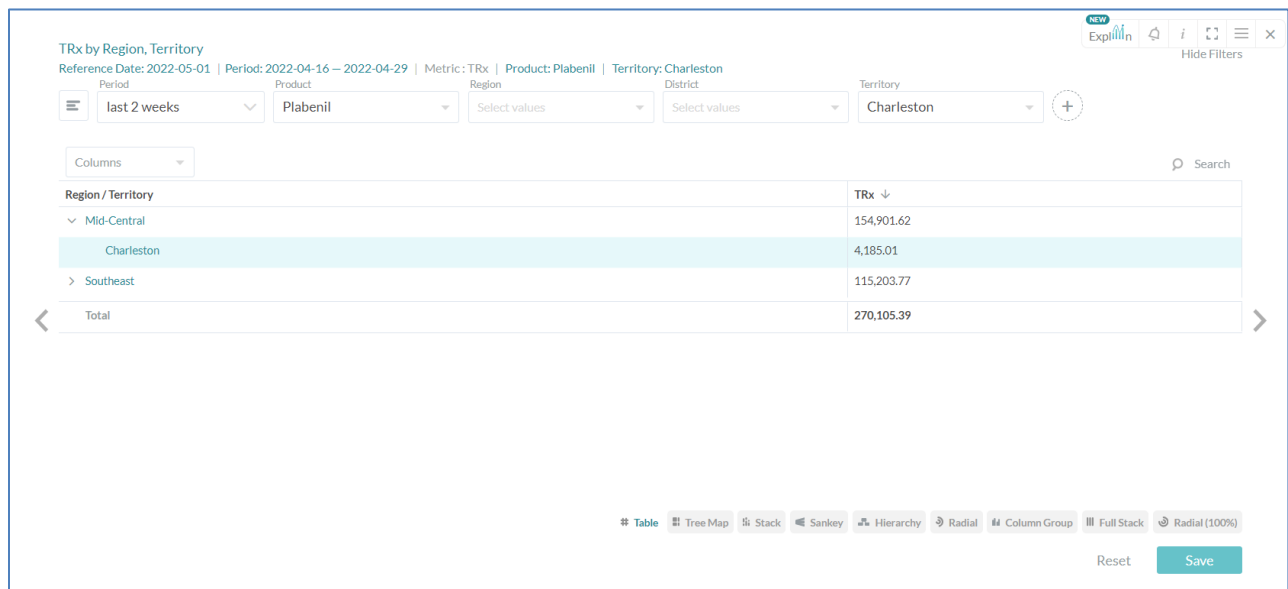
1. Pin the response Trx by region by district by territory.



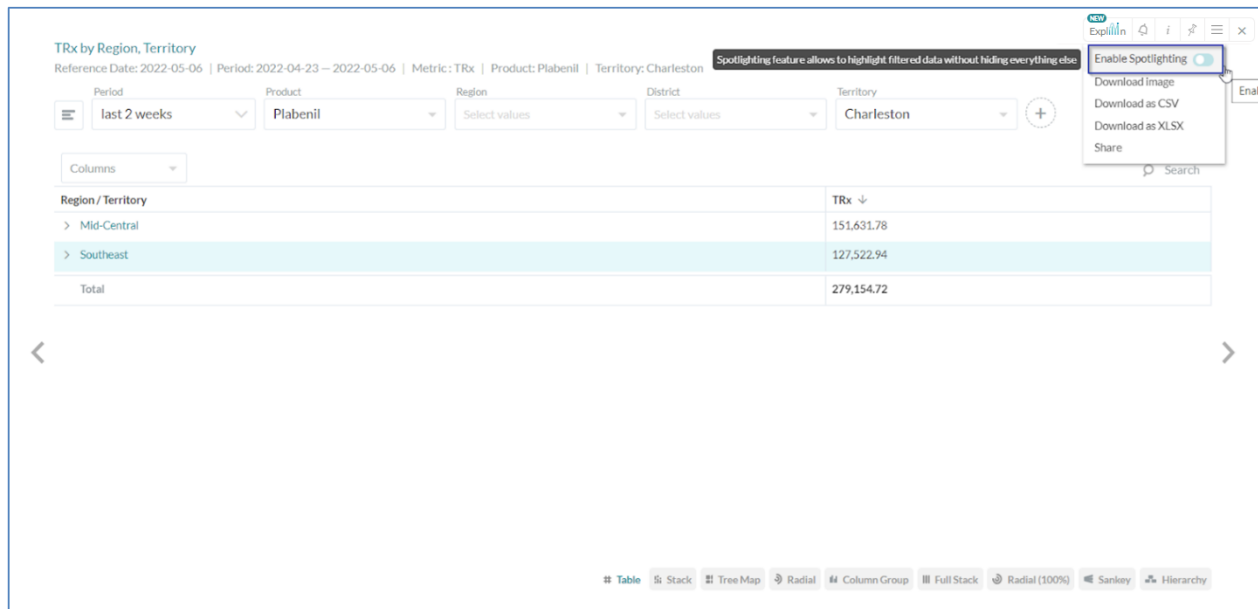
- Apply the following filters:
Period: 2 weeks
Product: Plabenil
Territory: Charleston



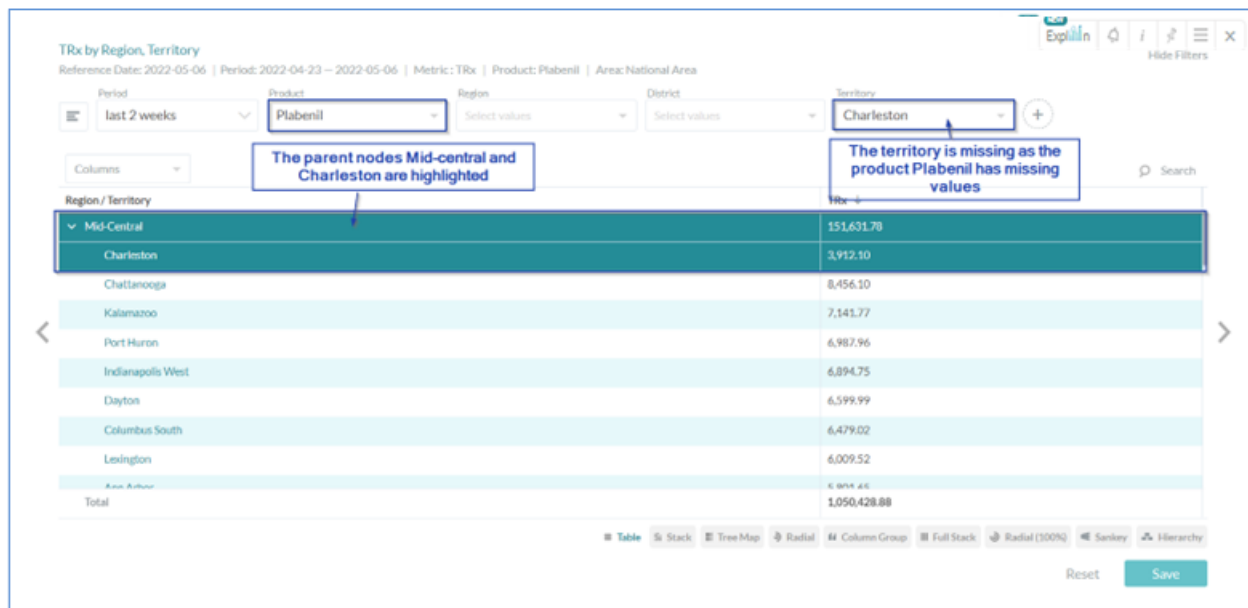
- Click **Apply**. The filtered list is displayed.



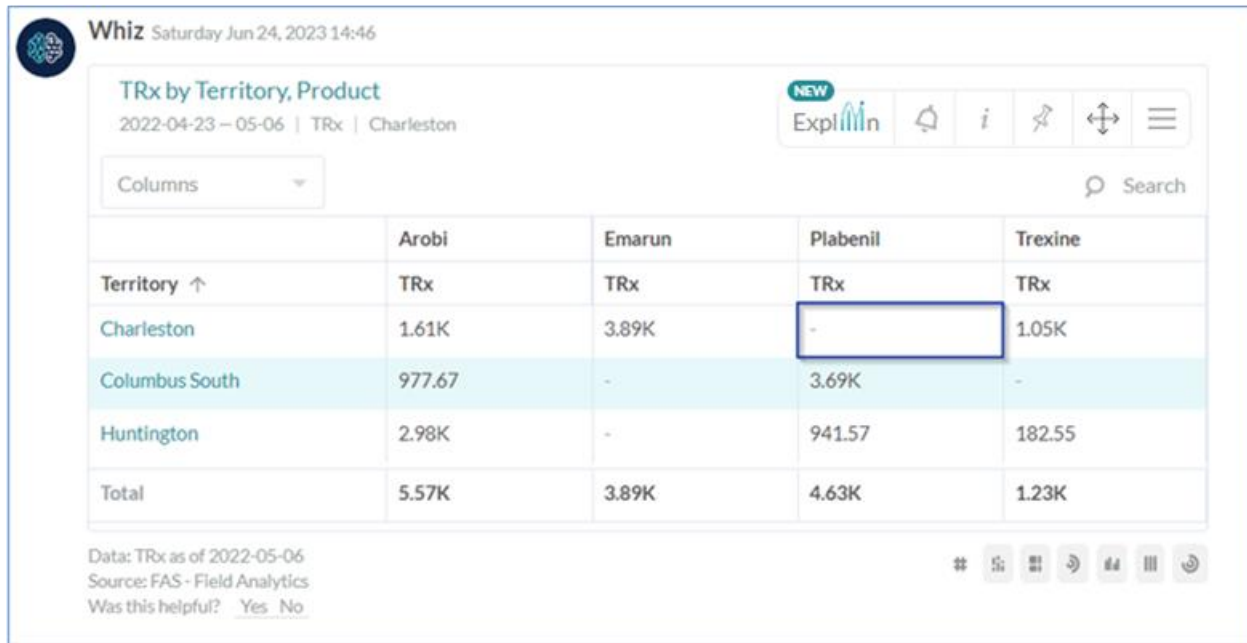
- Go to the hamburger icon and click **Enable Spotighting**.



- In the given scenario, the Territory Charleston, which falls under the District Charleston, does not have any data specifically related to the Product Plabenil. Due to this absence of data, when looking at the table (shown below), you will not see **Territory Charleston** listed. However, if you apply a filter to specifically display data for **Territory Charleston** and have spotighting enabled, the highlighting feature will still highlight the upper hierarchical parent, which in this case is **District Charleston**. This is because spotighting aims to visually indicate the hierarchy and relationships between different levels of data. However, since there is no data available for the selected filter of Territory Charleston, it will not be displayed in the table.



Query for reference: "by territory name by products for district Charleston for last two weeks"



Whiz Saturday Jun 24, 2023 14:46

TRx by Territory, Product
2022-04-23 – 05-06 | TRx | Charleston

Columns Search

	Arobi	Emarun	Plabenil	Trexine
Territory ↑	TRx	TRx	TRx	TRx
Charleston	1.61K	3.89K	-	1.05K
Columbus South	977.67	-	3.69K	-
Huntington	2.98K	-	941.57	182.55
Total	5.57K	3.89K	4.63K	1.23K

Data: TRx as of 2022-05-06
Source: FAS - Field Analytics
Was this helpful? [Yes](#) [No](#)

Applying Common Filters across Multiple Pinboards

WhizAI gives you the ability to create a set of filters and apply the common filters from this set across multiple pinboards. Thus, you don't have to spend time selecting the same filters, again.

Remember! The filters are passed to the other pinboards only when you click '**Apply**'. Also, only common filters are passed to other board/s. The new filters will override the user defaults. If you change the data model, the selected filters do not get passed to other board/s. As a board 'owner', if you apply the filters to all the pinboards, although the filters get passed to all the other boards, you must go to each board and 'save' the changes.

If you are a 'Viewer' of a board, you cannot save the changes. The filters are reset after you refresh the page. When applying such common filters, note the following points and how the filters behave under these scenarios:

- Hierarchy Filter vs Single Dimension Filter:**
 On Board 1 if you have hierarchical filters → **Region, District, Territory**. From this filter, you choose '**D1**' as a district and click **Apply Globally**.
 On Board 2 you have only a single dimension '**District**' filter. In this case, the district value '**D1**' is passed on to Board 2.
- Cascading Filters:**
 On board B1 if you have selected **the** market filter with value 'M1' and then you 'Apply' the changes.
 On board B2 if you have market '**All**' and product filter '**P1**', in this case on board B2, the 'Product' gets reset if it is conflicting and the market '**M1**' value gets passed on to Market '**All**'.

Also, WhizAI can show multiple default values on pinboards, therefore multiple values can be selected in user default for the dimensions.

Changing Values of Applied Filters

1. Open the **pinboard**, as required, and click the filter, for which you must change the value. WhizAI opens the drop-down list.
2. From this drop-down list, select the filter value, as required, and then click **Apply**. WhizAI filters details on all the **cards**.

The screenshot displays the WhizAI Test Board interface. At the top, there is a header bar with 'Test Board' and 'My Pins' tabs. Below this is a filter bar containing two dropdown menus: 'Customers' (with 'Select values' as the current selection) and 'Product' (with 'Arobi' as the current selection). To the right of these dropdowns are 'Cancel' and 'Apply' buttons. The main content area features three data cards, each displaying a table of top-performing regions, districts, or territories by TRx for the period 2022-01-01 to 05-01.

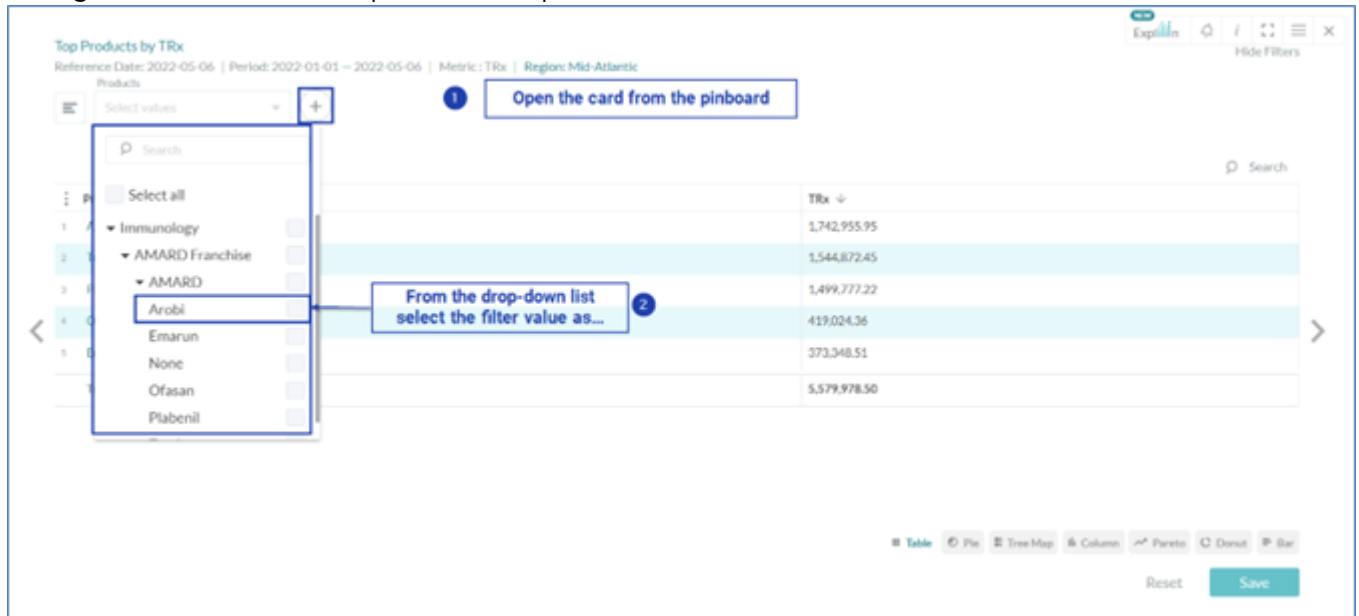
Region	TRx
1 Mid-Central	1.81M
2 Mid-Atlantic	1.78M
3 Midwest	1.66M
4 West	1.66M
5 Southeast	1.54M
6 Southcentral	1.41M
Total	35.08M

District	TRx
1 Eastern	321.18K
2 Orlando	311.99K
3 Central California	279.14K
4 Iowa North	273K
5 Tennessee	264.21K
6 Blue Mountains	243.93K
Total	8.31M

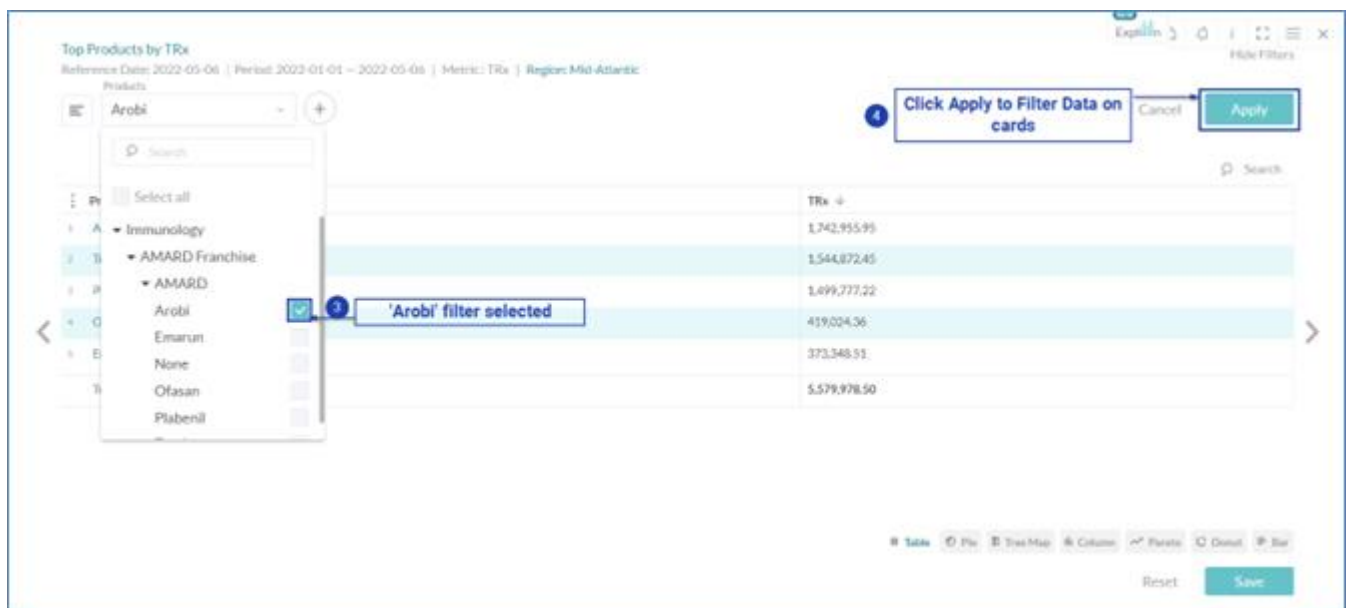
Territory	TRx
1 Springfield	157.54K
2 Columbia	142.72K
3 Charleston	119.94K
4 Albany	115.53K
5 Red Bank	109.89K
6 Claremont	103.93K
Total	3.29M

To change the filter values on an individual card

1. Go to the **pinboard**, as required, open the card, and then click the filter, for which you have to change the value. WhizAI opens the drop-down list.

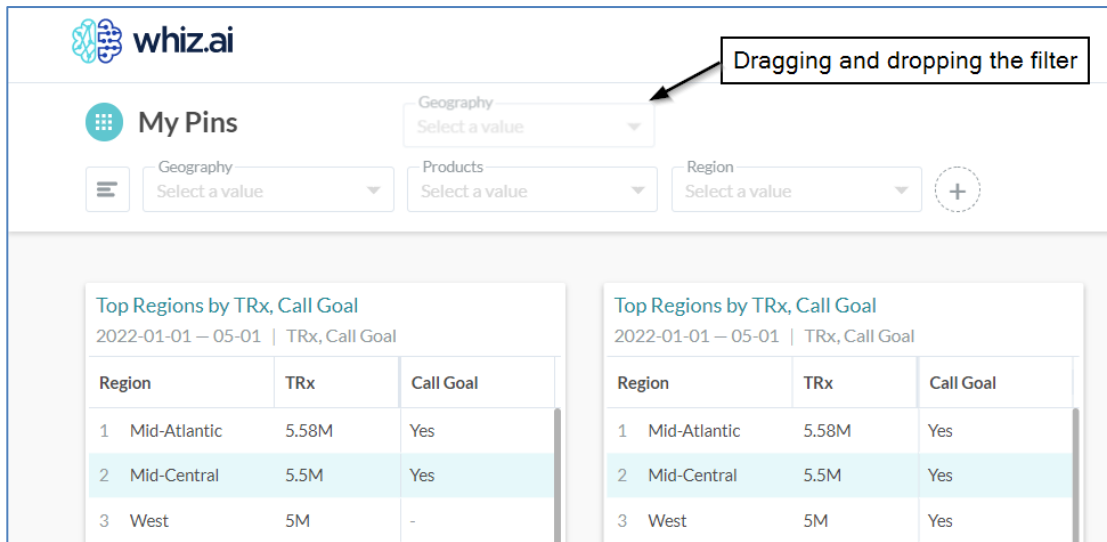


2. Select the filter value, as required, and then click **Apply** to filter the details on the card.



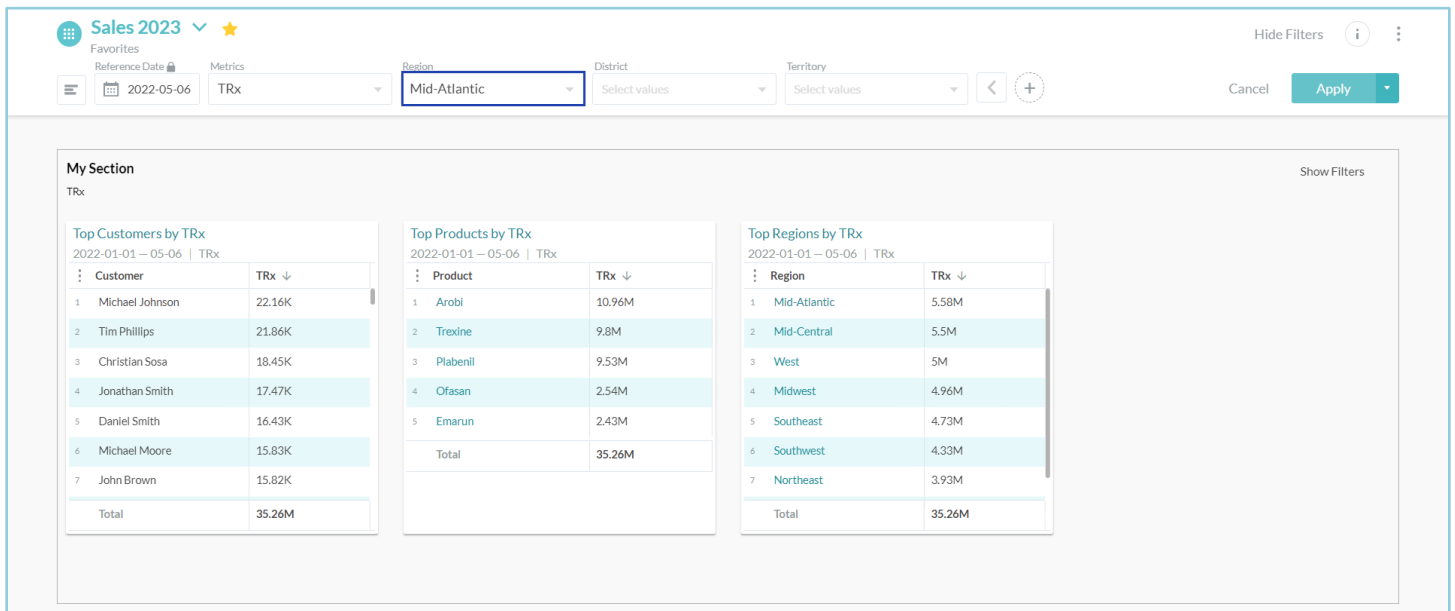
Drag and drop filters on pinboards

You can drag and drop the filters on pinboards to reorder them. For example, let's say you add **Region**, **Geography**, and **Products** as filters on a pinboard. You can simply drag and drop these filters to reorder them, as shown in the following figure:



Filtering behavior for pinboards

After you add and apply filters to pinboards, the cards show only the particular record that you searched. For example, if the **Region > Mid Atlantic** filter is added and applied as shown in the following figure:



The card displays the data only for **Mid-Atlantic** region as shown in the following figure.

Top Regions by TRx

Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: TRx | Area: National Area

Columns

Search

Region	TRx
1 Mid-Atlantic	5,579,978.50
2 Mid-Central	5,502,699.06
3 West	4,998,216.63
4 Midwest	4,960,737.09
5 Southeast	4,726,744.04
6 Southwest	4,334,003.28
7 Northeast	3,926,407.92
8 South Central	1,231,693.83
Total	35,260,480.34

Table Pie Tree Map Columns Pareto Donut Bar



Note! If you want to view all the rows (and not just the filtered row), you can click the **Enable Spotighting** toggle button. This shows all the records in the table and highlights the filtered record. Row highlighting can also be enabled from configurations on UI. Contact your system administrator for more information.

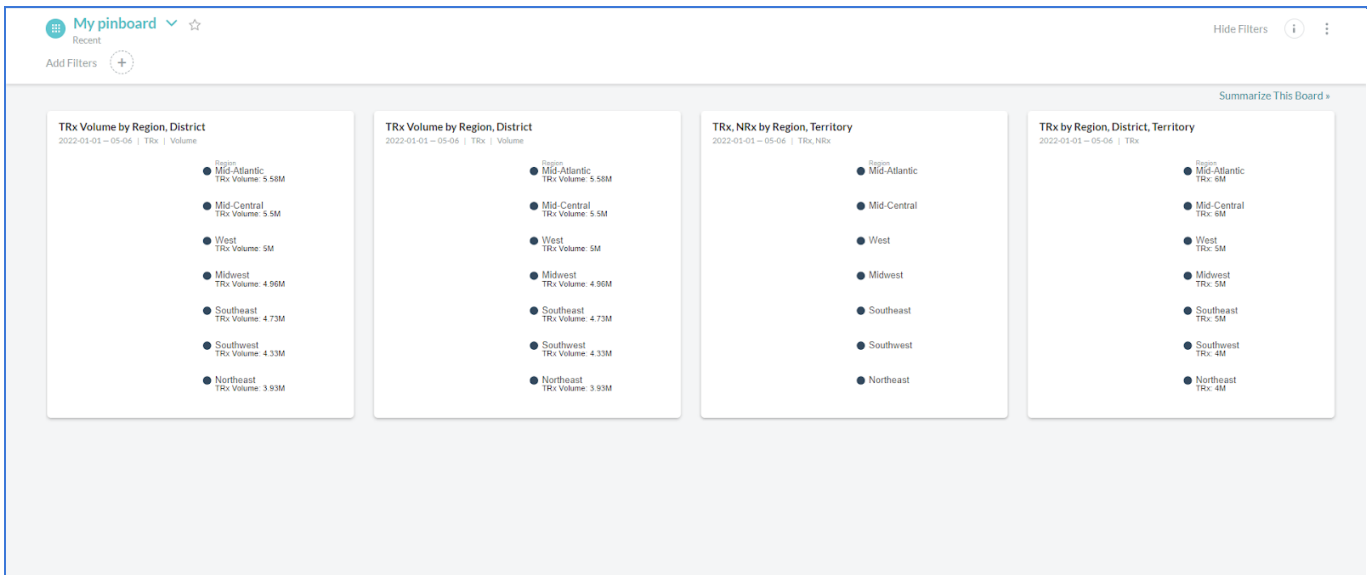
Hierarchical charts in compact mode on Pinboards

The hierarchical chart displays metric data upfront for a single metric in compact mode. For multiple metric horizontal or vertical hierarchy charts, data is only displayed when you hover the mouse on the metric values.

This ensures a more user-friendly experience, making valuable information immediately accessible without the need to expand the card.



Note! In a compact mode in Pinboards the dimension name is displayed only on the first node.



Column Reordering in Charts and Pinboards

As an owner or admin, you can drag-and-drop the column to re-order the default column arrangements in charts and pinboards.

This feature ensures that changes made to one column are automatically applied to all the repeated columns.

Before applying drag-and-drop feature

Scott Thursday Apr 04, 2024 11:28
Region by products for Trx, Nr, Nbrx

Whiz Thursday Apr 04, 2024 11:28

TRx, NRx, NBRx by Region, Product
2022-01-01 – 05-06 | Trx, NRx, NBRx

Columns

Region	Arobi	NRx [nr]	NBRx [nr]	Trx	NRx [nr]	NBRx [nr]	Trx
Mid-Atlantic	1.74M	1.68M	2.52K	373.35K	360.61K	575	419.02K
Mid-Central	1.74M	1.73M	2.47K	363.02K	356.64K	542	378.66K
Midwest	1.47M	1.45M	2.37K	344.20K	335.25K	532	356.71K
Northeast	1.25M	1.26M	2.02K	234.33K	234.13K	408	294.00K
South Central	372.33K	373.17K	634	86.47K	89.04K	134	65.03K
Southeast	1.52M	1.49M	2.29K	323.78K	317.01K	515	360.97K
Southwest	1.35M	1.32M	2.03K	339.14K	343.17K	473	300.31K
West	1.51M	1.49M	2.32K	368.00K	353.72K	527	360.37K
Total	10.96M	10.79M	16.66K	2.43M	2.41M	3.71K	2.34M

Data: Trx, NRx, NBRx as of 2022-05-06
Generated in: 2.85 Sec
Source: FAS - Field Analytics
Was this helpful? Yes No

After applying drag-and-drop to 'Trx'

Scott Thursday Apr 04, 2024 11:28
Region by products for Trx, Nr, Nbrx

Whiz Thursday Apr 04, 2024 11:28

TRx, NRx, NBRx by Region, Product
2022-01-01 – 05-06 | Trx, NRx, NBRx

Columns

Region	Arobi	NRx [nr]	NBRx [nr]	Trx	NRx [nr]	NBRx [nr]	Trx
Mid-Atlantic	1.68M	2.52K	1.74M	360.61K	575	373.35K	425.79K
Mid-Central	1.73M	2.47K	1.74M	356.64K	542	363.02K	377.30K
Midwest	1.45M	2.37K	1.47M	335.25K	532	344.20K	352.78K
Northeast	1.26M	2.02K	1.25M	234.13K	408	234.33K	275.61K
South Central	373.17K	634	372.33K	89.04K	134	86.47K	71.83K
Southeast	1.49M	2.29K	1.52M	317.01K	515	323.78K	360.87K
Southwest	1.32M	2.03K	1.35M	343.17K	473	339.14K	299.16K
West	1.49M	2.32K	1.51M	353.72K	527	368.00K	351.72K
Total	10.79M	16.66K	10.96M	2.41M	3.71K	2.43M	2.52M

Data: Trx, NRx, NBRx as of 2022-05-06
Generated in: 2.85 Sec
Source: FAS - Field Analytics
Was this helpful? Yes No

Automatically propagate changes made in one 'Trx' column across all identical columns in a table

Suggested methods for column reordering in crosstab response to retain custom order

1. First, save the custom order changes made to the parent column, then proceed to modify the child columns and save the changes again.
2. Reorder columns in a table with multiple pivots and repetitive columns only when all pivots at every level are present in the response.
3. It is recommended to make selections or deselections one at a time simultaneously to both the parent (Product) and child (Metric) columns from the table configurability box and then Save the card.

Example 1: Pin response for “TRx average, TRx volume, TRx growth by regions by products”

- Move **Growth Trx** to first position and **Emarun** in place of **Arobi** and click **Save**.

Average TRx, TRx Volume, Growth TRx by Region, Product
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: TRx | Computations: Average, Growth, Volume

Columns

Emarun and Growth TRx columns custom ordered

Region	Emarun Growth TRx (%)	Average TRx	TRx Volume	Arobi Growth TRx (%)	Average TRx	TRx Volume	Ofasan Growth TRx (%)	Average TRx	TRx Volume	Plabon Growth TRx (%)	Average TRx	TRx Volume	Treke Growth TRx (%)	Average TRx	TRx Volume
Mid-Atlantic	7.65	20,741.58	373,348.51	5.09	96,830.89	1,742,955.95	-2.17	23,279.13	419,024.36	3.69	83,320.96	1,499,777.22	-0.47	85,826.25	1,544,872.45
Mid-Central	2.56	20,167.97	363,023.50	-1.00	96,688.27	1,740,388.86	-3.81	21,036.48	378,654.73	-0.43	78,871.90	1,419,494.18	2.22	86,940.88	1,600,935.80
Midwest	0.37	19,122.29	344,201.16	6.43	81,857.26	1,473,430.62	-7.54	19,817.28	356,711.08	3.49	76,000.87	1,368,015.67	-3.94	78,798.81	1,418,378.56
Northeast	-5.15	13,018.13	234,326.37	-6.03	69,304.43	1,247,479.68	3.73	16,333.60	294,004.82	3.06	61,725.87	1,111,065.72	-7.00	57,751.74	1,039,531.33
South-Central	-3.61	4,804.08	86,473.51	-5.47	20,685.22	372,334.01	-20.19	3,612.70	65,028.53	-4.99	21,253.23	382,558.16	1.23	18,072.20	325,299.61
Southeast	-4.34	17,987.69	323,778.35	3.16	84,401.81	1,519,232.64	18.80	20,054.12	360,974.11	-3.77	67,197.94	1,209,563.00	0.24	72,955.33	1,313,195.95
Southwest	6.33	18,840.92	339,136.57	-0.81	75,260.61	1,354,690.98	2.81	16,683.88	300,309.85	-0.40	61,323.33	1,103,819.94	-0.57	68,669.22	1,236,045.94
West	7.94	20,444.30	367,997.40	-0.35	84,035.51	1,512,639.19	-6.43	20,020.69	360,372.46	6.64	79,968.50	1,439,432.95	0.48	73,209.70	1,317,774.63
Total	2.26	135,126.96	2,432,285.36	0.97	609,064.00	10,963,151.92	-0.73	140,837.89	2,535,081.93	1.54	529,662.60	9,533,926.84	-1.04	544,224.13	9,796,034.28

Show notes

Table Bubble

Reset Save

- 1a. Suggested method of using this feature:

From the table configurability box Uncheck **Growth TRx** only and click **Apply**. **Average TRx** and **TRx Volume** columns retain their reordered position.

- To reintroduce the **Growth TRx** column to the response check the **Growth Trx** option from the table configurability. The column is added back to the response, retaining its position as the first column in the custom order.

Average TRx, TRx Volume, Growth TRx by Region, Product
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: TRx | Computations: Average, Growth, Volume

Columns

Growth TRx retaining its position as the first column in the custom order after adding back from the table configurability.

Region	Emarun Growth TRx (%)	Average TRx	TRx Volume	Arobi Growth TRx (%)	Average TRx	TRx Volume	Ofasan Growth TRx (%)	Average TRx	TRx Volume	Plabon Growth TRx (%)	Average TRx	TRx Volume	Treke Growth TRx (%)	Average TRx	TRx Volume
Mid-Atlantic	7.65	20,741.58	373,348.51	5.09	96,830.89	1,742,955.95	-2.17	23,279.13	419,024.36	3.69	83,320.96	1,499,777.22	-0.47	85,826.25	1,544,872.45
Mid-Central	2.56	20,167.97	363,023.50	-1.00	96,688.27	1,740,388.86	-3.81	21,036.48	378,654.73	-0.43	78,871.90	1,419,494.18	2.22	86,940.88	1,600,935.80
Midwest	0.37	19,122.29	344,201.16	6.43	81,857.26	1,473,430.62	-7.54	19,817.28	356,711.08	3.49	76,000.87	1,368,015.67	-3.94	78,798.81	1,418,378.56
Northeast	-5.15	13,018.13	234,326.37	-6.03	69,304.43	1,247,479.68	3.73	16,333.60	294,004.82	3.06	61,725.87	1,111,065.72	-7.00	57,751.74	1,039,531.33
South-Central	-3.61	4,804.08	86,473.51	-5.47	20,685.22	372,334.01	-20.19	3,612.70	65,028.53	-4.99	21,253.23	382,558.16	1.23	18,072.20	325,299.61
Southeast	-4.34	17,987.69	323,778.35	3.16	84,401.81	1,519,232.64	18.80	20,054.12	360,974.11	-3.77	67,197.94	1,209,563.00	0.24	72,955.33	1,313,195.95
Southwest	6.33	18,840.92	339,136.57	-0.81	75,260.61	1,354,690.98	2.81	16,683.88	300,309.85	-0.40	61,323.33	1,103,819.94	-0.57	68,669.22	1,236,045.94
West	7.94	20,444.30	367,997.40	-0.35	84,035.51	1,512,639.19	-6.43	20,020.69	360,372.46	6.64	79,968.50	1,439,432.95	0.48	73,209.70	1,317,774.63
Total	2.26	135,126.96	2,432,285.36	0.97	609,064.00	10,963,151.92	-0.73	140,837.89	2,535,081.93	1.54	529,662.60	9,533,926.84	-1.04	544,224.13	9,796,034.28

Show notes

Table Bubble

Reset Save



Note! The option to save the card whenever it is resized is available both in expanded and collapsed mode.

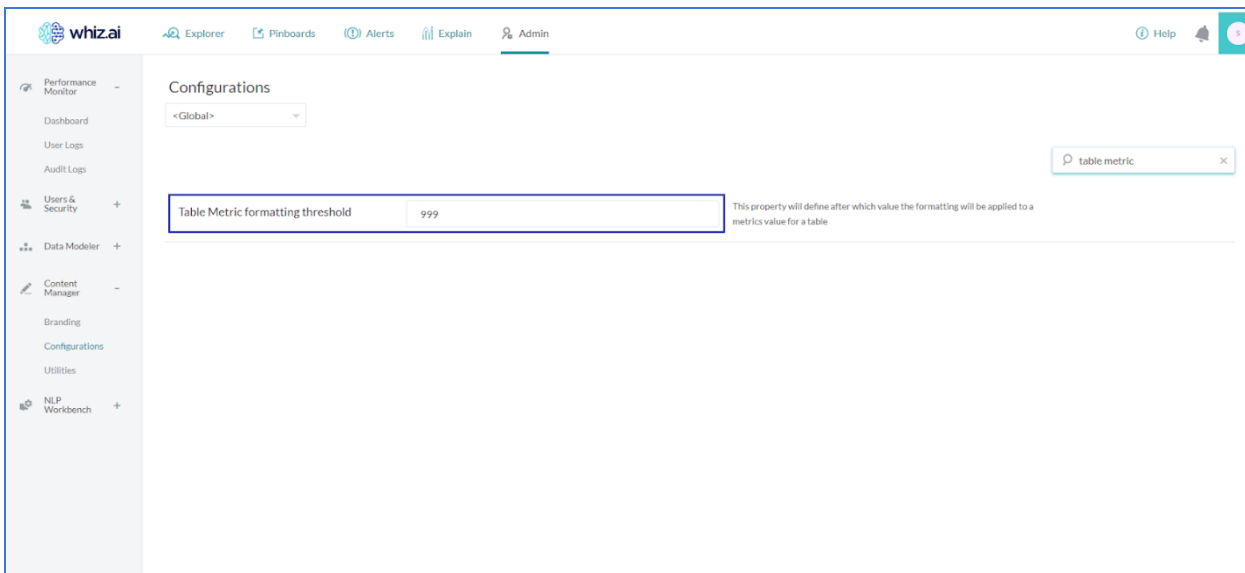


Tip! When the hidden column is added back to the response through the configurability table, the column retains the last saved column width.

Configuring display formats of metrics for table responses

WhizAI provides the ability to select a configuration to display full numbers on tables. This allows you to view the numbers without shortening them across the model .

Go to **Admin > Content Manager > Configurations > Global > Table Metric formatting threshold** to define the default value. All the numbers lower than the set value are displayed in full format. For example, The threshold value is set as 999 as shown in the figure below..



All numbers lower than 999 are displayed as full numbers.

Example query: Show me top territory by TRx.

Scott
Tuesday Feb 27, 2024 11:26

Show me Top Territory by TRx

Whiz
Tuesday Feb 27, 2024 11:26

NEW

Expl

lin

Columns

Search

	Territory	TRx ↓
1	Springfield	489.43K
2	Columbia	453.56K
3	Charleston	359.56K
4	Red Bank	313.79K
5	Albany	292.21K
6	Oklahoma City	268.76K
7	Rockford	256.97K
8	Clermont	255.82K
9	St Louis Metro East	251.77K
10	Portland	250.73K
	Total	35.26M

Data: TRx as of 2022-05-06
 Generated in: 3.51 Sec
 Source: FAS - Field Analytics
 Was this helpful? Yes No



Note! The number formatting displayed in tables and charts are consistent with the exported XLS/CSV file format.



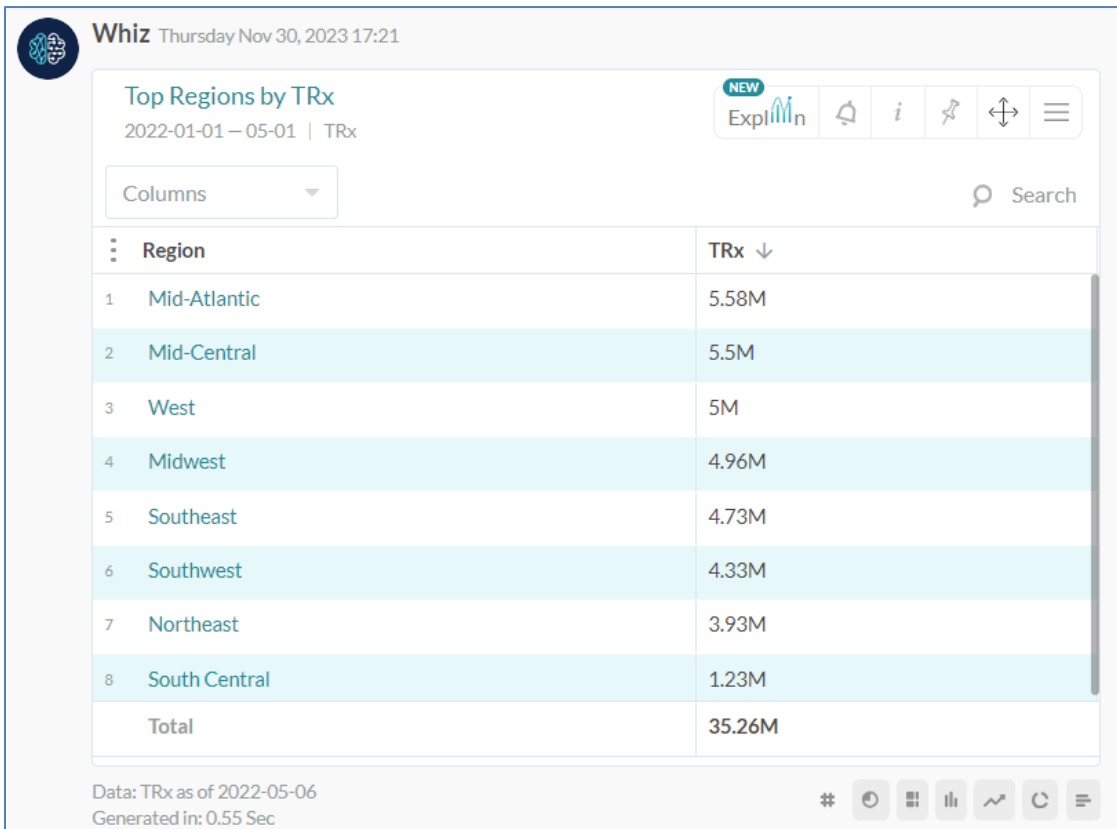
Note! The time period 'quarter' displayed as Q1 and Q2 and time period 'semester' displayed as H1 and H2 in tables and charts are consistent with the exported XLS file format.

Saving the sorting order on cards in pinboards



Note! This feature is only available for board owners and not for board viewers.

On cards in pinboards, when you sort the columns, you can save that sorting order. For example, if you ask the query 'Show me TRx by region' you will get a response as shown in the following figure.



When you sort the column TRx and save the changes, the sorted order gets saved as shown in the following figure:

Whiz Thursday Dec 07, 2023 19:31

Top Regions by TRx
2022-01-01 — 05-01 | TRx

Columns NEW Explain 🔔 i 🔗 🔄 ☰


Search

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

Data: TRx as of 2022-05-06
Generated in: 2.26 Sec
Source: FAS - Field Analytics
Was this helpful? Yes No

🔄 📊 📈 🔄 ☰

No Default sorting icon on top_N Trend, and crosstab queries

You do not see the default sort icon  for tables in responses to the following queries:

- Top_N trend query - 'Show me top 50 customer by week'
- Queries with two dimensions; the first dimension is asked with a certain threshold - 'top 10 customers by brands.'

Trend tables often display aggregated values over a period of time, such as monthly sales totals. These aggregated values are calculated based on the underlying data, but they may not be explicitly included as a column in the table.

The default sorting symbol typically denotes the sorting order of a specific column in the table. However, since the aggregated value column is not directly present in the response table, WhizAI does not provide a default sorting symbol.



Tip! The absence of a default sorting symbol reflects that the response contains aggregated data and the focus is on temporal analysis rather than specific column sorting.

Example Query: 'Show me top 50 customers by week'.

Whiz Thursday Nov 30, 2023 18:27

TRx by Customer [Weekly]
2022-01-01 – 05-01 | TRx

Columns Search

Customer	2022-01-07	2022-01-14	2022-01-21	2022-01-28	2022-02-04	2022-02-11	2022-02-18	2022-02-25	2022-03-04	2022-03-11	2022-03-18
	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx
Michael Johnson	1.27K	545.15	1.28K	625.29	1.63K	602.29	3.02K	2.52K	2.31K	935.29	1.72K
Tim Phillips	-	1.33K	-	2.33K	-	3.55K	-	1.77K	1.62K	2.24K	2.4K
Christian Sosa	-	1.45K	-	578.49	-	948.49	-	2.78K	1.09K	1.49K	1.19K
Jonathan Smith	-	1.56K	-	1.72K	-	3.27K	-	569.60	-	2.47K	2.04K
Daniel Smith	1.16K	1.83K	953.60	644.97	816.67	372.97	1.46K	-	2.47K	279.97	394.97
Michael Moore	-	1.24K	-	1.56K	-	1.12K	-	-	2.35K	1.62K	1.39K
John Brown	731.49	548.62	-	1.16K	900.49	1.66K	-	2.15K	334.44	1.13K	1.09K
Total	21.79K	33.53K	16.01K	51.21K	19.79K	53.96K	26.48K	42.64K	31.99K	54.28K	51.33K

Data: TRx as of 2022-05-06
Generated In: 1.04 Sec

Switching between Period over Period (POP) to Year over Year (YOY) growth on cards in pinboards

On period over period comparison (PoP) cards in pinboards, you can switch to year over year (YoY) comparison. For example, if you ask the query 'Show me NRx, nbrx average by regions mtd pop' you will get the response as shown in the following figure.

Whiz Thursday Nov 30, 2023 18:28

Top Regions by NBRx, NRx
2022-04-30 – 05-01 / 04-02 – 04-03 | NRx, NBRx

Columns Search

Region	NRx				NBRx			
	MTD vs Prior MTD				MTD vs Prior MTD			
	Curr	Prev	Abs Chg	% Chg [%]	Curr	Prev	Abs Chg ↓	% Chg [%]
1 Mid-Atlantic	280.08K	288.78K	-8.70K	-3.01%	517.76	446.50	71.26	+15.96%
2 Southeast	251.57K	260.08K	-8.52K	-3.27%	443.56	402.27	41.29	+10.26%
3 Midwest	283.28K	284.79K	-1.50K	-0.53%	445.83	426.63	19.21	+4.50%
4 South Central	66.1K	66.08K	17.03	+0.03%	128.89	117.89	11.01	+9.34%
5 West	249.86K	265.4K	-15.54K	-5.86%	418.01	435.73	-17.72	-4.07%
6 Northeast	218.69K	197.66K	21.03K	+10.64%	343.16	374.44	-31.28	-8.35%
Total	1.9M	1.94M	-42.23K	-2.18%	3.07K	3.07K	7.00	+0.23%

Data: NRx, NBRx as of 2022-05-06
Generated In: 0.52 Sec

To switch between POP and YOY growth, expand the card and click the hamburger button. You will then see a Period Operator toggle button that allows you to switch between the two. This is demonstrated in the accompanying figure.



Note! This toggle is available only when the card is pinned to the pinboard.

Top Regions by NBRx, NRx
Reference Date: 2022-05-01 | Period: 2022-04-30 – 2022-05-01 / 2022-04-02 – 2022-04-03 | Metrics: NRx, NBRx

Add Filters +

Columns ▼

Region	NRx				NBRx			
	MTD vs Prior MTD				MTD vs Prior MTD			
	Curr	Prev	Abs Chg	% Chg [%]	Curr	Prev	Abs Chg ↓	% Chg [%]
1 Mid-Atlantic	280,075.49	288,777.53	-8,702.04	-3.01%	517.76	446.50	71.26	+15.96%
2 Southeast	251,567.62	260,083.26	-8,515.64	-3.27%	443.56	402.27	41.29	+10.26%
3 Midwest	283,284.44	284,788.65	-1,504.21	-0.53%	445.83	426.63	19.21	+4.50%
4 South Central	66,100.14	66,083.11	17.03	+0.03%	128.89	117.89	11.01	+9.34%
5 West	249,861.97	265,402.59	-15,540.62	-5.86%	418.01	435.73	-17.72	-4.07%
6 Northeast	218,690.19	197,655.34	21,034.85	+10.64%	343.16	374.44	-31.28	-8.35%
7 Southwest	261,977.34	261,963.61	13.73	+0.01%	347.21	385.75	-38.54	-9.99%
8 Mid-Central	286,899.30	315,934.14	-29,034.85	-9.19%	428.19	476.40	-48.21	-10.12%
Total	1,898,456.50	1,940,688.23	-42,231.73	-2.18%	3,072.60	3,065.60	7.00	+0.23%

⚙️ Variance 📊 Column 📊 Bar

Exporting Pinboards to PDF or PPT

- From the main pinboard panel, open the pinboard you have to export.

whiz.ai Explorer Pinboards Alerts Explain Admin

My Pins Recent ☆

Add Filters +

Sales Analysis (TRx)

- Top Regions by TRx** 2022-Q1 | TRx

Region	TRx (\$)
1 Mid-Atl...	4,04M
2 Mid-Ce...	3,99M
Total	25.49M
- Top Regions by TRx** 2022-Q1 | TRx
- Top Regions by TRx** 2022-Q1 | TRx
- TRx [Weekly]** 2022-01-01 – 05-06 | TRx
- Top Products by TRx** 2022-01-01 – 05-06 | TRx

Product	TRx (\$)
1 Arobi	10.96M
2 Trexine	9.80M
Total	35.26M
- Top Customers by TRx** 2022-01-01 – 05-06 | TRx

Customer	TRx (\$)
1 Michael...	22.16K
2 Tim Phil...	21.86K
Total	35.26M

Sales Analysis (NRx)

- Top Regions by NRx** 2022-01-01 – 05-06 | NRx

Region	NRx (\$)
1 Mid-Atl...	5.47M
2 Mid-Ce...	5.41M
Total	34.72M
- Top Regions by NRx** 2022-01-01 – 05-06 | NRx
- Top Products by NRx** 2022-01-01 – 05-06 | NRx

Product	NRx (\$)
1 Arobi	10.79M
2 Trexine	9.64M
Total	34.72M
- Top Customers by NRx** 2022-01-01 – 05-06 | NRx

Customer	NRx (\$)
1 Michael...	21.15K
2 Tim Phil...	17.87K
Total	34.72M

Options Menu: Share, Design Mode, Export, Export as JSON, Copy, Transfer Ownership, Delete

- Click ⋮ icon to open the list of options and then click **Export Pinboard**. WhizAI shows a dialog where you can select individual pins to export to PDF, as required.

Select all

Top Regions by TRx

2022-Q1 | TRx

Region	TRx (\$) ↓
1 Mid-Atlant...	4.04M
2 Mid-Central	3.99M
Total	25.49M

Top Regions by TRx

2022-Q1 | TRx

Top Regions by TRx

2022-Q1 | TRx

TRx [Weekly]

2022-01-01 — 05-06 | TRx

Top Products by TRx

2022-01-01 — 05-06 | TRx

Product	TRx (\$) ↓
1 Arobi	10.96M
2 Trexine	9.80M
Total	35.26M

Top Customers by TRx

2022-01-01 — 05-06 | TRx

Customer	TRx (\$) ↓
1 Michael Jo...	22.16K
2 Tim Phillips	21.86K
Total	35.26M

Top Regions by NRx

2022-01-01 — 05-06 | NRx

Region	NRx (\$) ↓
1 Mid-Atlant...	5.47M
2 Mid-Central	5.41M
Total	34.72M

Top Regions by NRx

2022-01-01 — 05-06 | NRx

Top Products by NRx

2022-01-01 — 05-06 | NRx

Product	NRx (\$) ↓
1 Arobi	10.79M
2 Trexine	9.64M
Total	34.72M

Export

10 pages

My Pins

Orientation

Destination

Save as a PDF

☐ Narratives

Cancel

Export



Note! By default, all the pins are selected to be exported to PDF. If you want to export individual pins, you can clear the checkbox, as required.



Tip! You can select Landscape or Portrait orientation mode, as required. WhizAI creates the PDF according to the selected mode.

- From the **Destination** drop-down, select PDF or PPT, as required.
- Click **Export**. According to the option selected, a PDF or PPT file is downloaded to your local folder.



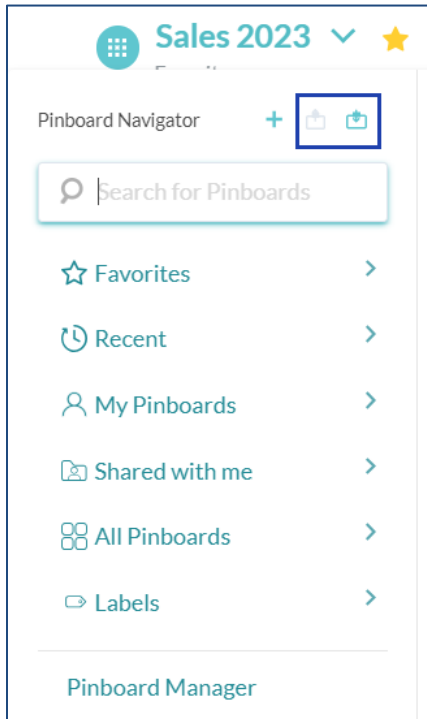
Note! You can export a pinboard if you are a board owner or even if you are a board viewer.



Note! WhizAI captures information regarding pinboard exports. The Admin user can track this under the Admin > Audit Logs section.

Moving pinboards across environments

As a Board Owner, you can import or export a pinboard across environments. Let's have a look at some details when you export a pinboard: As a board owner, you can see the option to Export the pinboard to any other environment, as shown in the following figure:



After you export the pinboard, a JSON file is downloaded on your local machine that contains all the pinboard details such as the details of the pinned cards, metadata that is 'locked', visualizations, board level, and card level filters, etc. (This file is used during import to other environments.)



Remember! You can export a pinboard in its temporary state or the latest 'saved' state.



Tip! The export is captured as part of the **Audit Logs** under the **Administration** page.

When you import a pinboard: As a board owner, you can see the option to Import the pinboard to the desired environment. The import is executed using the JSON file that is downloaded during the export pinboard activity. From the dialog box, select the JSON file or drag and drop it and click **OK**.




Tip! You can minimize the **Import pinboard** window and continue with your work. This import-export activity is executed by the system without causing any impediments to your work.

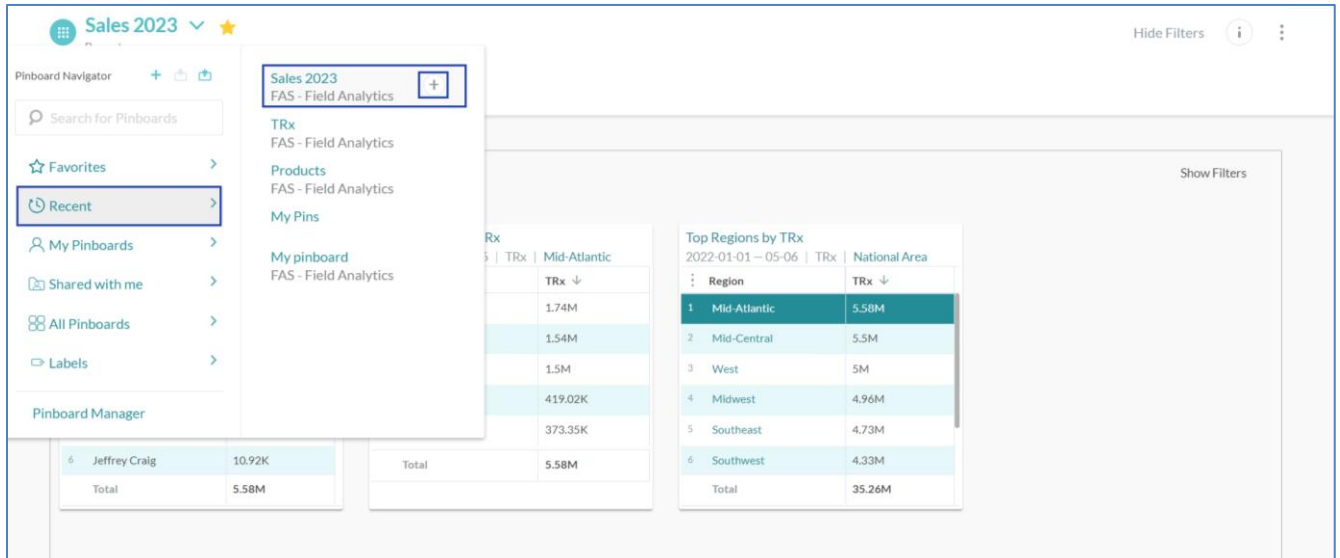
In case a board with the same name already exists, you can either choose to import the board with a different name or you can allow WhizAI to override the existing board. In this case, although WhizAI overrides the board, it retains the sharing preferences of the original board. In case, a board is imported, however, the new environment does not contain the corresponding data model/s; in this case, WhizAI shows relevant messages to make you aware of the limited data availability. **Tip!** The Import activity is captured as part of the **Audit Logs** under the **Administration** page.

From the pinboard navigator, you can download the pinboard from the current environment in JSON format and import the pinboard into the destination. This allows you to move your pinboards from one environment to another.

Importing and Exporting a pinboard from Pinboard Navigator

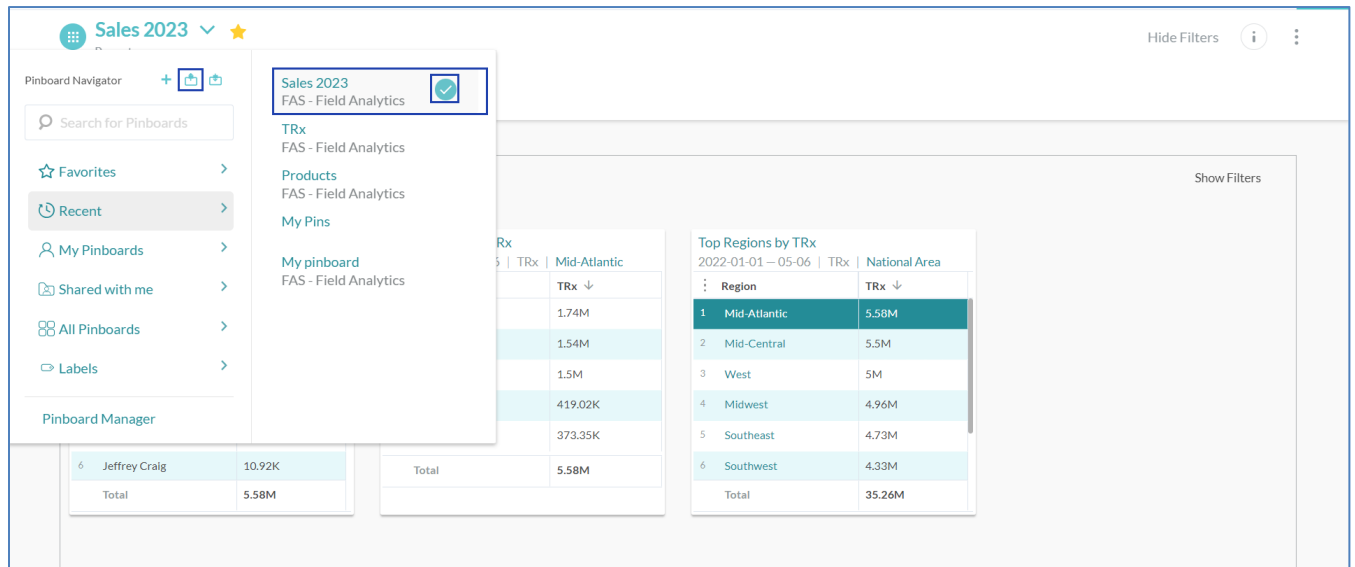
To download a pinboard in JSON format from the **Pinboard Navigator**:

1. From the Pinboard Navigator, go to the pinboard that you have to export, and click the . The option to export the board becomes available.




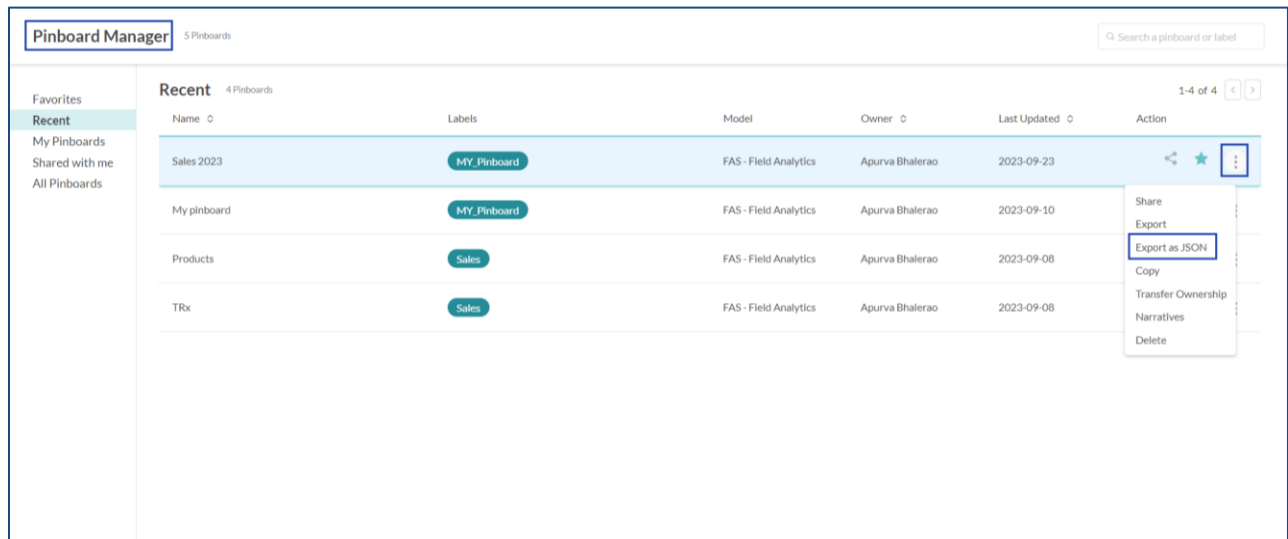
The screenshot displays the WhizAI Pinboard Navigator interface. On the left, a sidebar lists navigation options: Pinboard Navigator, Search for Pinboards, Favorites, Recent (highlighted), My Pinboards, Shared with me, All Pinboards, and Labels. The main area shows a list of pinboards under the 'Sales 2023' context. The 'Recent' pinboard is selected, and a dropdown menu is visible, showing options like 'FAS - Field Analytics', 'Products', 'My Pins', and 'My pinboard'. The 'Export' icon (a square with a plus sign) is highlighted in the dropdown menu. The background shows a dashboard with various data visualizations, including a table of 'Top Regions by TRx' and a 'Total' summary.

Region	TRx
1 Mid Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
Total	35.26M

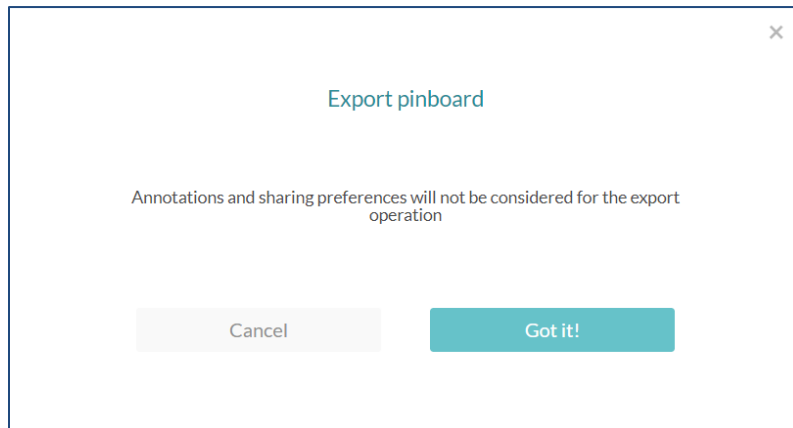


OR

In case **Pinboard Manager** is configured for you, open the pinboard that you want to export as JSON format and click  icon and then click **Export as JSON**.



- Click the export button  next to **Pinboard Navigator**. You get the following message.



3. Click **Got it!** The pinboard gets downloaded in JSON format.




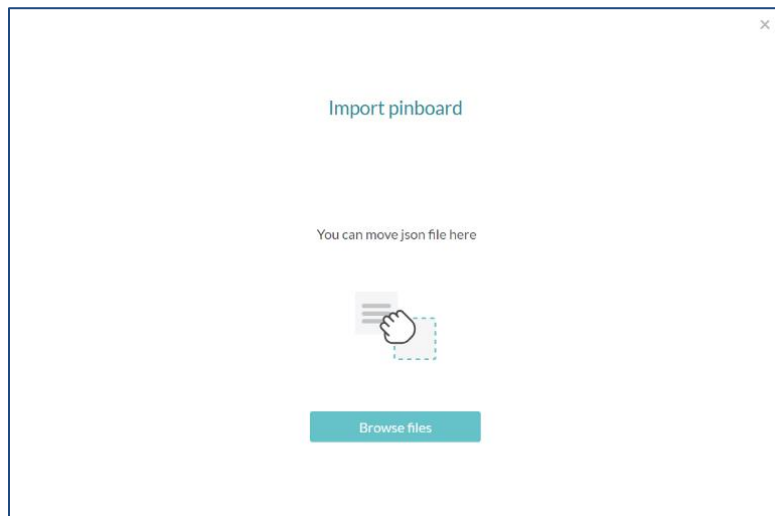
Note! WhizAI shows a dialog where it prompts the user that annotations and sharing preferences will not be exported as shown in the figure below.



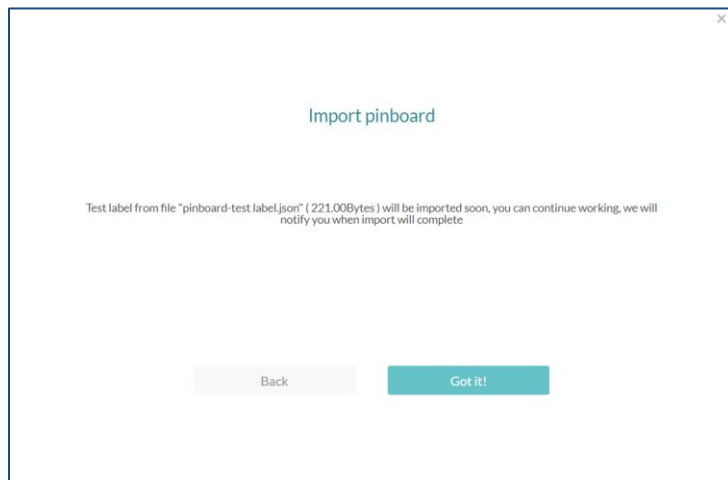
Note! This feature is only available when Pinboard Manager is configured.

To import pinboard in JSON format from the **Pinboard Navigator**:

1. Click the  icon. The **Pinboard Navigator** is displayed.
2. Click the import icon next to the **Pinboard Navigator**. An Import pinboard dialogue box is displayed.



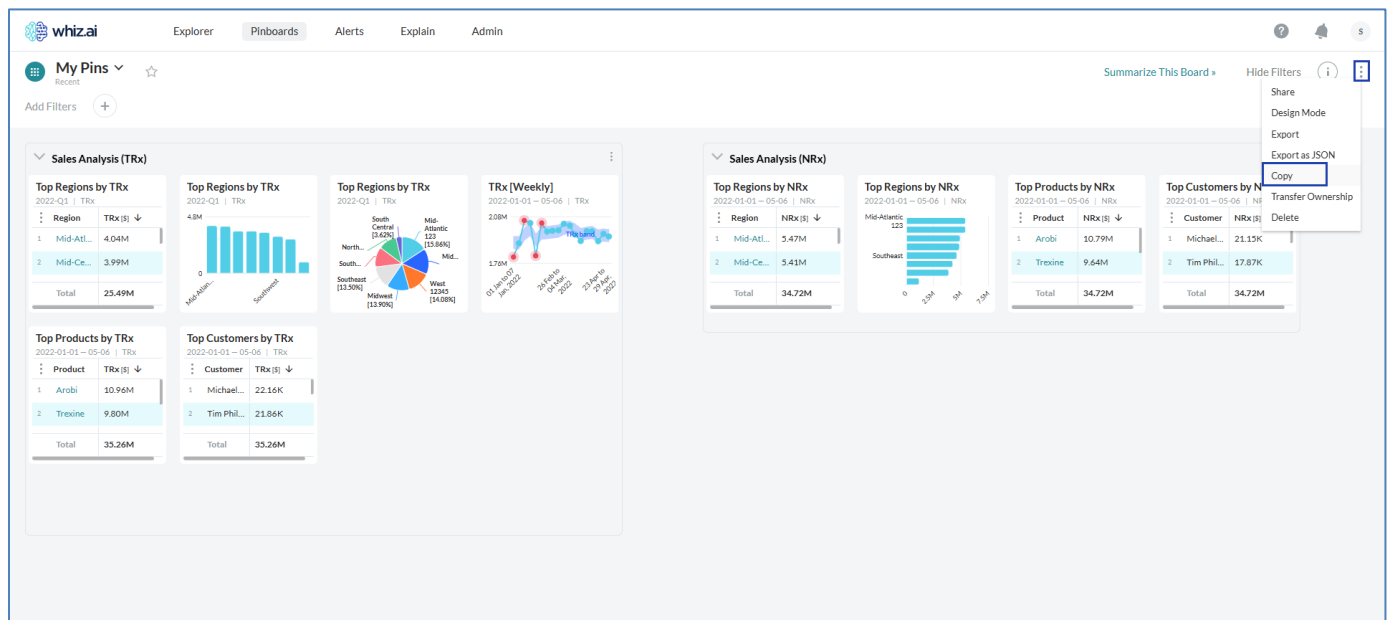
3. Click **Browse files**. Your file explorer window is displayed.
4. Select the pinboard in JSON format you wish to import. Click **Open**. An **Import pinboard** dialogue box appears.




- Click **Got it!** You get a message that the pinboard is imported successfully.

Copying Pinboards


- From the main boards panel, open the pinboard of which you have to create a copy.

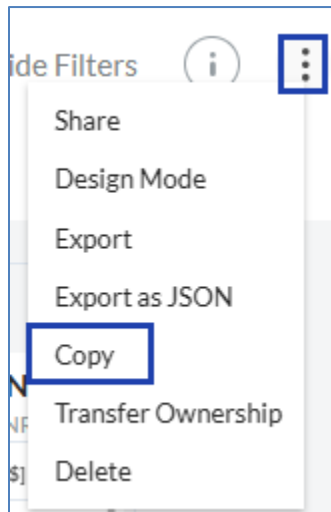


- Click  icon to open the list of options and then click **Copy Pinboard**. WhizAI shows the **Create a Copy?** dialog.

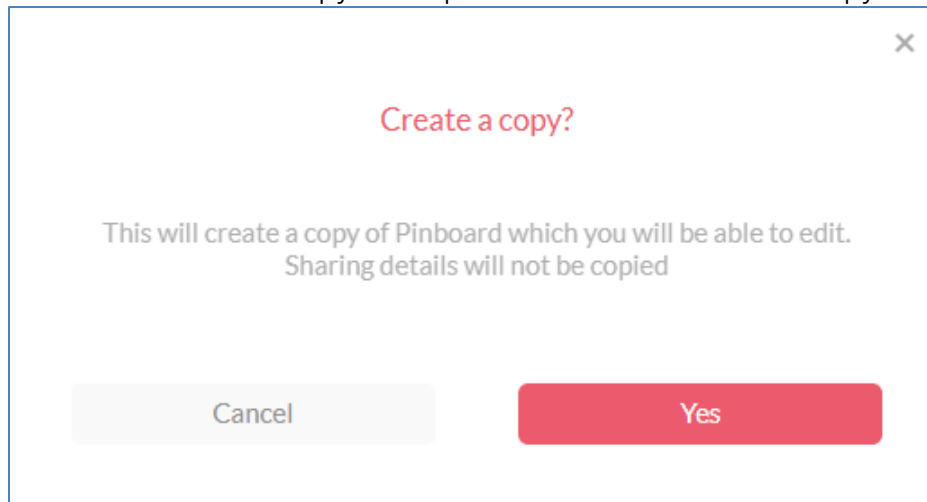
OR

In case **Pinboard Manager** is configured for you, open the pinboard that you want to copy and click

 icon and then click **copy**.



3. Click **Yes** to create a copy of the pinboard. WhizAI creates a copy of the pinboard.



Note! You can copy a pinboard if you are a board owner, board viewer or a board editor.

Scrolling on pinboards

When there are filter/s added to pinboards, the filters toolbar gets hidden while scrolling up or down the board; however, the filters toolbar is displayed back on your screen as soon as you stop scrolling. Before scrolling on the pinboards the filters toolbar is displayed as shown in the following figure.

My Pins

Reference Date: 2022-05-01 | Period: Pick a period | Metrics: Default | Computations: Default | Customers: Select a value | Geography: Select a value | Products: Select a value | Region: Select a value | Access Cate...: Select a value | Account Type: Select a value | Active Flag: Select a value | Save Changes

Address: Select a value | Administration M...: Select a value | Age: Select a value | Age Group: Select a value | Availability INFL...: Select a value | Call Sequence: Select a value | Call Status: Select a value | Call Type: Select a value | Campaign Type: Select a value

Top Regions by TRx, Call Goal
2020-05-03 – 2022-05-01 | TRx, Call Goal

Region	TRx	Call Goal
1 Mid-Atlantic	32.37M	Yes
2 Mid-Central	32.01M	Yes
3 Midwest	29.23M	Yes
4 West	29.17M	Yes
5 Southeast	27.97M	Yes
6 Southwest	25.57M	No
7 Northeast	23.64M	Not Applicable
8 South Central	7.46M	-

Top Regions by TRx, Call Goal
2020-05-03 – 2022-05-01 | TRx, Call Goal

Region	TRx	Call Goal
1 Mid-Atlantic	32.37M	Yes
2 Mid-Central	32.01M	Yes
3 Midwest	29.23M	Yes
4 West	29.17M	Yes
5 Southeast	27.97M	Yes
6 Southwest	25.57M	No
7 Northeast	23.64M	Not Applicable
8 South Central	7.46M	-

Top Regions by TRx, Call Goal
2020-05-03 – 2022-05-01 | TRx, Call Goal

Region	TRx	Call Goal
1 Mid-Atlantic	32.37M	Yes
2 Mid-Central	32.01M	Yes
3 Midwest	29.23M	Yes
4 West	29.17M	Yes
5 Southeast	27.97M	Yes
6 Southwest	25.57M	No
7 Northeast	23.64M	Not Applicable
8 South Central	7.46M	-

Top Customers by Growth TRx, TRx Market Share
2020-05-03 – 2022-05-01 | TRx | Arobi

Customer	Growth TRx	TRx Market Share
1 David Smith	-	27.96%
2 Robert Johnson	-	10.85%
3 Allison Williams	-	100.00%
4 Scott Reynolds	-	21.38%
5 Paul Moore	-	54.64%
6 John Jones	-	42.77%
Total	-	31.16%

Top Customers by Growth TRx, TRx Market Share
2020-05-03 – 2022-05-01 | TRx | Arobi

Customer	Growth TRx	TRx Market Share
1 David Smith	-	27.96%
2 Robert Johnson	-	10.85%
3 Allison Williams	-	100.00%
4 Scott Reynolds	-	21.38%
5 Paul Moore	-	54.64%
6 John Jones	-	42.77%
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Top Customers by Growth TRx, TRx Market Share
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Total	-	31.16%

Top Customers by Growth TRx, TRx Market Share
2020-05-03 – 2022-05-01 | TRx | Arobi

Customer	Growth TRx	TRx Market Share
1 David Smith	-	27.96%
2 Robert Johnson	-	10.85%
3 Allison Williams	-	100.00%
4 Scott Reynolds	-	21.38%
5 Paul Moore	-	54.64%
6 John Jones	-	42.77%
Total	-	31.16%

After scrolling on the pinboards the filters toolbar is hidden as shown in the following figure.

whiz.ai

Top Customers by Growth TRx, TRx Market Share
2020-05-03 – 2022-05-01 | TRx | Arobi

Customer	Growth TRx	TRx Market Share
1 David Smith	-	27.96%
2 Robert Johnson	-	10.85%
3 Allison Williams	-	100.00%
4 Scott Reynolds	-	21.38%
5 Paul Moore	-	54.64%
6 John Jones	-	42.77%
Total	-	31.16%

Month

Month	Boston	Chicago
Jun 20	23.95K	52.22K
Jul 20	16.51K	32.55K
Aug 20	18.98K	39.7K
Sep 20	32.71K	53.84K
Oct 20	25.16K	37.21K
Nov 20	28.36K	35.27K

Product

Product	Curr	Prev
1 Arobi	63.41M	0.00
2 Trexine	56.73M	0.00
3 Plabenil	54.33M	0.00
4 Ofasan	14.73M	0.00
Total	203.06M	0.00

Top Customers by Growth TRx, TRx Market Share
2020-05-03 – 2022-05-01 | TRx | Arobi

Customer	Growth TRx	TRx Market Share
1 David Smith	-	27.96%
2 Robert Johnson	-	10.85%
3 Allison Williams	-	100.00%
4 Scott Reynolds	-	21.38%
5 Paul Moore	-	54.64%
6 John Jones	-	42.77%
Total	-	31.16%

TRx by Indication, Product
2020-05-03 – 2022-05-01 | TRx

Indication	Arobi	Emarun
Crohn's disease	36.33M	-
Plaque Psoriasis	14.17M	14.24M
Rheumatoid Arthritis	14.13M	-
Total	64.63M	14.24M

TRx Market Share by Region, Product
2020-05-03 – 2022-05-01 | TRx

Region	TRx Market Share	Emarun
Mid-Atlantic	30.89%	6.57%
Mid-Central	31.63%	6.60%
Midwest	29.82%	7.00%
Northeast	32.34%	6.09%
South Central	30.21%	6.72%
Total	31.16%	6.87%

Top by TRx for Trexine v/s Arobi v/s Plabenil
2020-05-03 – 2022-05-01 | TRx | Trexine, Plabenil, A...

Month	Trexine	Trexine
Jun 20	2.72M	2.59M
Jul 20	2.13M	2.05M
Aug 20	2.19M	2.18M
Sep 20	2.81M	2.72M
Oct 20	2.24M	2.2M
Nov 20	2.25M	2.17M

Opening Pinboards from Explorer

WhizAI now offers the ability to call specifically named pinboards directly from Explorer. All you must do is ask specific questions in Explorer and WhizAI opens the pinboard for you.

For example, as a sales rep, you can ask the query: Show me the HCP preparation pinboard, then in this case WhizAI opens the corresponding pinboard.

OR

As a sales rep, you can ask *Prepare me for my day for Boston MA*; in this case, WhizAI opens the corresponding pinboard with 'Boston MA' applied as a filter.

Opening Pinboards from Cards

WhizAI gives you the ability to navigate to a pinboard directly from a card.

If you hover the cursor over any data value in a card, WhizAI opens a list of all the pinboards that are either created by you or shared with you. From this list, you can click the required pinboard to open it. Before opening that board, WhizAI filters the board data according to the data value clicked from that card. Thus, that board displays information related only to that data value. Also, you can see this data value set in the filters on the pinboard.

Updating Data on Pinboards and Cards

The data on **cards** and **pinboards** is updated automatically thus you can always view the latest information.



Note! If you are using the pinboards and the system is down, you shall continue to see the data on cards, however, WhizAI shows an error message notifying you about the system being down. Also, during the downtime, the **'Apply'** button that you can see when applying filters after is unavailable.



Tip! If you **Refresh** your browser, you can update data on all the **cards** in a **pinboard**.

Updating action fields on cards in pinboards

On pinboards, certain cards can be configured so that they show an actionable metric column. You can update the actions performed against a particular record from the dropdown lists in this column. For example, if you ask, *Show me top customers by status*:

The response displays a **Status** column. When you hover the cursor over any field in this column, a tooltip is displayed asking you to select an action (No, Not Applicable, Yes) from the drop-down list, as shown in the following figure:

The screenshot shows a WhizAI interface with a table titled "Top Customers by Status". The table has two columns: "Customer" and "Status". The "Status" column contains a dropdown menu with the following options: "Not Applicable", "No", and "Yes". A tooltip points to the dropdown menu with the text "Select an option from this dropdown list". The table lists 12 customers, with the first four having a status of "Not Applicable", the next three having a status of "No", and the remaining five having a status of "Yes".

Customer	Status
1 Jessica Smith	Not Applicable
2 Jasmine Wilson	Not Applicable
3 Ann Mcneil	Not Applicable
4 Javier Day	No
5 David Livingston	No
6 Daniel Harris	No
7 Michael Williams	Yes
8 Michael Johnson	Yes
9 Manchester Memorial Hospital	Yes
10 Kathy Smith	Yes
11 Tim Phillips	Yes
12 Christian Sosa	Yes

Top Customers by Status
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metric: Status

Columns Search

Customer	Status
1 Jessica Smith	Not Applicable
2 Jasmine Wilson	Not Applicable
3 Ann Morell	Not Applicable
4 Javier Day	No
5 David Livingston	Yes
6 Daniel Harris	No
7 Michael Williams	Select a value
8 Michael Johnson	Yes
9 Manchester Memorial Hospital	Yes
10 Kathy Smith	Yes
11 Tim Phillips	Yes
12 Christian Grace	Yes

Show notes Reset Save

After you click **Save**, the updated actions get captured on the card. This helps collaboration between the board users as all the board users can view the updated action for a particular record/s. Also, the board users can edit the action, if required.

Sorting on editable column for easy access to data

The sort function for 'editable metric' columns allows you to perform certain actions such as updating the column values etc. Click the column names to sort the values. This facilitates quick access to the desired records.

For example, if you click the **Status** column (actionable metric column) in the following card.

- The first click sorts the column values in descending order.

Whiz.ai Sunday Jul 16, 2023 19:13

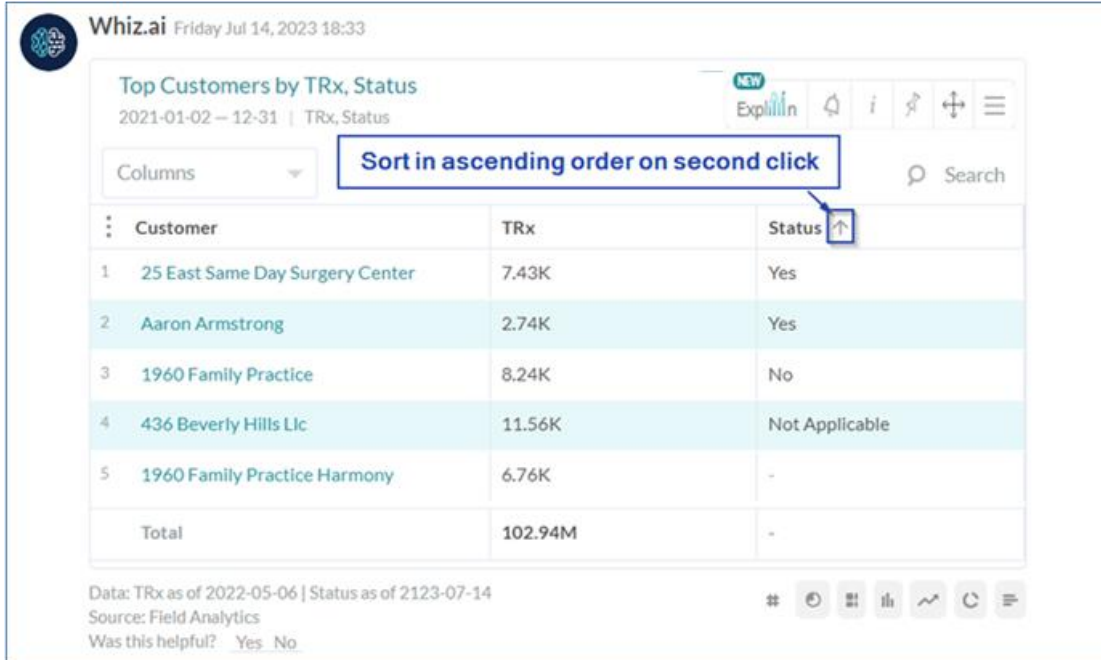
Top Customers by TRx, Status
2021-01-02 – 12-31 | TRx, Status

Columns Sort in descending order on first click Search

Customer	TRx	Status
1 436 Beverly Hills Llc	-	Not Applicable
2 1960 Family Practice	-	No
3 Aaron Armstrong	2.74K	Yes
4 25 East Same Day Surgery Center	-	Yes
5 1960 Family Practice Harmony	-	-
Total	15.95M	-

Data: TRx as of 2022-05-06 | Status as of 2123-07-16
Source: Field Analytics
Was this helpful? [Yes](#) [No](#)

- The second click sorts the column values in ascending order.



Whiz.ai Friday Jul 14, 2023 18:33

Top Customers by TRx, Status
2021-01-02 – 12-31 | TRx, Status

Columns Sort in ascending order on second click Search

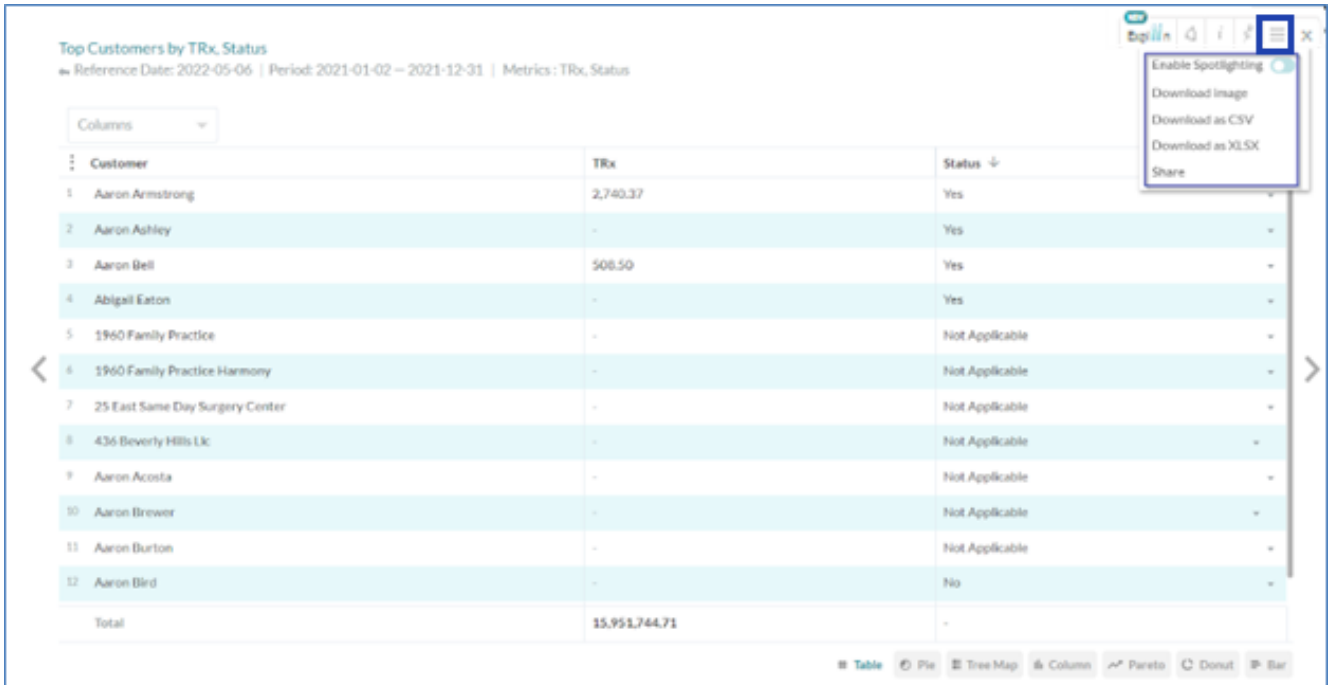
Customer	TRx	Status
1 25 East Same Day Surgery Center	7.43K	Yes
2 Aaron Armstrong	2.74K	Yes
3 1960 Family Practice	8.24K	No
4 436 Beverly Hills Llc	11.56K	Not Applicable
5 1960 Family Practice Harmony	6.76K	-
Total	102.94M	-

Data: TRx as of 2022-05-06 | Status as of 2123-07-14
Source: Field Analytics
Was this helpful? Yes No

- As a pinboard owner or editor you can save the sorting. This saved sort order is retained and displayed in the exported files (XLS/PDF/PPT).



Note! Pinboard viewers cannot save the sort order.



Top Customers by TRx, Status
Reference Date: 2022-05-06 | Period: 2021-01-02 – 2021-12-31 | Metrics: TRx, Status

Columns

Customer	TRx	Status
1 Aaron Armstrong	2,740.37	Yes
2 Aaron Ashley	-	Yes
3 Aaron Bell	508.50	Yes
4 Abigail Eaton	-	Yes
5 1960 Family Practice	-	Not Applicable
6 1960 Family Practice Harmony	-	Not Applicable
7 25 East Same Day Surgery Center	-	Not Applicable
8 436 Beverly Hills Llc	-	Not Applicable
9 Aaron Acosta	-	Not Applicable
10 Aaron Brewer	-	Not Applicable
11 Aaron Burton	-	Not Applicable
12 Aaron Bird	-	No
Total	15,951,744.71	-

Table Pie Tree Map Column Pareto Donut Bar

- After sorting, if the actionable metric column (**Status** column) is hidden, the system retains the sorting for the rest of the columns.

Top 13 Customers by Status, TRx
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metrics: Status_hidden, Status, TRx | Age Group: 19-30, 41-50

Territory:

Columns:

Metrics ☐ **Dimensions** ☐

Status ☐ **Age Group** ☐

TRx ☒ **Region** ☐

Territory ☐

Cancel Apply

1 Sort on the editable metric column

2 Hide the editable metric column by unchecking it from the table configurability

	TRx	Status
	-	No HCP Action Needed
	-	HCP Outreach Delivered
	-	HCP Outreach Delivered
	21,859.94	HCP Outreach Delivered
	7,988.11	HCP Education Delivered
	-	HCP Outreach Delivered
	-	HCP Education Delivered
7 436 Beverly Hills Llc	-	HCP Education Delivered
8 Aaron Armstrong	1,706.75	HCP Outreach Delivered
9 Aaron Ashley	-	HCP Outreach Delivered
Total	41,332.09	-

Table Pie Tree Map Column Pareto Donut Bar

Reset Save

Top 13 Customers by TRx
Reference Date: 2022-05-06 | Period: 2022-01-01 – 2022-05-06 | Metrics: Status_hidden, Status, TRx | Age Group: 19-30, 41-50

Territory:

Columns:

Customer	TRx
1 John Smith	-
2 1960 Family Practice	-
3 Christian Sosa	-
4 Tim Phillips	21,859.94
5 John Brown	7,988.11
6 1960 Family Practice Harmony	-
7 436 Beverly Hills Llc	-
8 Aaron Armstrong	1,706.75
9 Aaron Ashley	-
Total	41,332.09

3 Sort on the displayed data is displayed even if the editable column is hidden

Table Pie Tree Map Column Pareto Donut Bar

Reset



Note! The following features are not supported for the editable metric:

- Rollup-drill down
- Follow-on
- Setting up an alert on any data point
- ExplAI & Narratives

The following are the two prerequisites for the sort function to work:

- **Configuring lookup values:** When you are configuring the lookup values for the editable data, those values should be configured in such a way that the sorted keys will also sort the values. The way we are using the system for the editable data is that sorting happens on the keys column. This is a sorted list: (descending order)

Key	Value
1	No
2	Not Applicable
3	Yes

This is an unsorted list:

Key	Value
2	Not Applicable
1	No
3	Yes

- **Loading Entire Dimensionality Data:** To see all the data in the response, including other columns such as "Customers," you need to ensure that the entire dimensionality data is loaded into the editable data source, even if some values in the editable data column are null. By including null values and loading the complete dimensionality data, you can ensure that all the relevant information is available for sorting and displaying purposes. For example,

Top Customers by TRx, Status
Reference Date: 2022-05-06 | Period: 2021-01-02 -- 2021-12-31 | Metrics: TRx, Status

Columns

Customer	TRx	Status
1 436 Beverly Hills Llc	-	No
2 1960 Family Practice	-	No
3 Aaron Armstrong	2,740,337	Not Applicable
4 25 East Same Day Surgery Center	-	Yes
5 1960 Family Practice Harmony	-	Select a value
Total	15,951,744.71	-

Sorting on 'Action taken' editable column sh... only 5 data values as other data for editable column is not loaded for customers

Table Pie Tree Map Column Pareto Donut Bar

Top Customers by TRx, Status

Reference Date: 2022-05-06 | Period: 2021-01-02 ~ 2021-12-31 | Metrics: TRx, Status

Columns

Whereas, sorting on Customer column shows the entire data set

	Customer	TRx	Status
1	Zachary Waters	3,788.77	Select a value
2	Zachary Miller	11,179.09	Select a value
3	Zachary Lin	726.53	Select a value
4	Zachary Jordan	3,114.87	Select a value
5	Zachary Calderon	2,408.11	Select a value
6	Zachary Burgess	4,915.80	Select a value
7	Yvonne Thomas	2,397.81	Select a value
8	Yolanda Wilson	3,303.63	Select a value
9	Yolanda Stein	3,603.05	Select a value
10	Yolanda Robinson	5,099.12	Select a value
11	Yessenia Chavez	1,898.70	Select a value
	Total	15,951,744.71	-

Table Pie Tree Map Column Pareto Donut Bar

Reset Save


Setting Reference Date for Pinboards and Cards

You can add reference dates to pinboards and individual cards so that only the relevant information is displayed. To add the reference date, from the pinboard or card, click the **+** icon (Add filter) and then select **Reference date**. For example, consider the following scenarios:

- Data sources: 'Sales' data source and 'Calls' data source (out of synchronization).
- Cards on Pinboard 1 have data from only the 'Calls' data source, thus the reference date on all the cards is the same.
- Cards on Pinboard 2 have data from 'Sales' data source and 'Calls' data source. In this case, if the reference date is set for 'Sales' data source, then the cards having call data might either show an error or show irrelevant data. In this case, a board owner/ editor can set a reference date for individual cards so that the data represented on each of the cards is correct.

Setting a different Reference Date

For multiple data sources, WhizAI allows you to select the applicable reference date for better analysis of data in a response.

1. Open a card pinned to a pinboard in maximized view.
2. From the top-right corner, click **Show Filter** and then click the calendar icon  to open the **Select reference date** dialog.



Note! In the Select reference date dialog, WhizAI shows the name of the data source along with the corresponding reference date.

3. From this dialog, select the required reference date and then click **Apply**.

Slicers in Pinboards & Cards

Slicers is a feature that allows you to save filters or a combo of filters, that you often use and have to frequently apply to pinboards. Thus, slicers eliminate the need to manually add such commonly used filters or filter combos every time you want to filter data. Slicers can be applied to pinboards and cards. You can create and add slicers to pinboards or individual cards within pinboards. To add slicers to cards, you may open the card in the maximized view and besides the 'filters' section, you can see the slicers icon. Applying a slicer to card/s overrides the existing filters or slicers. Also, please note that slicers are the same throughout. You cannot have different slicers for cards and pinboards.



Tip! For a card, if you create a slicer that contains 'locked' metadata, WhizAI ignores the 'lock' and treats the slicer as a usual filter.



Remember! Slicers are not saved for a particular pinboard, they are grouped under a particular data source.

When you apply slicers to boards or cards, WhizAI merges the slicer values with (existing) filters applied to the board or card. Whenever the slicer is applied on a board or card, only those slicer values that are common to the board or card are applied. For example:

- **Slicer1:** Brand= Zocor, Region=West, HCP=ABC
- **Board/ card filters:** Brand=Crestor, Region=East, Account= XYZ

In this case, after you apply **Slicer 1**, the new filters on the board are as follows: Brand=Zocor, Region=West, Account=XYZ.



Note! The slicer values that are not present on the board/card are not considered and applied. In the above example, the HCP slicer value is not applied on the board/card.



Remember! Not always the entire slicers are applied. In the slicers window, you can see the following message: "Only the slicer context matching the board/card context is applied ". The message is visible only when there are no slicers in the list.

When you apply a slicer, the cascaded values present in that slicer are preserved on the board or card. If the cascading sequence is disturbed after the slicer is applied, for example, **Slicer:** District=New England and **Board:** Region=Midwest, District: Mountain, Territory: Chicago IL, in this case, all the remaining values i.e. Region and Territory in the cascading must be reset i.e. set to 'All'.

Creating a slicer

1. Open the pinboard and click show filters, WhizAI shows the slicers icon as soon

Sales 2023 Favorites Reference Date 2022-05-06

Note slicers icon. Show filters applied to the board

Hide Filters

My Section

TRx

Top Customers by TRx
2022-01-01 – 05-06 | TRx

Customer	TRx ↓
1 Michael Johnson	22.16K
2 Tim Phillips	21.86K
3 Christian Sosa	18.45K
4 Jonathan Smith	17.47K
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
9 John Smith	14.74K
Total	35.26M

Top Products by TRx
2022-01-01 – 05-06 | TRx

Product	TRx ↓
1 Arobi	10.96M
2 Trexine	9.8M
3 Plabenil	9.53M
4 Ofasan	2.54M
5 Emarun	2.43M
Total	35.26M

Top Regions by TRx
2022-01-01 – 05-06 | TRx

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

TRx
2022-01-01 – 05-06 | TRx

TRx
2022-01-01 – 05-06 | TRx

TRx by Areas
2022-01-01 – 05-06 | TRx

- Click the slicer icon and then click **Create new slicer +**. WhizAI shows the **Create slicer** dialog to add the filter combo as a new slicer.

Sales 2023 Favorites Reference Date 2022-05-06

Hide Filters

Sliders

Create your personal slicers for entities and KPIs - only you will have access to them

Slicer is a combination of your favorite filters which you can apply in a single click. When you apply a slicer, only the values suitable for the current filters are applied

Create new slicer +

Top Customers by TRx
2022-01-01 – 05-06 | TRx

Customer	TRx ↓
1 Michael Johnson	22.16K
2 Tim Phillips	21.86K
3 Christian Sosa	18.45K
4 Jonathan Smith	17.47K
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
9 John Smith	14.74K
Total	35.26M

Top Products by TRx
2022-01-01 – 05-06 | TRx

Product	TRx ↓
1 Arobi	10.96M
2 Trexine	9.8M
3 Plabenil	9.53M
4 Ofasan	2.54M
5 Emarun	2.43M
Total	35.26M

Top Regions by TRx
2022-01-01 – 05-06 | TRx

Region	TRx ↓
1 Mid-Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

TRx
2022-01-01 – 05-06 | TRx

TRx
2022-01-01 – 05-06 | TRx

TRx by Areas
2022-01-01 – 05-06 | TRx

Create slicer sales | Mid-Atlantic

Reference Date
2022-05-06

Region
Mid-Atlantic

+

Cancel Save

3. **Optional:** You can click **+** to add more filters if required.
4. Click **Save** to add the slicer.

Sales 2023

Reference Date 2022-05-06

Slicers

sales | Mid-Atlantic

Create new slicer +

Top Customers by TRx

Customer	TRx
1 Michael Johnson	22.16K
2 Tim Phillips	21.86K
3 Christian Sosa	18.45K
4 Jonathan Smith	17.47K
5 Daniel Smith	16.43K
6 Michael Moore	15.83K
7 John Brown	15.82K
8 Robert Smith	15.56K
9 John Smith	14.74K
Total	35.26M

Top Products by TRx

Product	TRx
1 Arobi	10.96M
2 Trexine	9.8M
3 Plabenil	9.53M
4 Ofasan	2.54M
5 Emarun	2.43M
Total	35.26M

Top Regions by TRx

Region	TRx
1 Mid-Atlantic	5.58M
2 Mid-Central	5.5M
3 West	5M
4 Midwest	4.96M
5 Southeast	4.73M
6 Southwest	4.33M
7 Northeast	3.93M
8 South Central	1.23M
Total	35.26M

TRx 2022-01-01 - 05-06 | TRx

TRx 2022-01-01 - 05-06 | TRx

TRx by Areas 2022-01-01 - 05-06 | TRx

Creating static slicers from responses on Explorer

WhizAI supports creating static slicers on the fly from responses on Explorer and Pinboards. Wherever there is a response that has at least one row dimension available, you can create a slicer. This allows you to group a set of dimension values and track them for the analysis. You can create slicers for the following applicable responses. It is applicable for all table responses except single datapoint & multi-data point responses

Slicer creation flow

1. Input the NLQ for a table response. For example, Top Regions by Trx.

Scott Wednesday Feb 07, 2024 17:10
top regions by TRx

Whiz.ai Wednesday Feb 07, 2024 17:10

Top Regions by TRx
2022-01-01 — 05-06 | TRx

Columns Search

	Region	Customer	TRx ↓
1	Mid-Atlantic	Tim Phillips	21,859.94
2	Southwest	Christian Sosa	18,447.75
3	Mid-Central	Ann Mcneil	14,711.15
4	Mid-Atlantic	Michael Moore	13,361.40
5	Mid-Atlantic	David Livingston	12,913.60
6	Southwest	Laura Jones	11,911.71
7	Mid-Atlantic	Kathy Smith	11,438.65
8	Mid-Central	Olivia Osborne	11,126.32
9	Mid-Atlantic	Scripps Memorial Hospital L...	11,097.07
	Total	-	35.26M

Data: TRx as of 2022-05-06
Generated in: 0.70 Sec
Source: Field Analytics
Was this helpful? [Yes](#) [No](#)

- Go to the **burger menu** > **Create slicer**. A Create slicer dialogue is displayed.

Scott Wednesday Feb 07, 2024 17:10
top regions by TRx

Whiz.ai Wednesday Feb 07, 2024 17:10

Top Regions by TRx
2022-01-01 — 05-06 | TRx

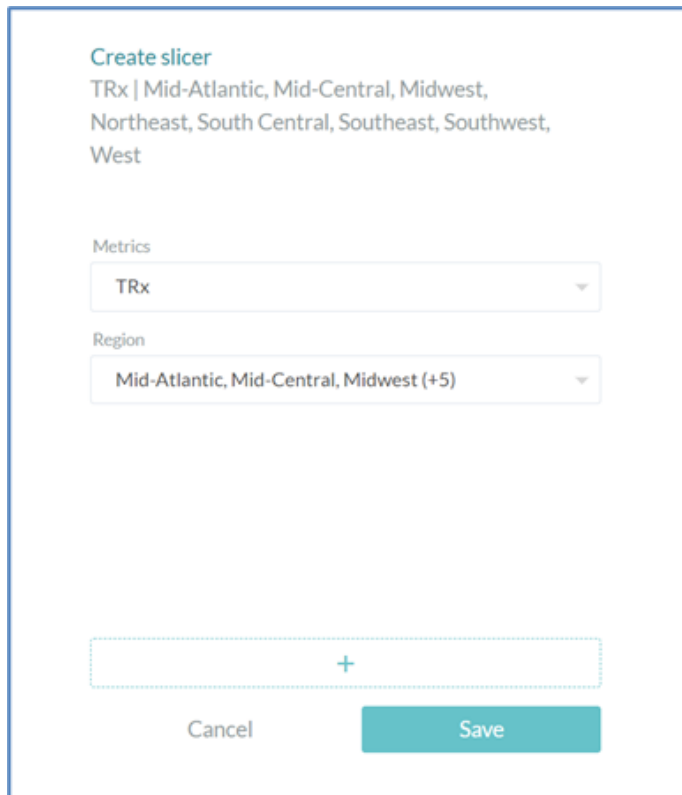
Columns Search

	Region	Customer	TRx ↓
1	Mid-Atlantic	Tim Phillips	21,859.94
2	Southwest	Christian Sosa	18,447.75
3	Mid-Central	Ann Mcneil	14,711.15
4	Mid-Atlantic	Michael Moore	13,361.40
5	Mid-Atlantic	David Livingston	12,913.60
6	Southwest	Laura Jones	11,911.71
7	Mid-Atlantic	Kathy Smith	11,438.65
8	Mid-Central	Olivia Osborne	11,126.32
9	Mid-Atlantic	Scripps Memorial Hospital L...	11,097.07
	Total	-	35.26M

Data: TRx as of 2022-05-06
Generated in: 0.70 Sec
Source: Field Analytics
Was this helpful? [Yes](#) [No](#)

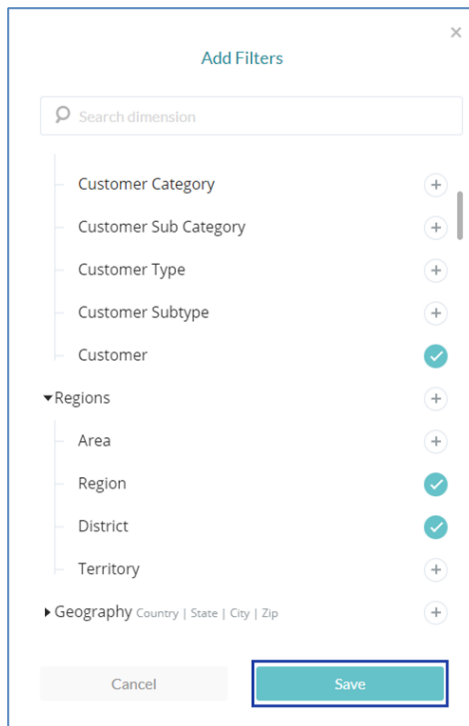
Download image
Download as XLSX
Download as CSV
Share
Create slicer

Create slicer



The 'Create slicer' dialog box is shown. It has a title 'Create slicer' and a subtitle 'TRx | Mid-Atlantic, Mid-Central, Midwest, Northeast, South Central, Southeast, Southwest, West'. Below the subtitle, there are two dropdown menus: 'Metrics' with 'TRx' selected and 'Region' with 'Mid-Atlantic, Mid-Central, Midwest (+5)' selected. At the bottom, there is a dashed box with a '+' icon, a 'Cancel' button, and a 'Save' button.

3. Click + to modify the slicer (optional). **Add Filters** dialogue is displayed.



The 'Add Filters' dialog box is shown. It has a title 'Add Filters' and a search bar 'Search dimension'. Below the search bar, there is a list of dimensions with checkboxes: 'Customer Category', 'Customer Sub Category', 'Customer Type', 'Customer Subtype', 'Customer', 'Regions', 'Area', 'Region', 'District', 'Territory', and 'Geography Country | State | City | Zip'. The 'Customer', 'Region', and 'District' dimensions are checked. At the bottom, there are 'Cancel' and 'Save' buttons.

4. Select the filters and click **Save**. You are re-directed to Create-slicer dialogue. Click **Save**.



Note! If the slicer name already exists, then an error message is displayed.

Create slicer

TRx | 1960 Family Practice, 1960 Family Practice Harmony, 25 East Same Day Surgery Center, 436 Beverly Hills Llc, Aaron

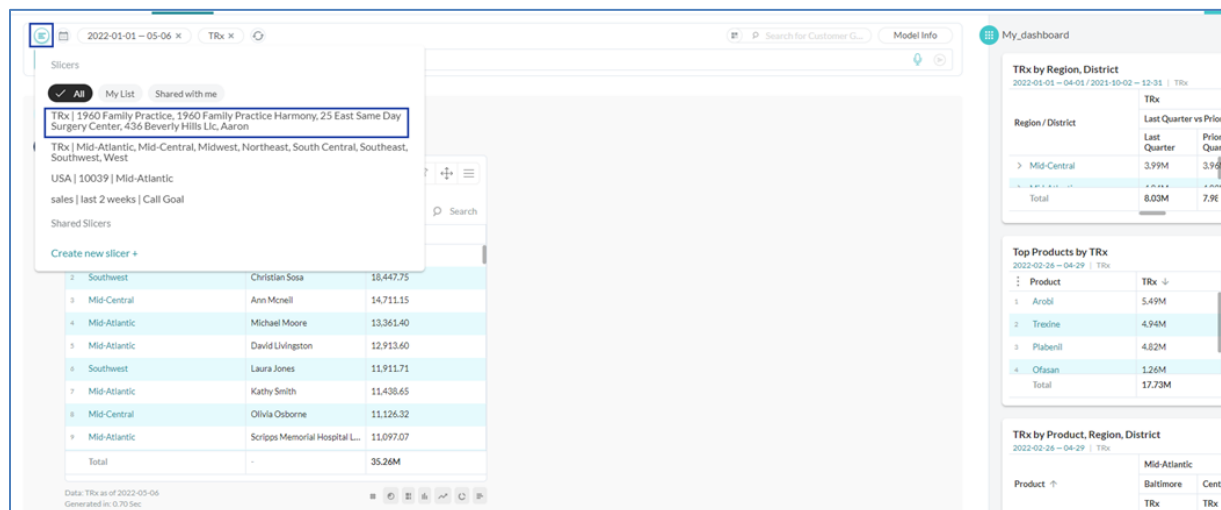
Metrics
TRx

Customer
1960 Family Practice (+21352)

Region
Mid-Atlantic, Mid-Central, Midwest (+5)

District
Select values

- The slicer is displayed under the slicer menu on Explorer and Pinboard as shown in the figure below

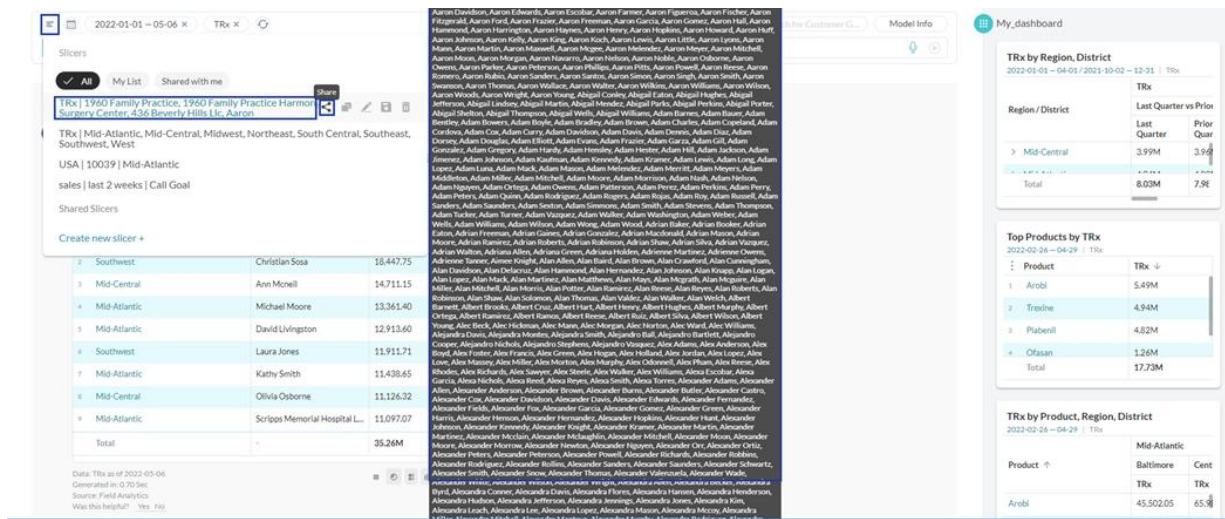


Sharing of Slicers from Explorer and Pinboard

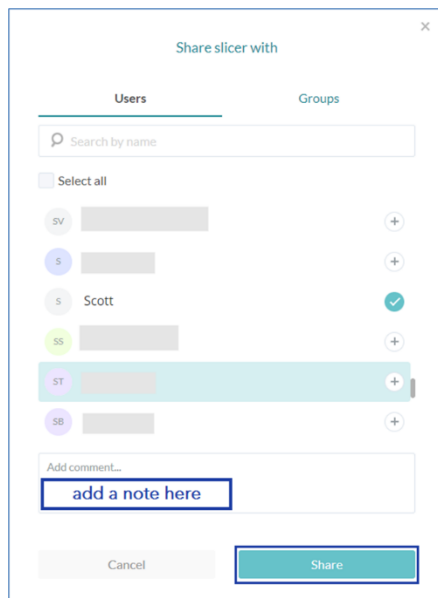
WhizAI provides the ability to share slicers with users. This enhancement improves data analysis speed and reduces redundant slicers.

Follow the steps given below to share the slicer from Explorer or Pinboard:

- From the top-right corner of the **Explorer > slicer** icon  > select the slicer you wish to share > click share icon .



- The **Share slicer with** dialogue is displayed. You can share the slicer either with single or multiple users or groups. You can also add a note as shown in the figure below.

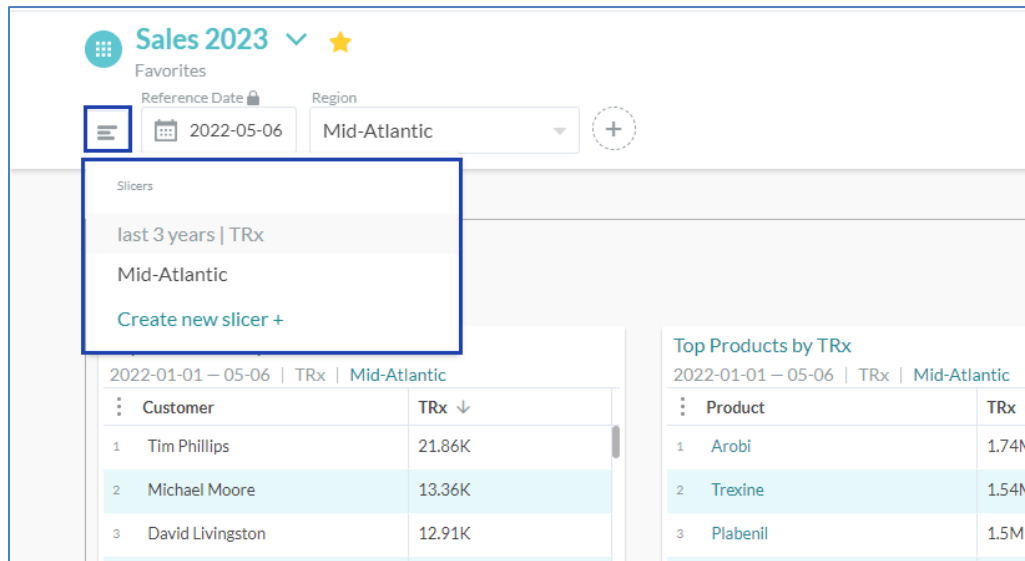


The 'Share slicer with' dialog box is shown. It has two tabs: 'Users' and 'Groups'. Under the 'Users' tab, there is a search bar and a list of users. The user 'Scott' is selected. There is also a text area for 'Add comment...' with a placeholder 'add a note here'. At the bottom, there are 'Cancel' and 'Share' buttons.

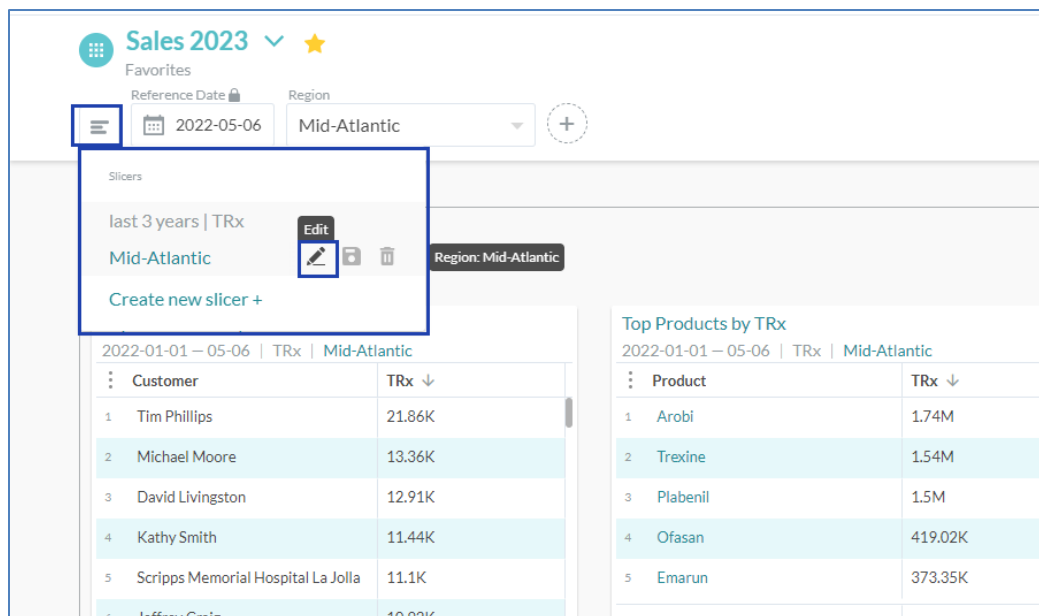
- Click Share. You will receive the notification under the bell icon .

Editing a slicer

- Click the slicer icon. WhizAI shows the list of available slicers.



2. Hover the cursor over the slicer you want to edit.



3. Click the edit icon. WhizAI shows the **Edit slicer** dialog.

[Edit slicer](#) MID WEST | MID ATLANTIC

Region
MID WEST

District
MID ATLANTIC

+

Cancel Save

- You can change the filter values or add filters to the slicer and click **Save**. WhizAI saves the changes.

Deleting a slicer

To delete a slicer, hover the cursor over the slicer and click the **Delete** icon.

Sales 2023 Favorites

Reference Date 2022-05-06 Region Mid-Atlantic

Slicers

last 3 years | TRx

Mid-Atlantic

Create new slicer +

Delete

Region: Mid-Atlantic

2022-01-01 – 05-06 | TRx | Mid-Atlantic

Customer	TRx
1 Tim Phillips	21.86K
2 Michael Moore	13.36K
3 David Livingston	12.91K
4 Kathy Smith	11.44K
5 Scripps Memorial Hospital La Jolla	11.1K
6 Jeffrey Craig	10.92K
7 Alexander Davis	9.87K


Top Products by TRx

2022-01-01 – 05-06 | TRx | Mid-Atlantic

Product	TRx
1 Arobi	1.74M
2 Trexine	1.54M
3 Plabenil	1.5M
4 Ofasan	419.02K
5 Emarun	373.35K
Total	5.58M

Cohorts in Pinboards and Cards

Cohorts allows you to group values of a dimension that share the same characteristics to analyze your patient and customer data.

WhizAI creates cohorts on the fly from the slicer and cohort  icon on **Explorer** and **Pinboards**.

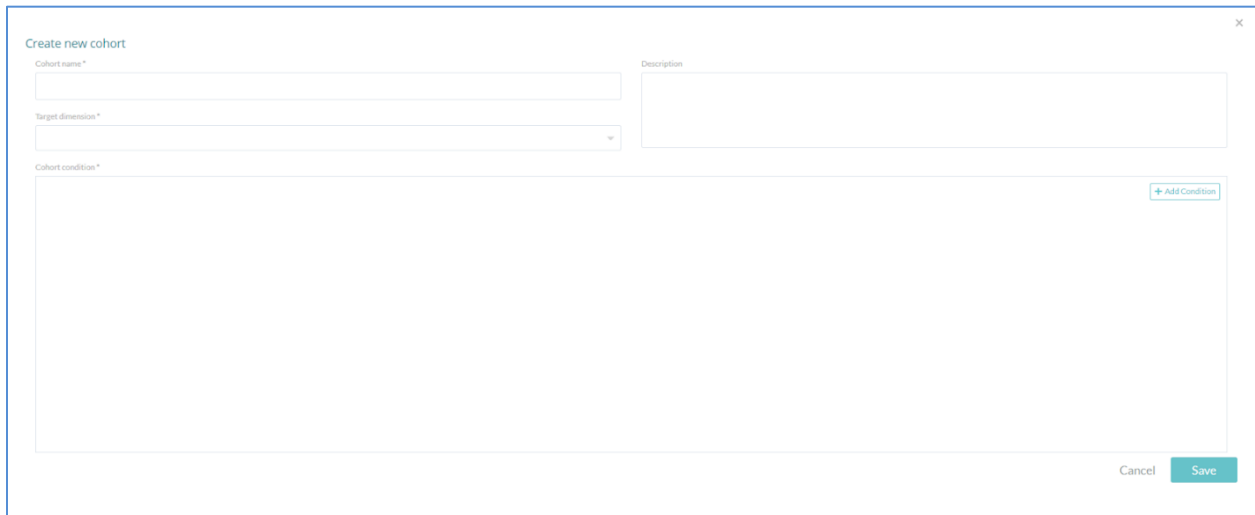
This allows you to group such values with certain conditions having a single target dimension. The condition is built using **AND** logic between one or more conditions with **In** and **Not In** operators to select the values. Cohorts is used for group analysis for a specific dimension.

One of the simple use cases of cohort is by grouping customers based on demographic information such as age, location, or gender. Examine the cohorts on how different demographic groups interact with your product and tailor marketing strategies accordingly.

Note! The same dimension cannot be used multiple times in the condition builder.

Cohort from Explorer

- Click **Slicer and Cohort** icon  > **Cohorts** > **Create new Cohorts +**. **Create a new cohort** dialogue is displayed.



The dialog box titled "Create new cohort" contains the following fields and controls:

- Cohort name***: A text input field.
- Description**: A larger text area for notes.
- Target dimension***: A dropdown menu to select the dimension for grouping.
- Cohort condition***: A large area for building conditions, with a **+ Add Condition** button in the top right corner.
- Buttons**: **Cancel** and **Save** buttons at the bottom right.

- Add **Cohort name** and **Description**. Select the target dimension from the drop-down. The target dimension serves as the basis for grouping entities into cohorts.
- Click **+Add Condition**. Select the **Dimension**, Operator (In, Not In), and **Values** from the drop-down. You can add another condition using AND logic. Click **Save**.

Update cohort

Cohort name*

Cohort

Target dimension*

Customer

Cohort condition*

AND

Dimension

Product Group

Operator

In

Values

MyBrands

Dimension

Region

Operator

In

Values

Northeast

Dimension

Age Group

Operator

In

Values

60 and above

Dimension

Gender

Operator

In

Values

Male

Description

A group of customers living in Northeast using MyBrands in the having age 60 and above and gender as male

Cancel

Save



Note! Save option is enabled only when conditions are added.

- A message is displayed on the “Cohort was created successfully”

whizai

Explorer

Pineboards

Alerts

Explain

Admin

2022-01-01 – 05-06

TRx

Search for Customer G...

Model Info

Field Analytics

Ask me a question for Field Analytics

Scott Friday May 03, 2024 13:12

Reset

Whiz.ai Friday May 03, 2024 15:12

Context Reset

Was this helpful?

Yes

No

Scott Friday May 03, 2024 15:11

Top 10 customers for Cohort 1

Whiz.ai Friday May 03, 2024 15:11

Top Customers by NRx

2022-01-01 – 05-06 | NRx | cohort 1

Columns

Search

Customer	Region	NRx
1 Michael Moore	Mid-Atlantic	13.99K
2 Ann McNeil	Mid-Central	11.69K
3 Olivia Osborne	Mid-Central	11.68K
4 Sara Howard	Mid-Central	11.46K
5 David Garcia	Southeast	9.22K
6 Paul Powell	Mid-Central	8.73K
7 Peter Rodriguez	Mid-Central	8.07K
8 Nathaniel Hancock	Mid-Central	8.04K

Cohort was created Successfully

My dashboard

TRx by Region, District

2022-01-01 – 04-01 / 2023-10-02 – 12-31 | TRx

Region / District	Last Quarter vs Prior Quarter	Prior Quarter
> Mid-Central	3.99M	3.99M
Total	8.03M	7.99M

Top Products by TRx

2022-02-28 – 04-29 | TRx

Product	TRx
1 Aroli	5.49M
2 Trosine	4.94M
3 Plabeni	4.82M
4 Ofasan	1.26M
Total	17.73M

TRx by Product, Region, District

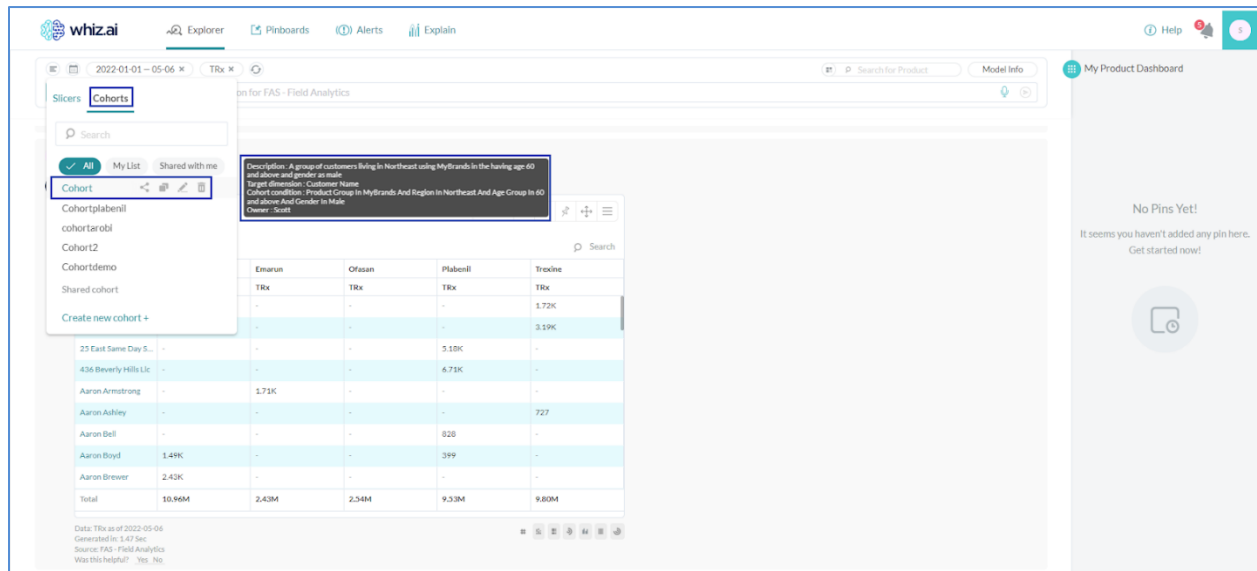
2022-02-28 – 04-29 | TRx

Product	Mid-Atlantic	Baltimore	Cent
Aroli	45.50K	65.8K	

- To view this cohort, click > **Cohorts** > **All** > **Cohort**.



Note! The cohorts are displayed in three different tabs namely All , My List and Shared with me. All tab include the entire list, My List tab displays the cohorts created by you, and Shared tab lists the cohorts shared with you.



Managing Cohorts

As an owner or editor, WhizAI allows you to **Share, Copy, Edit, or Delete** the cohorts from the explorer or pinboard. A system notification is sent to all the recipients if the cohort is shared or unshared by the cohort owner.

Note! While editing the cohort, changing the target dimension is not allowed.

After updating/ editing the cohort the changes are propagated to all the recipients on hard refresh or for a new session.

Sharing Cohorts

Cohort Sharing behavior - Authorization criteria:

Individual user: Authorization is checked when the cohort is shared with an individual user.

Group Sharing: No authorization check is performed for individual group members at the time of sharing. However, when a user queries the cohort with natural language queries (NLQ), authorization is checked, and data for unauthorized dimension entities are not displayed.

Metric Access: At least one metric must have complete access to all the dimension entities selected in the filter conditions of the cohort.

Scenario: Cohort Sharing from User1 to User2

1. Authorization Check for User2:
 - Hidden Dimension: If the dimension "Customer" is a primary dimension or filter condition at any level in the cohort:
 - Customer: If this dimension is unauthorized for User2, the cohort will not be shared.

2. Example Authorizations for User2:
 - All metrics:
 - Region: Mid-Atlantic, Mid-Central
 - Age Group: 19-30
 - Trx metric:
 - Region: West

3. Cohort Details:
 - Primary Dimension: Customers

Case 1:

- Filter Conditions:
 - Region: Mid-Atlantic, Mid-Central
 - Age Group: 19-30
 - Gender: Male, Female
- Outcome: The cohort will be shared since User2 has authorization for all specified regions and age groups.

Case 2:

- Filter Conditions:
 - Region: Mid-Atlantic, Mid-West
 - Age Group: 19-30
 - Gender: Male, Female
- Outcome: The cohort will not be shared, as the Region "Mid-West" is unauthorized for User2.

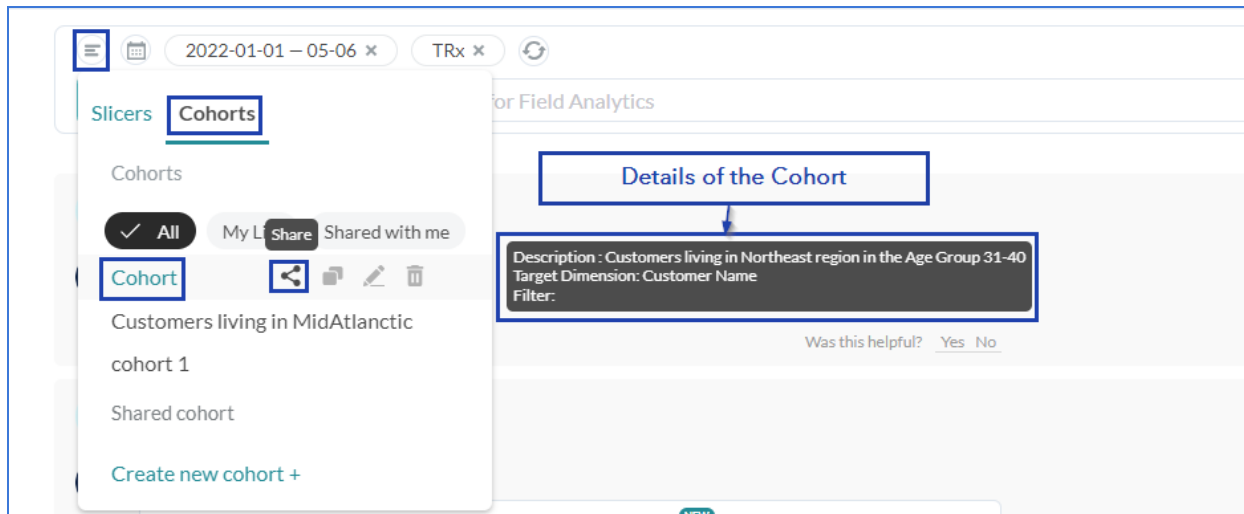
Case 3:

- Filter Conditions:
 - Region: West
 - Age Group: 19-30
 - Gender: Male, Female
- Outcome: The cohort will be shared since the Region "West" is authorized for the "Trx" metric.

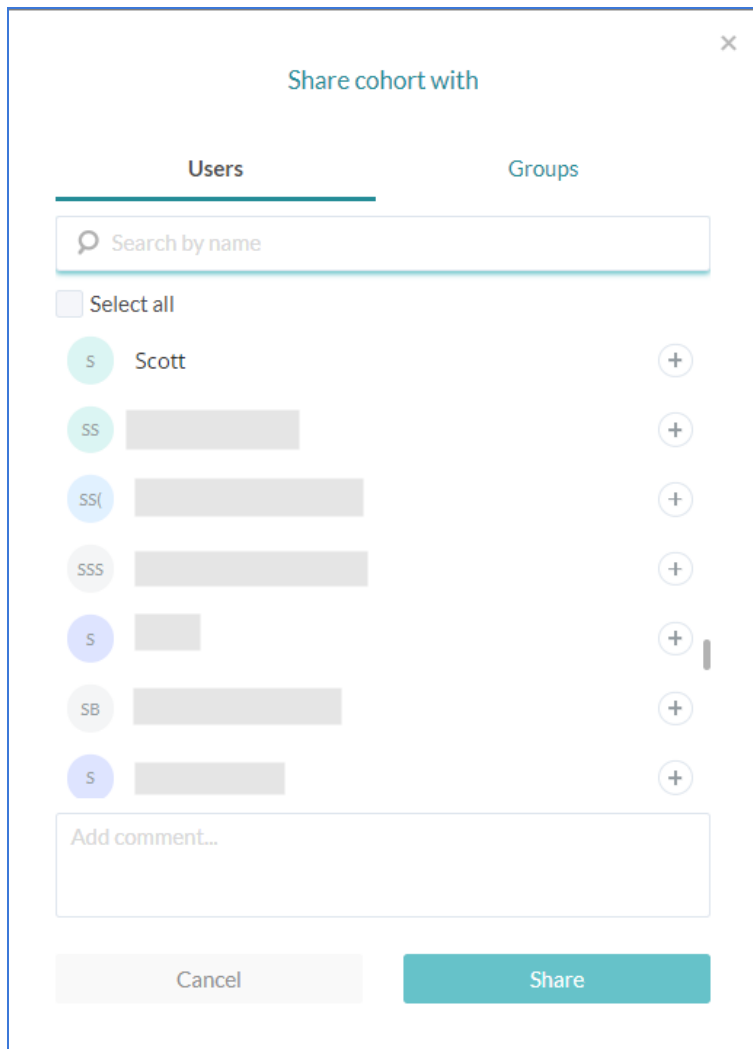
Sharing a Cohort


Follow the steps given below to share, the cohort from Explorer:

- From the top-right corner of the **Explorer > Slicer and Cohort** icon  > **Cohort** tab > select the cohort you wish to share > **share** .



- The **Share cohort with** dialogue is displayed. You can share the Cohort either with single or multiple users or groups. You can also add a note as shown in the figure below.





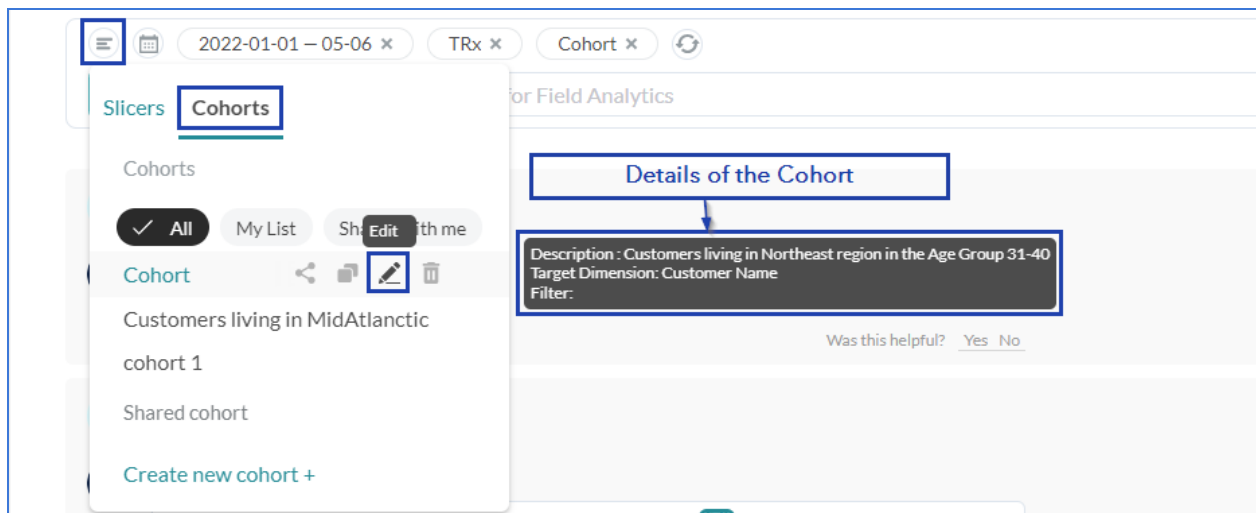
- Click **Share**. You will receive the notification under the bell icon .

Editing a Cohort

Follow the steps given below to edit the cohort from Explorer:

Limitation: When the user is authorized, the unauthorized dimension is displayed on the tooltip of the shared **Cohort**.

- Click the **slider icon**  > **Cohort** tab > select the cohort you wish to edit > **edit** .





- The **Update Cohort** dialogue is displayed. You can update the name, description, and/or conditions of the cohort if you are the owner. Click **Save**. Changes made are propagated to all the recipients of the cohort when hard refreshed.

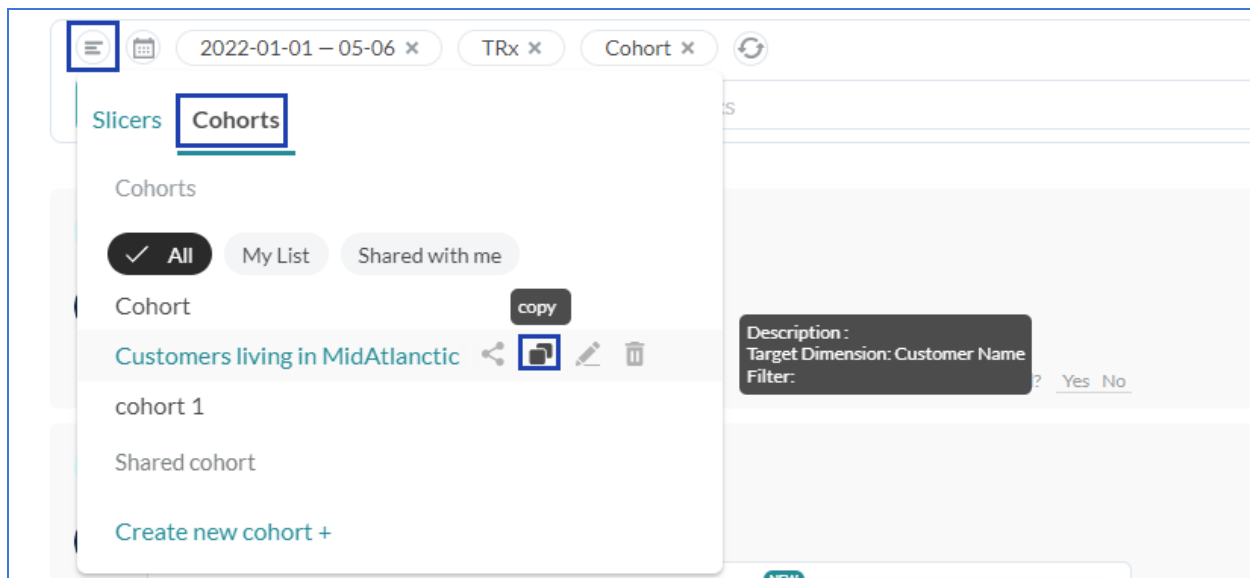


Note! To update the target dimension option is disabled.

Copying a Cohort

Follow the steps given below to copy the cohort from Explorer:

- Click **slicer and cohort icon**  > **Cohort** tab > select the cohort you wish to copy > **copy** .



- You are redirected to **Create new cohort** dialogue. Update the Cohort name and/or conditions and click **Save**.

Create new cohort

Cohort name, description, and values updated

Cohort name*
Cohort 2

Description
Customers living in Northeast region in the Age Group 31-40,41-50

Target dimension*
Customer

Cohort condition*

AND

Dimension Operator Values

Region In Northeast

Dimension Operator Values

Age Group In 31-40,41-50

+ Add Condition

Cancel Save

- A message is displayed on the explorer "Cohort was created successfully"

qas.whiz.ai learn.whiz.ai canvas Planning_V69_Apur...

whiz.ai Explorer Pinboards Alerts Explain Admin

Field Analytics Ask me a question for Field Analytics

2022-01-01 - 05-06 x TRx x

Search for Customer G... Model Info

My dashboard

Cohort was created Successfully.

TRx by Region, District
2022-01-01 - 04-01 / 2021-10-02 - 12-31 | TRx

Region / District	TRx	Last Quarter vs Prior
	Last Quarter	Prior Quarter
> Mid-Central	3.99M	3.98M
Total	8.03M	7.96M

Top Products by TRx
2022-02-26 - 04-29 | TRx

Product	TRx
1. Arobi	5.49M
2. Tredine	4.94M
3. Platenil	4.82M
4. Ofasan	1.26M
Total	17.73M

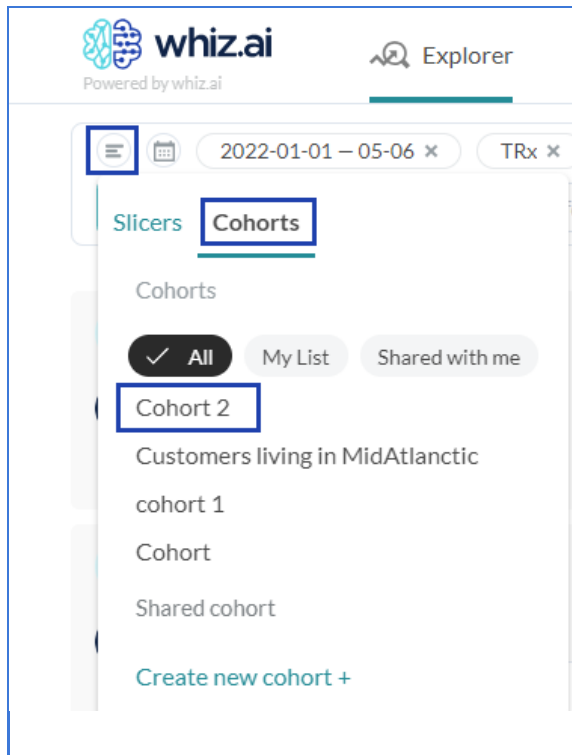
TRx by Product, Region, District
2022-02-26 - 04-29 | TRx

Product	Mid-Atlantic	Cent
	TRx	TRx
Arobi	45.50K	65.8K

Top Customers by NRx
2022-01-01 - 05-06 | NRx | cohort 1



Customer	Region	NRx
1. Michael Moore	Mid-Atlantic	13.99K
2. Ann Mcnell	Mid-Central	11.69K
3. Olivia Osborne	Mid-Central	11.68K
4. Sara Howard	Mid-Central	11.46K
5. David Garcia	Southeast	9.22K
6. Paul Powell	Mid-Central	8.73K
7. Peter Rodriguez	Mid-Central	8.07K
8. Nathaniel Hancock	Mid-Central	8.04K
9. Chula Scott	Mid-Central	7.69K

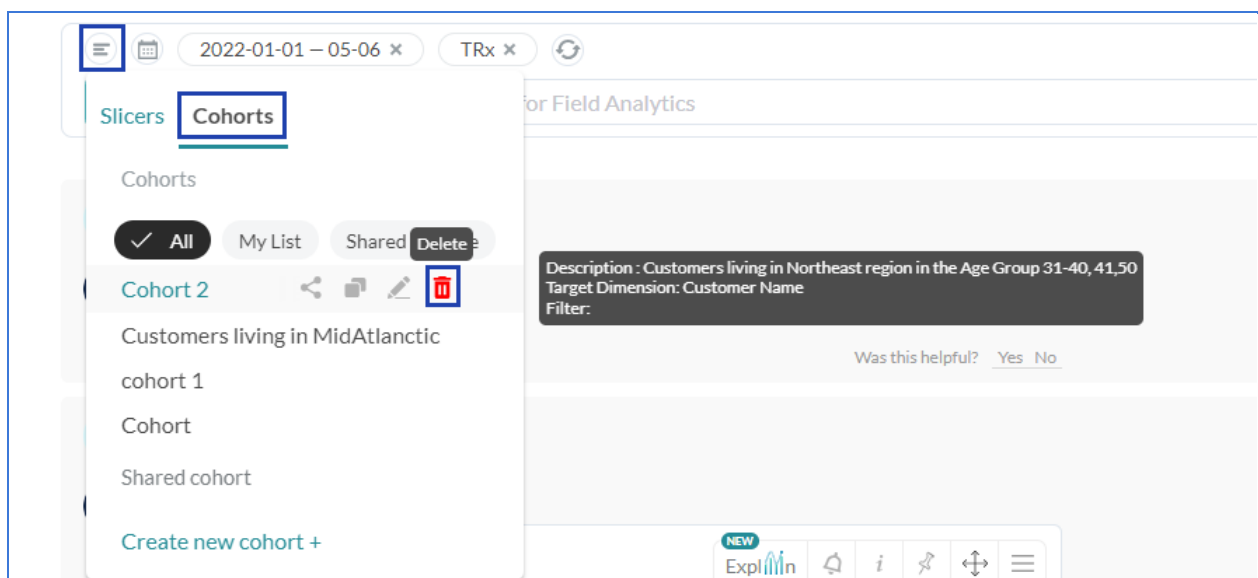
- To view this cohort, click  > **Cohorts** > **Cohort 2**.



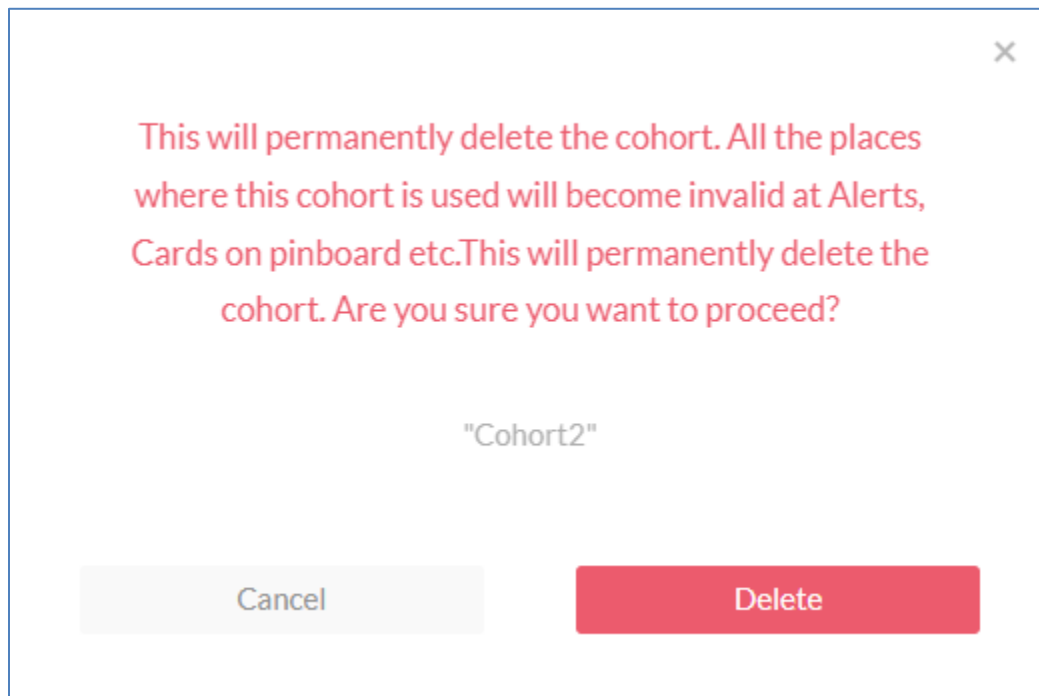
Deleting a Cohort

Follow the steps given below to delete the cohort from Explorer:

- Click **slicer and cohort icon**  > **Cohort** tab > select the cohort you wish to delete > **delete** .



- WhizAI confirms whether you want to proceed with the action. Click **Delete**.



Using Cohorts on Pinboards

As a board owner, you now have the ability to apply cohorts on pinboards, enabling collective group analysis of the cohort. The cohort filter always gets precedence over other filters.



Important! If filter values conflict with cohort conditions, the filter values are reset according to cascading rules. Only values that are compatible with the cohort filter are displayed.



Important! If a second cohort is applied to the pinboard the cohort will always replace the already existing cohort on the pinned card irrespective of whether the target dimension is the same or not.

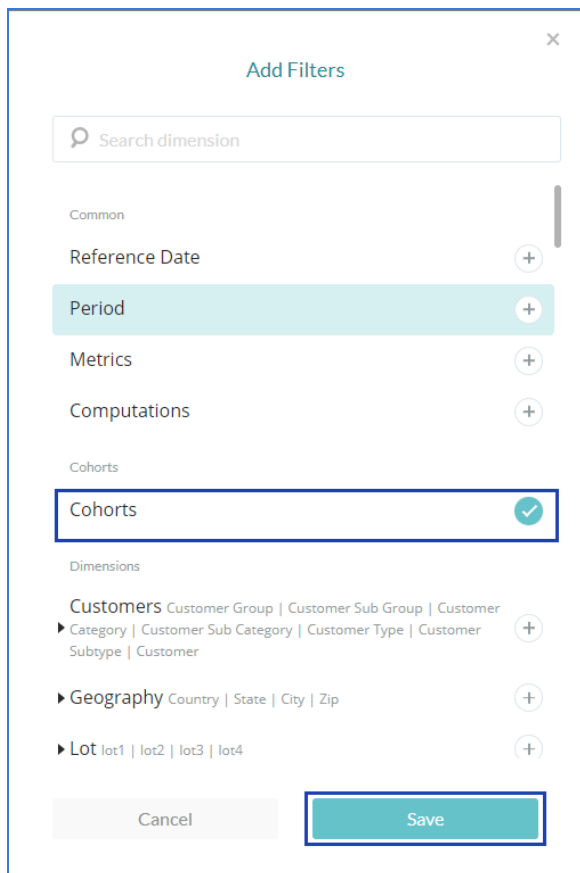


Note! Spotlighting does not get applied directly to a cohort filter. However, if spotlighting is applied to a filter after the cohort filter has been applied, it will highlight the filtered values within the already filtered cohort data.

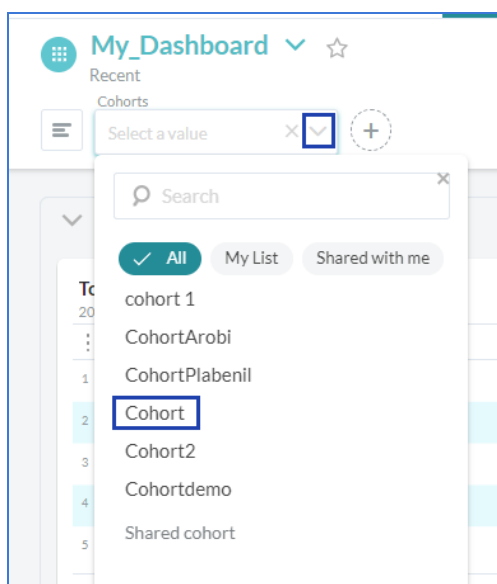
To add cohort filter on pinboards, follow the steps as below:

1. Click the 'Add **Filters** +' icon on the pinboard. The Add filters dialogue is displayed.

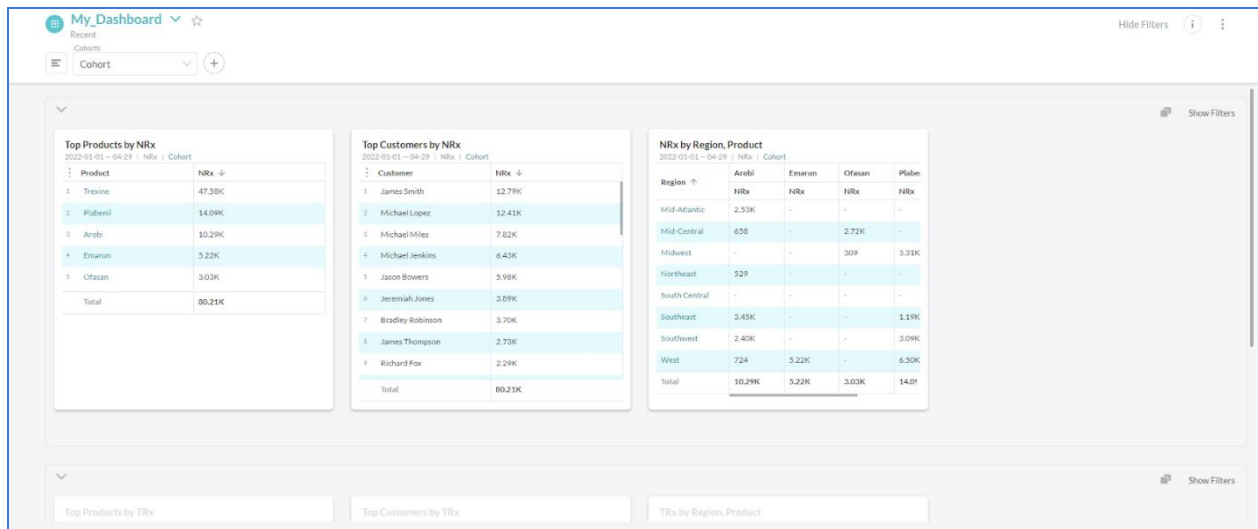
2. Select the **Cohorts** filter and click **Save**. The **Cohorts** filter gets added to the pinboard.



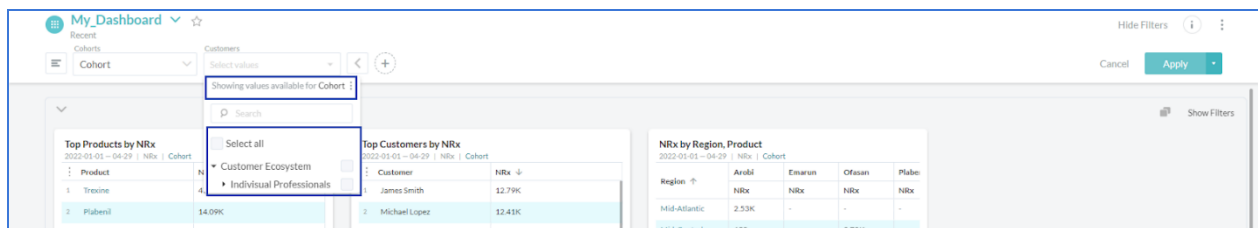
3. Select the **Cohort** value from the drop-down.



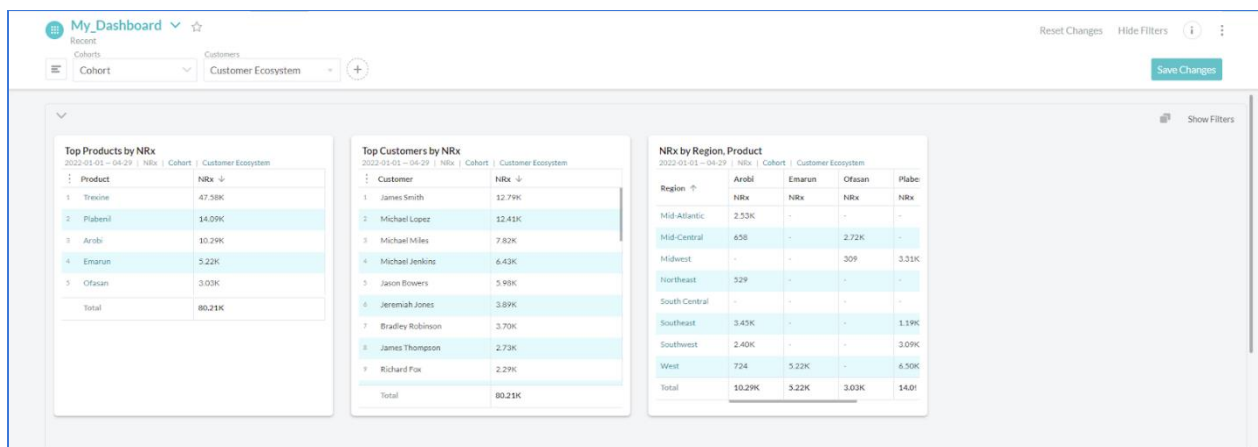
- Click **Apply**. Cohort is applied to all the cards on the pinboard.



- Add a **Customer** filter. Only the values available for Cohort is displayed.



- Select the value and click **Apply** and **Save Changes**



Annotations in Cards

WhizAI allows you to add annotations or notes at different points in a chart or cards having tabular data. In any type of chart response, from the bottom left side corner, you can click **Show Notes** to enter the

annotations mode. When you enter this mode, you can click any data point to add additional information or notes to it. You can click **Hide Notes** to opt out of the annotation mode.



Remember! The **Show Notes** button is available only for the 'Charts' and 'tabular' response types. In other types, you shall not see this button.



Remember! The annotations are bound to the data points irrespective of the visualization pattern. Thus, if you add annotations to one type of visualization pattern and then view the same card in a different pattern, WhizAI retains these notes and displays them at the same data points.

If you are a board owner or a board editor, you can:

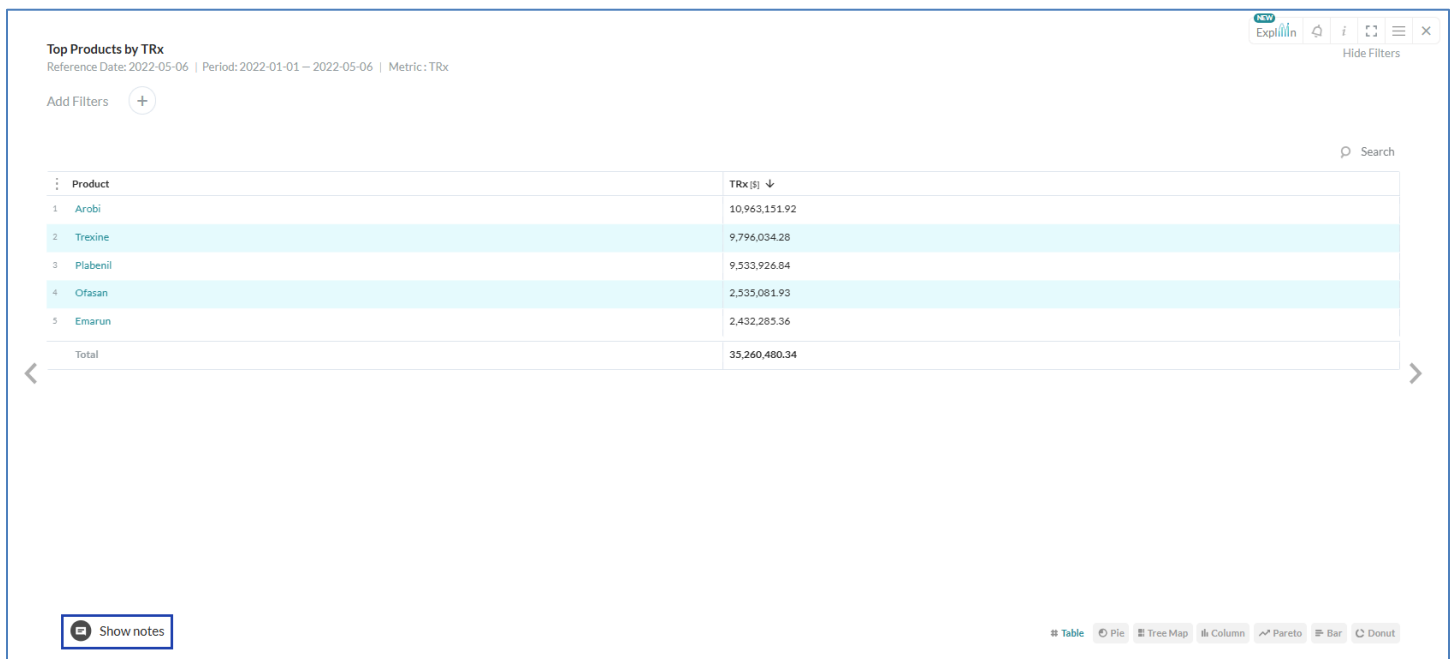
- Add or edit your annotations
- Reply to the notes added by other users
- Delete the notes added by other users

Also, as a board owner, you can delete replies added by other users. Whereas, if you are a board editor, you cannot delete these replies. As a board viewer, you can add and reply to annotations, only.



Note! If you update the data on a card by adding filters, WhizAI does not show the annotations on the updated chart response.

Also, you can add annotations to cards having tabular data. From the pinboard, open the card having tabular data in maximized view, you can see a **Show notes** icon at the bottom of such cards, as shown in the figure below:



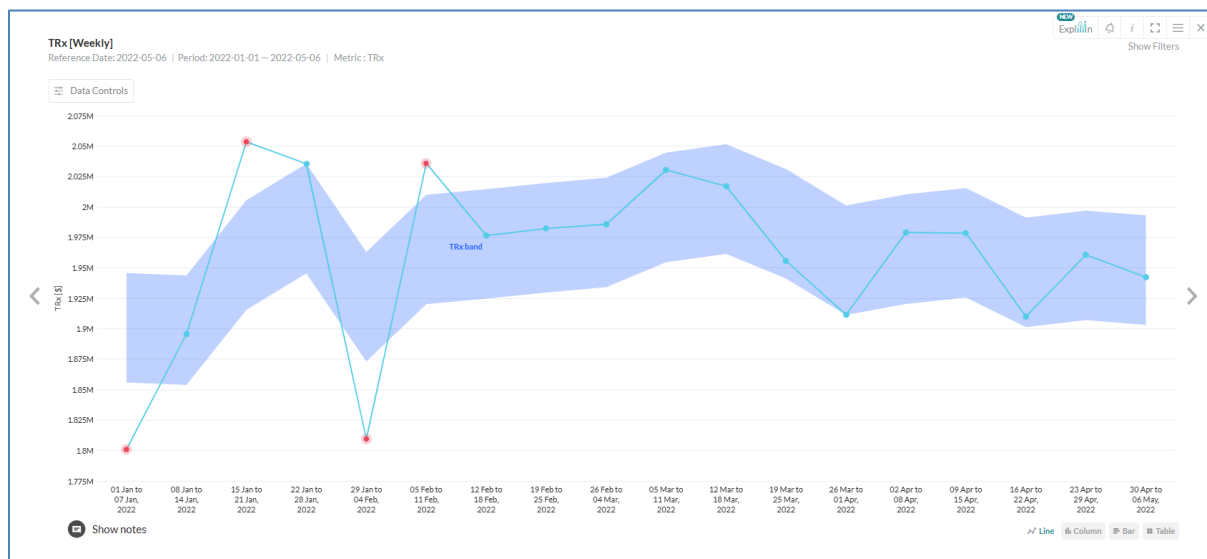
If you click this icon, you can see a notes icon as you hover over the table rows. Click any row to add annotations to it. A 'temporary' state of a pinboard is when a board owner or a board editor adds filters to a pinboard to view the updated data in pins; however, does not save these changes. In this 'temporary' state, if you add annotations to cards, they are not visible to any other user with whom the board is shared, instead, you see a warning message.



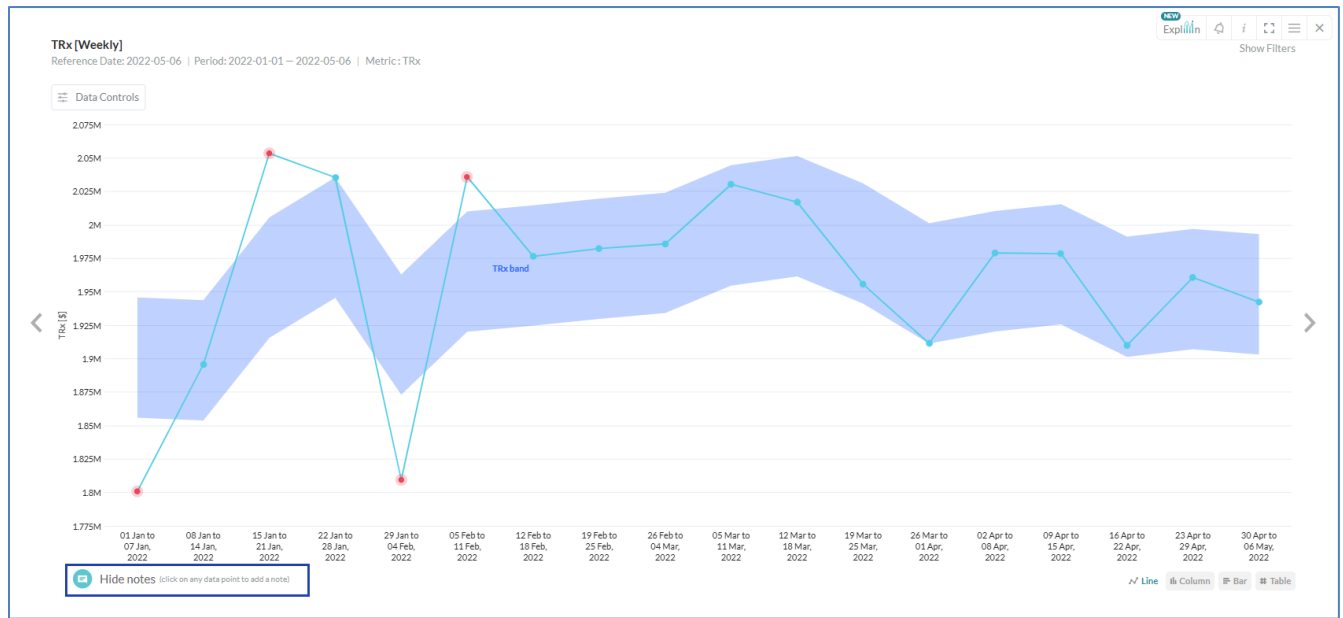
Note! The warning message stays till the pinboard is in the 'temporary' state. It goes away when you save the change.

Adding Annotations

1. From the pinboard, open the card to which you have to add annotations.



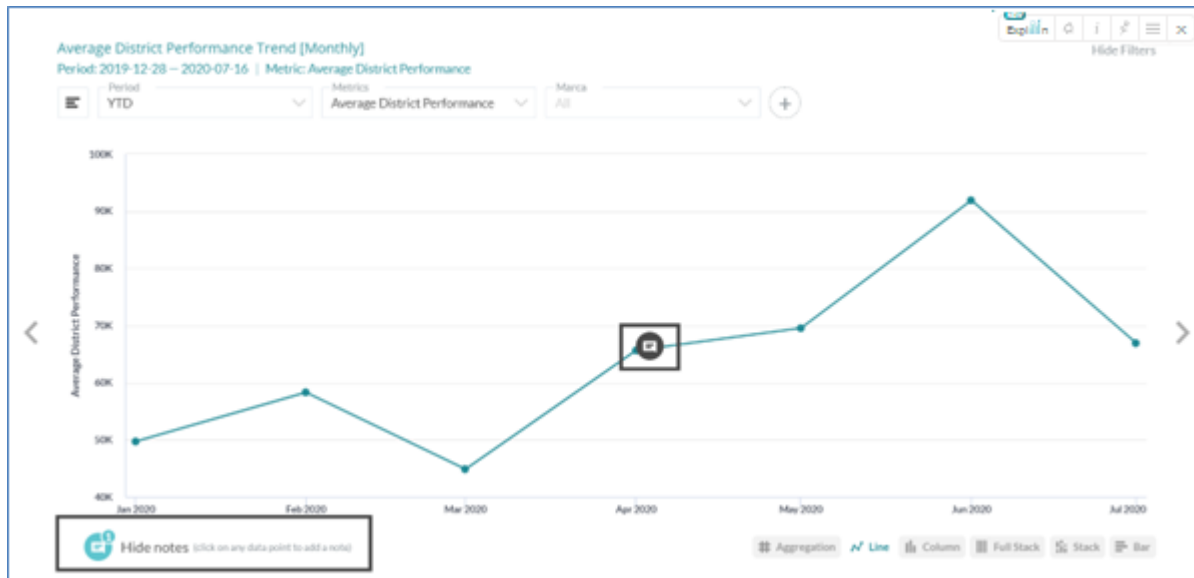
2. From the bottom left corner, click **Show notes**. WhizAI allows you to add annotations to the chart. You can see the note at the bottom of the card as shown in the following figure:



3. Click any data point to add annotations to it.



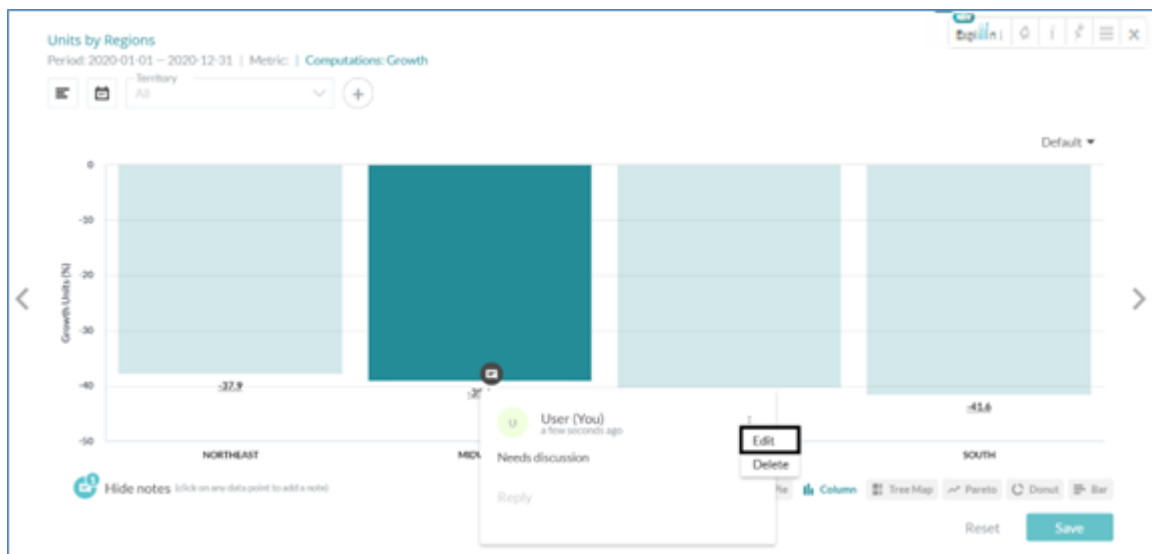
4. Enter notes in the dialog, as required, and then click **Add Notes** to save the details. WhizAI adds the notes at the data point as shown in the following figure:



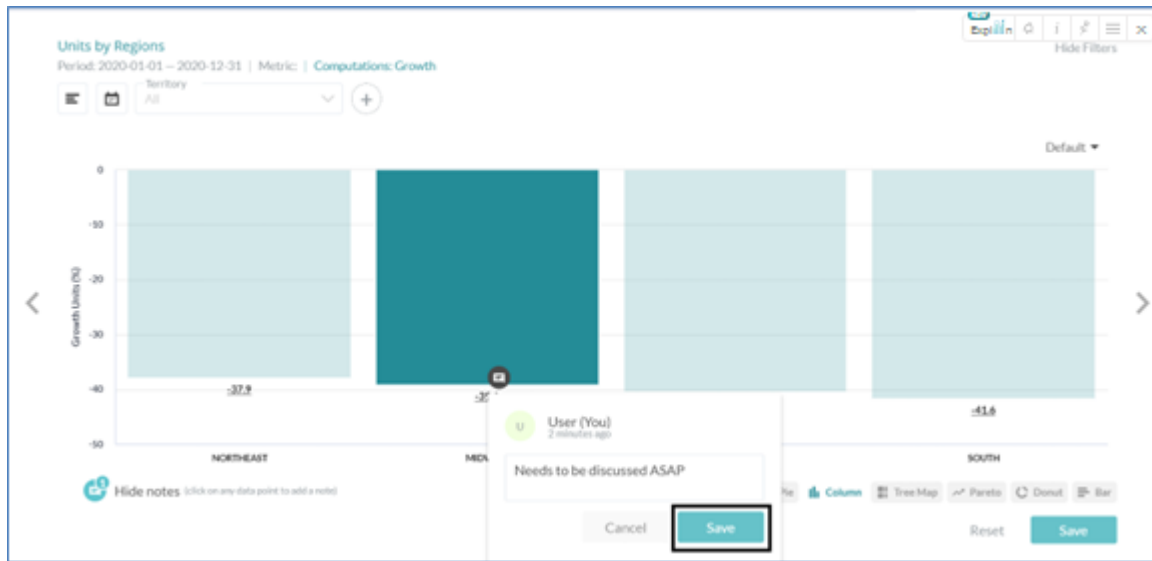
- Click **Hide notes** to opt out of annotations mode.

Editing Annotations

- Open the card and from the bottom left corner, click **Show notes** to enter the annotations mode.
- Open the annotation that you want to edit.
- Click **Edit**. WhizAI allows you to edit the details, as shown in the following figure:



- Update the details and then click **Save**.





5. Click **Hide notes** to opt out of annotations mode.

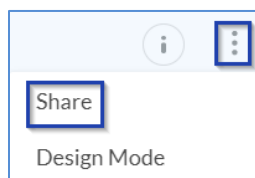
Deleting Annotations

1. From the pinboard, open the card to which you have added annotations and want to delete it.
2. Click **Show notes** to enter the annotations mode, then open the annotation that you want to delete.
3. Click **Delete**. WhizAI shows a confirmation message.
4. Click **Yes** to delete the annotation.

Sharing Pinboards and Cards

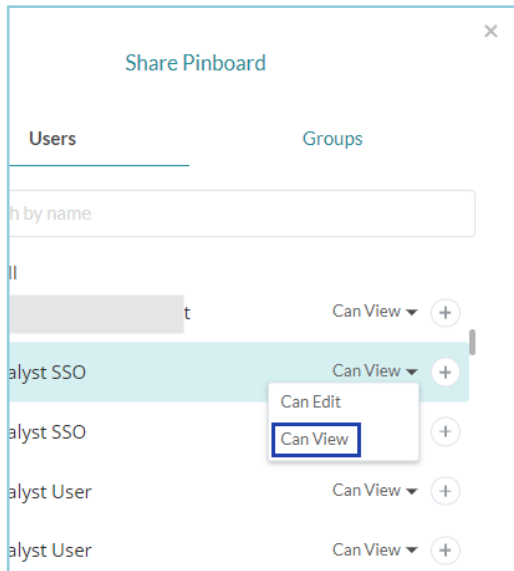
After successfully Creating a Board, follow these steps to share that **pinboard** with your team member or entire groups of members, as required:

1. From the main board's layout page, click  icon and then click **Share**. WhizAI opens the **Share Board** dialog with a list and groups of your team members.
OR
In case **Pinboard Manager** is configured for you, open the pinboard that you want to share. Click  icon and then click **Share**.



2. To select the members, click "+", or search by entering their name or email. If you want to share the **pinboard** with groups of users, click **Groups** and select the groups of team members, as required.

- Optional: If you want to assign editing rights to the user, from the drop-down list, select **Edit** as shown in the following figure:



Note! As a board owner, you may choose to assign Editing rights to the users with whom you are sharing the board. If these rights are assigned, the board editor may choose to make a copy of the board, export the pinboard to PDF, or unfollow the board, as required.

- Click **Save**. The board is shared with the selected members or the group. Selected members will get a notification on their Explorer. For more information about notifications, see Notifications.



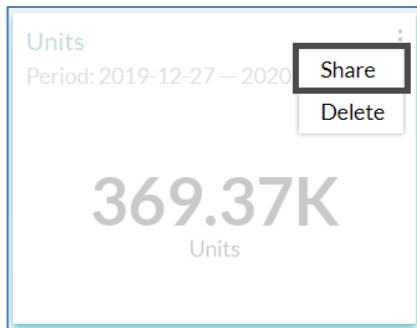
Note! When someone shares a board, you receive a notification about it in the form of a clickable link. You can click that link to open the shared **pinboard**.



Note! If someone shares a pinboard with you and you do not have access to view the details in a card/s within that pinboard, in this case, WhizAI shows a message that says "Sorry, you are not allowed to see the data for <Dimension Name>" when you open that card in maximized view.

There are two ways to share **cards** from **pinboards**:

- From the board that is open in Explorer, go to the card that you have to share with other users and then click **More Options**.

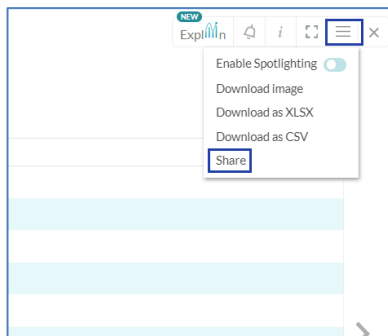


Note: The '**Share**' option is only available to board editors and board owners if the card-sharing feature is enabled for the environment.

2. Click **Share**. WhizAI shows the **Share response with** dialog.
3. You can search for the user or select the user from the list. If you want to share the card with groups of users, click **Groups** and select the groups of team members, as required. Then click **Share** to share the card with the selected user/s.

OR

Open the card that you want to share from the top-right corner and click .

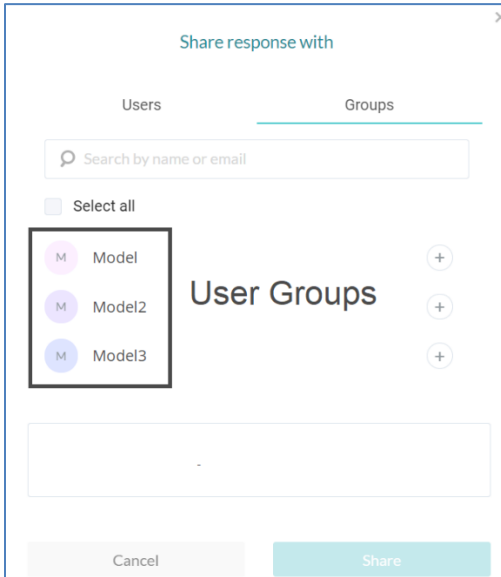


Note: The '**Share**' option is only available to board editors and board owners if the card-sharing feature is enabled for the environment.

4. Click **Share**. WhizAI shows the **Share response with** dialog.
5. You can search for the user or select the user from the list. If you want to share the card with groups of users, click **Groups** and select the groups of team members, as required. Then click **Share** to share the card with the selected user/s.

Sharing Pinboards and Cards with User Groups

You can share **pinboard**/s with system-generated group/s of users. To share a **pinboard** with a user group: Go to the **pinboard** and click the **+** button to share it. From the **Share Board** dialog, go to **Groups** and then select a user group, as required. Click **Save** to share the board.




Note! If you are a member of a particular group and a pinboard is shared with that group, then, you cannot 'unfollow' that board.

A typical system-generated group contains users categorized based on their roles, for example: you may see a user group of MRs or a user group of Sales Reps, and so on.



Remember! The admin users can track all the activity pertaining to user groups. For more information, see the [Audit Logs](#) section.

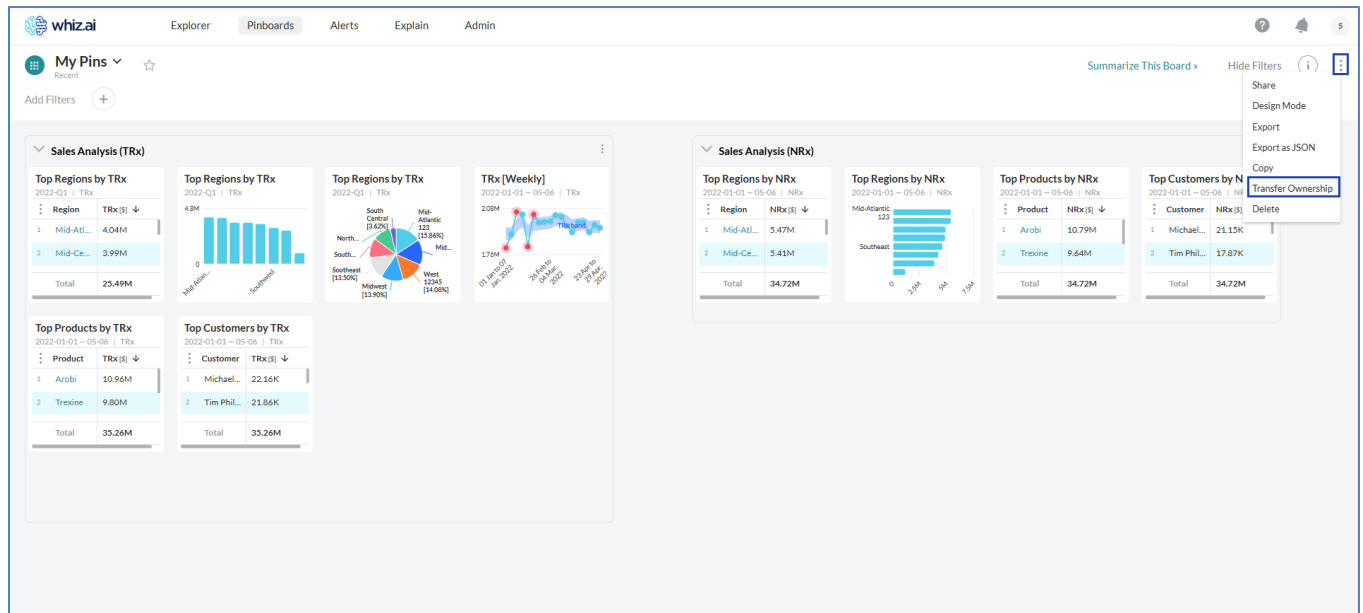
Stop following a pinboard


1. From the main board's layout page, open the pinboard that is shared with you.
2. Click  icon and then click **Unfollow Pinboard**. WhizAI shows a confirmation message.
3. Click **Confirm** to stop following the board. WhizAI displays a success message.

Transferring Ownership of Pinboards

If you are a board owner, WhizAI allows you to transfer ownership of that board, that is, you can set a new owner for the board. As shown in the following figure, you can click **Transfer Ownership** to select a new owner for the pinboard. Remember! You do not share the board ownership with the new user. After the ownership is transferred, you become the board viewer. To transfer the board's ownership:


1. Open the pinboard whose ownership you must transfer to any other user.

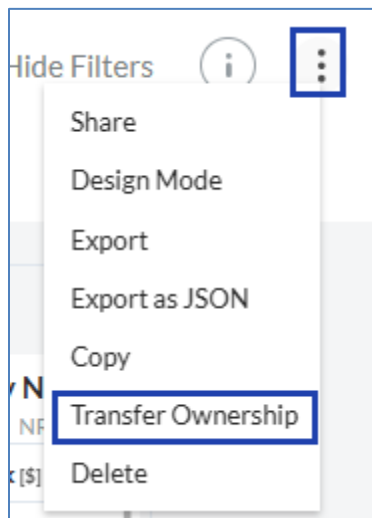


2. Click  icon to open the list of options and then click **Transfer Ownership**.

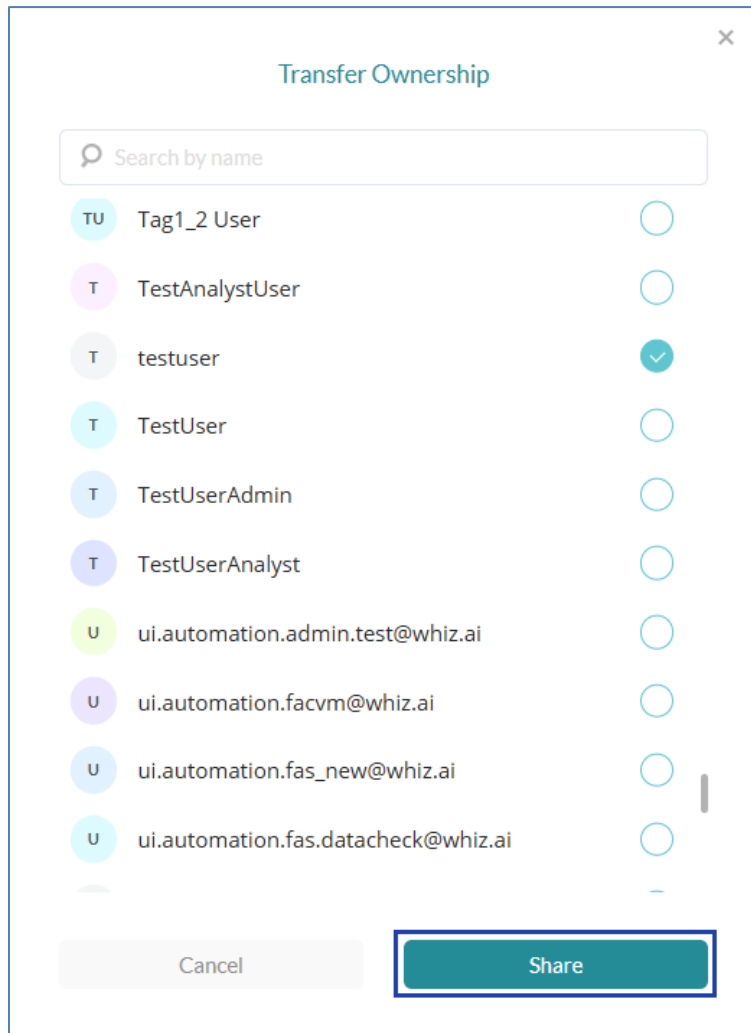
OR

In case **Pinboard Manager** is configured for you, open the pinboard whose ownership you want to

Transfer to other users. Click  icon, and then click **Transfer Ownership**.




3. WhizAI shows the **Transfer Ownership** dialog. Select the user to whom you must transfer the board's ownership and click **Share**. WhizAI shows a confirmation message.

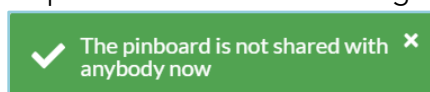


4. Click **Yes**. WhizAI transfers the ownership of the board to the selected user.

Removing Pinboard sharing

You can discontinue the sharing of your board from all users or specific users.

1. From the Explorer, click **Pinboard Navigator** > **Pinboard Manager** > **All Pinboards** to open the main board's layout page.
2. Open the **board** that you want to stop from being shared with others.
3. Click the  icon and then click **Share** to open the **Share Pinboard** dialog. This dialog shows the user/s with whom you have shared the pinboard.
4. Clear the check mark for the team member with whom you want to discontinue the sharing. If the board is shared with a particular group, go to the **Groups** tab, and clear the check box against that group.
5. Click **Save**. WhizAI shows a success message, the board is removed from the board panel of the respective users and/or user groups.



Switching base metrics on cards

On pinboards, for cards with a common base metric having computation/s, if you switch the base metric by applying filters then the base metric gets changed and computations from the previous metric remain the same.

For example, when you ask WhizAI 'Show me TRx growth and Trx market share by customers' then you get the response for the metric TRx for the computations Growth and MarketShare as shown in the following figure. Now, if you change the metric TRx to NRx, then the base metric for Growth TRx and TRx MarketShare will change to Growth NRx and NRx MarketShare.

Top Customers by Growth TRx, TRx Market Share
Reference Date: 2022-05-01 | Period: 2022-01-01 – 2022-05-01 | Metric: TRx | Product Name: Aroli

Metrics: NRx, NRx

Columns: Search

Customer	Growth TRx	TRx Market Share
1 Anna Wallace	3,880.32%	0.00%
2 Rodney Oconnor	2,822.14%	0.00%
3 Tammy Smith	2,733.11%	0.00%
4 Cathy Smith	2,517.37%	0.00%
5 John Knight	2,484.97%	0.00%
6 Rachel Anderson	2,342.88%	0.00%
7 Jason Robinson	2,339.20%	0.00%
8 Sydney Olson	2,233.97%	100.00%
9 Eric Pacheco	2,174.91%	100.00%
10 Kathy Zavala	2,147.53%	0.00%
Total	-	31.09%

Show notes

Table | Scatter | Column | Variable | Variable | Bar

Only the metric TRx will get changed to NRx for computations Growth and MarketShare as shown in the following figure. This helps in maintaining a single card for the base metrics which have common computations.

Top Customers by NRx MarketShare, Growth NRx
Reference Date: 2022-05-01 | Period: 2022-01-01 – 2022-05-01 | Metric: NRx | Product Name: Aroli

Metrics: NRx

Columns: Search

Customer	Growth NRx	NRx MarketShare
1 Matthew Cole	-19.25%	100.00%
2 Herbert Baker	-58.37%	100.00%
3 Walter Daniel	-22.71%	100.00%
4 Jared Beard	35.02%	100.00%
5 Sandra Wolf	105.64%	100.00%
6 Eric Arnold	5.04%	100.00%
7 Lynn Schneider	-69.68%	100.00%
8 Richard York	-39.82%	100.00%
9 Robert (Pseudonym Modified Customer)	94.47%	100.00%
Total	-	31.09%

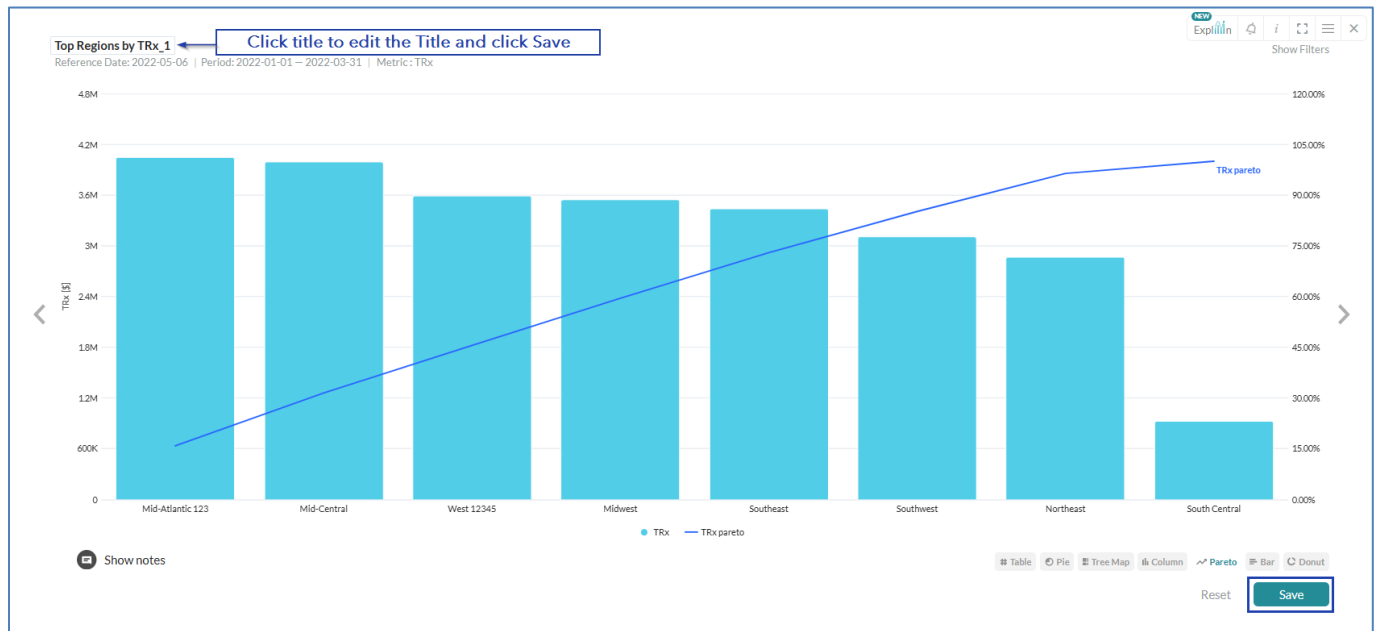
Show notes

Table | Scatter | Column | Variable | Variable | Bar

Reset Save

Renaming Cards from Pinboards

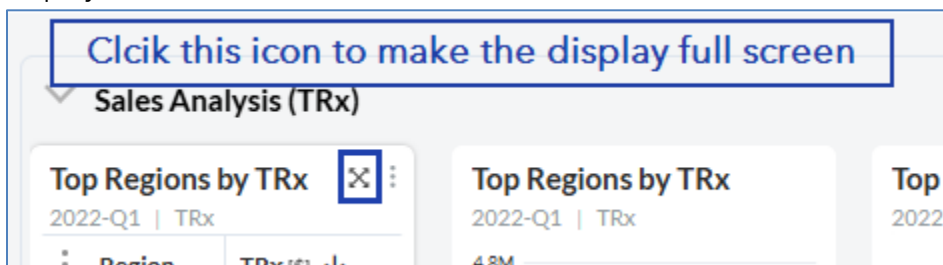
1. Open the card and click the title of the card to rename it. WhizAI allows you to change the name of the card as shown in the figure below.



2. Rename the card, as required, and then click **Save** to apply the changes. Click **Reset** to undo the changes.

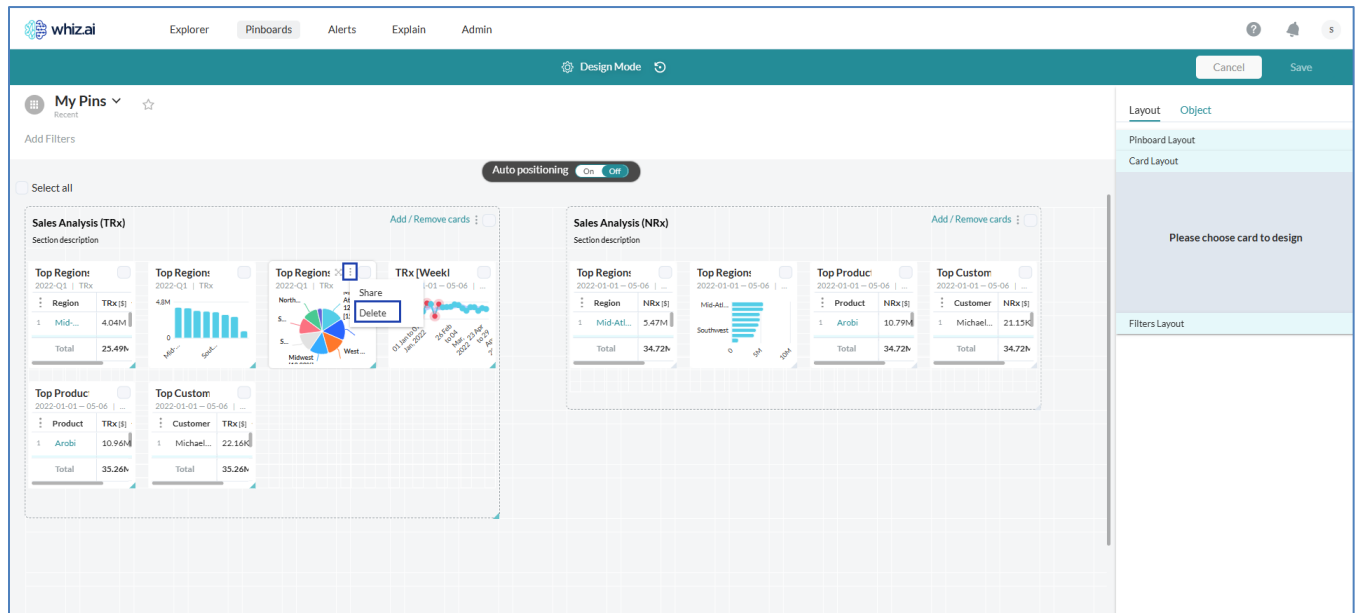
Viewing Cards in Full Screen Mode

When you open the cards pinned to a pinboard in a maximized view, you can click this icon to make the display full screen.




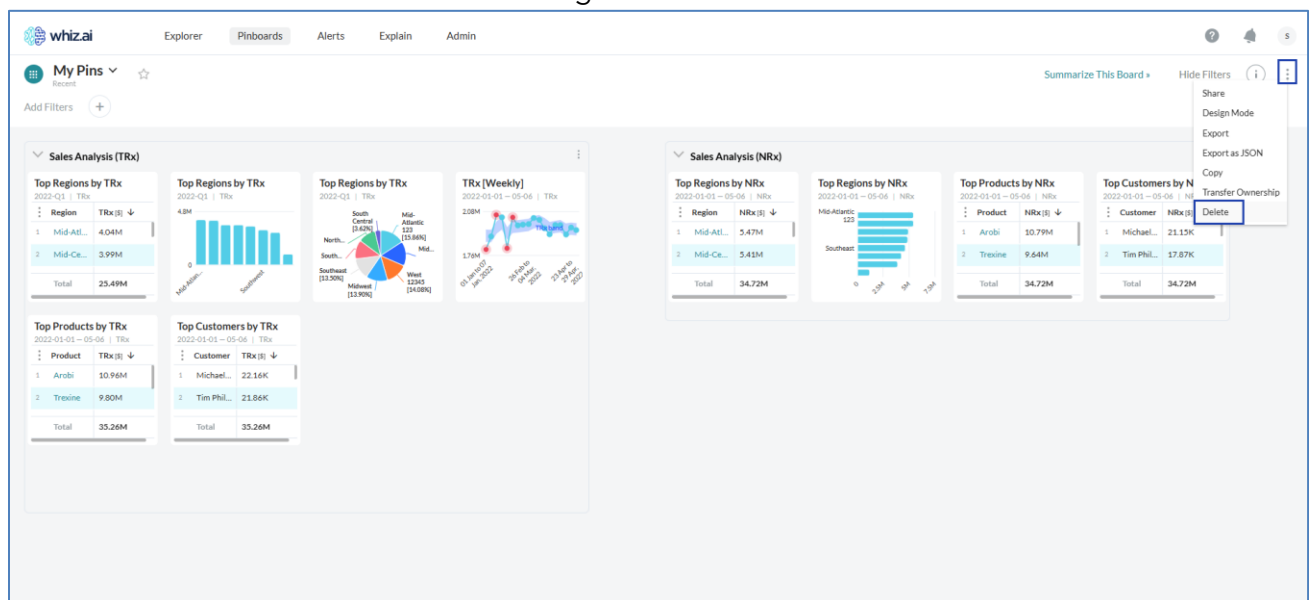
Deleting a card from a Pinboard


1. Click and then click **Designmode**. Go to the card which you must delete.
2. Click and then click **Delete** as shown in the following figure. WhizAI deletes the card from the pinboard:



Deleting a Pinboard

1. Go to the **pinboard** that you must delete. Click  icon to open the list of options and then click **Delete**. WhizAI shows a confirmation dialog.



OR In case **Pinboard Manager** is configured for you, open the pinboard that you want to delete, click  icon and then click **Delete**.

From the confirmation dialog, click the **Delete** button. The board will be deleted from Explorer.

