



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 or not. 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:

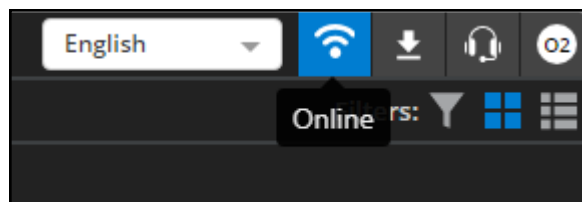
- Download, view, and interact with Reports and Storyboards.
- Change chart types or create temporary charts.
- Export downloaded Reports and Storyboards.
- Download export files scheduled by other users.

Without an internet connection:

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

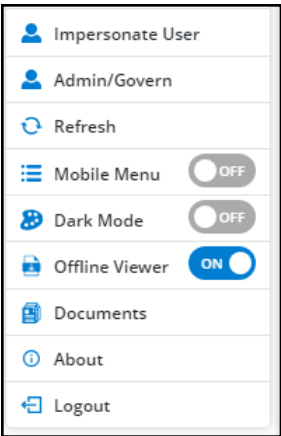
* Requires use of the same device and browser.

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

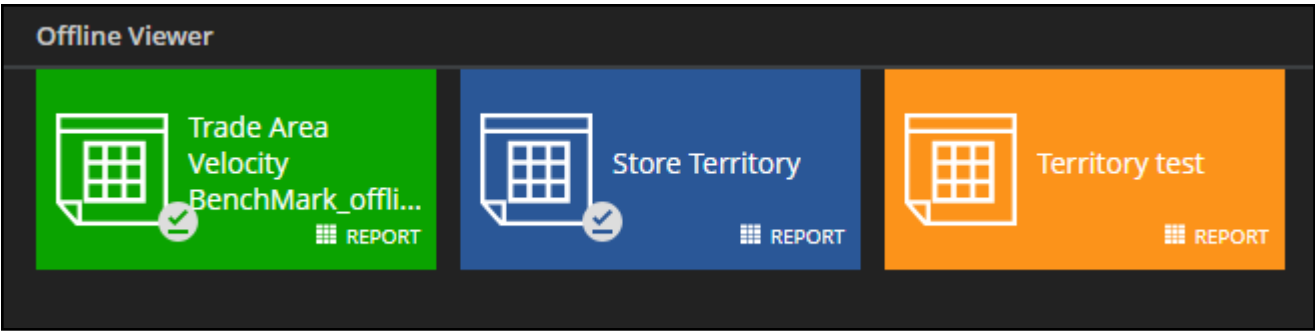


Accessing the Offline Viewer

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:   
☐	NAME	DOMAIN(S)	SPECIAL ATTRIBUTE	OWNER	TYPE	LAST DOWNLOADED TIME	  
☐	 Territory test	Sales Metrics		cmmand...	Report		  
☐	 Store Territory	Sales Metrics		bkrotec...	Report	Nov 22 2023, 10:55 AM	  
☐	 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. As stores are selected, they will be moved to the top of the list.

Note: The number of stores that can be selected may vary by client.

Choose Filters							
☐ STORE	MSA RETAIL NUMBER	TD CHAIN/INDEPENDENT INDICATOR	STORE ADDRESS	STORE STATE	STORE CITY	STORE ZIP	LAST CALL DATE
☐		Chain		CA	PERRIS		20230522
☐		Chain		CA	RANCHO MIRAGE		20230609
☐		Chain		CA	DESERT HOT SPRINGS		20230622
☐		Chain		CA	CHINO		20230726
☐		Independent		CA	FONTANA		20230810
☐		Chain		CA	REDLANDS		20230814
☐		Not a TD Store		CA	REDLANDS		20230814
☐		Independent		CA	FONTANA		20230816
☐		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.

Sales Metrics | Manufacturer Overview - 13W

(1 of 12)

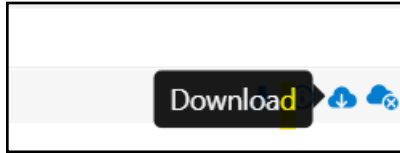
Choose Filters

☐ STORE	MSA RETAIL NUMBER	TD CHAIN/INDEPENDENT INDICATOR	STORE ADDRESS	STORE STATE	STORE CITY	STORE ZIP	LAST CALL DATE
☐		Independent		CA			NA
☒		Chain		CA			20150611
☐		Chain		CA			20221128
☐		Chain		CA			20230614
☐		Chain		CA			20230616
☐		Chain		CA			20230616
☐		Chain		CA			20230707
☐		Independent		CA			20230718

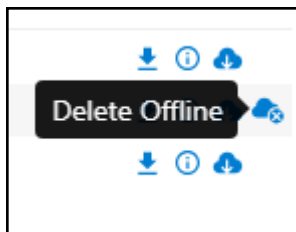
When the Report layout has stores on pages, a dropdown menu in the upper right corner allows users to switch between stores if they have more than one store downloaded.

MSA Retails						Preview	Controls
Filters: Relative (10/28/2023); N; CIGARETTES; Retail;						Store	
						STORE IN...	
MSA RETAIL NAME	STORE ADDRESS	STORE STATE	STORE ZIP	VOLUME-CY-13W			
		CA		1,242			

To add or remove stores from the download cache, click on the download icon located next to a report to bring up its store listing. From the store listing, check or uncheck stores to update the downloaded information.



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

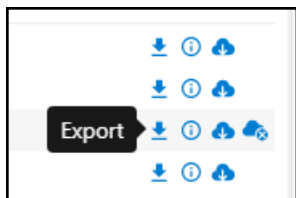


Exporting Assets

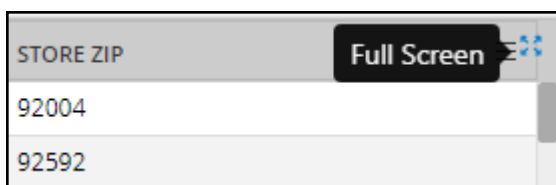
Reports and Storyboards available in Offline Viewer can be exported to other file types. Reports can be exported to Excel, CSV, PDF, or PPT; Storyboards can be exported to PDF or PPT.

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.

Downloads						
ASSET NAME	TRIGGERED BY U...	EXPORT AS	TRIGGER TYPE	STATUS UPDATED ... ↓	STATUS	
		SELECT	SELECT		SELECT	
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.

	Move to
	Star
	Info
	Rename
	Publish
	Delete
	Export
	Schedule
	Schedule On Reload
	Run As Online
	Configure PPT Template
	Open In New Tab

In the Schedule pop-up window click on the "Export settings" tab and choose the Export type "Offline"

Schedule | 4.1 testing

Schedule Settings

Export Settings



Schedule On Reload | 4.1 testing

Schedule Settings Export Settings

Export As

- ☐ PPT
- ☐ PDF
- ☐ Excel
- ☐ CSV
- ☒ Offline
- ☐ Cache

Send Via:

☐ Email ☐ SMS

Cancel DONE

After selecting an export setting, navigate back to the "Schedule settings" tab to select when and how often the Report will be sent to the Offline Viewer, as well as selecting the offline recipients.

Schedule | 4.1 testing

Schedule Settings Export Settings

Frequency: One Time

Trigger: ☒ Always ☐ On Alert

Start Day: Date: [Calendar Icon]

Time Of Day: 11 00 AM

Select Group(s):

Users Groups

Select All

Offline User -1

Clear All

> < >> <<

Cancel DONE

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 pop-up 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							
STORE	MSA RETAIL NUMBER	TD CHAIN/INDEPENDENT INDICATOR	STORE ADDRESS	STORE STATE	STORE CITY	STORE ZIP	LAST CALL DATE
☐		☐		☐		☐	
☐		Chain		CA			20230522
☐		Chain		CA			20230609
☐		Chain		CA			20230622
☐		Chain		CA			20230726
☐		Independent		CA			20230810
☐		Chain		CA			20230814
☐		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.

