



# User Manual



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## Revision Date: May 31, 2022

This documentation has been created for 2022 Spring (V2022.2.0.0) release.

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

No Warranties and Limitation of Liability

Every effort has been made to ensure that this document is an accurate representation of the steps to deploy WHIZ.AI platform. However, the development of the software is a continuous process. So, small inconsistencies may occur.

We would appreciate any feedback on this document

Send comments via email

To: [assistant@whiz.ai](mailto:assistant@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 of WhizAI along with the necessary information and instructions about using WhizAI through different interfaces. Refer the following sections to get started with WhizAI:

- [Getting Started](#)
- [Understanding WhizAI Interface](#)
- [Using WhizAI on the web](#)
- [Using WhizAI in Microsoft Teams](#)
- [Using WhizAI through SMS](#)

## 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:

- Pinboards Overview for Board Owners
- Pinboards Overview for Board Viewers

## Contacting WhizAI

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

- Website: <https://whiz.ai>
- Email : [assistant@whiz.ai](mailto:assistant@whiz.ai)

## Introduction

WhizAI is the first and only purpose-built cognitive insights platform for life sciences, empowering users to get answers to their business questions by simply asking via voice, text on web and mobile.

WhizAI is trained on the language and data of life sciences, enabling it to answer even the most complex questions from billions of records in seconds. Fast, easy and scalable, WhizAI is the trusted partner of choice at the top global life sciences companies. Asked. Answered. Instantly.

Learn more at <https://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 from 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, v102 & above
- Mozilla Firefox, v100 & above
- Microsoft Edge, v102 & above (Windows); v102 & above (MacOS)
- Safari, v14 & above (MacOS)



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

## Supported channels

You can access WhizAI from the following channels:

- Web: You can access WhizAI through web browsers. Refer 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. For more information, see [Using WhizAI in Microsoft Teams](#).
- SMS: You can interact with WhizAI by sending SMS through your registered mobile number. You need to send a separate SMS for each question and each option number in the response. For more information, see [Using WhizAI through SMS](#).
- 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



**Note:** WhizAI supports single sign-on, i.e., the custom login page can be configured by an Administrator. You may contact your Administrator to know more about single sign-on.



1. Open any of the [supported browsers](#) and enter the URL for WhizAI. The login page appears:



**Note:** If single sign-on is enabled, the organization specific login page appears instead of the WhizAI login page.

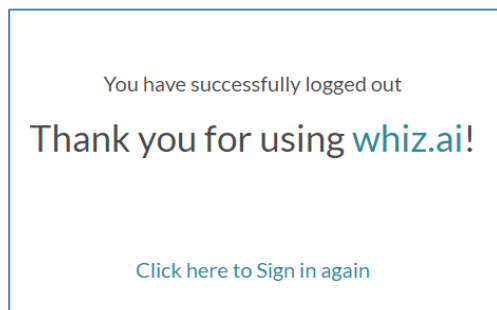
2. Enter your login credentials and click **Sign In** to log in to WhizAI.



**Tip!** From the top-right corner of this page, you can select the language (English or French) for WhizAI, as required.

## Logging out from the WhizAI

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



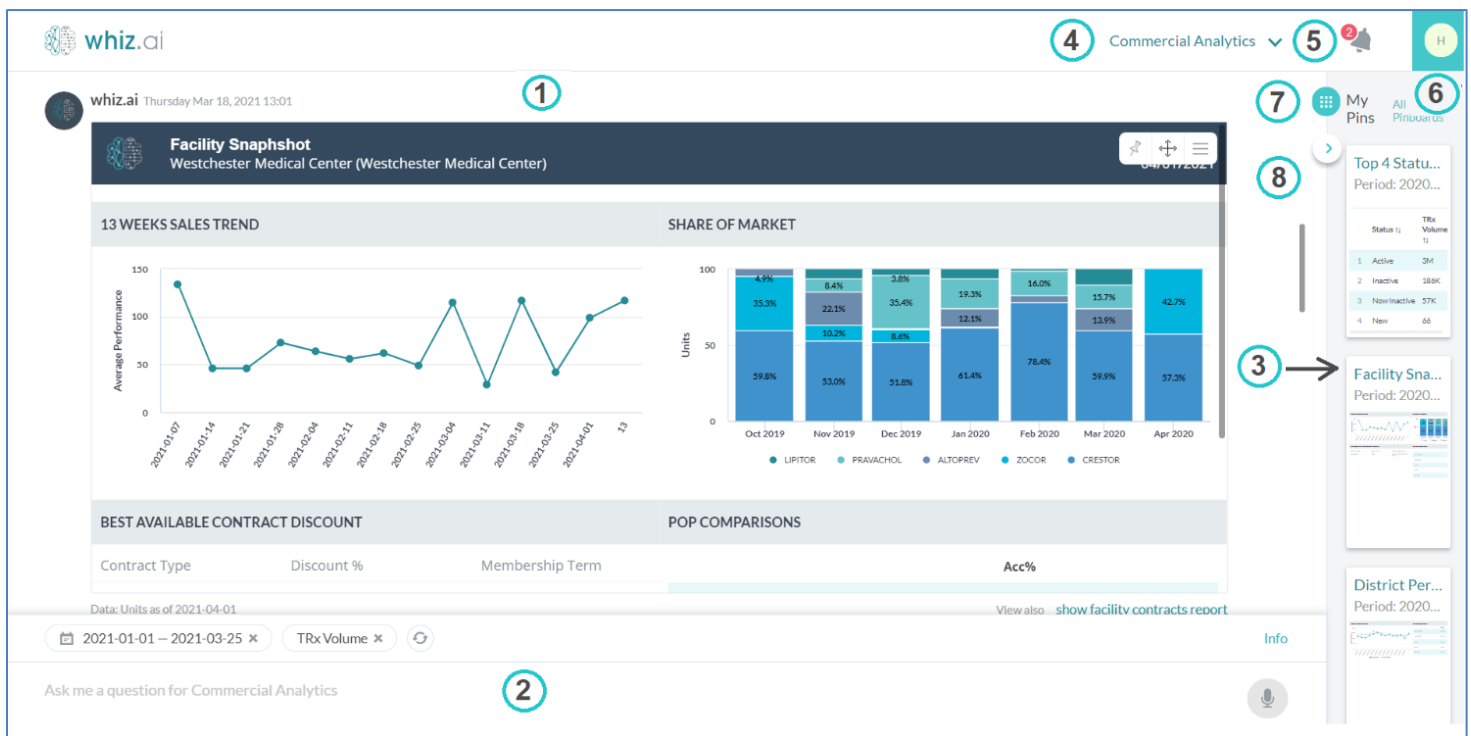
## Understanding WhizAI User Interface

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

- [Explorer](#)
- [Conversation box](#)
- [Response box](#)
- [Pinboards](#)

## 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

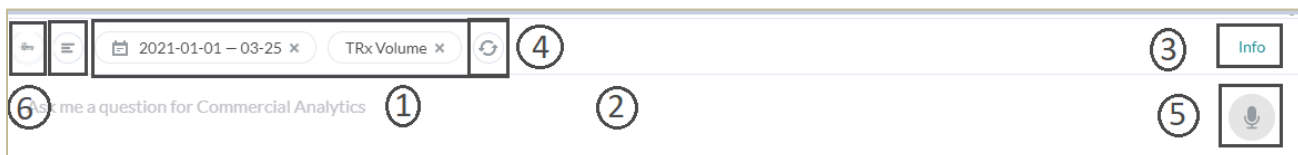


The following table explains different sections on the **Explorer**:

Callout	Description
1	<b>Response area:</b> In this area, you can see the responses to the questions you ask WhizAI.



2	<b>Conversation box:</b> In this area, you can enter your questions and view the filters that WhizAI applies to the response. For more information, see <a href="#">Conversation box</a> .
3	<b>Board panel:</b> This panel shows the different pins in the pinboard that is open. For more information, see <a href="#">Pinboards</a> .
4	<b>Data Model:</b> Shows the data models configured for you.
5	<b>Notification:</b> The bell icon to view the notification alerts generated in WhizAI platform. For more information, see <a href="#">Notifications</a> .
6	<b>Profile:</b> Click the profile icon of the logged in user to access the boards panel, admin section, change the language, log out from WhizAI and so on. For more information, see <a href="#">Profile Settings</a> .
7	<b>All Pins:</b> Click this icon to open the main boards panel where you can view all the <b>pinboards</b> and <b>cards</b> . Also, you can perform the <a href="#">board settings</a> and <a href="#">share boards</a> .
8	<b>Expand/ Collapse:</b> The icon to expand the response area by collapsing the board panel.



## Conversation box



The following table explains the context bar options:

Sr. No.	Context	Description
1	Context bar (filter)	<p>The gray color bar shows the filters that WhizAI identifies 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"> <li>• Default: Time and Metric are the default filters. You cannot remove these filters.</li> <li>• Context: The context is set due to reference to metadata entities or metrics used in the question asked by the user.</li> <li>• Authorization: Set due to user authorization. You cannot remove this filter.</li> <li>• It shows the data to which you have limited access. Knowing this detail helps you query the data accordingly.</li> <li>• You can see (maximum) 12 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.</li> <li>• For example, if you have access to 14 entities, the Authorization icon will show you the list of 12 entities (+2).</li> </ul> <p>For more information, see <a href="#">Context</a>.</p>
2	Question area	<p>The area where you can enter your question. For more information, see <a href="#">Asking a question</a>.</p>

3	Model Info & Suggested Queries	<p>Click the Info button to view list of Metrics, Dimensions, and Reports in the selected data model.</p> <p>You can see a + icon before Dimensions and Metrics. Click the + icon to expand all the metrics/dimensions and view 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 respective metric or dimension, WhizAI shows more information about the metric or dimension in a tool tip.</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, the Info modal 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> <p>The 'Info' modal shows a list Dimensions, metrics, and reports available for a particular data model. 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 model, you can see the 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. For more information, see <a href="#">Business Data Model</a>.</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 the reports applicable to that business area.</p>
4	Reset Context	<p>Click  icon to reset the context that is established from your previous question.</p> <p>After you click Reset, the Context Reset message appears in the Response box.</p>
5	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 <a href="#">Using voice to ask the question</a>.</p>

6	Slicers	<p>Now, 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.</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 the slicer icon  on the conversation box. 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>
6	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>

### Response box

The **Response box** is the area where WhizAI responds 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 response 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 a response, WhizAI shows only that 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 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 shows an 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

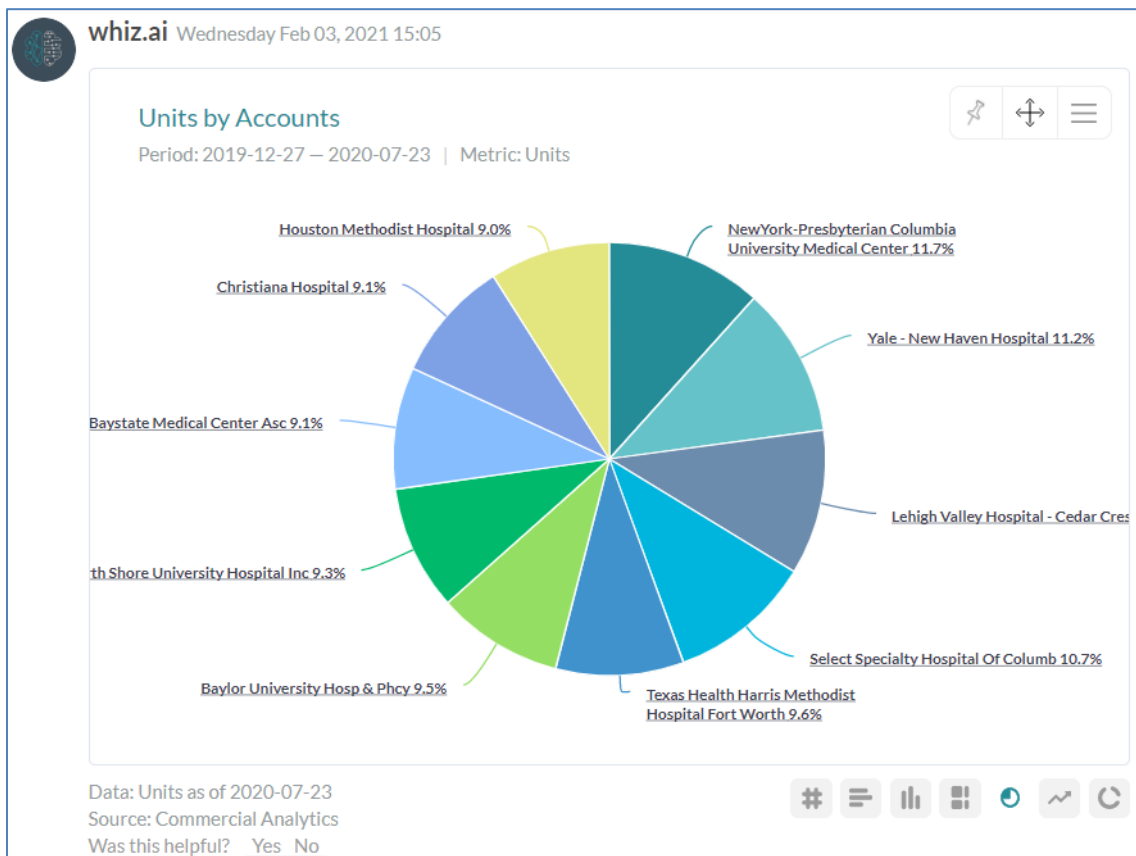
For all tabular responses (except responses that show variance) WhizAI shows a 'Total' and 'Sub-Total' row and column, as applicable. Having these rows in the response adds to the insights you can derive out of the data shown in the response.

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)

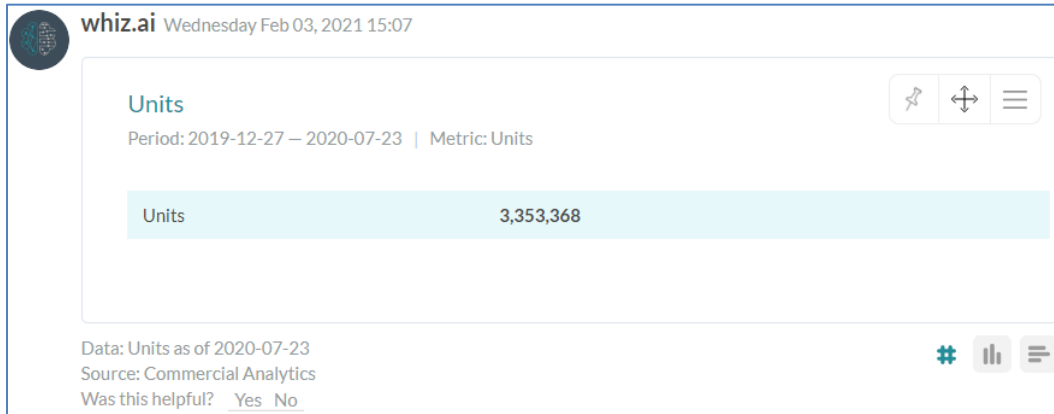
Following are the examples of different response types in WhizAI:

## Response - Chart





## Response - Message



## Response - Table

whiz.ai Wednesday Feb 03, 2021 15:05

**Top 10 Accounts by Units**

Period: 2019-12-27 – 2020-07-23 | Metric: Units

	Account	Territory	Units
1	<a href="#">NewYork-Presbyterian Columbia University Medical Center</a>	MANHATTAN NY	12,218
2	<a href="#">Yale - New Haven Hospital</a>	BRIDGEPORT CT	11,701
3	<a href="#">Lehigh Valley Hospital - Cedar Crest</a>	PHILADELPHIA PA	11,366
4	<a href="#">Select Specialty Hospital Of Columb</a>	CLEVELAND OH	11,219
5	<a href="#">Texas Health Harris Methodist Hospital Fort Worth</a>	FT WORTH TX	9,995
6	<a href="#">Baylor University Hosp &amp; Phcy</a>	DALLAS TX	9,890
7	<a href="#">North Shore University Hospital Inc</a>	LONG ISLAND E NY	9,729
8	<a href="#">Baystate Medical Center Asc</a>	HARTFORD CT	9,549
9	<a href="#">Christiana Hospital</a>	BALTIMORE MD	9,511
10	<a href="#">Houston Methodist Hospital</a>	HOUSTON S TX	9,438

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.

**Please note**, currently you can select only those attributes that are directly related to the dimension, for example: Account and Account Type.

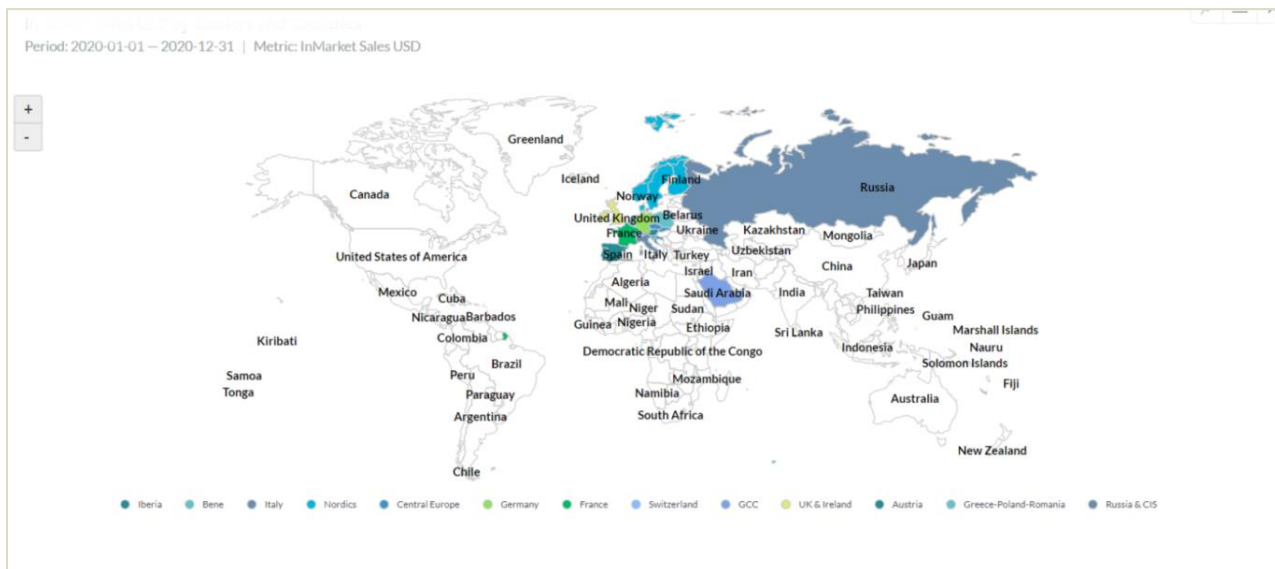
## Response - Question/ Answer

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, 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 clearly 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 example, 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.



## 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 have to view a patient's journey. You can see the status with 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.

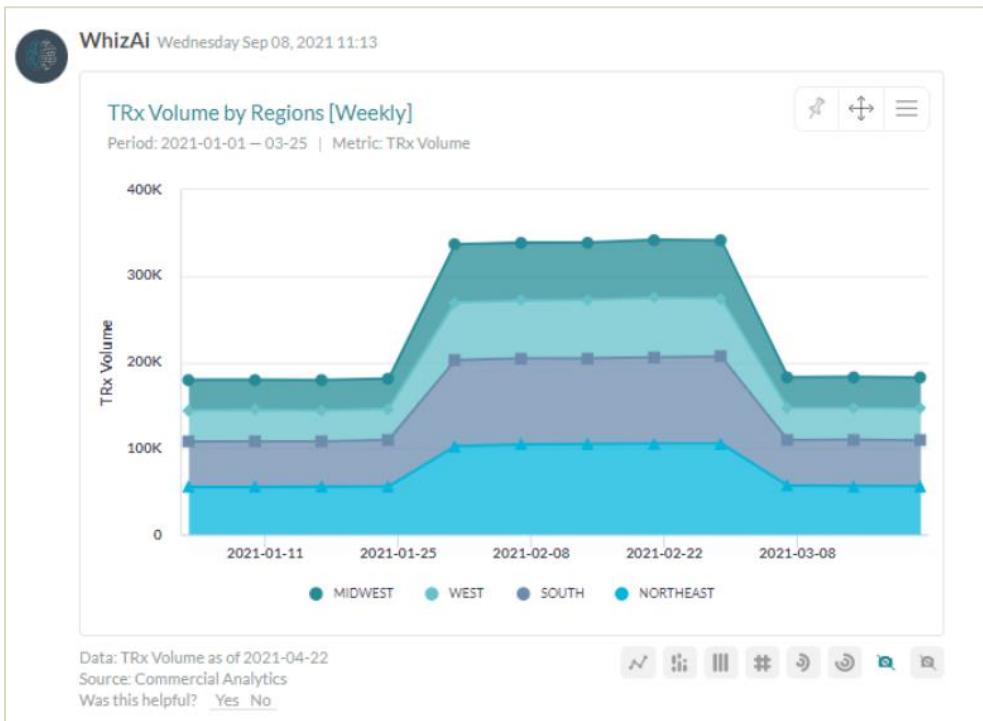
Note the following points:

- a. 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.
- b. 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.

### Response - Area/ Percentage Area Chart

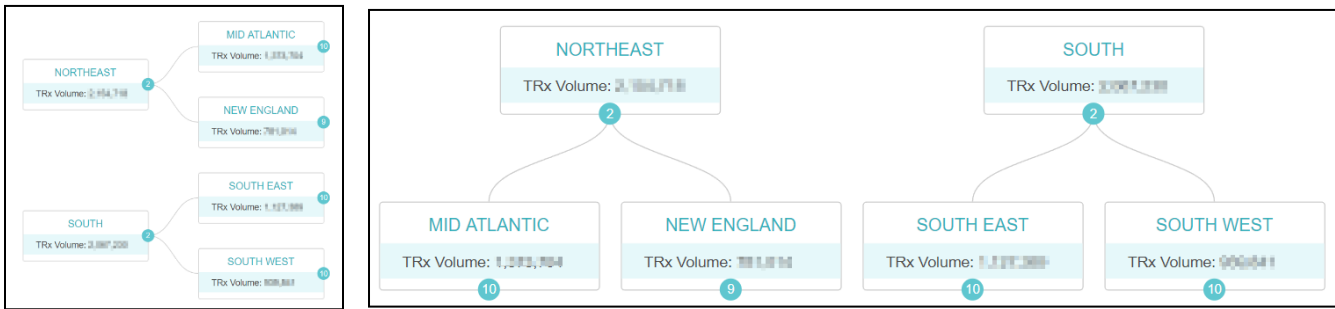
Now, if you ask a query that includes 'Trend' such as "Show me the Trends by Regions" or "Show me the Trends by Products", WhizAI provides the following additional visualization option:

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

- c. 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 metrics in the NLQs.
- d. 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.
- e. Every hierarchy level and its nodes are indicated by a particular node color. The colors of parents and children's nodes are different.
- f. When you change the card filter or pinboard filter, the details in chart are updated.

## 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 display 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 *Northeast* node and its corresponding districts.

## Response - Actual vs Forecast

Earlier, if you asked WhizAI to show a response for 'Actual vs Forecast', the response contained actual and forecast details on top of each other. We have updated this visualization so that now, the response contains details shown side-by-side, as can be seen in the following figure:

The screenshot displays the WhizAI interface. At the top, a user message from 'User' (Monday Oct 18, 2021 11:55) asks to 'Compare actual vs forecast in France for from January 2020 to June 2020'. Below this, a Whiz.AI response (Monday Oct 18, 2021 11:55) includes a warning icon and text: 'We need some clarifications for the following terms: "france". The following response is based on your previous choices.' with 'VIEW OPTIONS' and 'DISMISS' links. The main content area is titled 'Comparison of Actual v/s Forecast' and shows filters: 'Period: 2020-01 - 06', 'Metric: Volume TD', 'Operating Country: France', and 'Sales Type: Actual...'. It features dropdowns for 'Actual vs ... (+3)' and 'Forecast', and a search bar. A table titled 'Actual vs Forecast' has columns: 'Metrics ↑↓', 'Actual (TD) ↑↓', 'Forecast (TD) ↑↓', 'Abs Chg ↑↓', and '% Abs ↑↓'. The 'Volume TD' row shows bar charts for actual and forecast data. At the bottom, it states 'Data: Volume TD as of 2020-12-31', 'Source: Ask Ensemble', and a 'Was this helpful?' feedback link with 'Yes' and 'No' options.

## Response - Semester-level Volume and Growth

WhizAI allows you to call "semester-level" volume and growth in the same way that you are able to 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 - Timeline Chart

Certain important events may happen in a patient cycle or a sales cycle; WhizAI allows you to 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 have to view a patient's journey. You can see the status with 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 multiples 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.

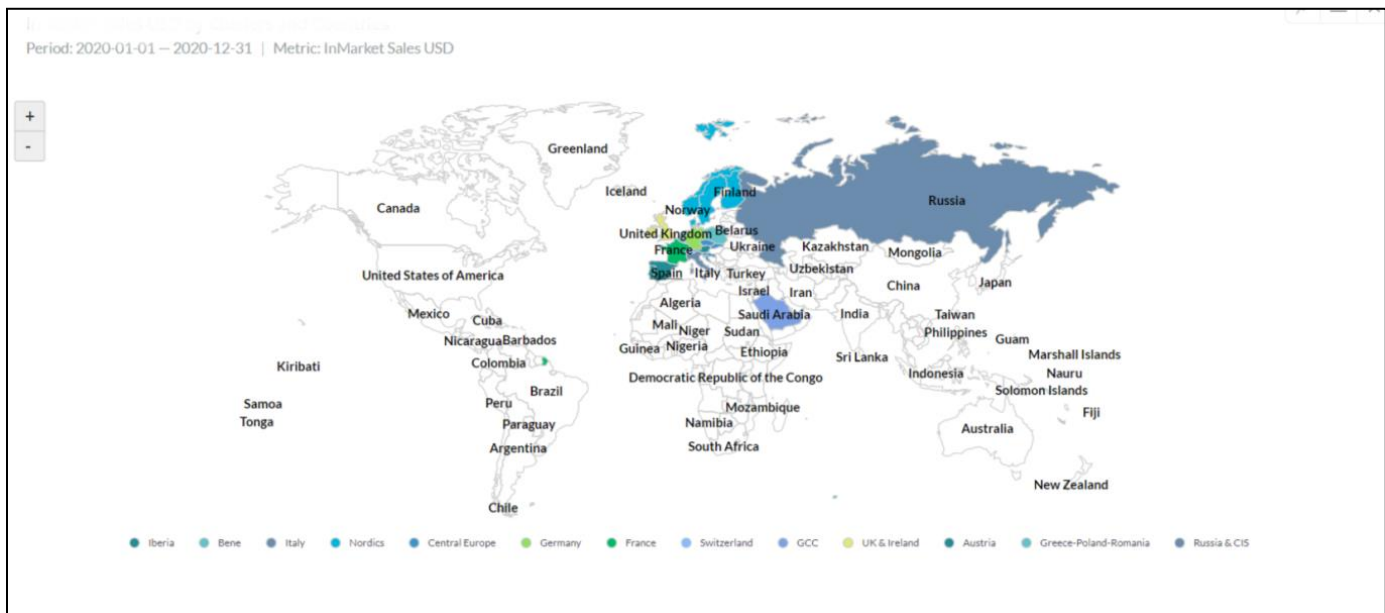
## Response - Color Coded Maps

In 'Maps' type visualization, now 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 example, 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.



## Response - Column Graph

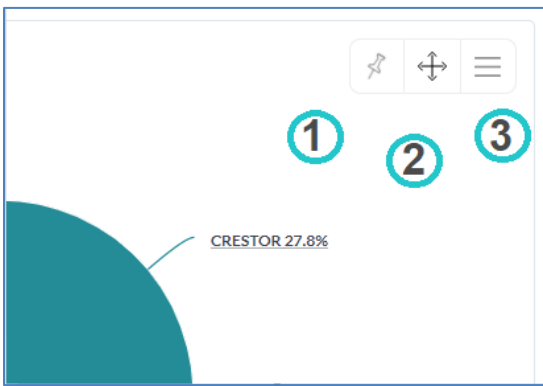
In this visualization option, data is displayed in vertical bars that go across a horizontal axis. These charts can be used to view data comparisons. For example, you can compare data across brands for a particular metric or you can compare data for brands in different regions etc.

Example queries:

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

## Response 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 <b>pinboard</b> .
2	Expand	Pops-up the response in its original size so that you can view the details clearly.
3	More actions	Displays more actions: <ul style="list-style-type: none"> <li>• <b>Average:</b> Calculates the National/ District/ Region/ Territory level average values (You can see this option in a tabular response, only).</li> <li>• <b>Download data:</b> Downloads the data of the response in a CSV file.</li> <li>• <b>Download image:</b> Downloads the response as an image in PNG format</li> <li>• <b>Share:</b> Opens the <b>Share response with</b> dialog. You can select a user or a user group, as required, and share the response.</li> </ul>

## Response Options - Hiding Columns in a Tabular Response

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



Top 5 Brands by TRx Volume, NRx Volume  
Period: 2019-06-17 – 2019-12-31 / 2020-01-01 – 2020-07-16 | Metrics: TRx Volume, NRx Volume

⚠ Data is available from 2020-04-17 to 2020-07-16 only.

WhizAI allows you to hide any of these columns and sub-columns

TRx Volume... (+20) Search

Brand	2019-06-17,2019-12-31/2020-01-01,2020-07-16				2020-05-29,2020-06-25/2020-06-26,2020-07-23				2019-06-17,2019-12-31/2020-01-01,2020-07-16				2020-05-29,2020-06-25/2020-06-26,2020-07-23		
	Curr T1	Prev T1	Abs Chg T1	% Chg T1	Curr T1	Prev T1	Abs Chg T1	% Chg T1	Curr T1	Prev T1	Abs Chg T1	% Chg T1	Curr T1	Prev T1	Abs C
1 CRESTOR	1,129,862	776,410	+353,452	+45.52%	213,819	144,966	+68,853	+47.50%	126,955	78,295	+48,660	+62.15%	23,139	16,232	+6,907
2 LIPITOR	1,493,120	1,052,966	+440,154	+29.49%	289,211	189,319	+99,892	+52.76%	136,250	86,414	+49,836	+57.67%	24,698	17,257	+7,441
3 ZOCOR	1,079,641	744,153	+335,488	+30.29%	263,987	174,153	+89,834	+51.58%	125,648	79,612	+46,036	+57.83%	22,962	16,818	+6,144
4 PRAVACHOL	1,129,862	776,410	+353,452	+45.52%	213,819	144,966	+68,853	+47.50%	126,955	78,295	+48,660	+62.15%	23,139	16,232	+6,907
5 ALTOPREV	1,052,966	733,396	+319,570	+43.57%	199,547	135,118	+64,429	+47.68%	121,496	75,419	+46,077	+61.09%	21,233	15,430	+5,803

Data: TRx Volume, NRx Volume as of 2020-07-23  
Source: Commercial Analytics

Top 5 Brands by TRx Volume, NRx Volume  
Period: 2019-06-17 – 2019-12-31 / 2020-01-01 – 2020-07-16 | Metrics: TRx Volume, NRx Volume

⚠ Data is available from 2020-04-17 to 2020-07-16 only.

To hide any column: Open this drop-down list and clear the check box against the column, as required.

TRx Volume... (+20) Search

Search

- ▼ TRx Volume ☒
  - ▶ 2019-06-17,2019-12-31/2020-01-01,2020-07-16 ☒
  - ▶ 2020-05-29,2020-06-25/2020-06-26,2020-07-23 ☒
- ▼ NRx Volume ☒
  - ▶ 2019-06-17,2019-12-31/2020-01-01,2020-07-16 ☒
  - ▶ 2020-05-29,2020-06-25/2020-06-26,2020-07-23 ☒

Volume	2020-05-29,2020-06-25/2020-06-26,2020-07-23				2019-06-17,2019-12-31/2020-01-01,2020-07-16				2020-05-29,2020-06-25/2020-06-26,2020-07-23		
	Curr T1	Prev T1	Abs Chg T1	% Chg T1	Curr T1	Prev T1	Abs Chg T1	% Chg T1	Curr T1	Prev T1	Abs
1	369,763	245,595	+124,168	+50.56%	210,980	129,893	+81,087	+62.43%	38,592	27,307	+11,285
2	289,211	189,319	+99,892	+52.76%	136,250	86,414	+49,836	+57.67%	24,698	17,257	+7,441
3	263,987	174,153	+89,834	+51.58%	125,648	79,612	+46,036	+57.83%	22,962	16,818	+6,144
4 PRAVACHOL	1,129,862	776,410	+353,452	+45.52%	213,819	144,966	+68,853	+47.50%	126,955	78,295	+48,660
5 ALTOPREV	1,052,966	733,396	+319,570	+43.57%	199,547	135,118	+64,429	+47.68%	121,496	75,419	+46,077

Data: TRx Volume, NRx Volume as of 2020-07-23  
Source: Commercial Analytics

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.

whiz.AI Friday Sep 24, 2021 14:06

**Top 10 Accounts by Units**

Period: 2019-12-28 – 2020-07-23 | Metric: Units

Territory, Units  [Click here to search data](#)

Account ↑↓	Territory ↑↓	Units ↑↓
1 NewYork-Presbyterian Columbia University Medical Center	MANHATTAN NY	44.86K
2 Select Specialty Hospital Of Columb	CLEVELAND OH	44.11K
3 NewYork-Presbyterian / Weill Cornell Medical Center	MANHATTAN NY	38.97K
4 Lehigh Valley Hospital - Cedar Crest	PHILADELPHIA PA	38.23K
5 Providence Health & Services - Oregon	SEATTLE WA	37.26K
6 Yale - New Haven Hospital	BRIDGEPORT CT	37.23K
7 Houston Methodist Hospital	HOUSTON S TX	37.19K
8 North Shore University Hospital Inc	LONG ISLAND E NY	36.45K
9 Baylor University Hosp & Phcy	DALLAS TX	36.29K
10 UC Davis Medical Center	SACRAMENTO CA	35.01K

2019-12-28 – 2020-07-23 × Units ×

Ask me a question for Commercial Analytics

whiz.AI Friday Sep 24, 2021 14:06

**Top 10 Accounts by Units**

Period: 2019-12-28 – 2020-07-23 | Metric: Units

Territory, Units

Account ↑↓	Territory ↑↓	Units ↑↓
10 UC Davis Medical Center	SACRAMENTO CA	35.01K

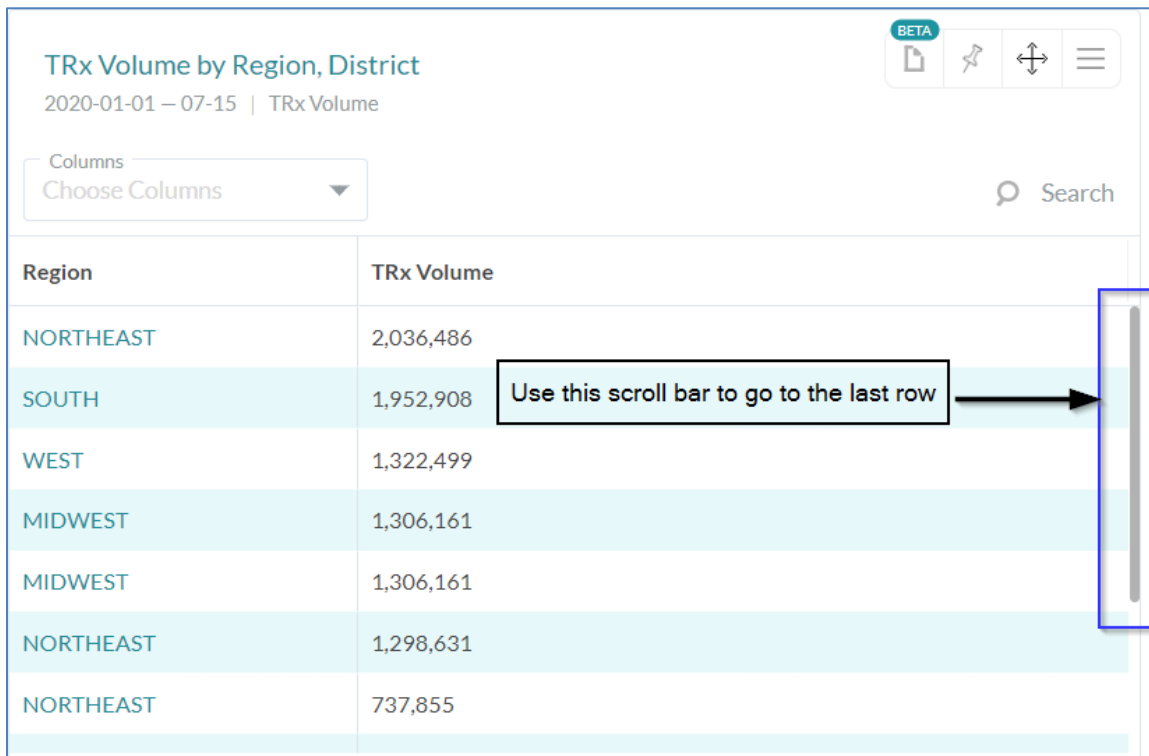
Data: Units as of 2020-07-23  
Source: Commercial Analytics  
Was this helpful? Yes No

## Response Options - Enhancing table responses

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

Using the Scroll bar to navigate to the last row:

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



TRx Volume by Region, District  
2020-01-01 – 07-15 | TRx Volume

Columns  
Choose Columns

Search

Region	TRx Volume
NORTHEAST	2,036,486
SOUTH	1,952,908
WEST	1,322,499
MIDWEST	1,306,161
MIDWEST	1,306,161
NORTHEAST	1,298,631
NORTHEAST	737,855

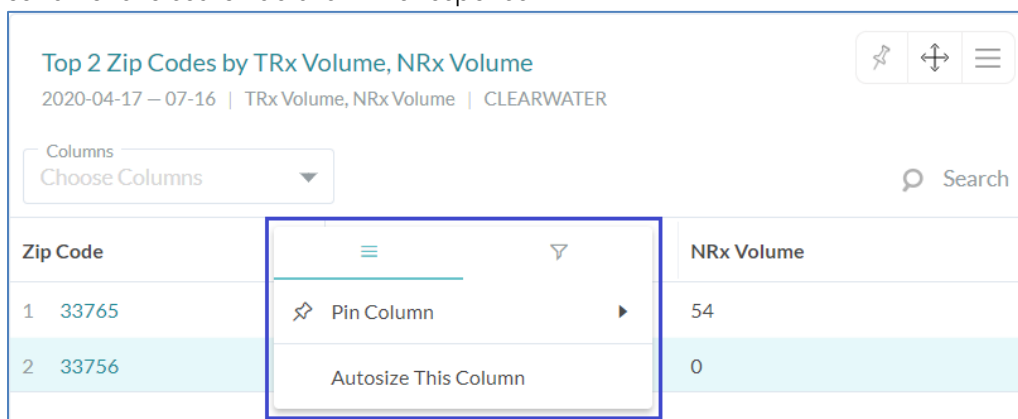
Earlier, the response showed the pagination option, only, to browse through it.

Searching data in a dimensional column:

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:

1. From the response column, click the hamburger menu. WhizAI opens a dialog box that has two tabs. The first tab (default) contains options to pin a column, etc (refer to the figure below). The second tab allows you to define filter conditions to search details in the response.




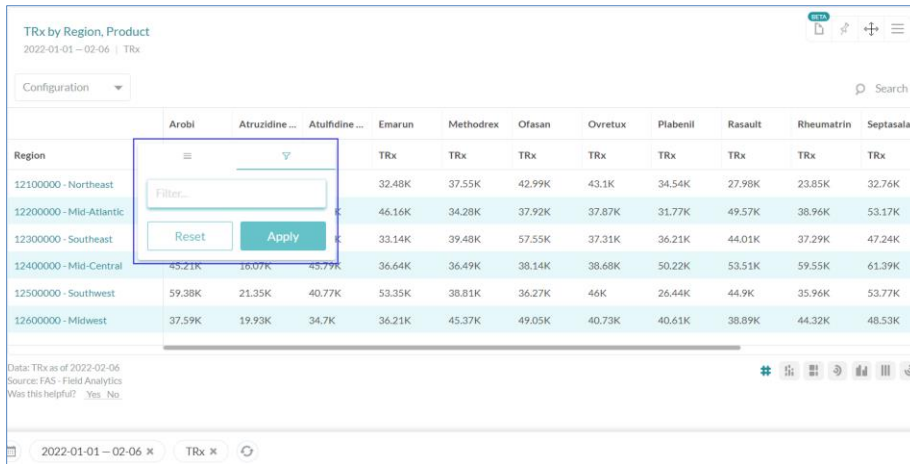
Top 2 Zip Codes by TRx Volume, NRx Volume  
2020-04-17 – 07-16 | TRx Volume, NRx Volume | CLEARWATER

Columns  
Choose Columns

Search

Zip Code	NRx Volume
1 33765	54
2 33756	0

- Click the  icon to go to the filter tab.



TRx by Region, Product  
2022-01-01 – 02-06 | TRx

Configuration Search

Region	Arobi	Atruzidine...	Atulfidine...	Emarun	Methodrex	Ofasan	Ovretux	Plabenil	Rasault	Rheumatrin	Septasalaz
12100000 - Northeast	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx	TRx
12200000 - Mid-Atlantic	32.48K	37.55K	42.99K	43.1K	34.54K	27.98K	23.85K	32.76K			
12300000 - Southeast	46.16K	34.28K	37.92K	37.87K	31.77K	49.57K	38.96K	53.17K			
12400000 - Mid-Central	33.14K	39.48K	57.55K	37.31K	36.21K	44.01K	37.29K	47.24K			
12500000 - Southwest	45.21K	18.07K	45.77K	36.64K	36.49K	38.14K	38.68K	50.22K	53.51K	59.55K	61.39K
12600000 - Midwest	59.38K	21.35K	40.77K	53.35K	38.81K	36.27K	46K	26.44K	44.9K	35.96K	53.77K
	37.59K	19.93K	34.7K	36.21K	45.37K	49.05K	40.73K	40.61K	38.89K	44.32K	48.53K

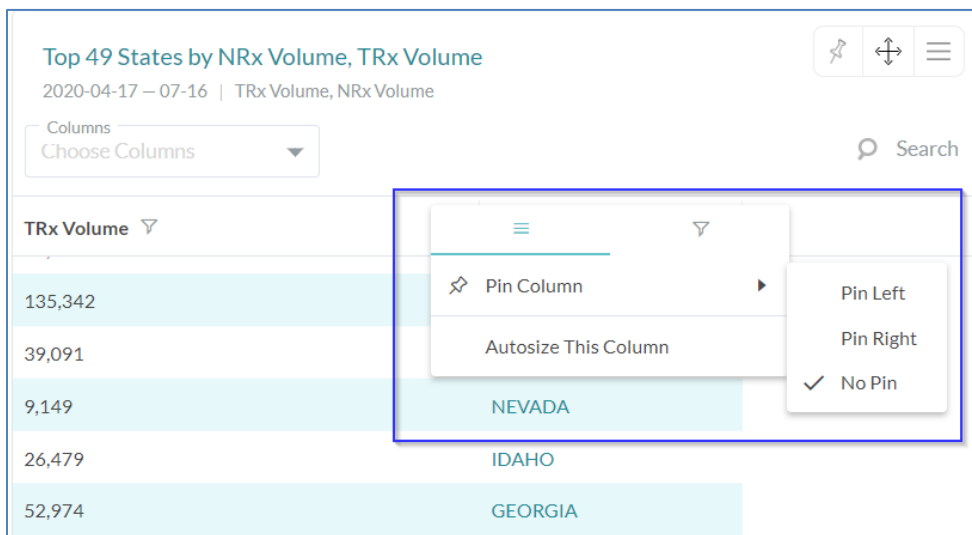
Data: TRx as of 2022-02-06  
Source: FAS - Field Analytics  
Was this helpful? Yes No

2022-01-01 – 02-06 TRx

- Select the filter condition, as required.
- In the **Filter** text box, enter the data value and click **Apply** button. WhizAI searches and displays the records according to the defined filter conditions. Also, you can click the **Reset** button to clear the searched record.

## Pinning Columns:

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



Top 49 States by NRx Volume, TRx Volume  
2020-04-17 – 07-16 | TRx Volume, NRx Volume

Columns  
Choose Columns Search

TRx Volume	
135,342	
39,091	
9,149	NEVADA
26,479	IDAHO
52,974	GEORGIA

Context Menu:

- Pin Column
- Autosize This Column
- Pin Left
- Pin Right
- No Pin

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

## Copy, and Copy with Headers Details:

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

Top Territories by TRx  
2022-01-01 – 02-06 | TRx

Configuration Search

	Territory	District	Region	TRx
1	14220822 - Red Bank, NJ	14220800 - South Je...	14200000 - Mid-Atl...	43.15K
2	14321905 - Miami S, FL	14321900 - South FL...	14300000 - Mid-Atl...	31.61K
3	12643624 - Waukegan, IL	12643600 - Iowa N...	12600000 - Mid-Atl...	31.61K
4	17190314 - Clermont, FL	17190300 - South	17100000 - Southeast	31.61K
5	13230925 - Pittsburgh S, PA	13230900 - Wester...	13200000 - Mid-Atl...	31.32K
6	12240825 - West Chester, OH	12240800 - Eastern ...	12200000 - Mid-Atl...	30.52K
7	12442501 - Chattanooga, TN	12442500 - Tennes...	12400000 - Mid-Ce...	30.18K
8	12341302 - Columbia, SC	12341300 - Sc / Ga	12300000 - Southeast	29.59K

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 Volume** column was wider as shown in the following figure:

Top 50 Cities by TRx Volume, NRx Volume  
2020-04-17 – 07-16 | TRx Volume, NRx Volume | FLORIDA

Columns Choose Columns Search

Before clicking Autosize This Column option, the width of column is longer

City	TRx Volume ↓
1 TAMPA	9.59K
2 WEST PALM BEACH	9.55K
3 PORT CHARLOTTE	8.68K
4 ORLANDO	8.65K
5 LAKE LAND	8.04K
6 WINTER HAVEN	7.89K
7 BROOKSVILLE	7.35K

After you click **Autosize This Column** option, WhizAI automatically adjusts its width as shown in the following figure:

**Top 50 Cities by TRx Volume, NRx Volume**  
2020-04-17 – 07-16 | TRx Volume, NRx Volume | FLORIDA

Columns  
Choose Columns

After clicking Autosize This Column option, the width of column is reduced

City	TRx Volume ↓	NRx Volume
1 TAMPA	9.59K	175
2 WEST PALM BEACH	9.55K	170
3 PORT CHARLOTTE	8.68K	180
4 ORLANDO	8.65K	1.23K
5 LAKE LAND	8.04K	178
6 WINTER HAVEN	7.89K	158
7 BROOKSVILLE	7.35K	162

## Pinboards

Pinboards are containers where you can attach/bookmark your important or favorite responses. Later, you can refer 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.

**My Pins** All Pinboards

**Top Accounts By Units**  
2019-12-27 – 2020-07-23 | Units

Account	Territory	Units
1 NewYork-Presbyterian Columbia University Medical Center	MANHATTAN NY	12,

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 the section [Using Pinboards & Cards](#).

# Using WhizAI on the web

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

- [Overview](#)
- [Asking a question](#)
- [Using voice to ask the question](#)
- [Viewing a response](#)
- [Viewing a response in different formats](#)
- [Response Pinning](#)
- [Creating a Board](#)

## Overview

Before you proceed, understand the following concepts:

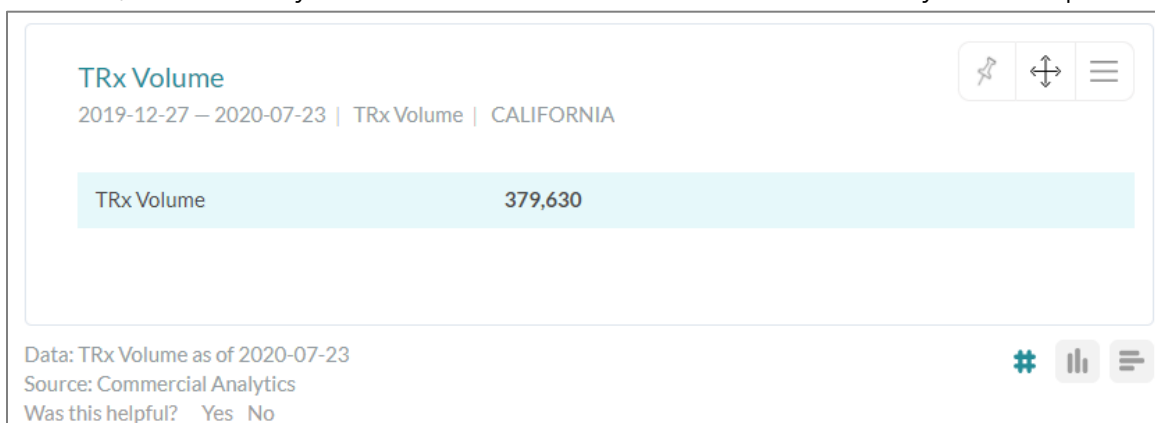
- [Context](#)
- [Follow on](#)
- [Disambiguation](#)

## 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.



Suppose, you do not want the context and wish to start over again. In this case, you need to reset the context and ask your question again. You can reset the context by entering the **Reset** command or clicking



the **Reset** icon  from the [Conversation box](#). Also, if you want to reset a specific dimension in the context, you can enter the command "**Reset <dimension name>**."

## Follow on

'Follow on' is an option that WhizAI provides to drill down a response in order to get more insights.



**Note:** The result of the follow-on may vary depending on the customizations done on WhizAI.

## Example

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

 whiz.ai Friday Nov 06, 2020 14:31

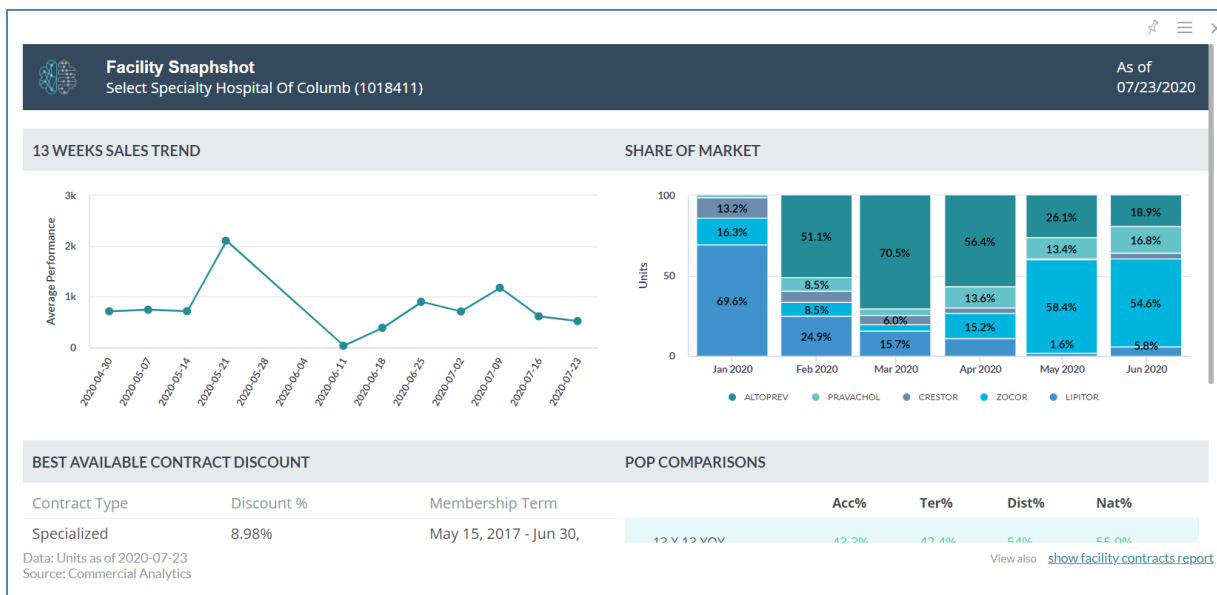
**Top 10 Accounts By Units**   

2019-05-31 – 12-26 / 2019-12-27 – 2020-07-23 | Units

	Account	Territory	Curr	Prev	Abs Chg	% Chg
1	<a href="#">Select Specialty Hospital Of Columb</a>	CLEVELAND OH	11.2K	4.7K	6.5K	139.2%
2	<a href="#">Community Regional Medical Center</a>	FRESNO CA	9.1K	4.2K	4.9K	118.5%
3	<a href="#">Christiana Hospital</a>	BALTIMORE MD	9.5K	4.9K	4.6K	95.5%
4	<a href="#">Banner Desert Medical Center</a>	PHOENIX AZ	8.5K	5.0K	3.5K	69.0%
5	<a href="#">Houston Methodist Hospital</a>	HOUSTON TX	9.4K	6.0K	3.5K	58.2%
6	<a href="#">Baylor University Hosp &amp; Phcy</a>	DALLAS TX	9.9K	6.4K	3.5K	53.7%
7	<a href="#">Texas Health Harris Methodist Hospital Fort Worth</a>	FT WORTH TX	10.0K	6.8K	3.2K	46.6%
8	<a href="#">Lehigh Valley Hospital - Cedar Crest</a>	PHILADELPHIA PA	11.4K	8.3K	3.1K	37.6%
9	<a href="#">Northside Hospital Atlanta</a>	ATLANTA GA	9.1K	6.0K	3.1K	51.2%

In this response, each account entry is hyperlinked. To follow on, you can either click the account link or enter the number of that entry in the [Conversation box](#).

Suppose you click '**Select Specialty Hospital of Columb**' account or enter **1** in the [Conversation box](#). You get the following detail response of that account:



**Note!** Don't forget to view the facility contract snapshot by clicking the **show facility contracts report** at the bottom of the response.

## 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 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 relation, 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 have to 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 "California." To resolve this ambiguity, WhizAI responds with multiple options, as shown below:

show me sales of California

**Whiz** Thursday Apr 23, 2020 13:18

What did you mean by "California"?

CA State

University Of California (UC) Health IDN Name

California Hospital Medical Center (1003653) Account

California Pacific Medical (1009940) Account

Methodist Hospital Of Southern California (1011428) Account

[Show more](#)

Here, WhizAI is unable to decide if 'California' is a state, IDN name, or an account name. You can either click any of the given option, as required, or click **Show more** to view more options.

We need 1 clarification for your original query:

show me sales of California

**California**

What did you mean by "California"?

Account IDN Name State

CA State

University Of California (UC) Health IDN Name

California Hospital Medical Center (1003653) Account

California Pacific Medical (1009940) Account

Methodist Hospital Of Southern California (1011428) Account

Central California Foundation (1008919) Account

6 results

[Apply](#)

In the **Show more** dialog box, click the appropriate button that indicates the meaning of the ambiguous term "California" and click **Apply**. Suppose, you click **State** as shown in the following figure, WhizAI responds to your question with sales details of California state:

×

We need 1 clarification for your original query:

show me sales of California

**California**

What did you mean by "California"?

Account

IDN Name

**State**


✓ CA State


6 results

Apply

Thus, you clear the ambiguity by specifying the meaning for 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.

 Whiz Thursday Apr 23, 2020 13:18

 Found 6 matching options to "California".  
Following response is based on your previous choices.

[VIEW OPTIONS](#) [DISMISS](#)

Cases

[Period: 2018-12-28 → 2020-01-23]  
[State: CA]

Cases	65,040
-------	--------

Data is available till 2020-01-23.  
Source: Life Sciences

View as: [# Table](#) [Column](#) [Bar](#)

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

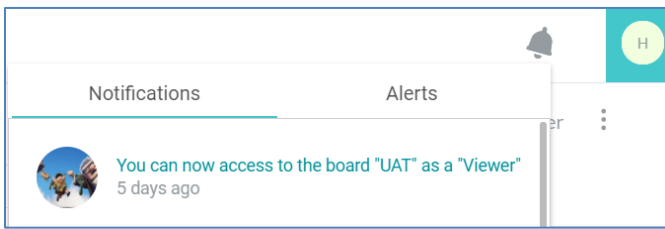
If the given response is not correct to your question in the context, you can click the **View Options** link in the message and again choose the correct option.

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 have to disambiguate the terms again from the possible options.

## Notifications

In the **Notifications** area, you can view the notifications and alerts segregated in two different sections as shown in the following figure :



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 or when a response is shared from the explorer, if the ownership of the board is transferred to you, if the access to a board is revoked, if you are assigned editing rights to a board or these rights are revoked, or 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 of the following accounts: WhizAI account, MS-Teams account, and Whiz Teams client ID.

The **Alerts** section shows messages about changes such as 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. Of course, you can always click the bell icon to view the notifications.

After you log in, WhizAI asks for a 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.

### Example

WhizAI displays a notification when another user shares a **pinboard** with you.



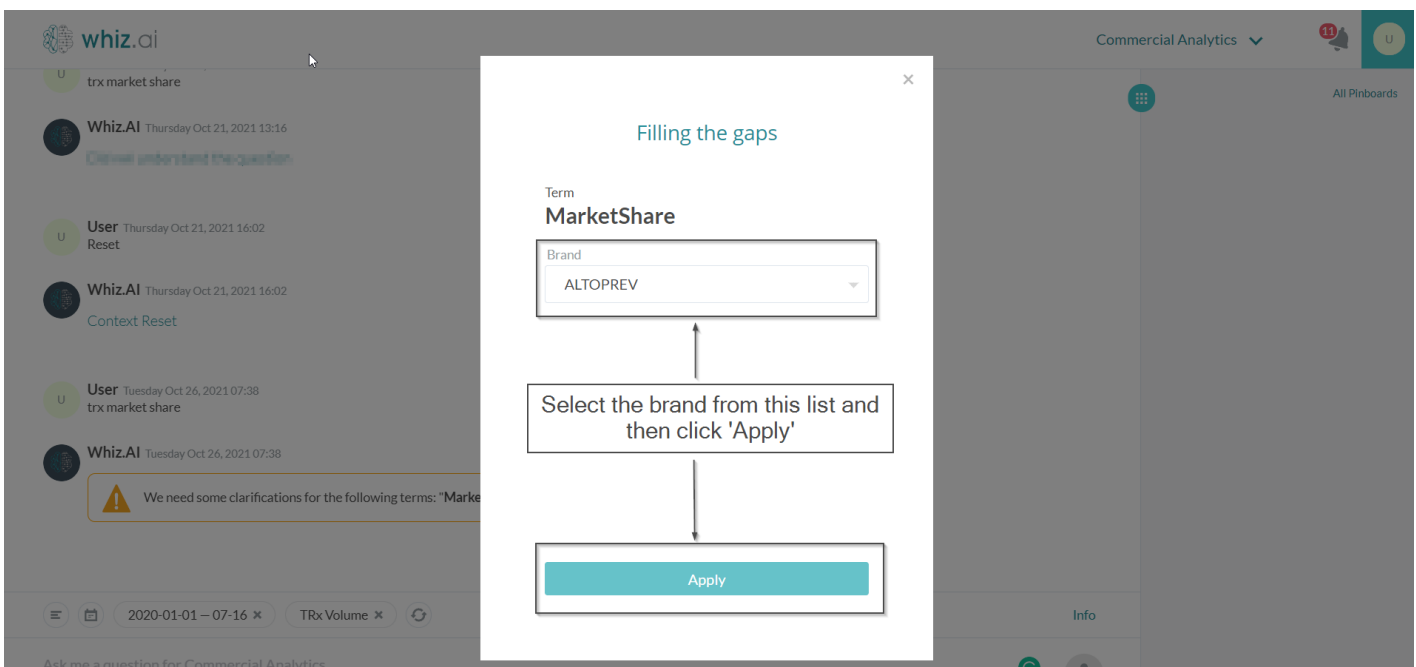
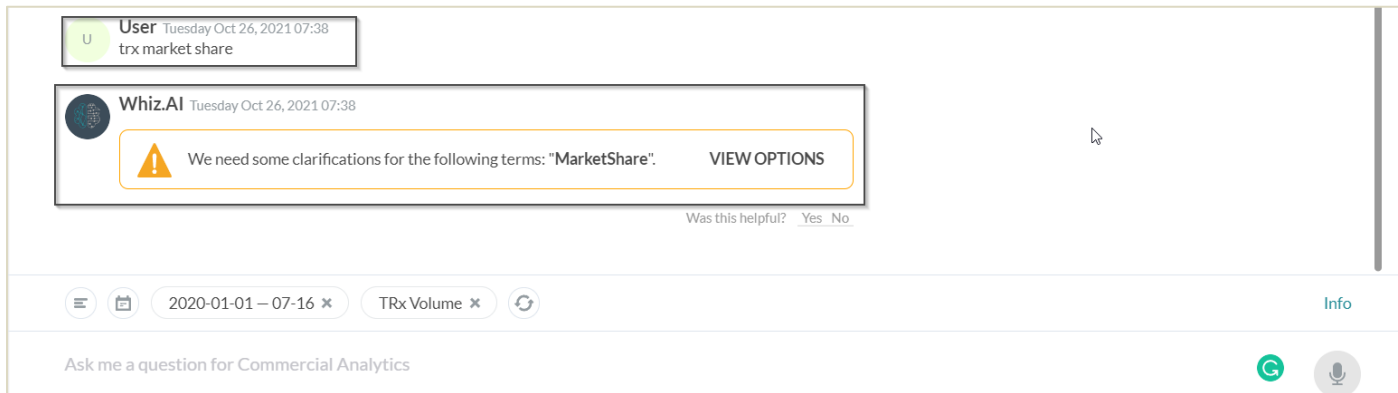
**Note!** This notification is a clickable link. You can click the link to open the shared **pinboard**.

## 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 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:



## 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 these interactions on any new channel and work without losing the context of the interaction with WhizAI.

### Example

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:*

H

Tuesday Dec 08, 2020 15:06  
 Show me top 10 accounts in boston ma

whiz.ai

Tuesday Dec 08, 2020 15:06  
 Top 10 Accounts By Units  
 2019-12-27 – 2020-07-23 | Units | BOSTON MA

	Account	Territory	Units
1	<a href="#">Boston Medical Center</a>	BOSTON MA	5,936
2	<a href="#">Beth Israel Deaconess Medical</a>	BOSTON MA	5,435
3	<a href="#">Brigham And Womens Hospital</a>	BOSTON MA	4,866
4	<a href="#">Children'S Hospital Boston</a>	BOSTON MA	4,022
5	<a href="#">Mgh Outpatient Phcy</a>	BOSTON MA	3,456
6	<a href="#">North Shore Medical Center</a>	BOSTON MA	2,742
7	<a href="#">Lahey Clinic Hospital Inc</a>	BOSTON MA	2,661
8	<a href="#">Newton-Wellesley Hospital</a>	BOSTON MA	2,640

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.

Today

2:53 AM context

Whiz.AI Demo 2:53 AM

[Period: 2018-12-28,2020-01-23]  
 [Territory: BOSTON MA]  
 [Metrics: Cases]

Type your questions here

## Asking a question

- Enter your question in the [Conversation box](#). For example: *Show me the top 10 accounts by cases*.
- (Optional) Use 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.

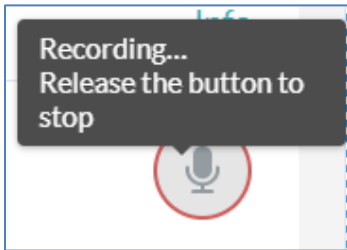
## Using voice to ask a question

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 a 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:



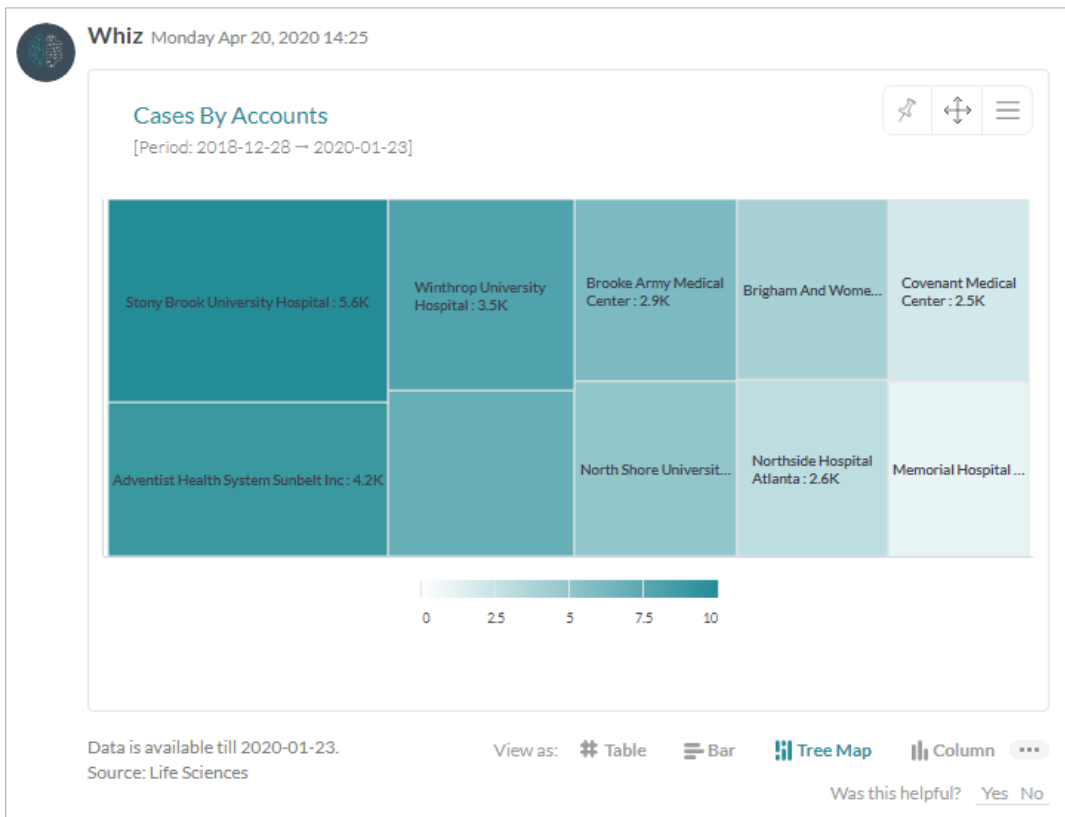
**Note!** You have to hold the click till you finish speaking your question.

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.ai Monday Mar 29, 2021 13:49

TRx Volume, NRx Volume

Period: 2021-02-05 — 03-04 / 03-05 — 04-01 | Metrics: TRx Volume, NRx Volume

Metrics ↑↓	2021-W10,2021-W13/2021-W06,2021-W09				2021-W06,2021-W13/2020-W51,2021-W05			
	Curr ↑↓	Prev ↑↓	Abs Chg ↑↓	% Chg ↑↓	Curr ↑↓	Prev ↑↓	Abs Chg ↑↓	% Chg ↑↓
TRx Volume	730.62K	1.36M	-630K	-5K%	2.09M	1.72M	+374K	+2K%
NRx Volume	79.57K	136.01K	-56K	-4K%	215.58K	175.26K	+40K	+2K%

Data: TRx Volume, NRx Volume as of 2021-04-22  
Source: Commercial 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.ai Monday Mar 29, 2021 13:49

TRx Volume, NRx Volume

Period: 2021-02-05 — 03-04 / 03-05 — 04-01 | Metrics: TRx Volume, NRx Volume

Metrics ↑↓	2021-W10,2021-W13/2021-W06,2021-W09				2021-W06,2021-W13/2020-W51,2021-W05			
	Curr ↑↓	Prev ↑↓	Abs Chg ↑↓	% Chg ↑↓	Curr ↑↓	Prev ↑↓	Abs Chg ↑↓	% Chg ↑↓
TRx Volume	730.62K	1.36M	-630K	-5K%	2.09M	1.72M	+374K	+2K%
NRx Volume	79.57K	136.01K	-56K	-4K%	215.58K	175.26K	+40K	+2K%

Data: TRx Volume, NRx Volume as of 2021-04-22  
Source: Commercial Analytics  
Was this helpful? [Yes](#) [No](#)

## Switching between multi-calendars

Based on the metrics included in the questions, WhizAI, switches between Gregorian and Custom calendars and then shows the response.

Let's say you ask a question that involves two metrics and each of these metrics caters to a different calendar. In this case, WhizAI identifies these metrics from the question, switches to the relevant calendars i.e., Gregorian or Custom Calendar, and displays the corresponding response.

However, on pinboards, if the card has multiple metrics and calendars, then an error message is displayed "Metrics in the cards have different calendars type".

## Viewing response in different formats

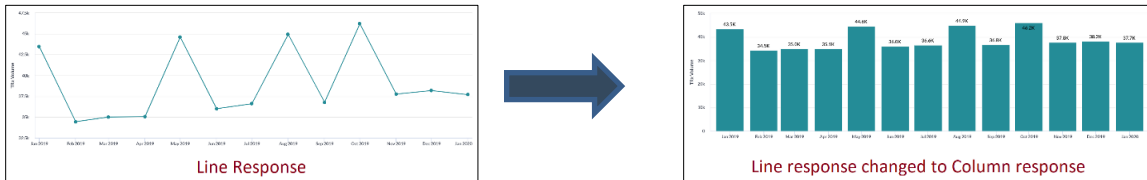
WhizAI has options to change the format in which you can view a response.

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 provided a response. 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 of 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 the 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 the Explorer.

Currently, this list of suggestions is drawn from the query history of a particular user. These are possible 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 be helpful in deriving meaningful insights from the data shown in the response. They guide you in taking informed decisions.

## 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.

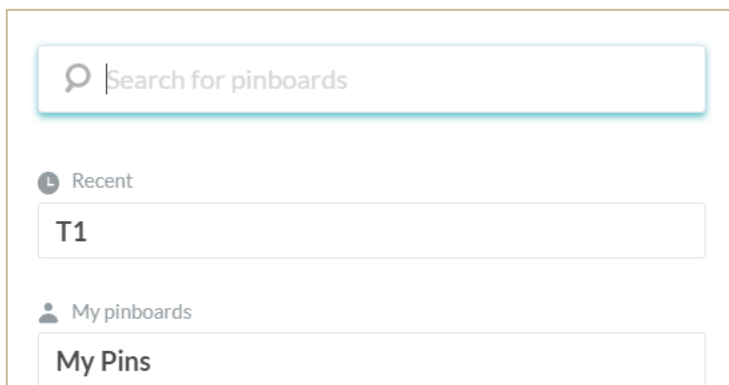
1. Enter your question in the [Conversation box](#). The [Response box](#) displays the response to your question. The response can be in the form of text, table, or chart.
2. Click the **Pin Message** option available from the response options.



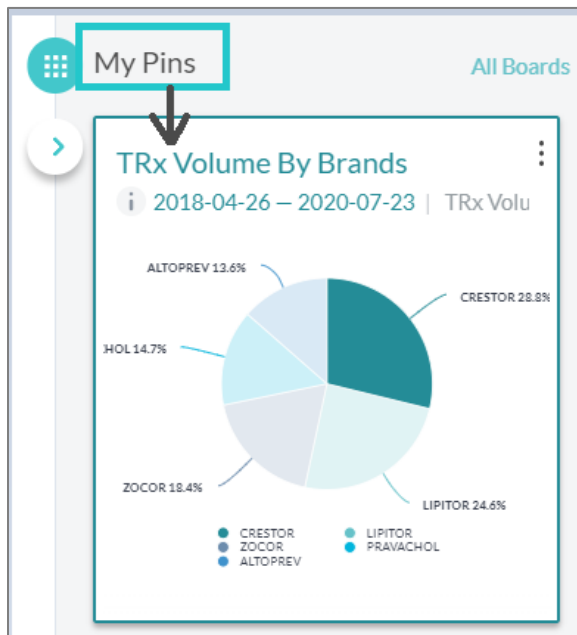
3. Select a board from the available board list. For more information, see [Creating a Board](#).



**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 Pinboards & Cards

- [Creating a Pinboard](#)
- [Editing Pinboard's name](#)
- [Editing layout of a Pinboard](#)
- [Adding Filters to Cards and Pinboards](#)
- [Adding Cascading Filters to Pinboards](#)
- [Adding Hierarchy Pinboard Filters](#)
- [Adding Computation Filters to Pinboards](#)
- [Annotations in Cards](#)
- [Changing Values of Applied Filters](#)
- [Configuring Filter Settings](#)
- [Follow-on from Cards](#)
- [Changing Card Formats](#)
- [Downloading Data from Cards](#)
- [Exporting Pinboards to PDF or PPT](#)
- [Locking Filters in Cards](#)
- [Copying Pinboards](#)
- [Highlighting Cards on Pinboards](#)
- [Moving Pinboards across Environments](#)
- [Opening Pinboards from Explorer](#)
- [Opening Pinboards from Cards](#)
- [Setting a different Reference Date](#)

- [Updating Data on Pinboards and Cards](#)
- [Renaming Cards in Pinboards](#)
- [Slicers in Pinboards and Cards](#)
- [Sharing a Pinboard with others](#)
- [Sharing Pinboards and Cards with User Groups](#)
- [Stop following a pinboard](#)
- [Transferring Ownership of Pinboards](#)
- [Viewing Cards in Full Screen Mode](#)
- [Renaming Cards from Pinboards](#)
- [Removing the Pinboard sharing](#)
- [Deleting a card from a Pinboard](#)
- [Deleting a Pinboard](#)



**Note!** Pinboards and cards show only that 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.

## Creating a Pinboard

### Method 1

1. From the top right corner of a response, click the pin icon. WhizAI shows a list of pinboards as shown in the following figure:

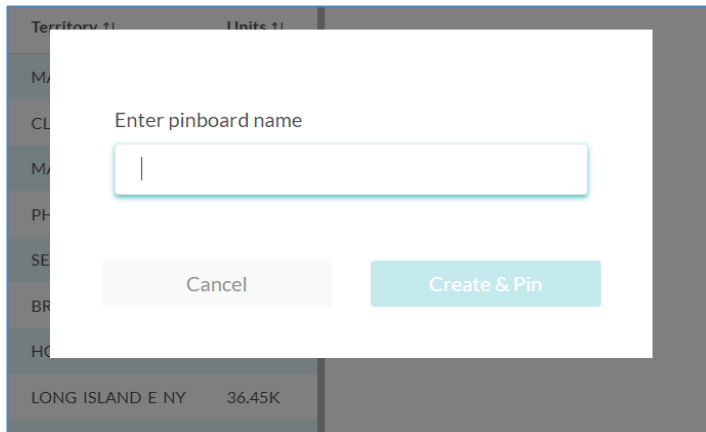
The screenshot shows the WhizAI interface. At the top, it says 'WhizAI Monday Jul 26, 2021 16:52'. Below this is a card titled 'Top 10 Accounts by Units' with a subtitle 'Period: 2020-01-01 — 07-16 | Metric: Units'. The card contains a table with two columns: 'Account T1' and 'Territory T1'. The table lists 10 accounts, with the first 7 rows highlighted in light blue. To the right of the table, a dropdown menu is open, showing a search bar 'Search for pinboards' and a list of pinboards: 'My pinboards', 'My Pins', 'My board', and 'TRx Data'. At the bottom of the dropdown is a button '+ Create New Pinboard'. At the bottom of the main interface, there is a navigation bar with a menu icon, a calendar icon, and a date range '2020-01-01 — 07-16' with a close icon, followed by a 'Units' button and a refresh icon.

Account T1	Territory T1	
1 NewYork-Presbyterian Columbia University Medical Center	MANHATTAN NY	
2 Select Specialty Hospital Of Columb	CLEVELAND OH	
3 NewYork-Presbyterian / Weill Cornell Medical Center	MANHATTAN NY	
4 Lehigh Valley Hospital - Cedar Crest	PHILADELPHIA PA	
5 Providence Health & Services - Oregon	SEATTLE WA	
6 Yale - New Haven Hospital	BRIDGEPORT CT	
7 Houston Methodist Hospital	HOUSTON S TX	
8 North Shore University Hospital Inc	LONG ISLAND E NY	36.45K
9 Baylor University Hosp & Phcy	DALLAS TX	36.29K
10 UC Davis Medical Center	SACRAMENTO CA	35.01K



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


2. To add a pinboard, click **+ Create New Pinboard**. WhizAI displays a text box where you can enter a name for the board.

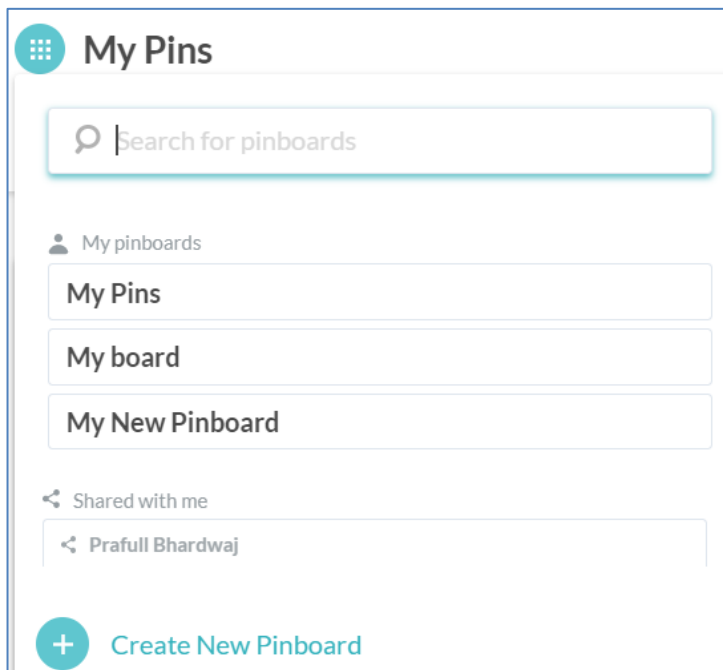
A screenshot of a web application showing a modal dialog box titled "Enter pinboard name". The dialog has a text input field with a cursor inside. Below the input field are two buttons: "Cancel" and "Create & Pin". The background is a blurred view of a map or data visualization.

3. Enter the name for the **pinboard** and then click **Create & Pin** to create the new **pinboard**. The newly added **pinboard** is added to the list of **pinboards** and the response is pinned to it.

### Method 2

To create a board, from the main board's panel, complete the following steps:

1. From the [Explorer](#), click **All Pinboards** to open the main pinboard's page.
2. From the main pinboard's page, click  and then click **+ Create New Pinboard**.

A screenshot of the "My Pins" page in a web application. The page has a header with a pinboard icon and the title "My Pins". Below the header is a search bar with the placeholder text "Search for pinboards". Under the search bar, there is a section titled "My pinboards" with three items: "My Pins", "My board", and "My New Pinboard". Below this section is a section titled "Shared with me" with one item: "Prafull Bhardwaj". At the bottom of the page is a button with a plus icon and the text "Create New Pinboard".

3. In the **Enter pinboard name** field, enter a name for the pinboard, as required.

Enter pinboard name

Cancel Create

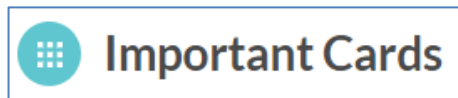
4. Click **Create**. WhizAI creates the new board and opens it as the active pinboard. Also, you can click **All Pinboards** from the **Explorer** to view all the pinboards.

## Editing Pinboard name

1. From the [Explorer](#), click **All Pinboards** to open the main pinboard's layout page.
2. Open the pinboard to update the pinboard name.
3. Click the pinboard name, WhizAI allows you to edit the name, as required.



4. Update the pinboard name, as required, and click outside the text-box. WhizAI saves the updated pinboard name as shown in the following figure:




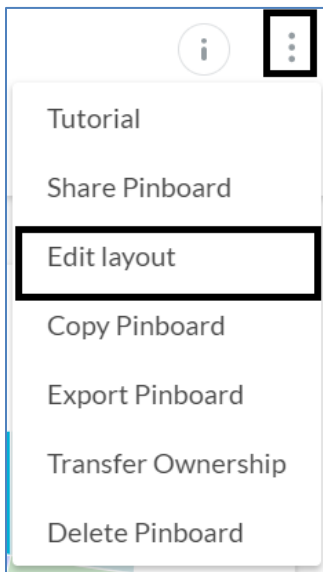
## Editing layout of a Pinboard

When you pin a lot of responses, you may need to rearrange the pinned responses to view the important responses. WhizAI provides the option to edit the layout of the **pinboard**. While editing, you can either resize the pinned responses or rearrange the pinned responses.



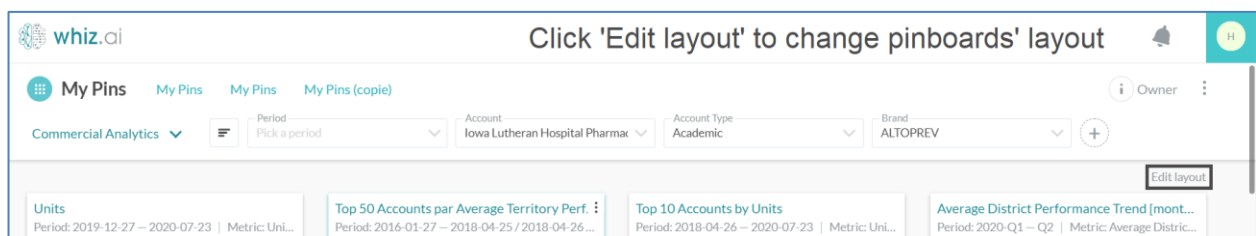
**Note:** The **Edit Layout** option is available only if the board contains at least one pinned response. Also, you shall not see the **Edit Layout** option if the board is shared with you.

1. From the [Explorer](#), click **All Pinboards** to open the main pinboard's layout page.
2. Open the pinboard for which you want to change the layout, click  and then click **Edit layout**.



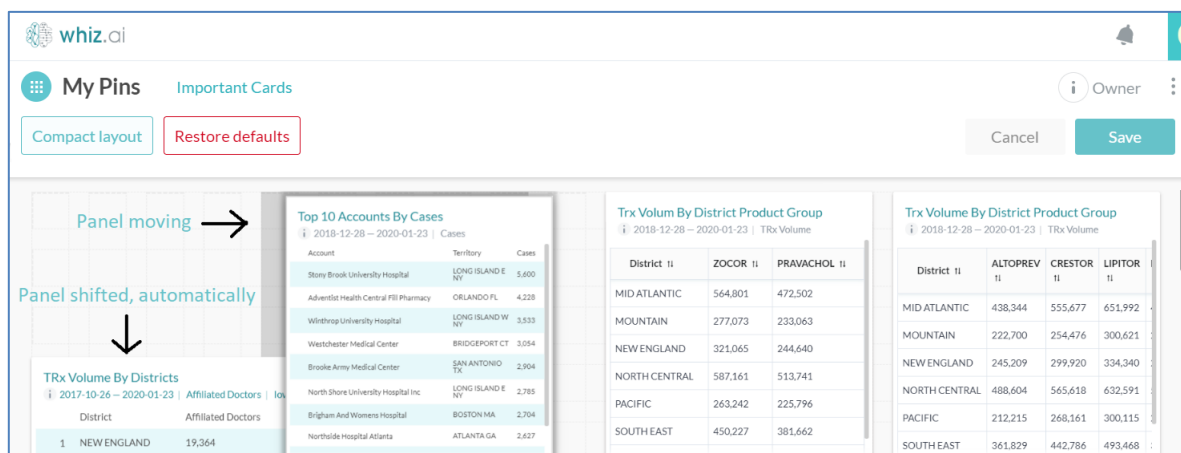
OR

1. Open the pinboard for which you want to change the layout and then click **Edit Layout** as shown in the following figure:



**Note!** You cannot change the layout of a "shared" board.

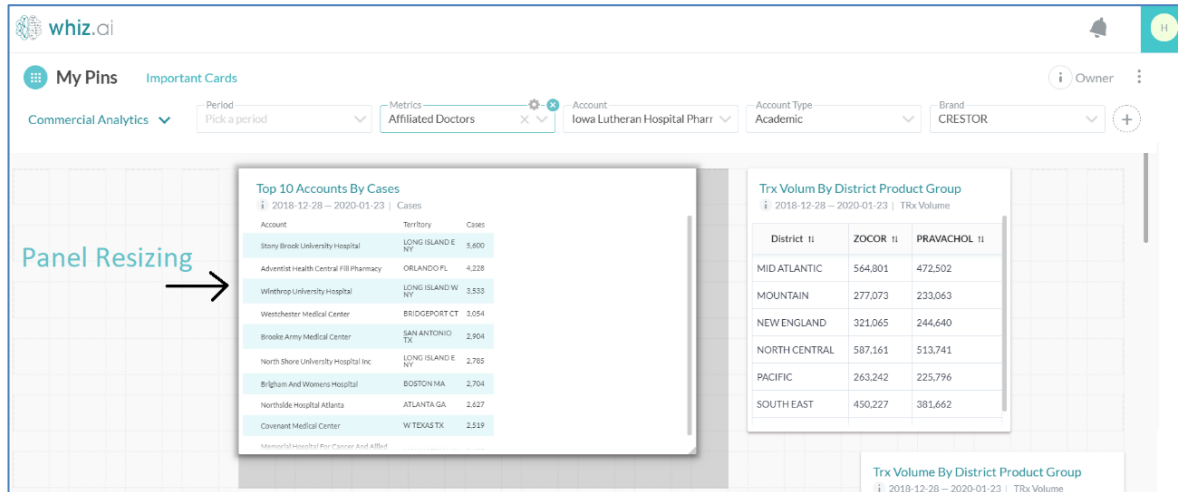
2. Rearrange the pinned messages according to your requirements.
3. Hold the pinned response panel and drag it on the interface to rearrange.



4. Resize the pinned messages as per your requirements.



- Hold the cursor at the edge of the pinned response panel and then drag the panel to resize it.



- Click **Save** to save the changes to the board layout.



**Note!** If you click the **Compact Layout** button, WhizAI aligns all the cards to fit your screen or you may choose to restore the changes to default settings by clicking the **Restore Defaults** button.

## 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.

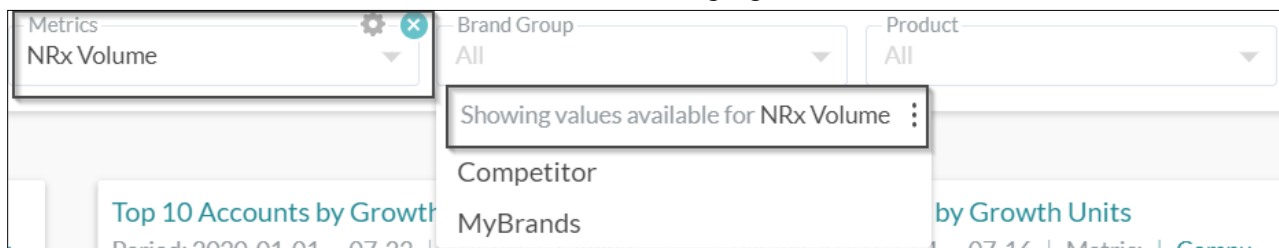


**Remember!** When you (as a board owner or editor) 'apply' filters, the data is updated only for you.


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 changes.

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 affects 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:

Top 50 Accounts By Units  
Period: 2019-05-31 - 2019-12-26 / 2019-12-27 - 2020-07-23 | Metric: Units

No filters  ← **Currently, no filters are added**

	Account	Territory	Curr	Prev	Abs Chg	% Chg
1	Select Specialty Hospital Of Columb	CLEVELAND OH	11.2K	4.7K	6.5K	139.2%
2	Community Regional Medical Center	FRESNO CA	9.1K	4.2K	4.9K	118.5%
3	Christiana Hospital	BALTIMORE MD	9.5K	4.9K	4.6K	95.5%
4	Banner Desert Medical Center	PHOENIX AZ	8.5K	5.0K	3.5K	69.0%
5	Houston Methodist Hospital	HOUSTON S TX	9.4K	6.0K	3.5K	58.2%
6	Baylor University Hosp & Phcy	DALLAS TX	9.9K	6.4K	3.5K	53.7%
7	Texas Health Harris Methodist Hospital Fort Worth	FT WORTH TX	10.0K	6.8K	3.2K	46.6%
8	Lehigh Valley Hospital - Cedar Crest	PHILADELPHIA PA	11.4K	8.3K	3.1K	37.6%
9	Northside Hospital Atlanta	ATLANTA GA	9.1K	6.0K	3.1K	51.2%
10	University Of Kansas Hospital Retail	KANSAS CITY KS	6.7K	3.7K	3.0K	81.4%
11	Medical Center Of Central Geo	COLUMBIA SC	6.9K	3.9K	3.0K	75.1%
12	Grossmont Hospital Pharmacy	SAN DIEGO CA	4.5K	1.5K	3.0K	196.4%

As you can see in the above figure, no filters are added. Now, if you add the 'Account' 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:

Top 50 Accounts By Units  
 Period: 2016-01-27 – 2018-04-25 / 2018-04-26 – 2020-07-23 | Metric: Units | Account: Christiana Hospital | Account Type: Academic | Brand: CRESTOR

Account: Christiana Hospital

← Account filter is added & highlighted in the context

	Account	Territory	Curr	Prev	Abs Chg	% Chg
1	Adventist Health Central Ill Pharmacy	ORLANDO FL	7.2K	-	7.2K	-%
2	Westchester Medical Center	BRIDGEPORT CT	5.8K	-	5.8K	-%
3	North Shore University Hospital Inc	LONG ISLAND E NY	4.7K	-	4.7K	-%
4	Covenant Medical Center	W TEXAS TX	4.6K	-	4.6K	-%
5	Northside Hospital Atlanta	ATLANTA GA	4.5K	-	4.5K	-%
6	St Elizabeth Med Ctr- Covington	CINCINNATI OH	4.1K	-	4.1K	-%
7	Hackensack University Medical Center	WHITE PLAINS NY	4.0K	-	4.0K	-%
8	Ny Soc For The Relief Of Ruptured And Cr	MANHATTAN NY	3.8K	-	3.8K	-%
9	University Of Texas Md Anderson Cancer	HOUSTON S TX	3.3K	-	3.3K	-%
10	Memorial Hospital (1011328)	HOUSTON N TX	2.9K	-	2.9K	-%
11	Brigham And Womens Hospital	BOSTON MA	2.8K	-	2.8K	-%

Variance Bar Column



**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 display corresponding data in the cards.

In the 'Period' filter, you can see a date input field where you can enter the date range to filter data for those dates. If data is not available for the specified date range. When entering the dates, make sure that you enter the date in the correct format - YYYY-MM-DD. Also, check that the 'To' date is not greater than 'From' date.



**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.



**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.

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.

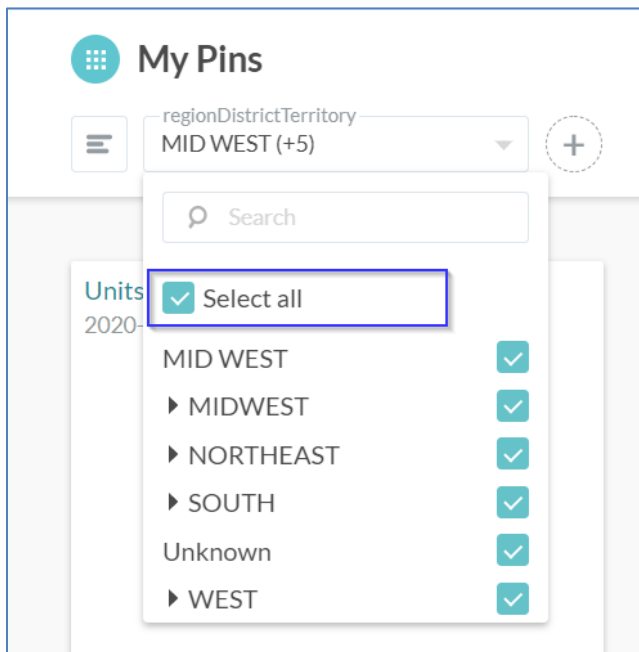


**Remember!** If required, Administrator users can configure WhizAI to make any of the above-mentioned time buckets unavailable. Thus, these filter values do not get displayed in the 'Period' filter. For more information on the different configuration options, check the '[Configurations](#)' section.


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).

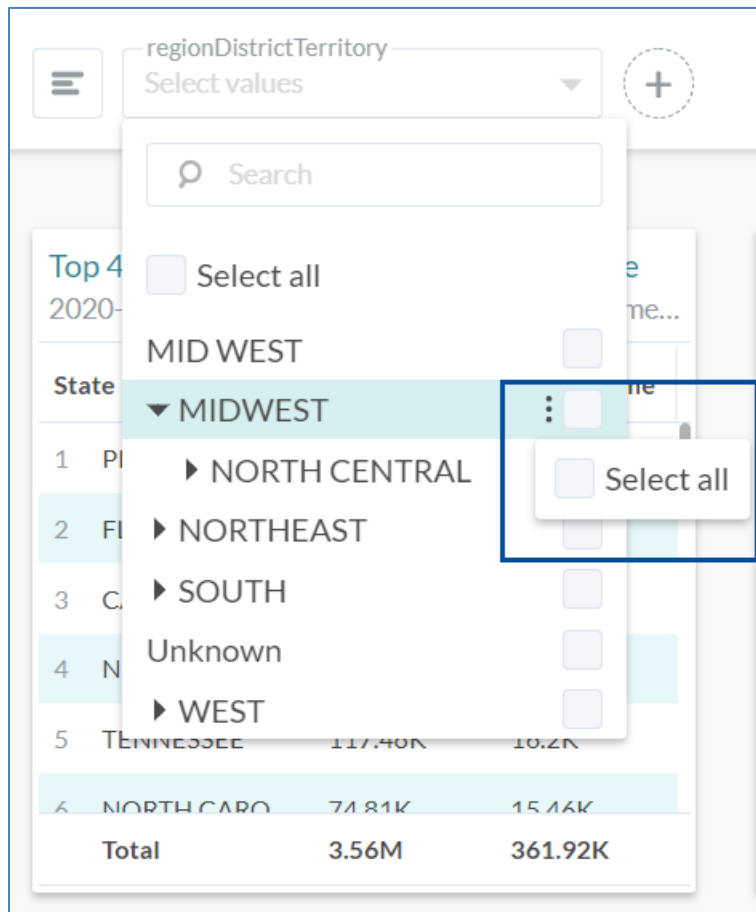
Thus, instead of selecting individual options from a very long list, now, you can click just one check box.

For example, if you add regionDistrictTerritory 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.

regionDistrictTerritory  
Select values

Search

☐ Select all

MID WEST

▼ MIDWEST

▼ NORTH CENTRAL

CHICAGO IL

DES MOINES IA

DETROIT MI

INDIANAPOLIS IN

KANSAS CITY KS

☐ Select all

Total 3.56M 361.92K



**Important!** The **Select all** check box can be seen only if the **Multiple values** option is enabled for a filter. Please refer the product user manual for details on how to enable the multi-select option.

Filter settings

☐ Mandatory ☒ Multiple values [Restore defaults](#)

Cancel Apply



**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 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.

TRx by Region, Product Group, Product

Reference Date: 2022-02-06 | Period: 2022-01-01 – 2022-02-06 | Metric: TRx

Columns

Search

Columns

Competitor

MyBrands

	truzidine ...	Atulfidine ...	Emarun	Methodrex	Ofasan	Ovretux	Rasault	Septasalaz...	Tablunomide	Trexine	Tychoxychl...	
12200000 - Mid-Atlantic	35,125.65	37,815.05	44,372.90	46,164.42	34,276.40	37,917.77	37,870.21	49,565.01	53,165.34	47,548.29	38,376.23	41,327.82
12300000 - Southeast	43,713.65	25,056.11	51,343.69	33,139.74	39,483.51	57,548.02	37,309.14	44,008.37	47,240.18	30,928.32	34,965.44	42,318.15
12400000 - Mid-Central	45,211.30	16,069.88	45,786.40	36,637.47	36,493.93	38,139.40	38,678.65	53,508.15	61,389.99	43,828.88	49,283.47	42,198.62
12500000 - Southwest	59,378.41	21,347.55	40,774.29	53,354.90	38,812.06	36,267.03	45,996.16	44,895.73	53,766.55	40,571.95	40,949.68	44,674.66
12600000 - Midwest	37,592.83	19,931.54	34,695.43	36,210.54	45,365.99	49,048.92	40,728.60	38,894.77	48,533.70	39,201.30	47,201.95	40,064.84
12700000 - West	40,653.29	18,621.27	35,646.22	27,078.67	38,596.81	45,298.53	44,907.04	39,035.73	34,020.84	29,638.28	32,143.45	37,663.48
13100000 - Northeast	34,542.65	23,098.99	24,413.64	25,022.78	17,712.83	25,274.09	27,296.26	31,748.58	33,805.86	20,688.08	35,755.74	23,604.52
13200000 - Mid-Atlantic	37,880.94	27,545.02	44,020.38	42,129.04	43,197.32	54,499.54	42,787.87	45,317.20	51,692.49	45,896.75	63,869.15	46,421.64

Data: TRx as of 2022-02-06

Source: FAS - Field Analytics

## To add filters to cards:

1. Open the card from **pinboard** and then click **Show Filters**.

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My P

Top 50 Accounts By Units

Period: 2019-05-31 – 2019-12-26 / 2019-12-27 – 2020-07-23 | Metric: Units

1. Expand the card and click 'Show Filters' → Show Filters

Account	Territory	Curr	Prev	Abs Chg	% Chg
1 Select Specialty Hospital Of Columb	CLEVELAND OH	11,219	4,690	6,529	139.2%

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My P

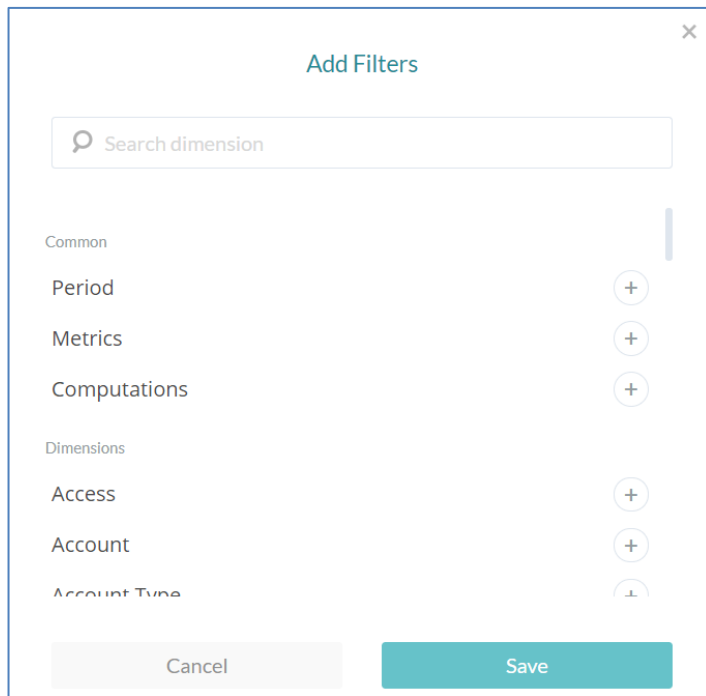
Top 50 Accounts By Units

Period: 2019-05-31 – 2019-12-26 / 2019-12-27 – 2020-07-23 | Metric: Units

Add Filters + 2. Click + icon to add filters

Account	Territory	Curr	Prev	Abs Chg	% Chg
1 Select Specialty Hospital Of Columb	CLEVELAND OH	11,219	4,690	6,529	139.2%

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.



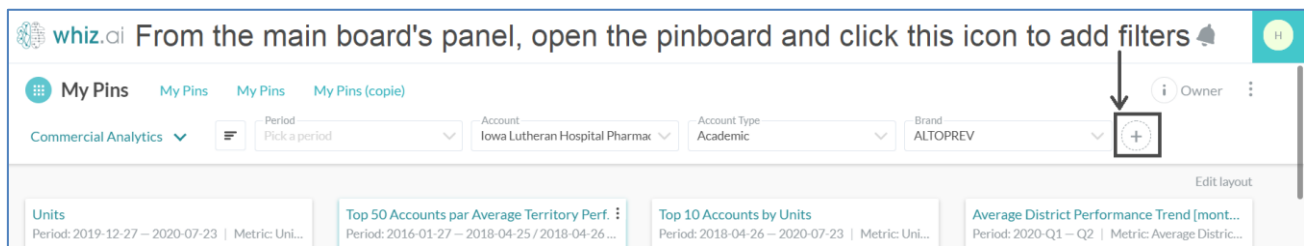
3. You can search the dimension or select the dimension from the list and then click **Save** to add the filter to the card.

## To add filters to Pinboards:

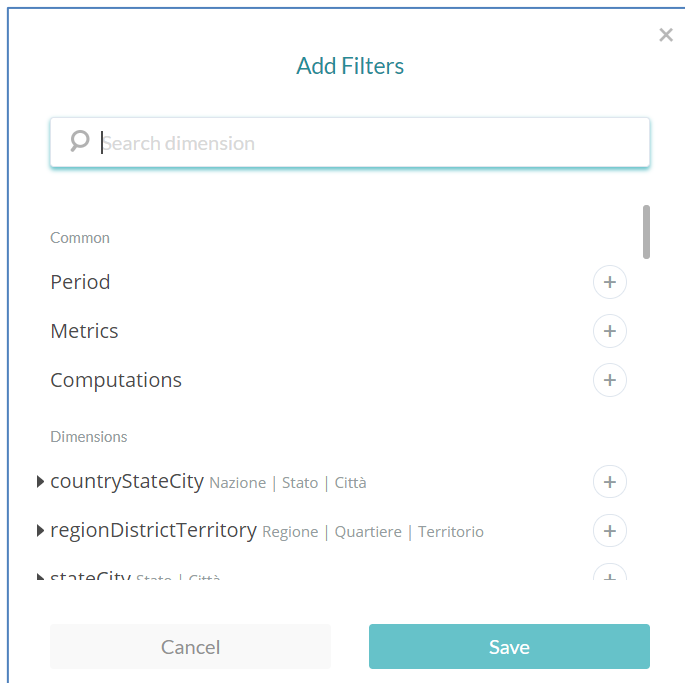
1. Open the **pinboard** and then click  to add filters to the **pinboard**. WhizAI shows the **Add Filters** dialog.



**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 display corresponding data in the cards.







2. You can search the dimension or select the dimension from the list and then click **Save** to add the filter to the **pinboard**.

### Viewing Filter Search Results in Cards

If you apply filters to cards or pinboards, WhizAI completes the search, highlights the result and places it on the first page of that card. Thus, leading to a better user experience.

Imagine a scenario when the searched result is not on the first page, instead, it is seated on some subsequent page.

With this functionality, you don't have to manually navigate to that page to view the searched data; WhizAI pulls the search result and places it straightaway on the first page.

whiz.ai

7th Sept 24th August 2021 26th Aug 2021

Add Filters

Data does not exist on first page in this card

Top 50 Territories by TRx Volume

Period: 2021-01-01 – 03-25 | Metric: TRx Volume

Territory	TRx Volume
1 SEATTLE WA	134.19K
2 PHILADELPHIA PA	123.73K
3 SHREVEPORT LA	115.04K
4 SPRINGFIELD IL	100.68K
5 NASHVILLE TN	98.33K
6 TAMPA FL	89.45K
7 RICHMOND VA	78.11K
8 KANSAS CITY KS	75.43K
9 WASHINGTON DC	74.76K
10 INDIANAPOLIS IN	73.36K

Top 50 Territories by NRx Volume

Period: 2021-01-01 – 03-25 | Metric: NRx Volume

Territory	NRx Volume
1 PHILADELPHIA PA	16.56K
2 PHOENIX AZ	15.3K
3 NASHVILLE TN	13.43K
4 HARTFORD CT	12.32K
5 MILWAUKEE WI	11.93K
6 MIAMI FL	11.69K
7 RALEIGH NC	10.64K
8 DETROIT MI	10.41K
9 NEWARK NJ	10.14K
10 PITTSBURGH PA	9.98K

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7th Sept 24th August 2021 26th Aug 2021

Territory Filter applied to a board

Reset Changes Save Changes Edit layout

Top 10 Territories by TRx Volume

Period: 2021-01-01 – 03-25 | Metric: TRx Volume | District: SOUT...

Territory	TRx Volume
1 NASHVILLE TN	98.33K
2 TAMPA FL	89.45K
3 ORLANDO FL	65.52K
4 MIAMI FL	62.54K
5 RALEIGH NC	48.1K
6 COLUMBIA SC	35.5K
7 CHARLOTTE NC	22.11K
8 JACKSONVILLE FL	21.63K
9 ATLANTA GA	20.71K
10 BIRMINGHAM AL	11.68K

Top 10 Territories by NRx Volume

Period: 2021-01-01 – 03-25 | Metric: NRx Volume | District: SOUT...

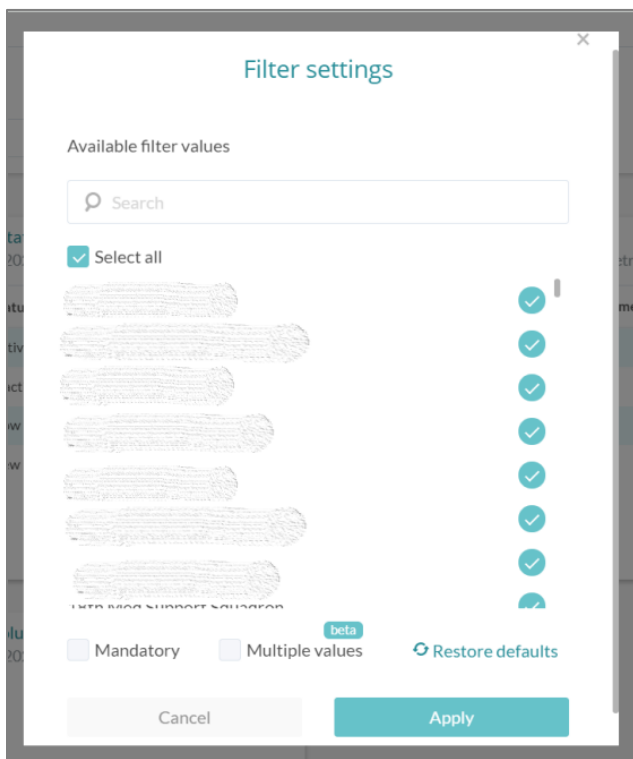
Territory	NRx Volume
1 NASHVILLE TN	13.43K
2 MIAMI FL	11.69K
3 RALEIGH NC	10.64K
4 ORLANDO FL	8.14K
5 JACKSONVILLE FL	3.65K
6 COLUMBIA SC	3.29K
7 CHARLOTTE NC	3.11K
8 TAMPA FL	2.31K
9 BIRMINGHAM AL	1.88K
10 ATLANTA GA	1.56K

Filter results displayed

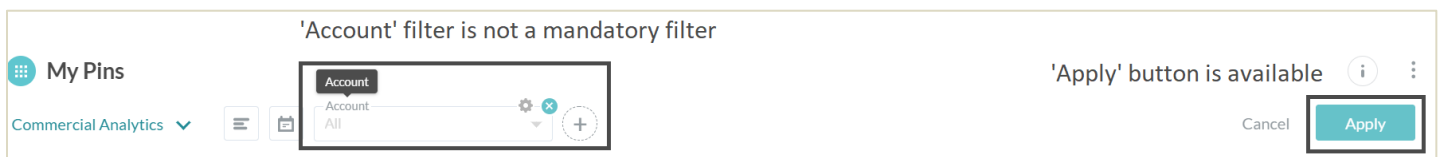
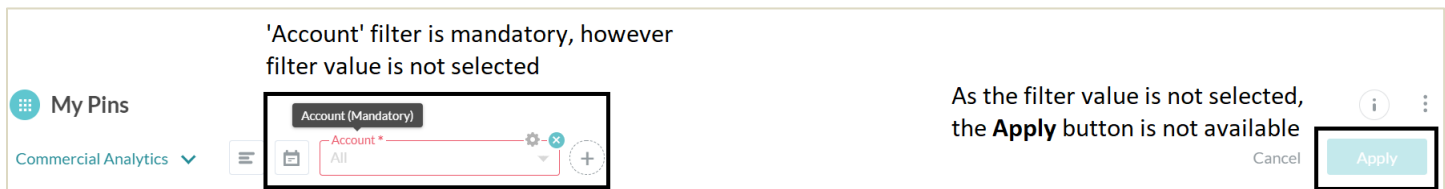
## Configuring Mandatory Pinboard Filters

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** check-box as shown in the following figure and then click **Apply**.



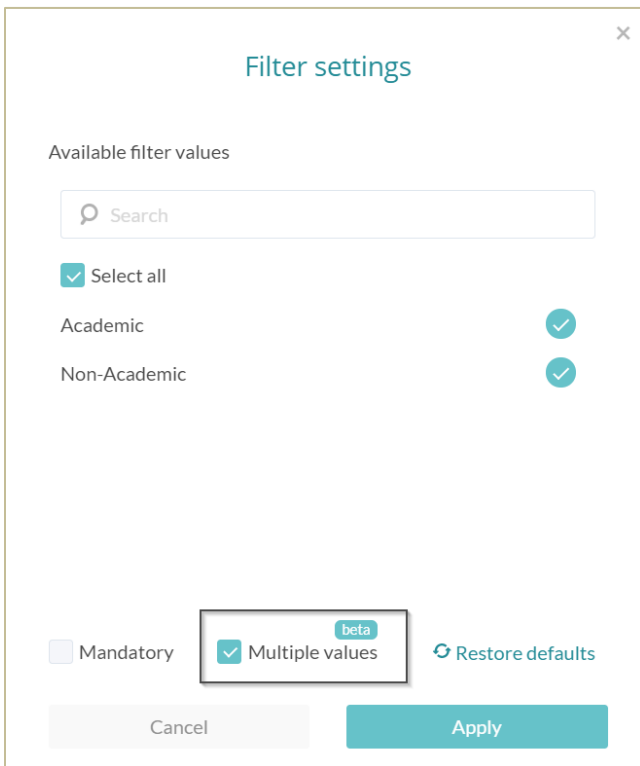
**Remember!** After a filter is configured as 'Mandatory', it is required to have some value selected in the filters. Such Mandatory filters cannot be empty. The button to apply the filters on pinboards is available only if the Mandatory filters contain values, as shown in the following figure:



## 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:



**Filter settings**

Available filter values

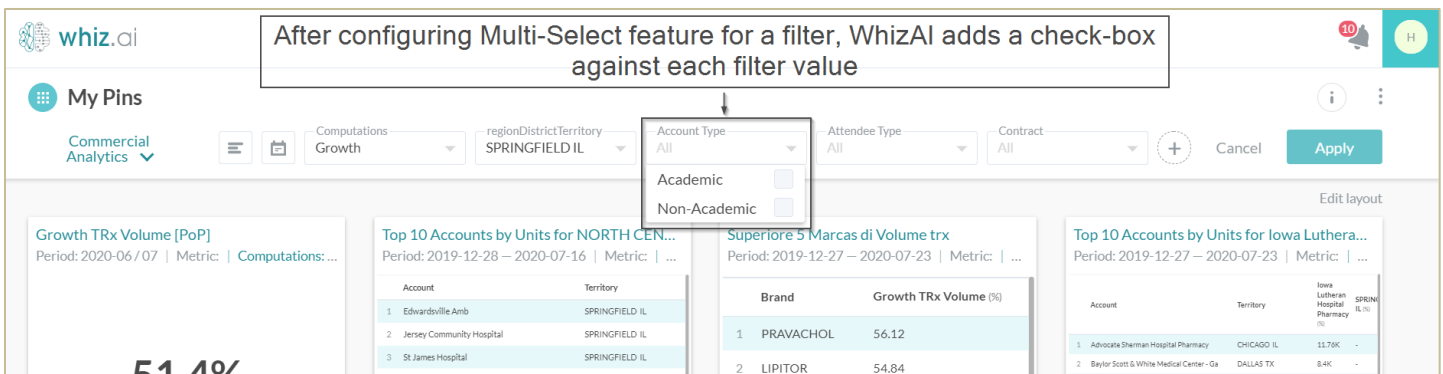
☒ Select all

Academic ☒

Non-Academic ☒

☐ Mandatory ☒ Multiple values beta [Restore defaults](#)

After this configuration, WhizAI shows a check-box against each filter value. You can select either one or multiple filter values and click **Apply** to filter the data.



After configuring Multi-Select feature for a filter, WhizAI adds a check-box against each filter value

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My Pins

Commercial Analytics

Computations: Growth

regionDistrictTerritory: SPRINGFIELD IL

Account Type: All

Attendee Type: All

Contract: All

Account Type

All

Academic ☐

Non-Academic ☐

Growth TRx Volume [PoP]

Period: 2020-06 / 07 | Metric: | Computations: ...

51.10%

Top 10 Accounts by Units for NORTH CEN...

Period: 2019-12-28 – 2020-07-16 | Metric: | ...

Account	Territory
1. Edwardsville Amb	SPRINGFIELD IL
2. Jersey Community Hospital	SPRINGFIELD IL
3. St James Hospital	SPRINGFIELD IL

Superiore 5 Marcos di Volume trx

Period: 2019-12-27 – 2020-07-23 | Metric: | ...

Brand	Growth TRx Volume (%)
1. PRAVACHOL	56.12
2. LIPITOR	54.84

Top 10 Accounts by Units for Iowa Luthera...

Period: 2019-12-27 – 2020-07-23 | Metric: | ...



Account	Territory	Iowa Lutheran Hospital Pharmacy (%)	SPRINGFIELD IL (%)
1. Advocate Sherman Hospital Pharmacy	CHICAGO IL	11.76K	-
2. Baylor Scott & White Medical Center - Ga	DALLAS TX	8.4K	-

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 selection of multiple values, the slicer also allows multiple values to be selected for that particular filter.
- **Annotations:** You can add notes to cards that include multiple values (for example: two values) in the context. To view the notes, it is mandatory that the card has 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** region, then the **District** filter shows values for **Mid-West** and **North-East** region, only.

### 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.

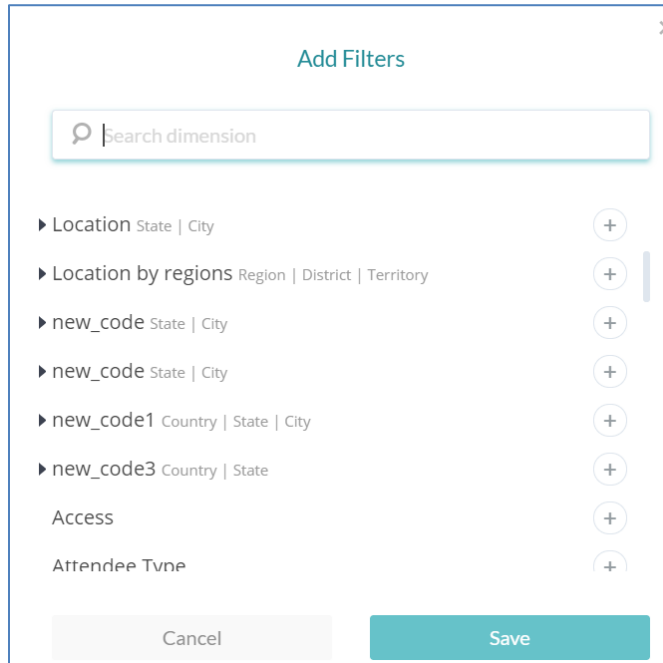
For example: If a card contains a simple dimensional filter (Region, District and Territory), and a hierarchical filter is applied to the pinboard (Location: South), the card's dimensional filters are updated accordingly: District and Territory are reset, and the result contains data for 'South' (because 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 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'.

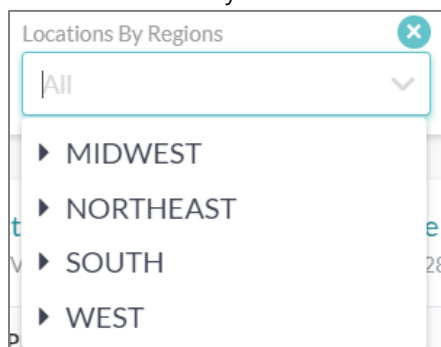
To apply hierarchy filters:

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.

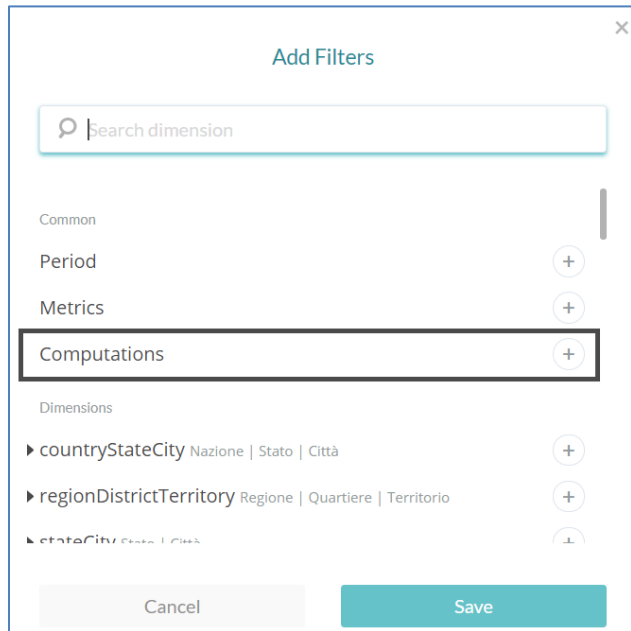
2. Under **Dimensions**, select the entire filter as shown in the figure.
3. Click **Save**. The **Location by Regions** filter is added to the **pinboard**. If you open this filter drop-down list, you can see a hierarchy of filter values.



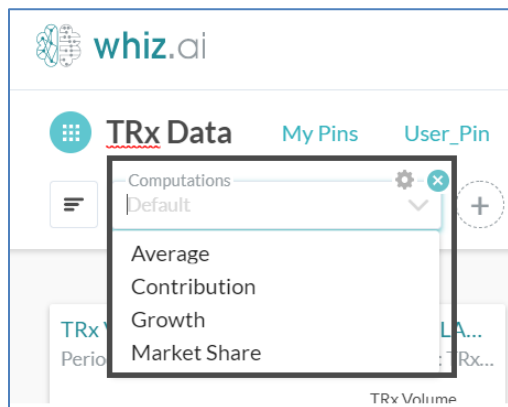
## Adding Computation Filters to Pinboards

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'.

## 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 board/s only when you click '**Apply**'. Also, only common filters are passed to other board/s.

The new filters will over-ride 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 have to go to each individual 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 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's conflicting and the market '**M1**' value gets passed on to Market '**All**'.

## 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 type. 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 it at the exact 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

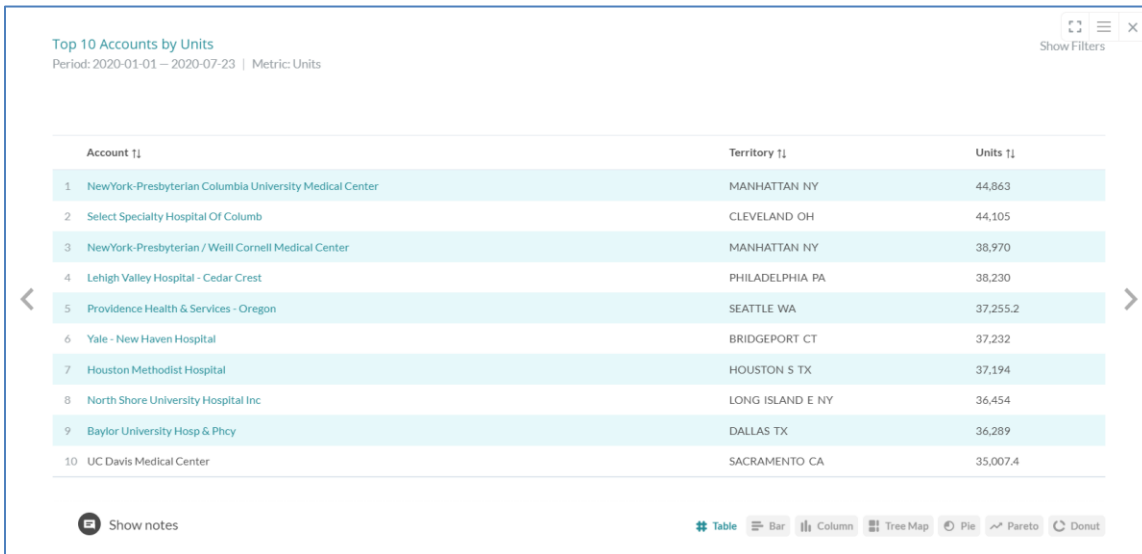
Also, as a board owner you can delete replies added by other users. Whereas, if you are a board editor, you cannot delete these replies. As a board viewer, you can add and reply to annotations, only.





**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.

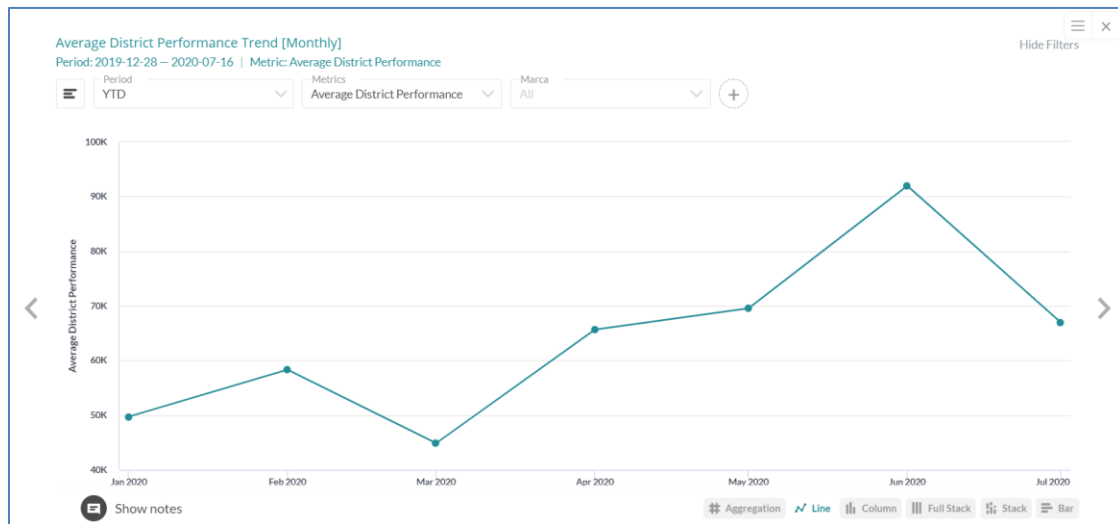
A 'temporary' state of a pinboard is when a board owner or a board editor adds filters to a pinboard to view the updated data in pins; however, does not save these changes. In this 'temporary' state, if you add annotations to cards, they are not visible to any other user with whom the board is shared, instead you see a warning message.



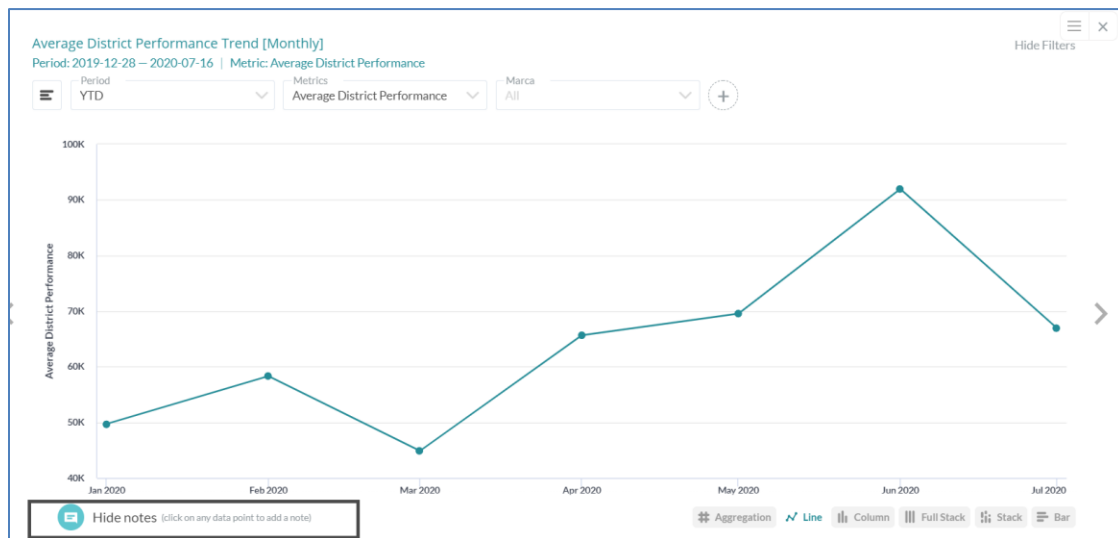
**Note!** The warning message stays till the pinboard is in the 'temporary' state. It goes away when you save the changes

## Adding Annotations

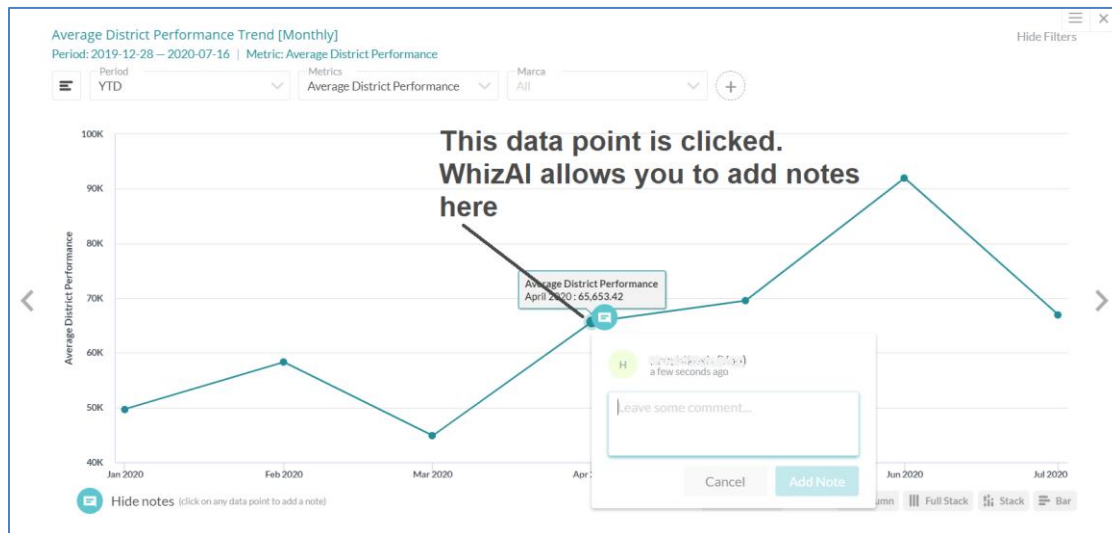
1. From the pinboard, open the card to which you have to add annotations.



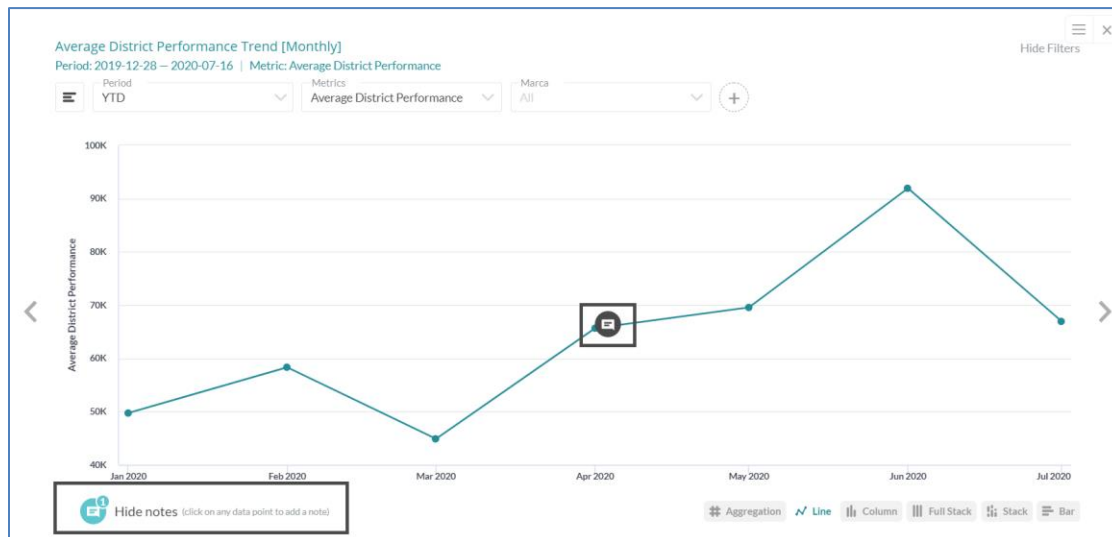
- From the bottom left corner, click **Show notes**. WhizAI allows you to add annotations to the chart. You can see the note at the bottom of the card as shown in the following figure:



- Click any data point to add annotations to it.



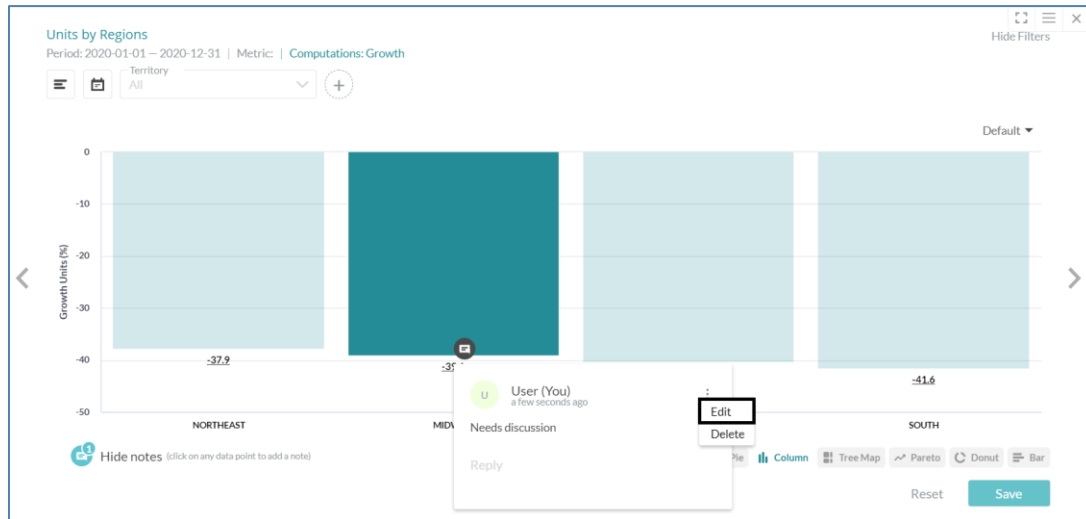
- Enter notes in the dialog, as required, and then click **Add Notes** to save the details. WhizAI adds the notes at the data point as shown in the following figure:



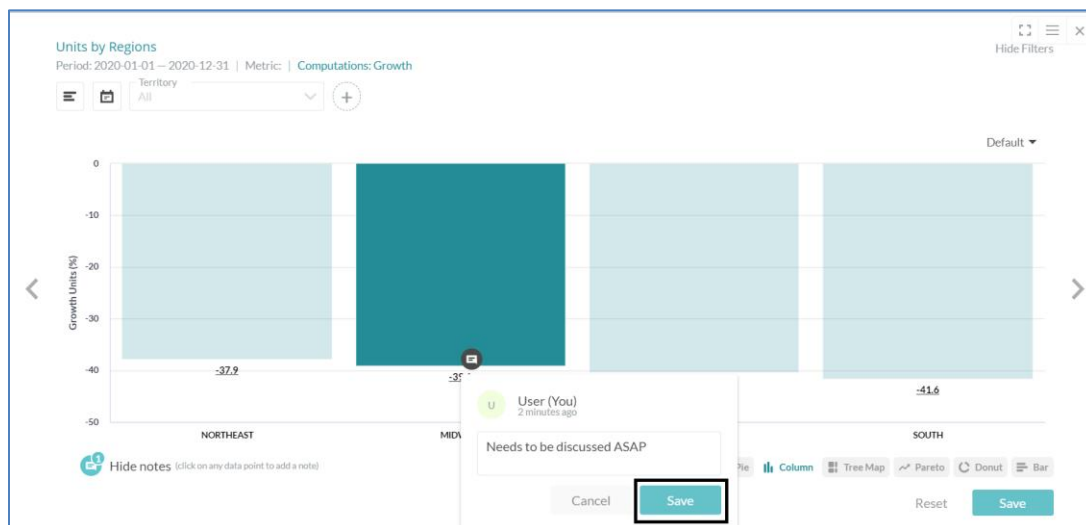
- Click **Hide notes** to opt out of annotations mode.

## Editing Annotations

1. Open the card and from the bottom left corner, click **Show notes** to enter the annotations mode.
2. Open the annotation that you want to edit.
3. Click **Edit**. WhizAI allows you to edit the details, as shown in the following figure:



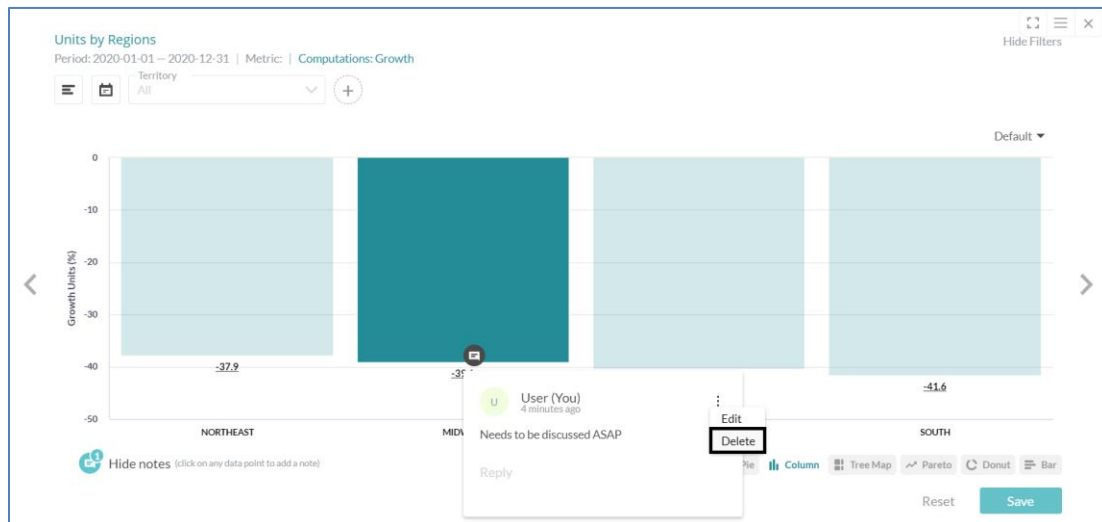
4. Update the details and then click **Save**.



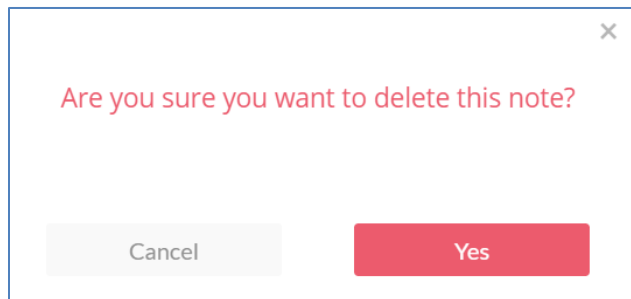
5. Click **Hide notes** to opt out of annotations mode.

## 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.

## Changing Values of Applied Filters

1. Open the **pinboard**, as required, and click the filter, for which you have to change the value. WhizAI opens the drop-down list.

**1. Open the pinboard**

**2. Select the filter value, as required**

Brand: CRESTOR

- ALTOPREV
- CRESTOR
- LIPITOR
- PRAVACHOL
- ZOCOR

Apply

2. From this drop-down list, select the filter value, as required and then click **Apply**. WhizAI filters details on all the **cards**.

**4. Click 'Apply' to filter data on all cards**

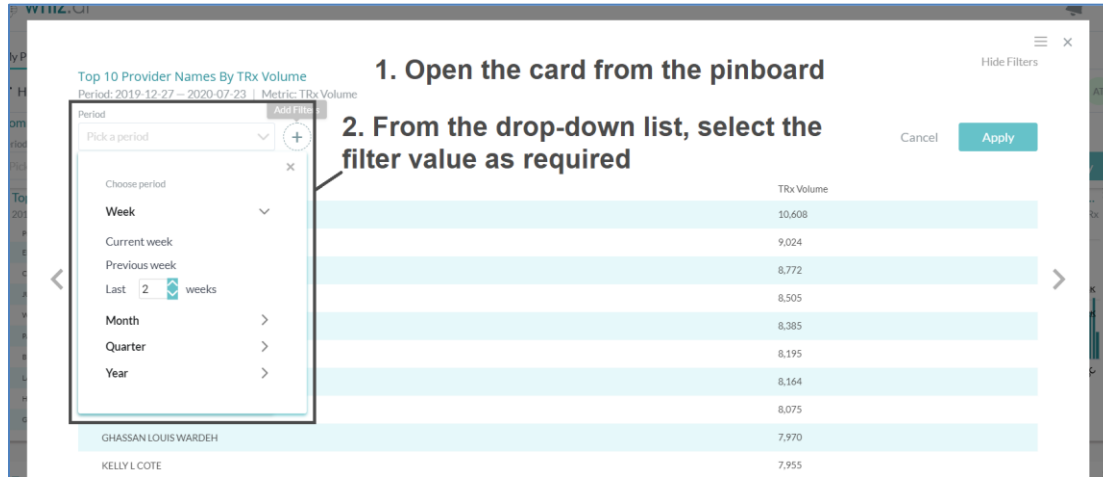
**3. Brand selected**

Brand: ALTOPREV

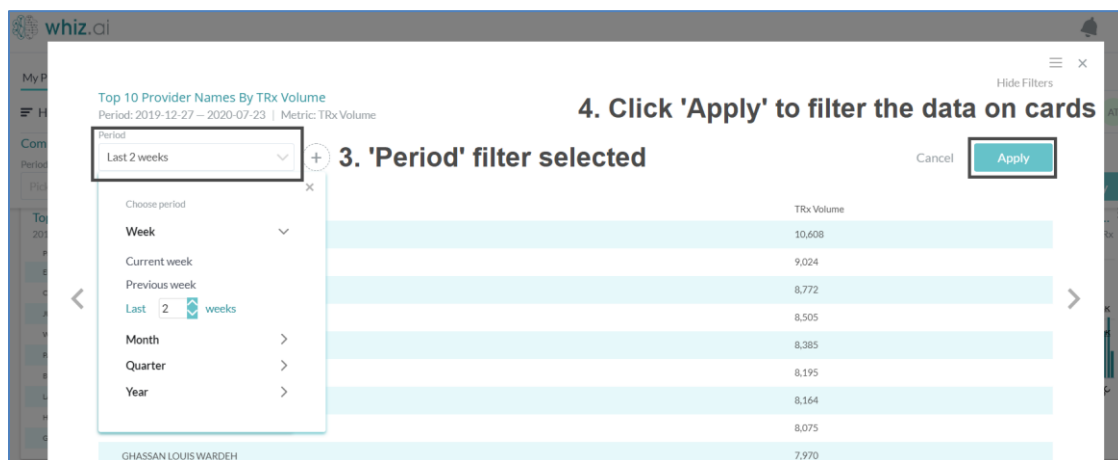
Apply

## 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.



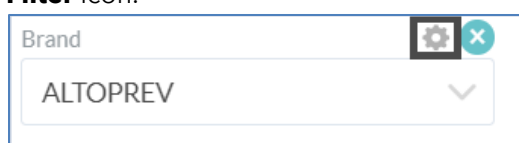
2. Select the filter value, as required and then click **Apply** to filter the details on the card.



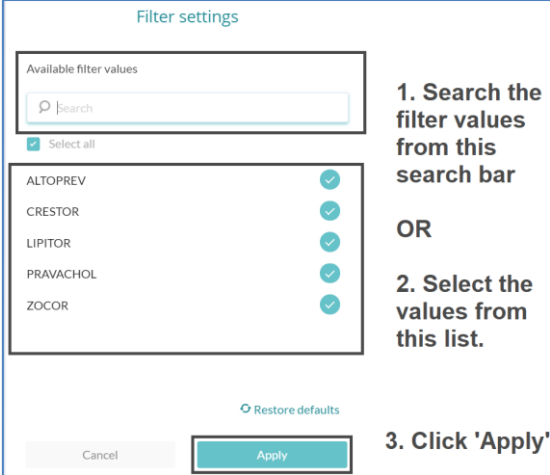
**Note!** When adding a **Period** filter, WhizAI has options to filter data for weeks, months, quarters, and years. For each of these options, you can select relative dates. For example, to filter data on Week basis: you can view data for the current week, the previous week, or last 'n' weeks.

## Configuring Filter Settings

1. Hover the cursor over the filter, values of which you want to configure and then. WhizAI shows the **Configure Filter** icon.



- Click the **Configure filter** icon. WhizAI opens the **Filter settings** dialog. By default, the **Select All** check-box is selected. Clear this check-box.



The 'Filter settings' dialog box contains a search bar at the top labeled 'Available filter values'. Below it is a checked checkbox labeled 'Select all'. A list of filter values is shown: ALTOPREV, CRESTOR, LIPITOR, PRAVACHOL, and ZOCOR, each with a green checkmark to its right. At the bottom are 'Cancel' and 'Apply' buttons. A 'Restore defaults' link is also present.

1. Search the filter values from this search bar

OR

2. Select the values from this list.

3. Click '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.

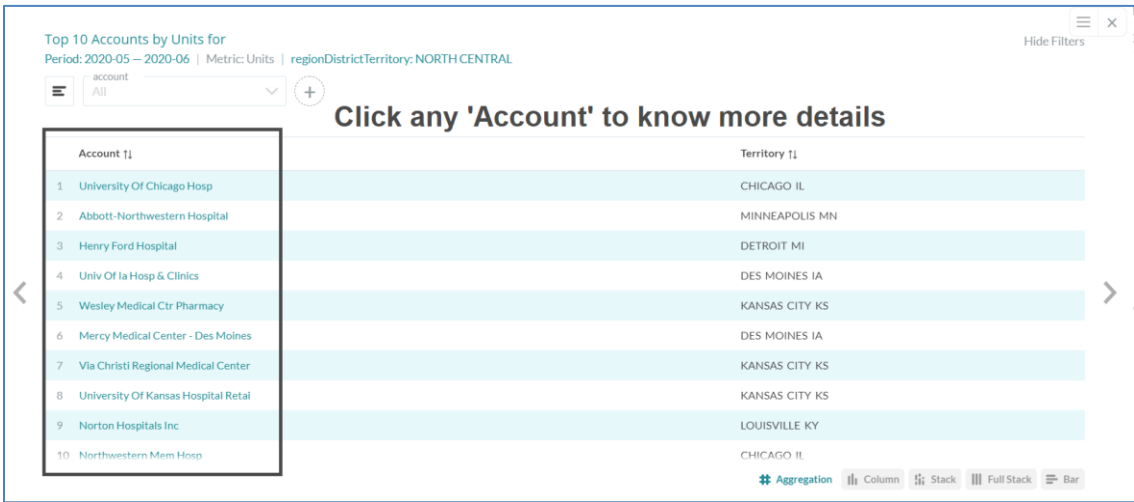
## Follow-On from Cards



**Remember!** The values you see in a card are hyperlinked. You can click these values to know more details about the response.

To follow-on a response:

- Open a **card** from the **pinboard**.



The screenshot shows the 'Top 10 Accounts by Units for' section. It includes a filter dropdown set to 'account' and a '+' button. Below is a table with two columns: 'Account' and 'Territory'. The table lists 10 accounts and their corresponding territories. A callout box points to the 'Account' column with the text 'Click any 'Account' to know more details'. At the bottom, there are tabs for 'Aggregation', 'Column', 'Stack', 'Full Stack', and 'Bar'.

Account	Territory
1 University Of Chicago Hosp	CHICAGO IL
2 Abbott-Northwestern Hospital	MINNEAPOLIS MN
3 Henry Ford Hospital	DETROIT MI
4 Univ Of Ia Hosp & Clinics	DES MOINES IA
5 Wesley Medical Ctr Pharmacy	KANSAS CITY KS
6 Mercy Medical Center - Des Moines	DES MOINES IA
7 Via Christi Regional Medical Center	KANSAS CITY KS
8 University Of Kansas Hospital Retail	KANSAS CITY KS
9 Norton Hospitals Inc	LOUISVILLE KY
10 Northwestern Mem Hosp	CHICAGO IL





**Note!** You can follow-on only if the response is in table format.

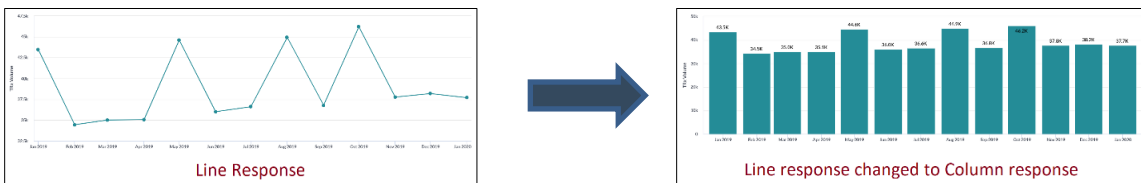
- Click any of the values to follow-on and know more details about it.

## Changing Card Formats


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

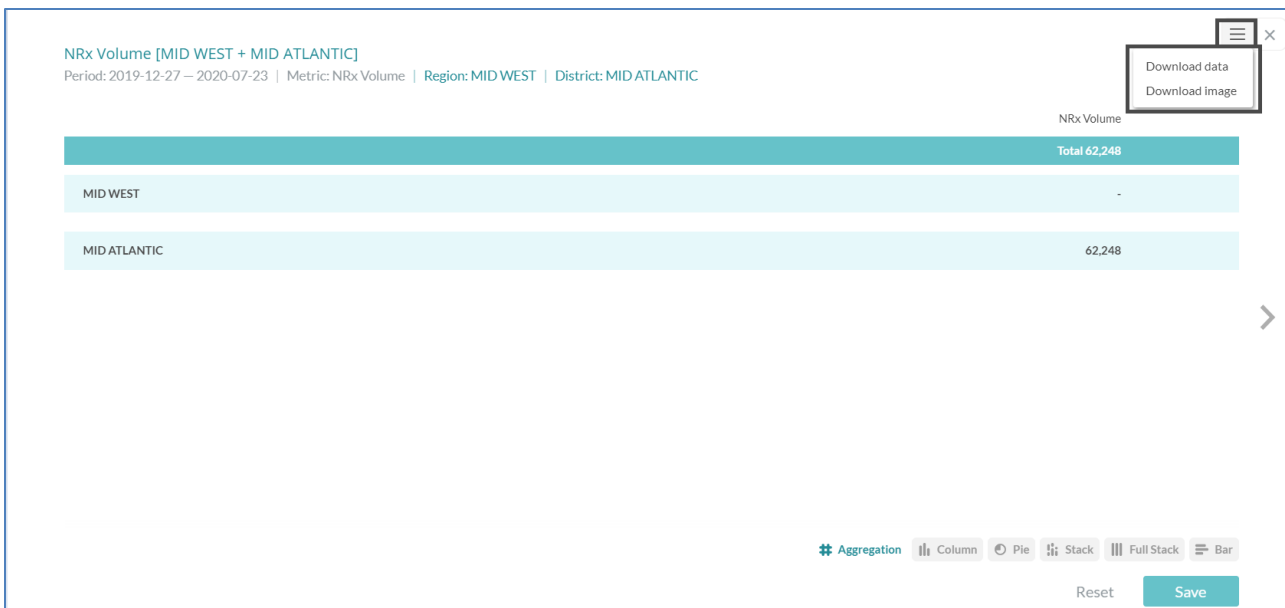


For example: In the following figure, Line response is changed to Column response.



## Downloading Data from Cards

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




## Exporting Pinboards to PDF or PPT


To download a pinboard in a PDF format:


- From the main boards panel, open the pinboard you have to export.

The screenshot shows the WhizAI dashboard with the 'My Pins' section selected. A dropdown menu is open, showing options: 'Share Pinboard', 'Edit layout', 'Copy Pinboard', 'Export Pinboard' (highlighted), 'Transfer Ownership', and 'Delete Pinboard'. The dashboard includes various charts and tables, such as 'Units' showing 369.37K, 'Top 50 Accounts par Average Territory Perf...', and 'Top 10 Accounts by Units'.

- 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.

The screenshot shows the 'Export Pinboard' dialog with 21 pages. It includes a 'My Pins' section with a list of pins and checkboxes. The 'Orientation' is set to 'Portrait' and the 'Destination' is 'Save as a PDF'. The 'Export' button is highlighted.

 **Note!** By default, all the pins are selected to be exported to PDF. If you want to export individual pins, you can clear the check-box, 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 **Admin > Audit Logs** section.

## Copying Pinboards

1. From the main boards panel, open the pinboard of which you have to create a copy.

2. Click  icon to open the list of options and then click **Copy Pinboard**. WhizAI shows the **Create a Copy?** dialog.

3. Click **Yes** to create a copy of the pinboard. WhizAI creates a copy of the pinboard as shown in the following figure:

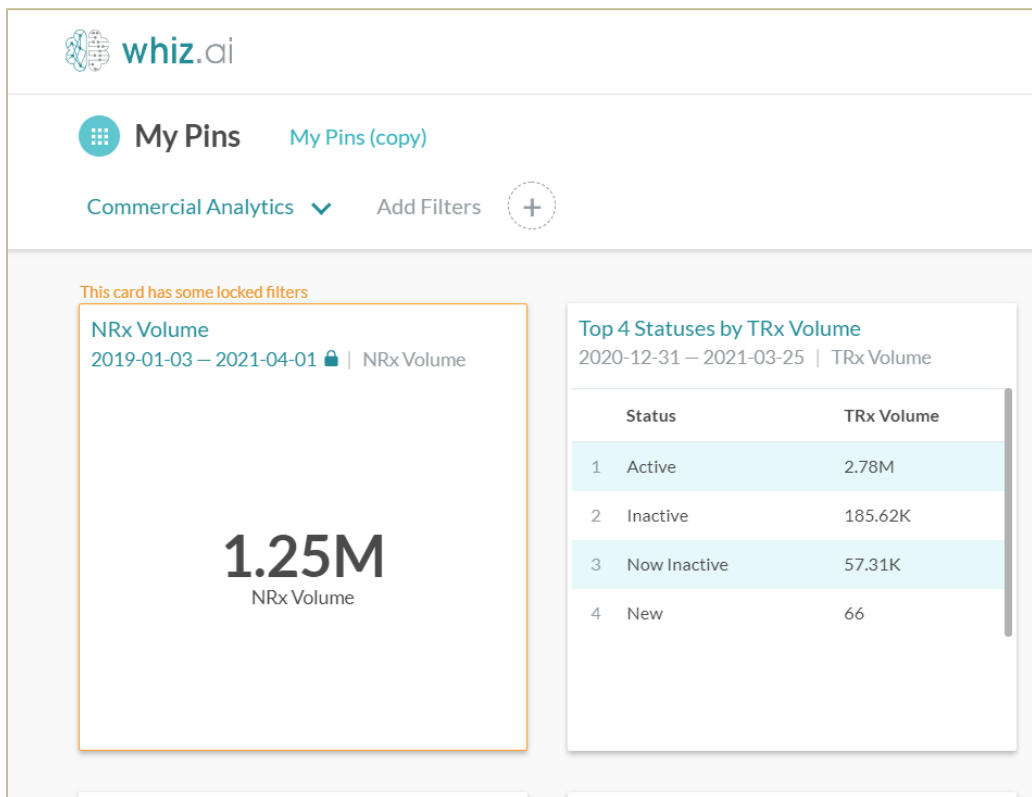


**Note!** You can copy a pinboard if you are a board owner, board viewer or a board editor.


## Highlighting Cards on Pinboards

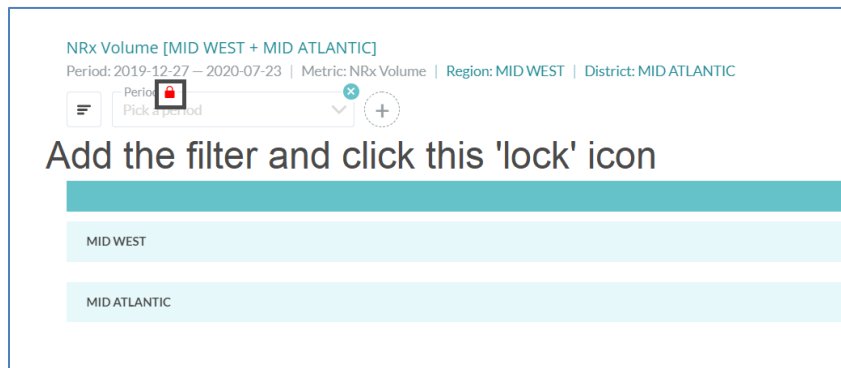
WhizAI highlight specific cards in a pinboard with a color or a border around it, if the particular card has at least one or more filter locks present in it.

You can also see text describing the reason why the card is highlighted.



## 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**'.



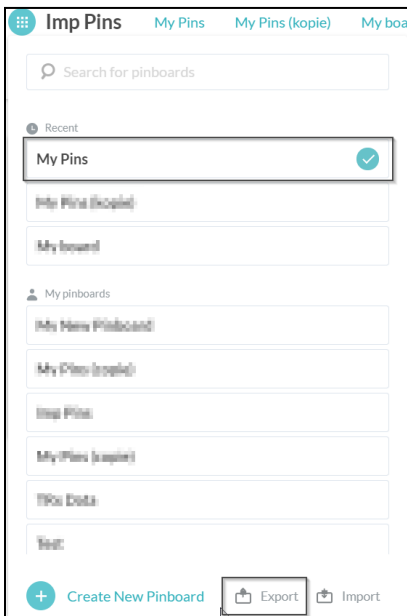
**Note!** Now, if same filter is added (at board level) but with a different value, WhizAI will not over-ride the data for this card; it retains this filter and applies the additional filter to other **cards**.



**Tip!** The lock symbol means that the value you select in this filter is locked. After locking the filter value, if same board level filter is added but having different value, WhizAI does not over-ride this card-level filter; it retains this filter and applies the additional filter to other cards.

## 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 over-ride the existing board. In this case, although WhizAI over-rides the board, however, 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.

## Opening Pinboards from Explorer

WhizAI now offers the ability to call specifically named pinboards directly from the Explorer. All you have to do is ask specific question in the 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 particular card. Thus, that board displays information related only to that particular 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 down-time, 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**.

## 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.

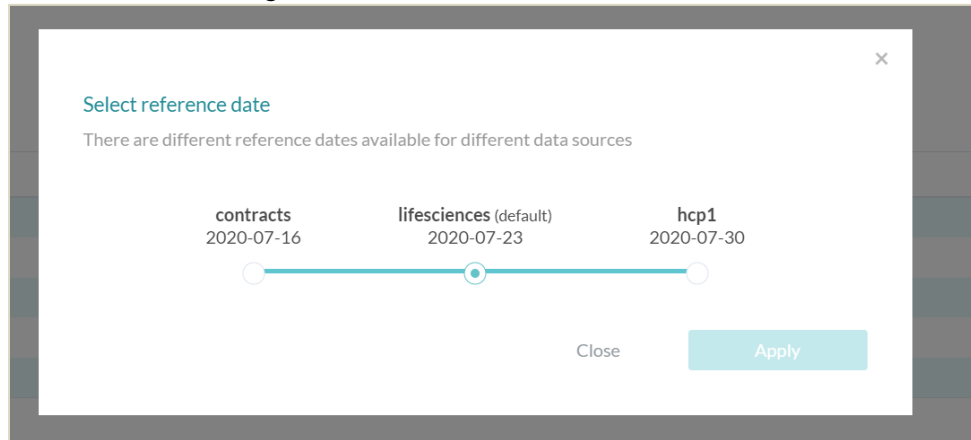
For example, consider the following scenarios:

- 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 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 calls data might either show an error or might 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 over-rides the existing filters or slicers. Also, please note that slicers are 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, HCP slicer value is not applied on the board/card.

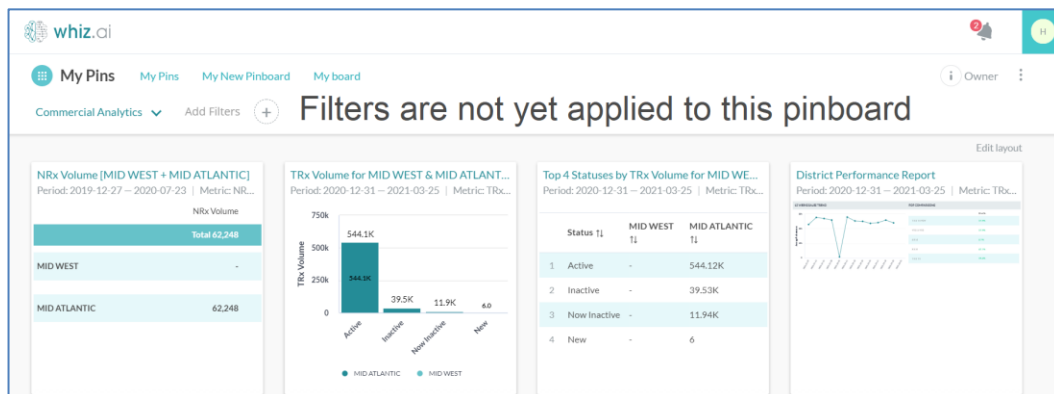


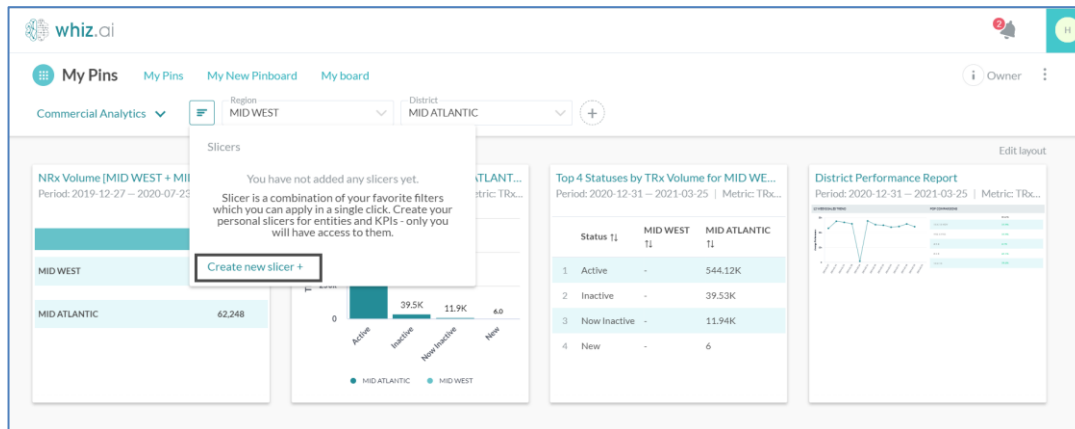
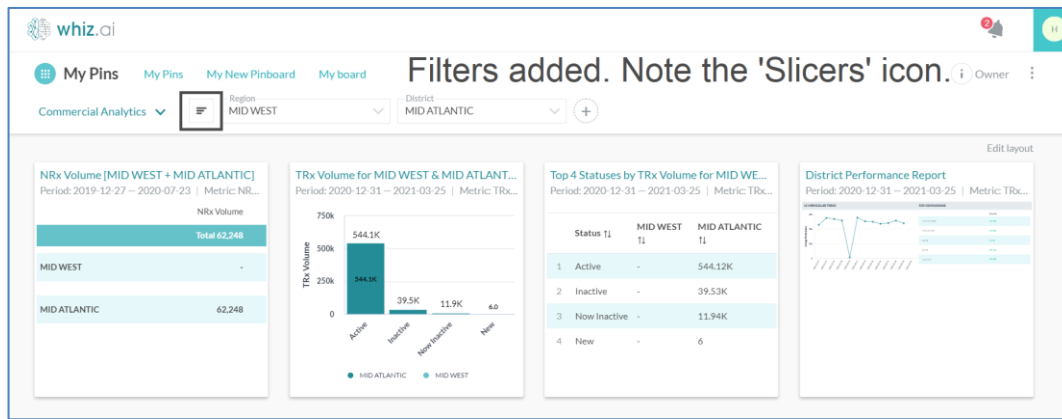
**Remember!** Not always the entire slicers are applied. In the slicers window, you can see the following message: "Only the slicer context matching the board/card context is applied". The message is visible only when there are no slicers in the list.

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 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 apply the filters, as required. WhizAI shows the slicers icon as soon as you add filters to the pinboard.





- 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.

Create slicer MID WEST | MID ATLANTIC

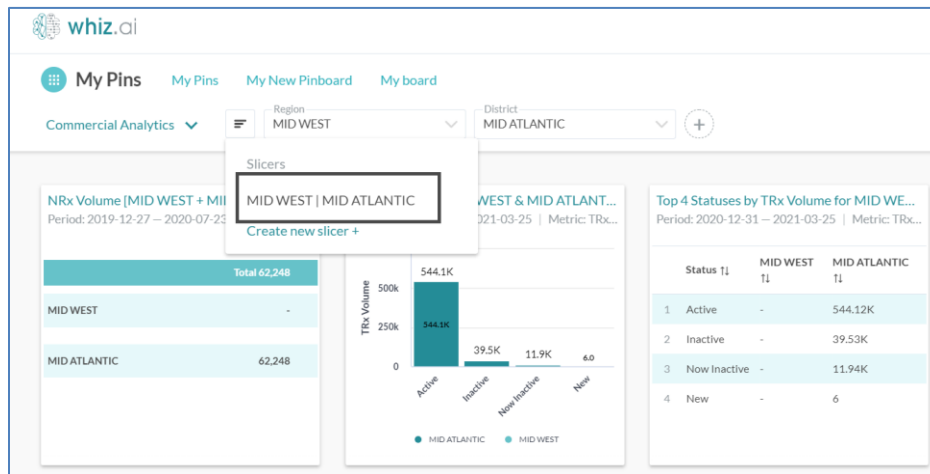
Region  
MID WEST

District  
MID ATLANTIC

+

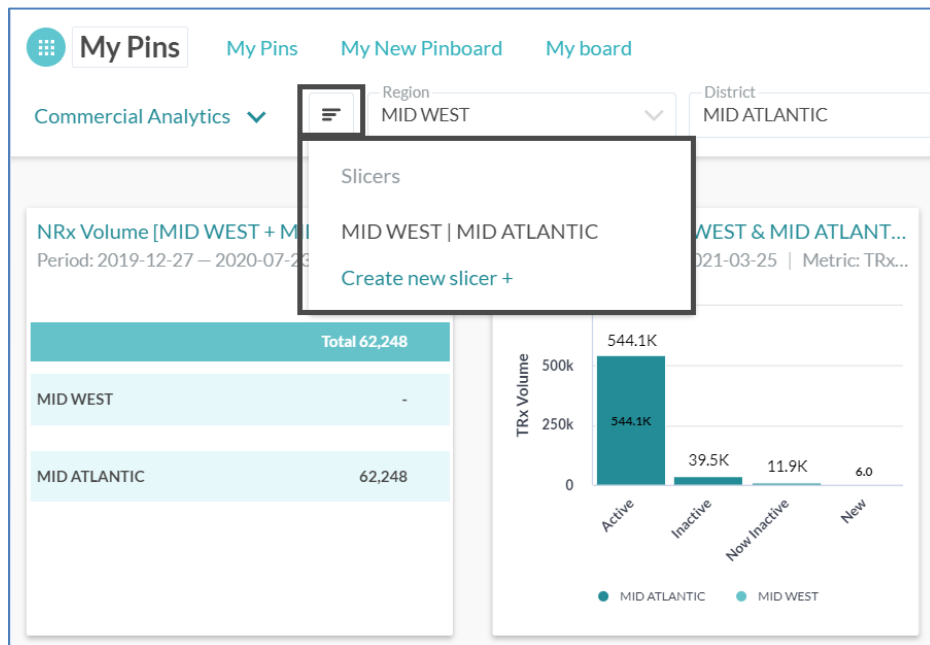
Cancel Save

- Optional:** You can click **+** to add more filters, if required.
- Click **Save** to add the slicer.

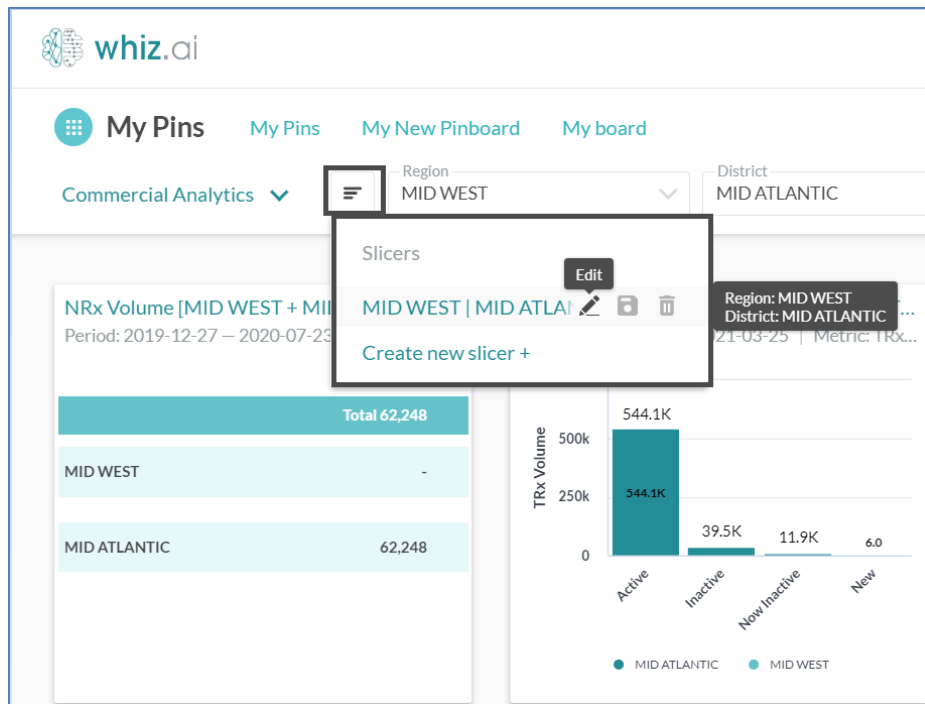


## Editing a slicer

1. Click the slicer icon. WhizAI shows the list of available slicers.



2. Hover the cursor over the slicer you want to edit.



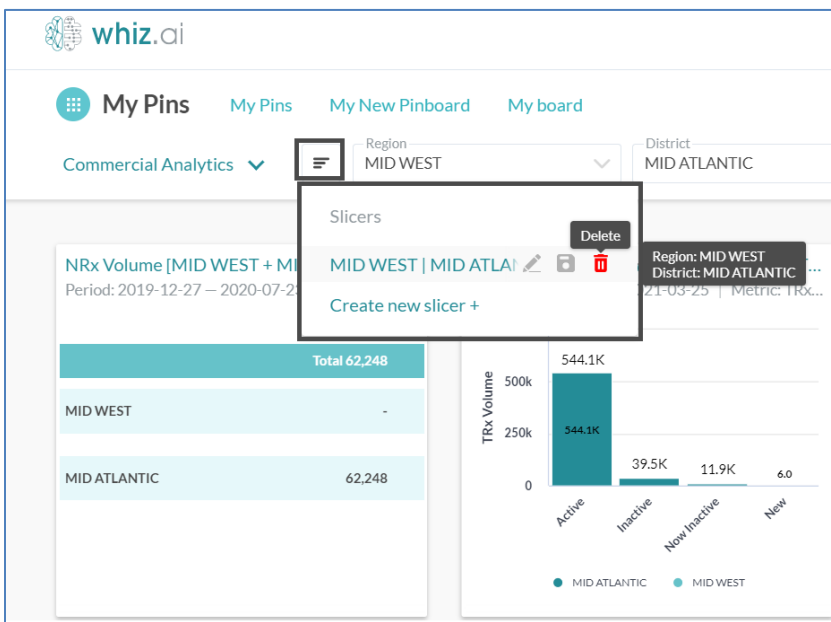
- Click the edit icon. WhizAI shows the **Edit slicer** dialog.

The screenshot shows the 'Edit slicer' dialog box. At the top, it says 'Edit slicer MID WEST | MID ATLANTIC'. Below this, there are two dropdown menus: 'Region' with 'MID WEST' selected and 'District' with 'MID ATLANTIC' selected. At the bottom, there's a dashed box with a '+' icon, a 'Cancel' button, and a 'Save' button.

- You can change the filter values or add filters to the slicer and click **Save**. WhizAI saves the changes.


## Deleting a slicer

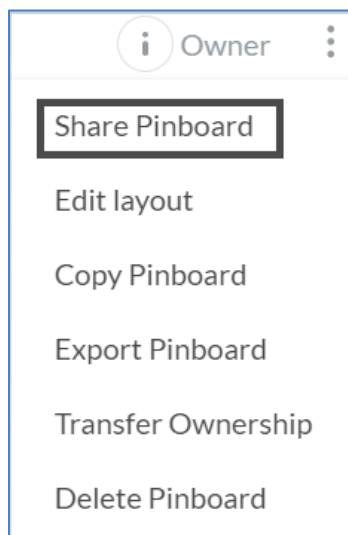
To delete a slicer, hover the cursor over the slicer and click the **Delete** icon.

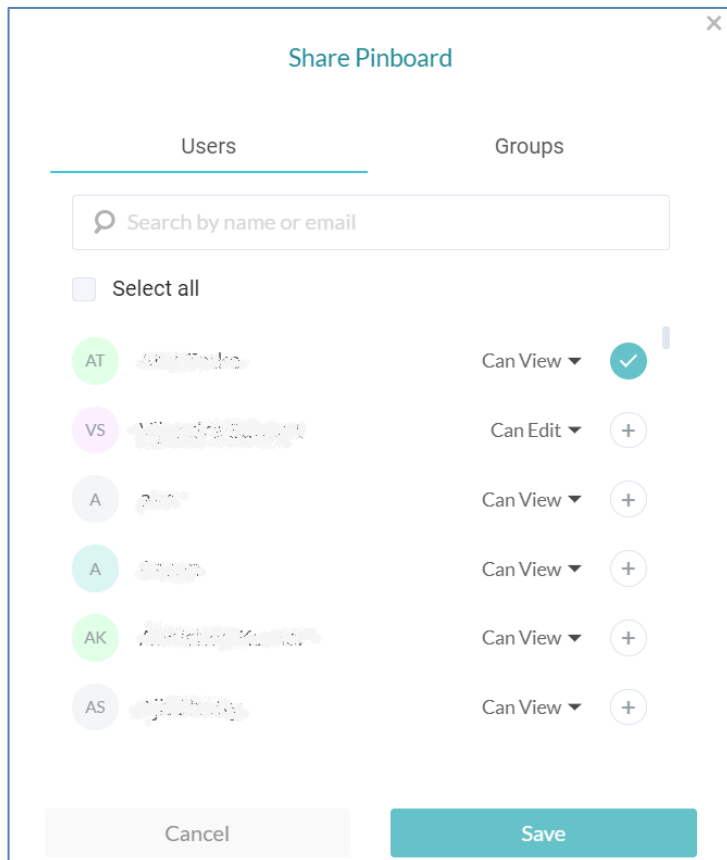


## Sharing Pinboards and Cards

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 Pinboard**. WhizAI opens the **Share Board** dialog with a list and groups of your team members.



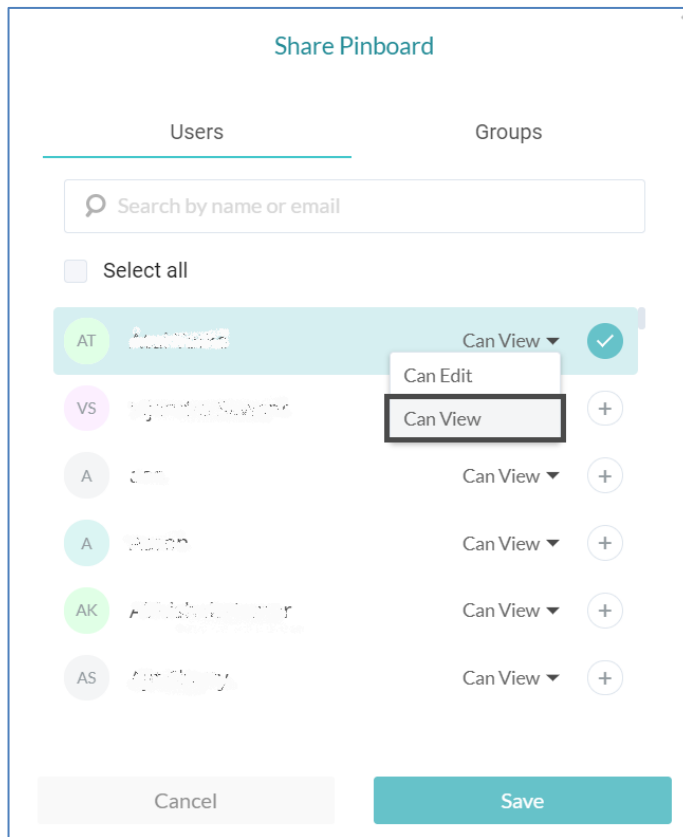


The image shows a 'Share Pinboard' dialog box with a close button (X) in the top right corner. It has two tabs: 'Users' (selected) and 'Groups'. Below the tabs is a search bar labeled 'Search by name or email'. Under the search bar is a 'Select all' checkbox. Below that is a list of users, each with a colored circular icon, a name, and a permission dropdown menu. The first user, 'AT', has a green icon and a 'Can View' dropdown with a checkmark. The second user, 'VS', has a purple icon and a 'Can Edit' dropdown with a plus sign. The other three users have a 'Can View' dropdown with a plus sign. At the bottom are 'Cancel' and 'Save' buttons.

Users		Groups
<input type="text" value="Search by name or email"/>		
<input type="checkbox"/> Select all		
AT	Can View	✓
VS	Can Edit	+
A	Can View	+
A	Can View	+
AK	Can View	+
AS	Can View	+

Cancel Save

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.
3. 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.

4. 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](#).



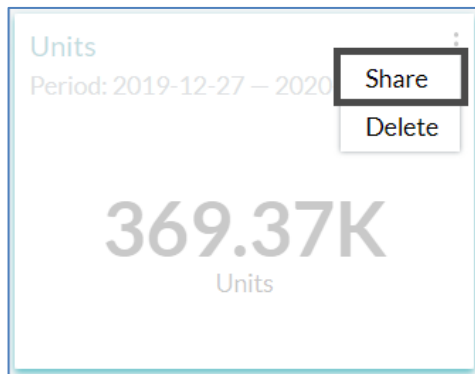
**Note!** When someone shares a board, you receive a notification about it in form of a clickable link. You can click that link to open the shared **pinboard**.



**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.

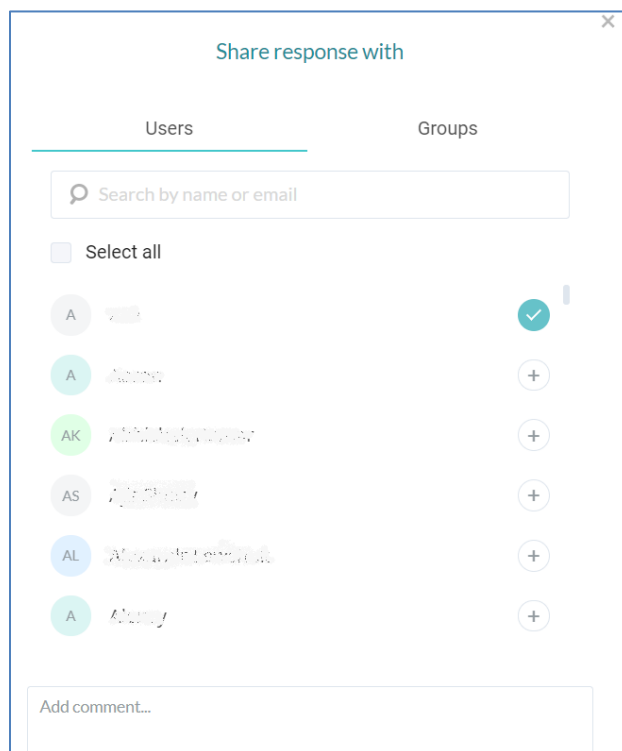
There are two ways to share **cards** from **pinboards**:

1. From the board which is open in the [Explorer](#), go to the card that you have to share with other users and then click **More Options**.




**Note:** 'Share' option is only available to board editors and board owners if card-sharing feature is enabled for the environment.

- Click **Share**. WhizAI shows the **Share response with** dialog.

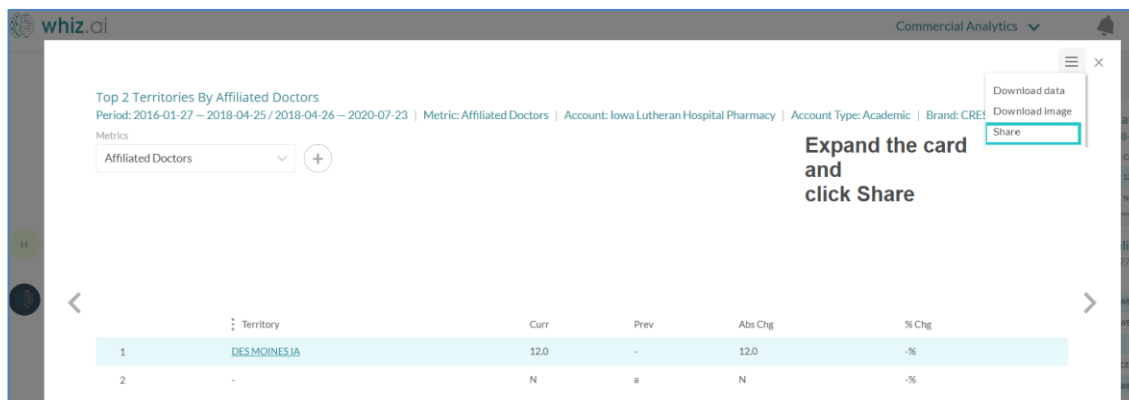


- You can search the user or select the user from the list. If you want to share the card with groups of users, click **Groups** and select the groups of team members, as required. Then click **Share** to share the card with the selected user/s.

**OR**

- Open the card that you want to share and from top-right corner and click .





**Note:** 'Share' option is only available to board editors and board owners if card-sharing feature is enabled for the environment.

- Click **Share**. WhizAI shows the **Share response with** dialog.

Share response with

Users Groups

Search by name or email

Select all

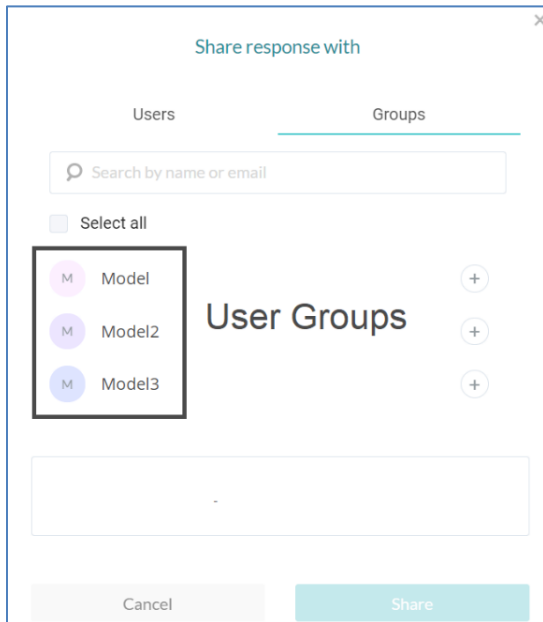
- A [selected] ✓
- A [unselected] +
- AK [unselected] +
- AS [unselected] +
- AL [unselected] +
- A [unselected] +

Add comment...

- You can search 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.

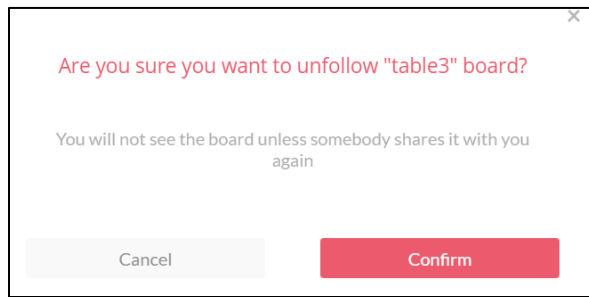
A typical system generated group contains users categorized based on their roles, for example: you may see a user group of MRs or a user group of Sales Reps and so on.



**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.

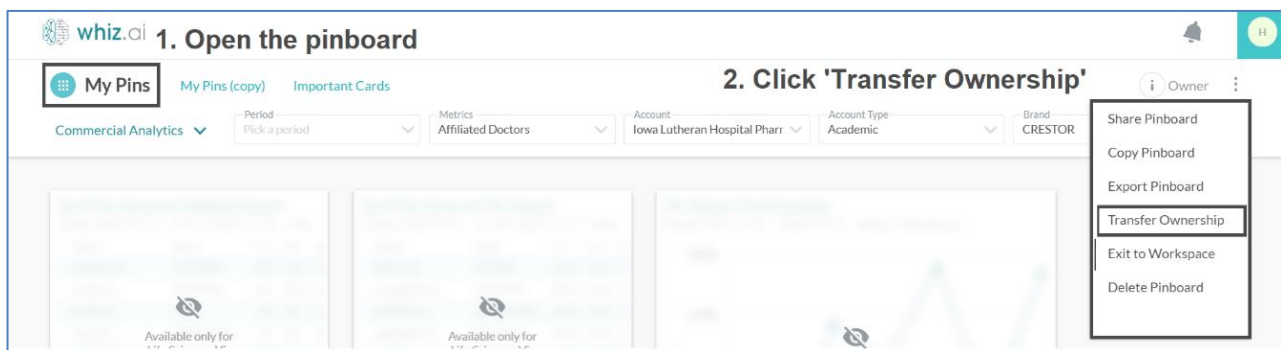



- Click **Confirm** to stop following the board. WhizAI displays a success message.

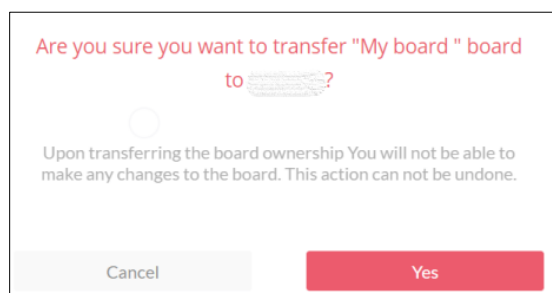
## Transferring Ownership of Pinboards

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 board's ownership:

- Open the pinboard whose ownership you have to transfer to any other user.



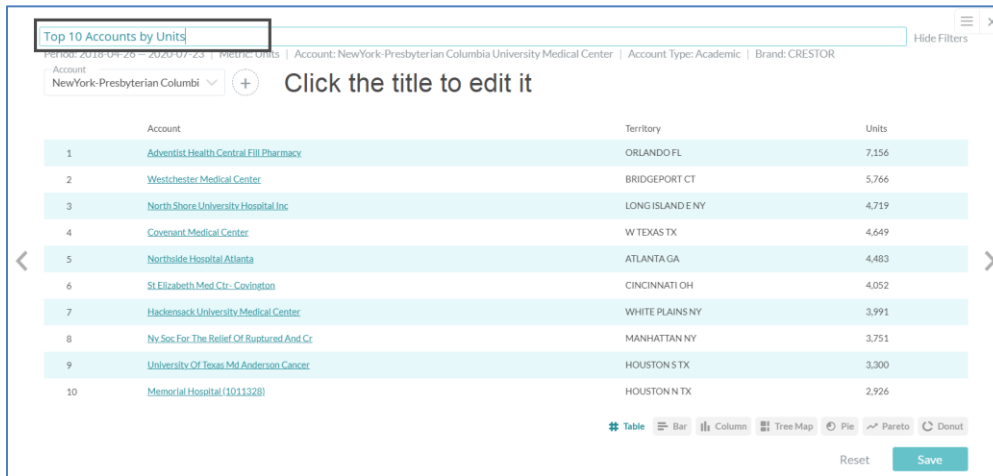
- Click  icon to open the list of options and then click **Transfer Ownership**. WhizAI shows the **Transfer Ownership** dialog.
- Select the user to whom you have to transfer the board's ownership and click **Confirm Transfer**. WhizAI shows a confirmation message.



- Click **Yes**. WhizAI transfers the ownership of the board to the selected user.

## 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 following figure:

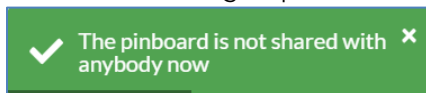


2. Rename the card, as required and then click **Save** to apply the changes.

## Removing Pinboard sharing

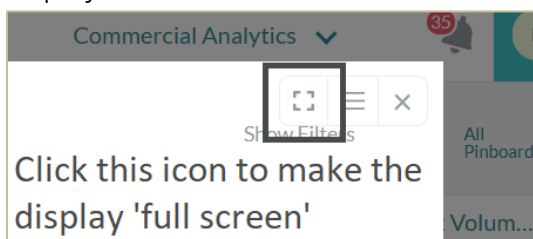
You can discontinue the sharing of your board from all users or specific users.

1. From the [Explorer](#), click **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 Pinboard** 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.




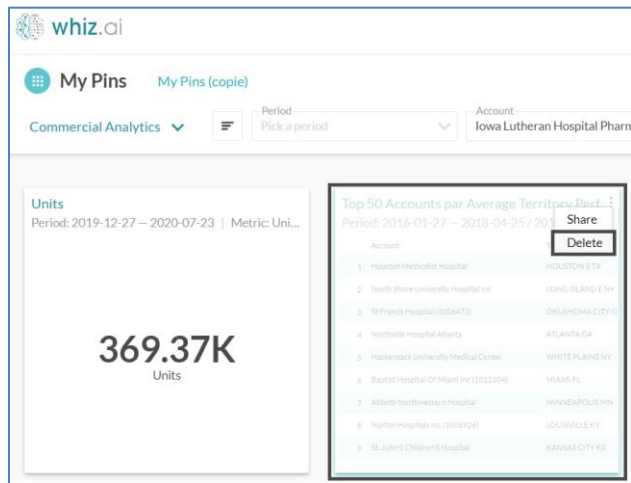
## Viewing Cards in Full Screen Mode

When you open the cards pinned to a pinboard in a maximized view, you can click this icon to make the display full screen.



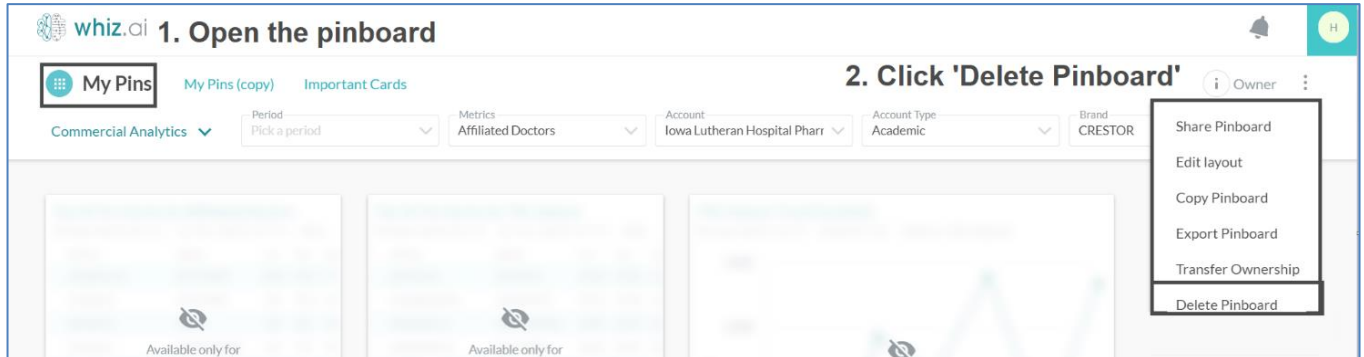
## Deleting a card from a Pinboard

1. From the **pinboard**, go to the pin which you have to delete.
2. Click  and then click **Delete** as shown in the following figure. WhizAI deletes the pin from the **pinboard**.

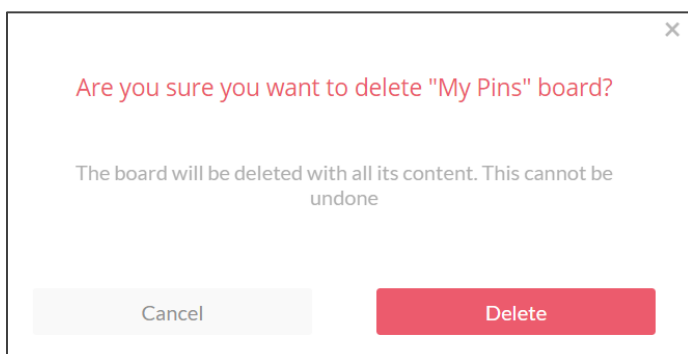


## Deleting a Pinboard

1. Go to the **pinboard** that you have to delete and click  icon to open the list of options and then click **Delete Pinboard**. WhizAI shows a confirmation dialog.



2. From the confirmation dialog, click the **Delete** button. The board will be deleted from the **Explorer**.



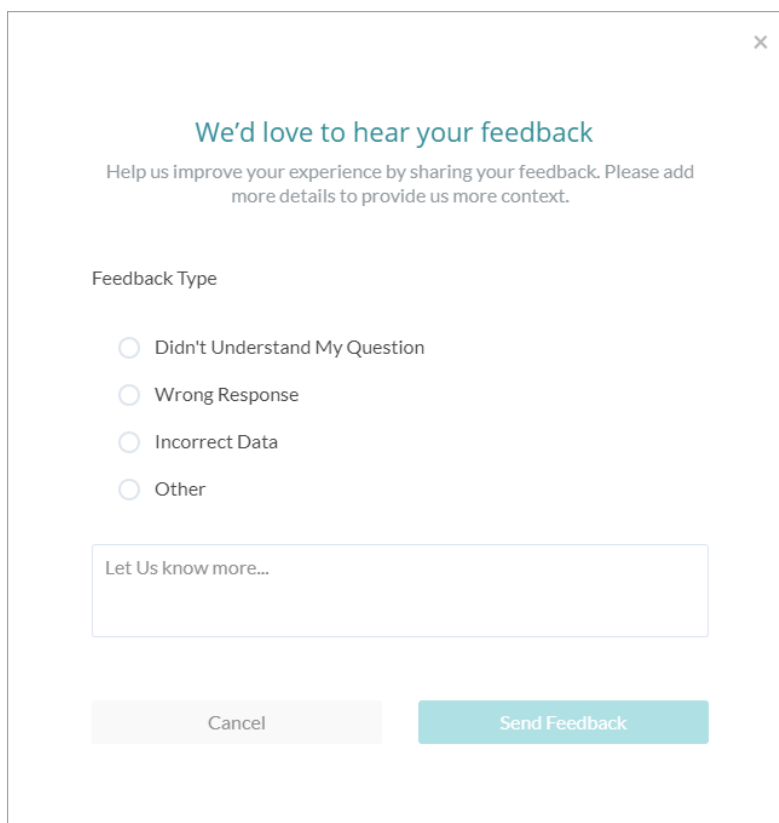
## Providing Feedback

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** option.

After you select **Yes**, WhizAI marks that answer to the response. However, if you click **no**, WhizAI opens the feedback dialog box for you to submit the feedback.

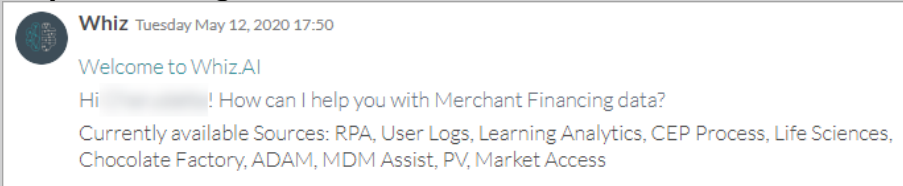
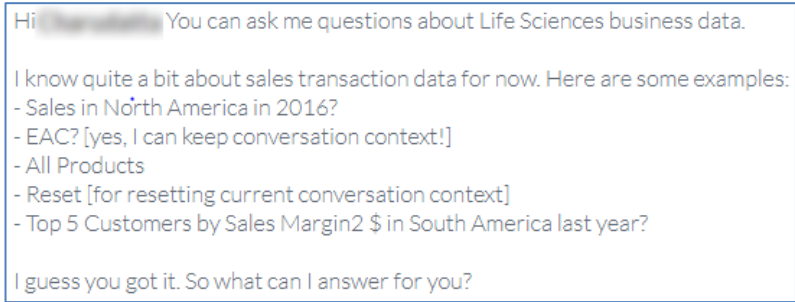
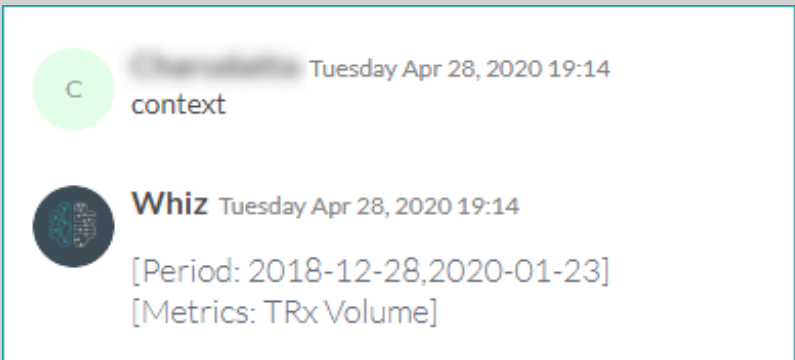
A feedback dialog box with a title bar and a close button (X) in the top right corner. The title is "We'd love to hear your feedback" in teal. Below it is a subtitle: "Help us improve your experience by sharing your feedback. Please add more details to provide us more context." The section "Feedback Type" contains four radio button options: "Didn't Understand My Question", "Wrong Response", "Incorrect Data", and "Other". Below these is a text input field with the placeholder "Let Us know more...". At the bottom are two buttons: "Cancel" (light gray) and "Send Feedback" (teal).




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.

Sr. No.	Command	Response from WhizAI platform
1.	Hi	<p>WhizAI greets you and lets you know that it is ready to get started. Also, it gives you information about the currently available sources.</p> <p><b>Response message:</b></p> 
2.	Help	<p>WhizAI displays the initial help so that you can learn about asking questions to WhizAI.</p> <p><b>Response message:</b></p> 
3.	Context	<p>WhizAI displays the current context that WhizAI has established from the previous question asked.</p> 

Sr. No.	Command	Response from WhizAI platform
4.	Reset	<p>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, <b>reset territory</b> or <b>reset TRx Volume</b>.</p> <p><b>Response Message:</b></p> <div>Context Reset</div>
5.	Show dimensions	<p>WhizAI displays all dimensions currently available in the selected data model or a data source.</p> <p><b>Response Message:</b></p> <div>  <b>whiz.ai</b> Tuesday Apr 06, 2021 11:43  Dimensions of Commercial Analytics  Access  Account  Account Type  Attendee Type  Brand  Brand Group </div>
6.	Show metrics	<p>WhizAI displays all metrics currently available in the selected data model.</p> <p><b>Response Message:</b></p> <div>  <b>whiz.ai</b> Tuesday Apr 06, 2021 11:44  Metrics of Commercial Analytics  Affiliated Doctors  Attendees  Average District Performance  Average District Performance Packs  Average HCO Performance  Average Territory Performance  Average Territory Performance Packs </div>
7	Show CSV Show XLSX	<p>WhizAI displays a link to download the response in a CSV and XLSX file.</p> <div>  <b>Note:</b> 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>
8	Go to <data source>	<p>WhizAI switches the current data source to the specified data source name.</p>