



Dhiva - Offline Viewer

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Introduction

The Dhiva Offline Viewer allows users to download Reports to their browser cache and view them in Dhiva regardless of whether they are connected to the internet. The Offline Viewer is available to all Dhiva users, though users licensed as Offline Users will only have access to the Offline Viewer module.

Key Features of the Offline Viewer Module

With an internet connection:

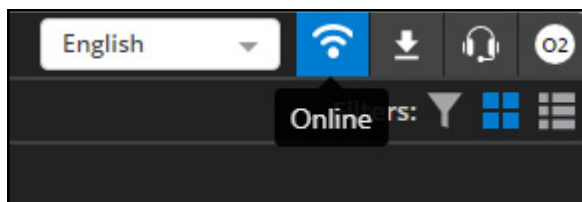
- Download, view, and interact with Reports and Storyboards.
- Change chart types or create temporary charts.
- Export downloaded Reports and Storyboards.
- Download export files scheduled by other users.

Without an internet connection:

- View and interact with Reports and Storyboards that were previously downloaded when connected to the internet.*

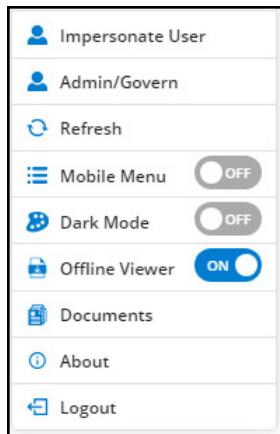
* Requires use of the same device and browser.

There is an indicator of online/offline status in the application status bar.

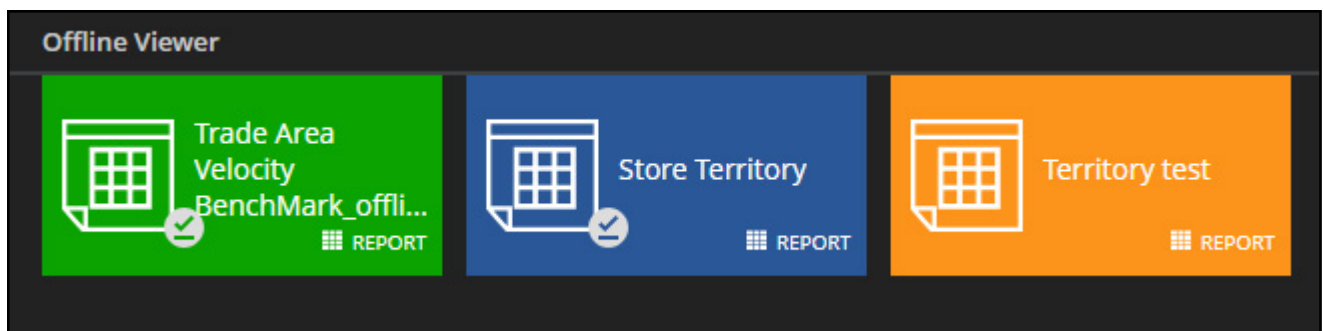


Accessing the Offline Viewer






Producer and Consumer users can access the Offline Viewer using the menu under their initials in the upper right corner of the page.



Offline Licensed Users (Offline Users) will load the Offline Viewer in Tile View upon logging into Dhiva. This initial screen shows assets that are available to the user. There is text and an icon bottom right corner of the tiles which indicates whether the asset is a Report or a Storyboard. A checkmark on a tile indicates that the asset has been downloaded to the local cache.



The List View provides a more detailed view of the available assets including the data domain, asset owner, presence of a Special Attribute, and last download time. Icons at the right provide the ability to export or download assets, view information, or delete the Report previously downloaded.

| Offline Viewer | | | | | | Filters:   |
|--------------------------|---|---------------|-------------------|------------|--------|--|
| <input type="checkbox"/> | NAME | DOMAIN(S) | SPECIAL ATTRIBUTE | OWNER | TYPE | LAST DOWNLOADED TIME |
| <input type="checkbox"/> |  Territory test | Sales Metrics | | cmmand... | Report | |
| <input type="checkbox"/> |  Store Territory | Sales Metrics | | bkrotec... | Report | Nov 22 2023, 10:55 AM |
| <input type="checkbox"/> |  Trade Area Velocity BenchMark_offline | Sales Metrics | Store | sbhaya... | Report | Nov 20 2023, 03:36 PM |

Downloading Assets

To download a Report or Storyboard, click on the name or the download icon. The assets are downloaded to the local browser cache. Once an asset has been downloaded, it will remain available for use without an internet connection, provided that Dhiva is accessed via the same device and browser used to download the assets and the cache has not been cleared.

If a Special Attribute is present, an additional screen will prompt users to select members of the Special Attribute to download. Stores acts as a Special Attribute in most scenarios. The search options at the top of each column can be used to filter the list. Up to 10 stores can be selected.

| Choose Filters | | | | | | | |
|--------------------------|-------------------|--------------------------------|---------------|-------------|--------------------|-----------|----------------|
| STORE | MSA RETAIL NUMBER | TD CHAIN/INDEPENDENT INDICATOR | STORE ADDRESS | STORE STATE | STORE CITY | STORE ZIP | LAST CALL DATE |
| <input type="checkbox"/> | | Chain | | CA | PERRIS | | 20230522 |
| <input type="checkbox"/> | | Chain | | CA | RANCHO MIRAGE | | 20230609 |
| <input type="checkbox"/> | | Chain | | CA | DESERT HOT SPRINGS | | 20230622 |
| <input type="checkbox"/> | | Chain | | CA | CHINO | | 20230726 |
| <input type="checkbox"/> | | Independent | | CA | FONTANA | | 20230810 |
| <input type="checkbox"/> | | Chain | | CA | REDLANDS | | 20230814 |
| <input type="checkbox"/> | | Not a TD Store | | CA | REDLANDS | | 20230814 |
| <input type="checkbox"/> | | Independent | | CA | FONTANA | | 20230816 |
| <input type="checkbox"/> | | Chain | | CA | INDIO | | 20230831 |

When selecting multiple stores from the download popup window of a Storyboard, use the Funnel icon to select an individual store from those that have been downloaded.

| Choose Filters | | | | | | | |
|-------------------------------------|-------------------|--------------------------------|---------------|-------------|------------|-----------|----------------|
| STORE | MSA RETAIL NUMBER | TD CHAIN/INDEPENDENT INDICATOR | STORE ADDRESS | STORE STATE | STORE CITY | STORE ZIP | LAST CALL DATE |
| <input type="checkbox"/> | | Independent | | CA | | | NA |
| <input checked="" type="checkbox"/> | | Chain | | CA | | | 20150611 |
| <input type="checkbox"/> | | Chain | | CA | | | 20221128 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230614 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230616 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230616 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230707 |
| <input type="checkbox"/> | | Independent | | CA | | | 20230718 |

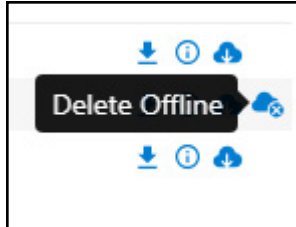
When the Report layout has stores on pages, a dropdown menu in the upper right corner allows users to switch between stores if they have more than one store downloaded.

| MSA Retails | | | | | | Preview | Controls |
|-----------------|---------------|-------------|-----------|---------------|--|---------|----------|
| MSA RETAIL NAME | STORE ADDRESS | STORE STATE | STORE ZIP | VOLUME-CY-13W | | | |
| | | CA | | 1,242 | | | |

Filters: Relative (10/28/2023); N: CIGARETTES; Retail:

Store: STORE IN...

To delete a downloaded asset from the browser cache, click the "Delete Offline" button in list view.

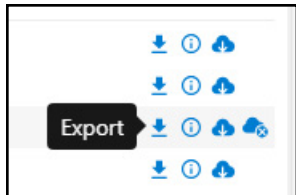


Exporting Assets

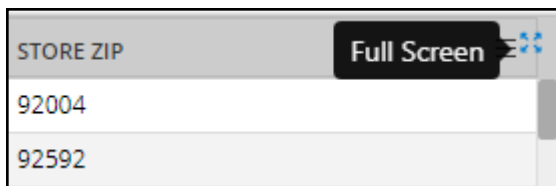
Reports and Storyboards available in Offline Viewer can be exported to other file types. Reports can be exported to Excel, CSV, PDF, or PPT; Storyboards can be exported to PDF or PPT.

There are several methods users have access to in order to export a Report or Storyboard.

- Right-click on the asset name in the list view.
- Click on the export icon next to the asset.



- Exit Preview mode, and select "Export" from the File menu.
- If the asset contains a Special Attribute, users will be prompted to select stores to export. This is recommended to avoid failed exports due to file size limitations.
- To export a single Report or chart from a Storyboard, use the full screen icon in the upper right corner of the Report users wish to export, exit preview mode, then choose export from the File menu.

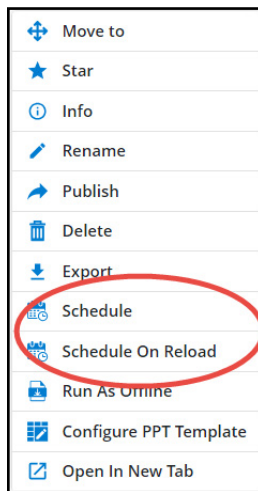


The Download Manager can be used to view the status of assets scheduled for offline use and to download any documents (Excel, PDF, PPT, etc.) scheduled to the account or exported by the user.

| ASSET NAME | TRIGGERED BY U... | EXPORT AS | TRIGGER TYPE | STATUS UPDATED ... ↓ | STATUS |
|--------------------------------------|-------------------|-----------|--------------|----------------------|-----------|
| Sales Metrics_YTD | | Offline | Schedule | Nov 22 2023, 10:... | Executing |
| Save as from Sai SB | | Offline | Schedule | Nov 22 2023, 08:... | Ready |
| Manufacturer Overview-store on pages | | Offline | Schedule | Nov 21 2023, 10:... | Ready |
| Sales Metrics_YTD | | PPT | Export | Nov 21 2023, 07:... | Ready |

Enabling Content for the Offline Viewer

A user must be a Producer user in order to enable a Report or Storyboard for offline use. To enable an asset for offline use users can use either the "Schedule" or "Schedule On Reload" menu option from list view or right click on the asset.



Under the "Schedule" options, choose Export type as "Offline", then select when and how often the Report will be scheduled to be sent to the Offline Viewer, as well as the offline recipients.

Schedule | Sales Metrics_YTD

Frequency: One Time Start Day: 11/22/2023

Export As: Offline Time Of Day: 11:00 AM

Send Via: Email SMS

Users Groups

off

Select All

Offline TestUser
Offline TestUser 2

Clear All

Offline TestUser

Note: To run the Report after each data refresh instead of scheduling it on a set frequency, select *Schedule On Reload*.

Special Attribute

The Special Attribute is typically a store attribute such as Store Number that has been configured to enable store level reporting. The presence of this attribute on rows, columns, or pages of a Report will prompt the download popup window to appear when a user tries to download an asset with a Special Attribute.

Example of a Report with a "Store" Special Attribute on Pages:

Additional Store Attributes such as Store State, City, Address, Zip, Type, etc, appear in the download screen along with the Special Attribute and can be configured to help narrow the selection of stores available to download.

| Choose Filters | MSA RETAIL NUMBER | TD CHAIN/INDEPENDENT INDICATOR | STORE ADDRESS | STORE STATE | STORE CITY | STORE ZIP | LAST CALL DATE |
|--------------------------|-------------------|--------------------------------|---------------|-------------|------------|-----------|----------------|
| <input type="checkbox"/> | | Chain | | CA | | | 20230522 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230609 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230622 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230726 |
| <input type="checkbox"/> | | Independent | | CA | | | 20230810 |
| <input type="checkbox"/> | | Chain | | CA | | | 20230814 |
| <input type="checkbox"/> | | Not a TD Store | | CA | | | 20230814 |

Notes on Special Attributes:

- The Special Attribute will not prompt the download popup screen to appear when used in a hierarchy.
- A Storyboard may contain Reports with and without the Special Attribute. Only Reports with the Special Attribute will be filtered when the asset is downloaded in the Offline Viewer.
- Consult your MSA client representative for information about using Special attributes in your Dhiva environment.

Assumptions and Limitations of the Offline Viewer

- User filters will not function in the Offline Viewer. The UF will appear on the Report if enabled but will be grayed out.
- Report links and other links do not work in Offline Mode. The underline that indicates a clickable link will not appear in the Offline Viewer.
- Merged Reports cannot be scheduled for offline use.
- Report data limits apply; Reports with assets exceeding the data limits will fail when scheduled for offline use.
- Offline users cannot refresh Reports on their own. Recommended practice is for the Producer to use the "Schedule On Reload" option so that the latest data is available when using the Offline Viewer.
- Folders are not available in the Offline Viewer.
- If a Special Attribute is present in a hierarchy, it will not prompt the download popup store selection screen to appear.
- Nested, Replacement, and Stacked hierarchies can be used in the Offline Viewer.
- Offline Viewer is not supported on smart phones.
- Offline users can add charts or change chart type while connected to the internet. These changes are temporary and will not be retained after closing the asset or when disconnected from the internet.

