



NAVIZ USER MANUAL



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1. About this Document

This Document is a User manual of Naviz Data Visualization Platform (hereafter referred as 'Naviz'), and describes some of the key features present in this platform.

Details of Naviz Data Integration Platform, with which Source Integration, Data cleansing & Analytical models can be built are not covered in this document.

For more details contact the Naviz Engagement Manager.

2. Glossary

Widget – Different charts with which data can be visualized

Filter – Used for slicing the data

Dashboard – A screen with a combination of multiple widgets and filters

Roles – User roles present in Naviz

Super Admin – User with highest privileges in Naviz

POD Admin – Client Level Admin

Super User – User who has view access to all the data, but cannot create any widgets

User – Client Level User

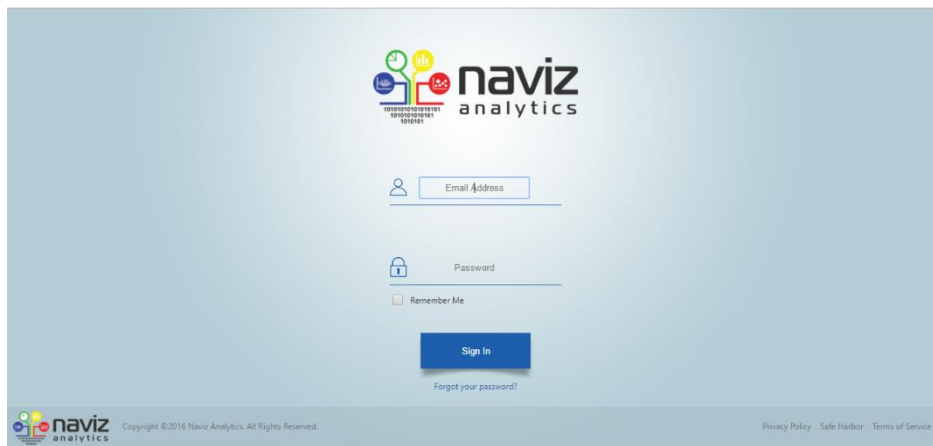
Global Dashboards – Dashboards created by Super admin

Custom Dashboards - Created by POD admin

3. Login

1. Click on the Naviz website link
2. Enter Email address (username) and password



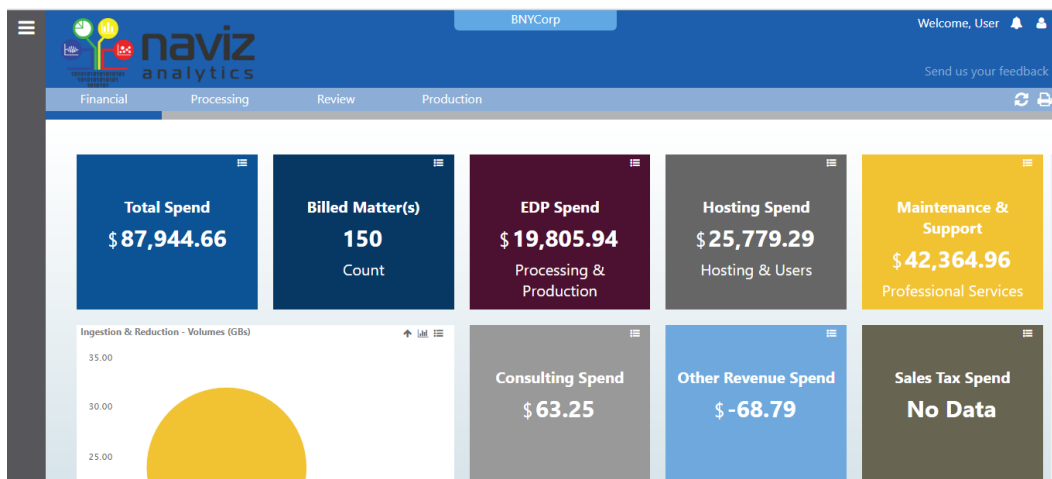


a) First Login

User will be presented with a 'Terms & Conditions' acceptance page. User can access the Dashboards only if the Terms are accepted.

b) Subsequent Logins

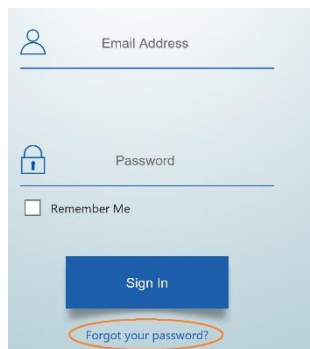
User will land at the Dashboard to which necessary access has been provided.



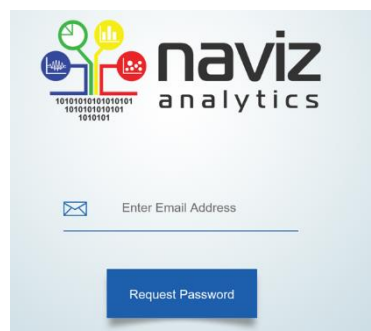
c) Forgot Your Password?

An email with a link will be sent to the user's email address. User can set the new password by clicking on this link.

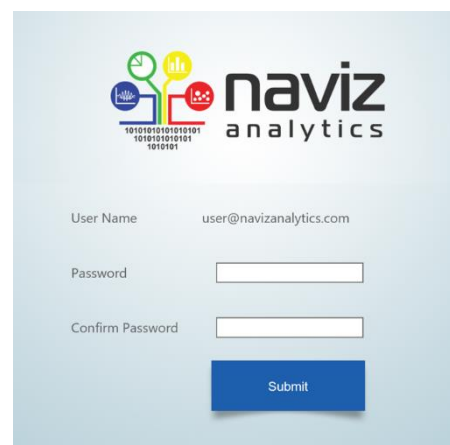




Sign In form with fields for Email Address, Password, and a Remember Me checkbox. A 'Sign In' button is at the bottom, and a 'Forgot your password?' link is below it.



Request Password form with the naviz analytics logo at the top and an 'Enter Email Address' field with a 'Request Password' button below it.



New User form with the naviz analytics logo at the top and fields for User Name, Password, and Confirm Password, followed by a 'Submit' button.

4. Roles

There are four user roles in Naviz

1. Super Admin
2. POD Admin
3. User
4. Super User

The access to various features in Naviz depends on the roles assigned to a user

	SUPER ADMIN	POD ADMIN	USER	SUPER USER
Access to <u>account settings</u>	YES	YES	NO	NO
<u>USER MANAGEMENT</u>				
create/edit/delete super admin	YES	NO	NO	NO
create/edit/delete POD admin	YES	YES	NO	NO
create/edit/delete user role	YES	YES	NO	NO
create/edit/delete super user	YES	NO	NO	NO
mimic user	YES	YES	NO	NO
switch client	NO	YES(>1 client count)	YES(>1 client count)	NO
<u>CLIENT MANAGEMENT</u>				
access to client management	YES	NO	NO	NO
update the client type	YES	NO	NO	NO



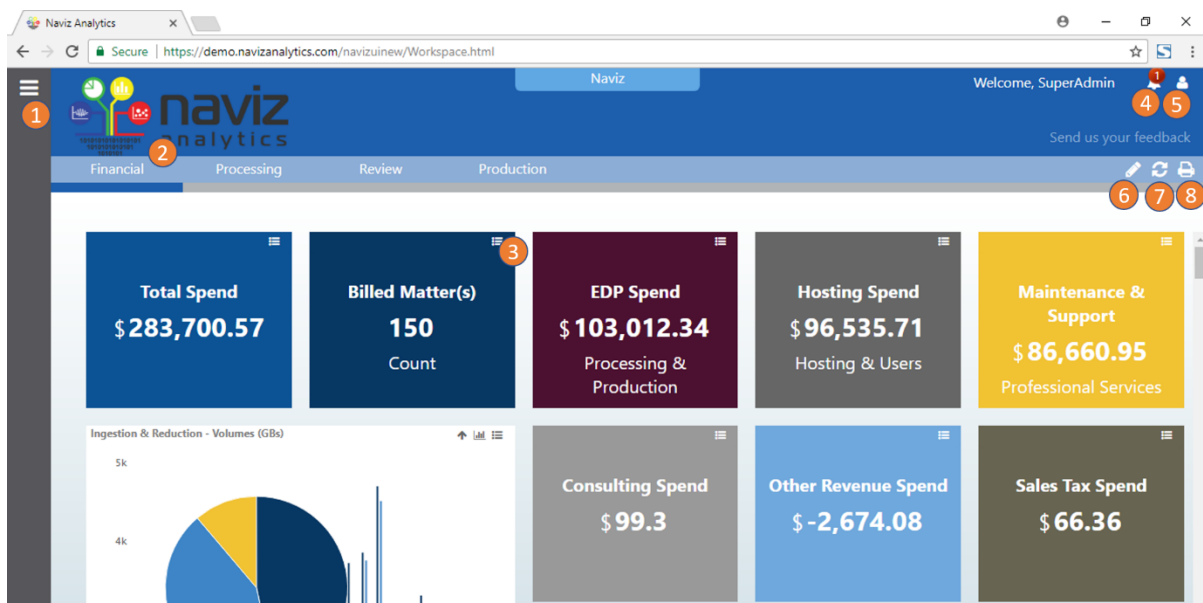
<u>CUBE MANAGEMENT</u>				
access to cube management	YES	NO	NO	NO
add/edit/delete cube	YES	NO	NO	NO
<u>MATTER MANAGEMENT</u>				
access to matter management	YES	YES	NO	NO
edit matter management	YES	YES	NO	NO
<u>DASHBOARD MANAGEMENT</u>				
access to dashboard management	YES	YES	NO	NO
create/edit/delete global dashboard	YES	NO	NO	NO
create/edit/delete custom dashboard	NO	YES	NO	NO
View global dashboards	YES	YES	YES	YES
View custom dashboards	NO	YES	ON ACCESS	NO
access to refresh dashboard	YES	YES	YES	YES
access to export dashboard	YES	YES	YES	YES
<u>ALERT MANAGEMENT</u>				
access to alert management	YES	NO	NO	NO
Enable/disable alerts	YES	NO	NO	NO
<u>SYSTEM MESSAGES</u>				
access to system messages	YES	YES	NO	NO
add/copy/delete messages	YES	YES	NO	NO
<u>ADMIN UTILITY</u>				
access to admin utility	YES	NO	NO	NO
RESET PASSWORD				
Reset password	YES	YES	YES	YES
WIDGETS				
add/edit/remove widget of global dashboards	YES	NO	NO	NO



add/edit/remove widget of custom dashboards	NO	YES	NO	NO
resize/move widget of global dashboards	YES	NO	NO	NO
resize/move widget of custom dashboards	NO	YES	NO	NO
can export widgets	YES	YES	YES	YES
FILTERS				
add/remove filters	YES	YES	YES	YES
add/remove favourite filters	YES	YES	YES	YES

5. Naviz Features

Below is a landing dashboard of a User



1. [Dashboard Filters](#) – User can apply filters
2. Dashboards
3. [Widget options](#) where the user can export the chart data into Excel/CSV/Jpeg/SVG
4. Alerts – All alerts regarding the user account/dashboards/widgets can be viewed here. An alert expires after 24 hrs.
5. User Profile Menu where the user can access [AccountSettings](#)/ Reset Password/ Logout
6. SuperAdmin & POD Admin can edit the dashboard and add/edit/delete/resize/move widgets



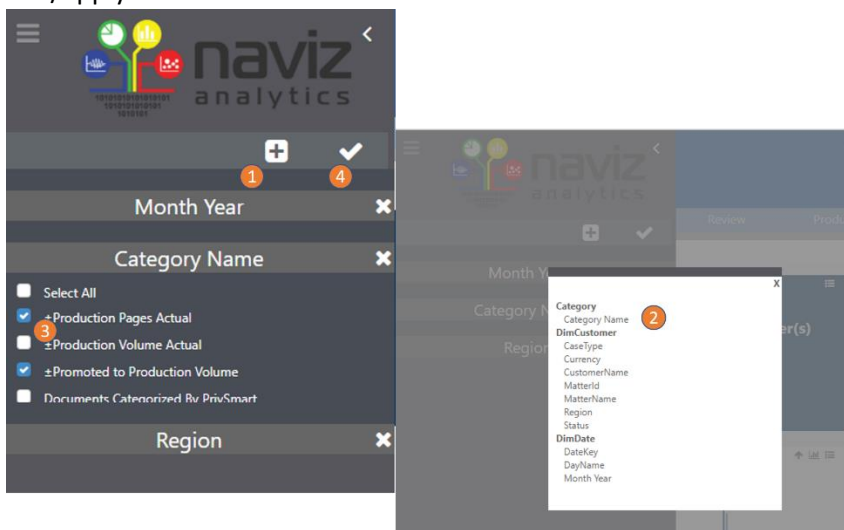
7. Refresh dashboard
8. [Export Dashboard](#)

a) Filters

- Any user role can create and apply filters to the dashboards.
- Filters once applied, remains until the session remains unless the user removes the filter. Once the user logs out, the filter settings are lost.
- Regularly used filters can be pinned to the dashboard, these filters will be available for the user in the subsequent logins.
- Applied filter persists across all dashboards. The user can view the filters applied on the breadcrumb displayed below the dashboard list
- A user can apply any number of filters to the dashboards
- There are two types of filters available in Naviz Application
 - [Dashboard Filters](#)
 - [Widget Filters](#)

i. Dashboard Filter

- On clicking the hamburger icon on the top left, the left panel expands with the option to add/apply filter

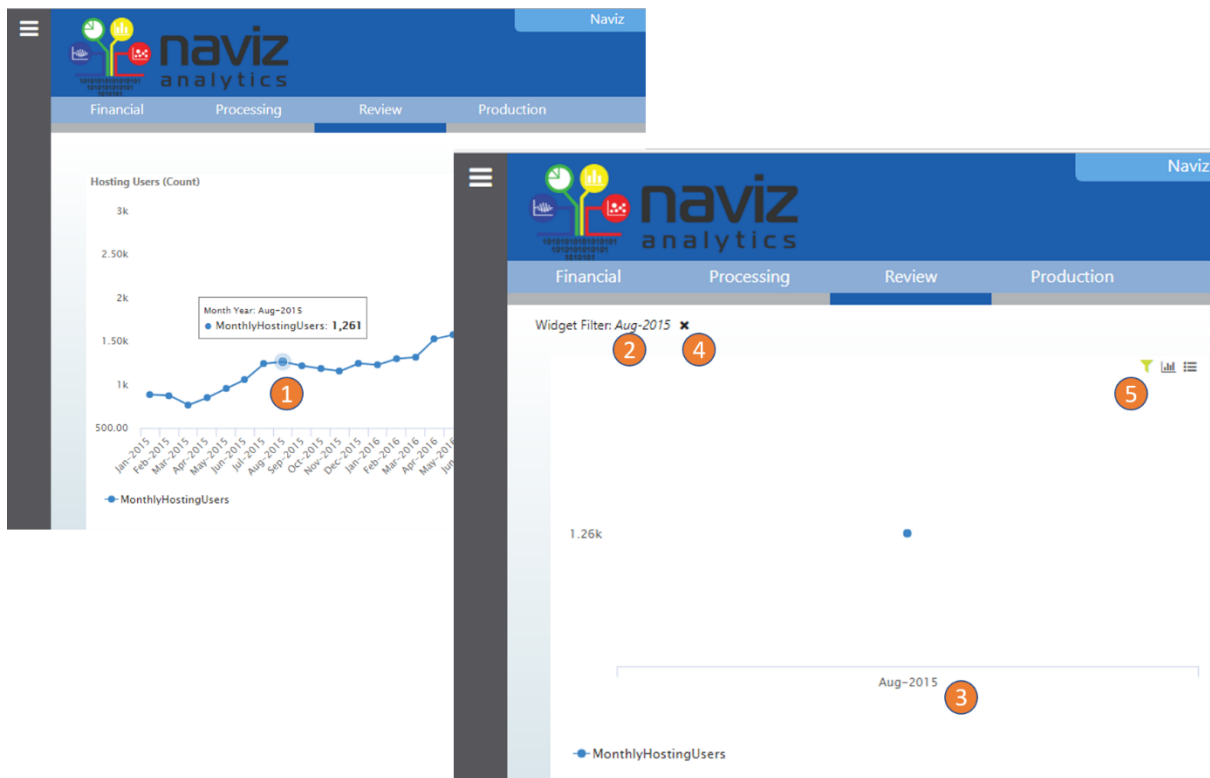


1. The user can add a filter of their choice
2. User then selects the filter of their choice
3. The filter gets added in the left panel where the user can select all or particular option
4. Clicking on the tick icon will apply the filters to the dashboard

ii. Widget Filter

Widget filter has similar filter functionality of dashboard filter but only one filter per widget can be applied at once. Filters from various widgets can be applied at once.



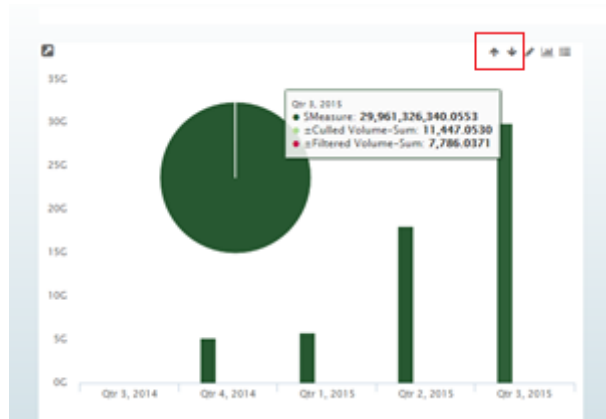


1. To apply widget filter, click on a data point on the chart
2. Filters get applied and the details of the filter gets displayed on the breadcrumb
3. The filter is applied on the widget
4. All the widget filters can be removed by clicking on the 'X' icon
5. Clicking on Funnel icon removes the filter that is being applied from the widget

b) Drill Functionality

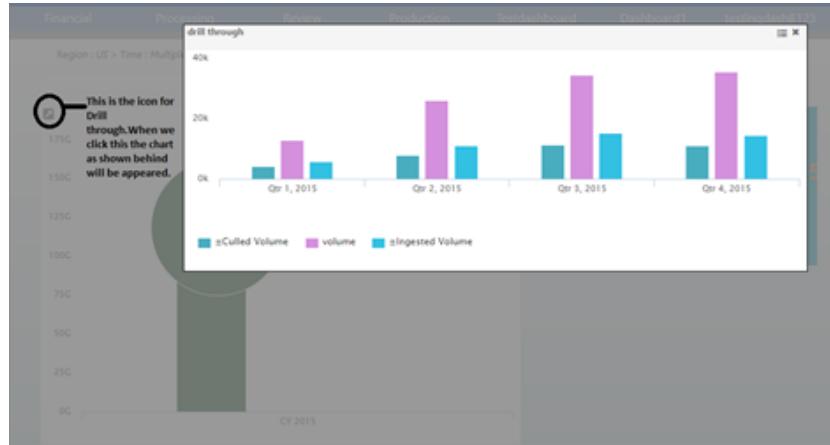
i. Drill Up/Down

- With the help of this functionality, the user (of any user role) can go up or down the hierarchy in a chart.
- Drill up/down arrows pointing up and down appear only when a chart is created using hierarchy dimensions.



ii. Drill Through

- A drill through icon appears on the top left of a widget and when clicked on that the widget created in drill through will be highlighted as shown below.



iii. Cross Dimension Drill Down

- This feature allows the chart to drill down using various dimensions.
- For example, in the chart below, that shows the Native Documents Promoted to Review by month, we can see that document count for every month. If we want to see for a particular month, what is the matters whose documents have been promoted for review, right click on the chart for that month and select the MatterID dimension as below



- Right-Click on a data point, a pop up appears showing different dimensions
- Select an option to drill down with
- The selection is being displayed on the top left corner of the chart
- Refresh – To get back to the original chart
- Left Arrow – To drill up one level

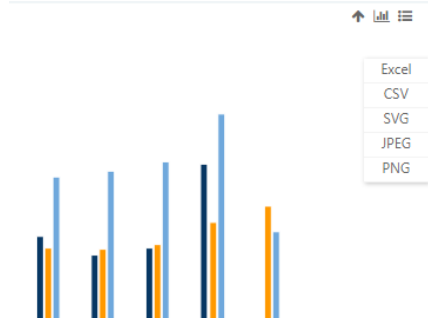
- Data can be exported to Excel/CSV/JPEG/PNG/SVG with the applied Cross Dimension Drill
- Chart zoom-in and widget-level filters can also be applied when Cross Dimension Drill is applied



c) Export

i. Widget

- Any user can export a widget into any type as an excel sheet, CSV, SVG, JPEG, PNG. But score cards can be exported only as excel and CSV as shown below.



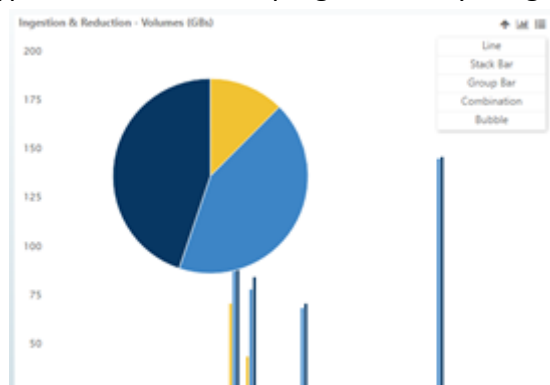
ii. Dashboard

- Export dashboard can be done by all the users. A printer icon will be available at the top right of the dashboard, beside the dashboards list.
- On clicking this icon, the widgets that are there in that particular dashboard will be exported/downloaded in a pdf format.
- In this pdf, the widgets are divided in such a way that all the score cards will be displayed in one page and other widgets are displayed in another page whereas, it should be exported in the order in which a user creates them.

d) Other Features

i. Change Chart Type

Charts on the dashboard can be viewed as different chart types by clicking on the icon change chart type which is at the top right of every widget, except a scorecard.



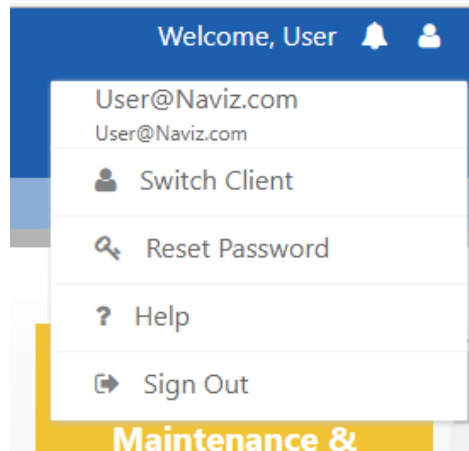
ii. Switch Client

Naviz supports Multi-Tenant architecture. By default, a POD Admin/User can access only one tenant's data. With Switch client option a Pod admin/User can access

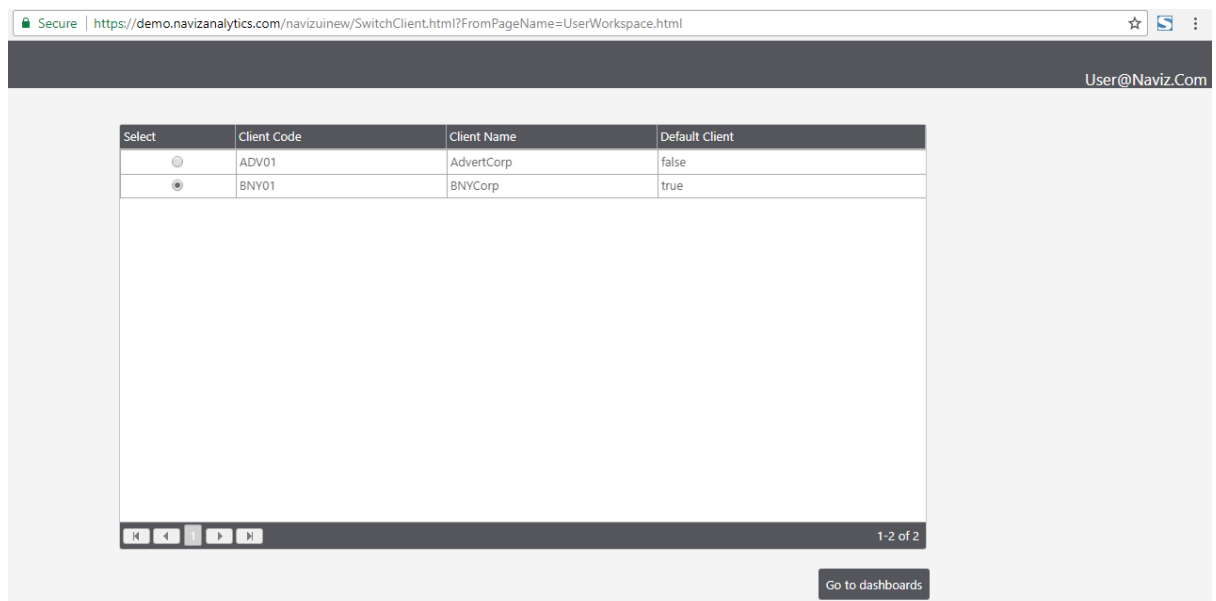


other clients' data to which the access has been given to them. Super admin and Super user have access to all the clients so they do not have switch client option.

- Pod admin and a User can view the Switch client option in the user profile as shown below

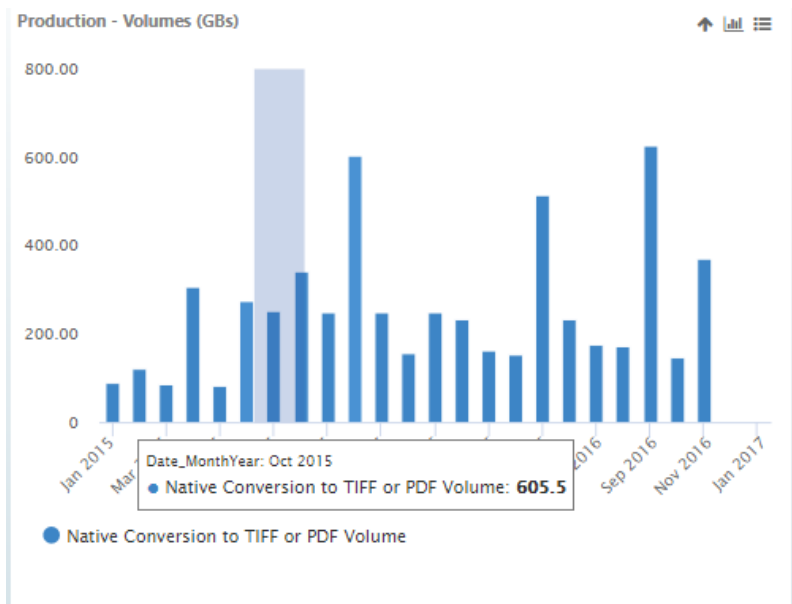


- After clicking the switch client option, a table with all the clients related to that particular User is displayed as shown below. And from those clients user need to select one client and click on Go to dashboard, then that particular client's dashboard is displayed on the screen.



iii. Zoom-in on Chart

The user can zoom in on chart by clicking on and dragging until required (as shown below).

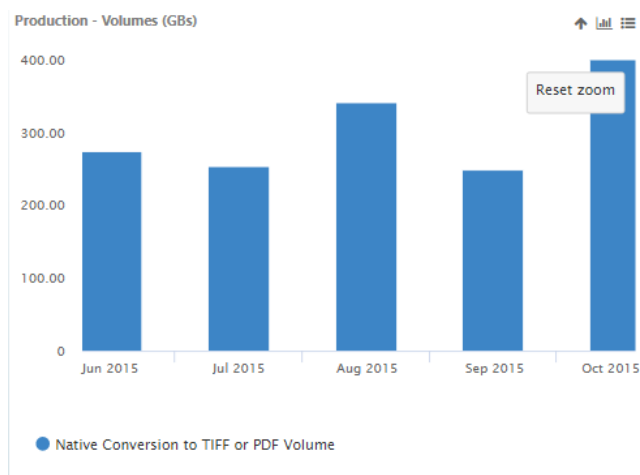


The chart then zooms-in and a 'Reset Zoom' button appears for going back to the original chart

iv. Widget Types

There are different types of widgets:

1. Line graphs (Smooth lines and Pointers)
2. Pie Chart
3. Bar graph (Horizontal/Vertical)
4. Stacked Bar graph (Horizontal/Vertical)
5. Funnel Chart
6. Combination Chart
7. Score card
8. Sparkline chart

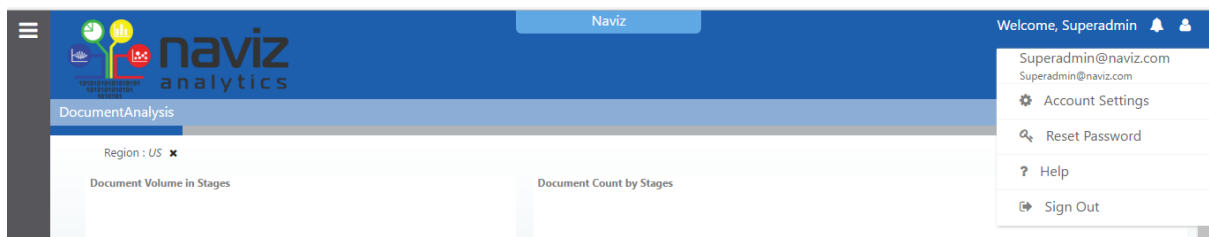


- Users and Super users does not have access to create any widgets. They can only view the widgets created by Super admin and pod admin.

e) Administration

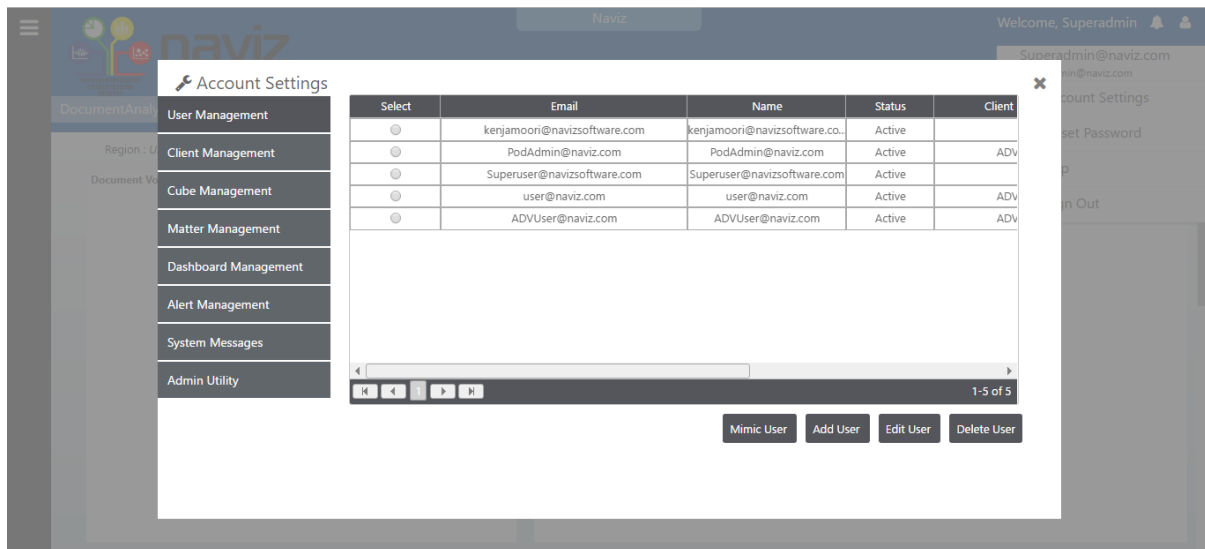
i. Account Settings

- Super Admin and POD Admin have access to Account Settings functionality whereas Users and Super Users do not.



- **Super Admin** has access to the following functionalities:
 - User Management
 - Client Management
 - Cube Management
 - Matter Management
 - Dashboard Management
 - Alert Management
 - System Messages
 - Admin Utility
- **POD Admin** has access to the following functionalities in Account Settings:
 1. User Management
 2. Matter Management
 3. Dashboard Management
 4. System Messages

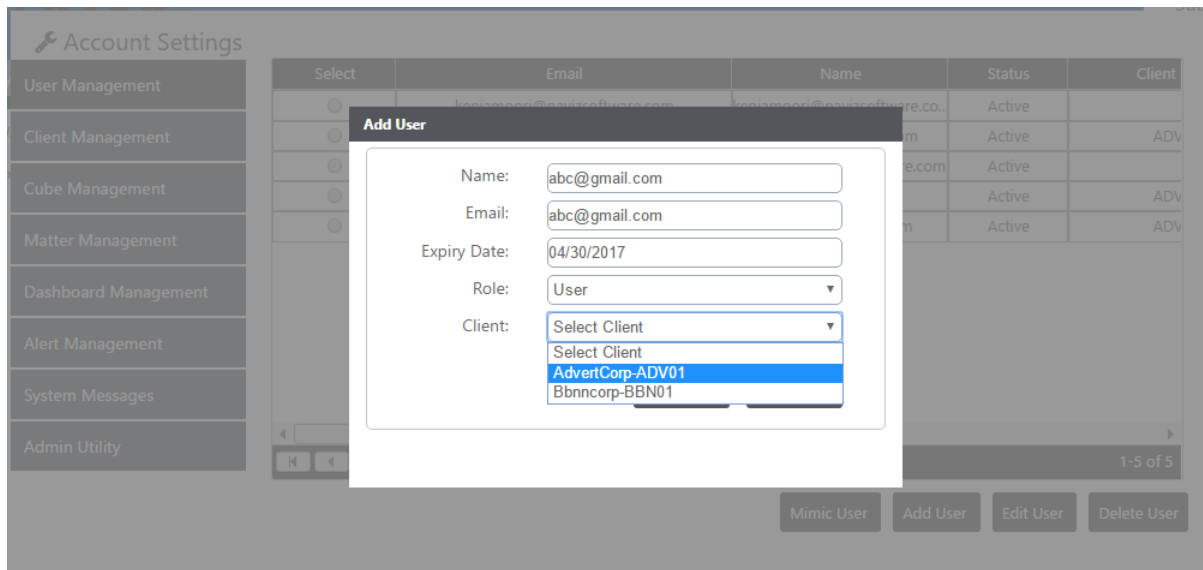




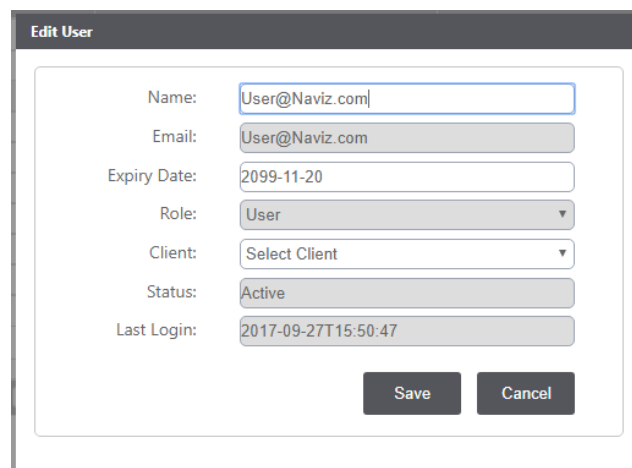
ii. User Management

- User Management tab consists of the user information. The information it provides are as follows:
 - Email: Email Address
 - Name: Name
 - Status: Active/Deactivated
 - Client Name: Name of the client to which the user has access to
 - For Super Admin and Super User the client code and client name fields will be empty as Super admin and Super user have access to all the clients.
 - Role: Role of the user
 - Last Login: Last login date and time.
- Super Admin can add/edit/delete/mimic any user whereas the POD Admin can add/edit/delete/mimic another Pod Admin (Role Id: 2) or a 'User' (Role Id: 3)
- For a Super Admin, the User Management tab shows the information of all the users whereas for a Pod Admin the User Management shows the information of those users of the client to which the Pod admin is currently managing.
- While adding a user following are the details to be provided:
 - Name: Valid Email id
 - Email: Email of the user
 - Expiry Date: User account expiry date
 - Role: Types of user:
 - Super Admin User can create another Super Admin User, POD Admin User, User and Super User
 - POD Admin User can create another POD Admin User and User
 - Client: The client to which the user belongs



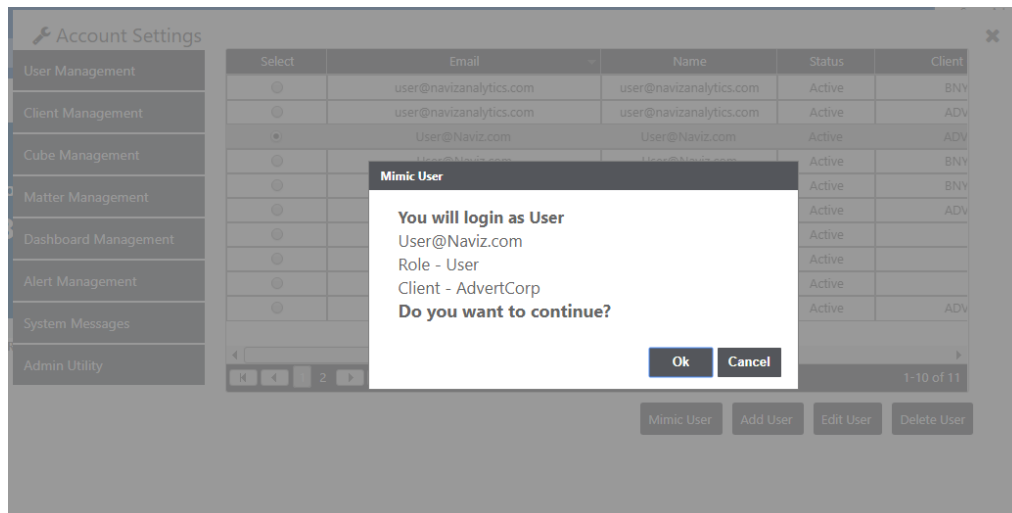


- Clicking on Save will save the details to the database and clicking on cancel will revoke the operation.
- Edit user function will allow update of following information of the user Name, Expiry date, Client as shown below.

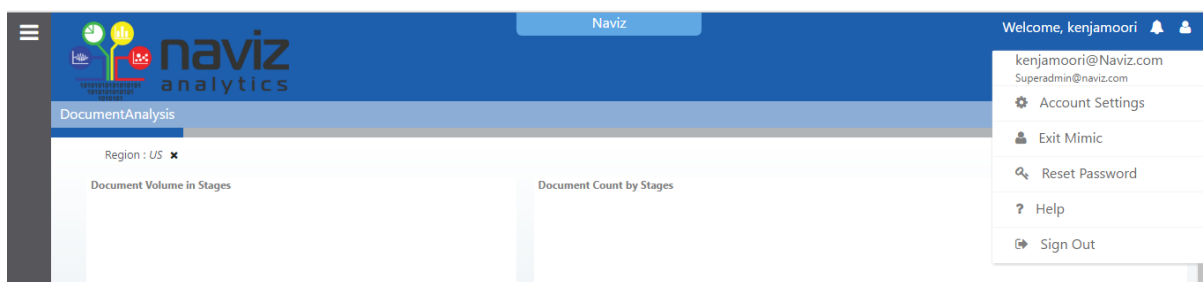


- Mimic user serves the purpose of the word 'mimic'. Clicking on this button will mimic the access permissions of the user. The below message in the screenshot will be shown when the user tries the mimic function.





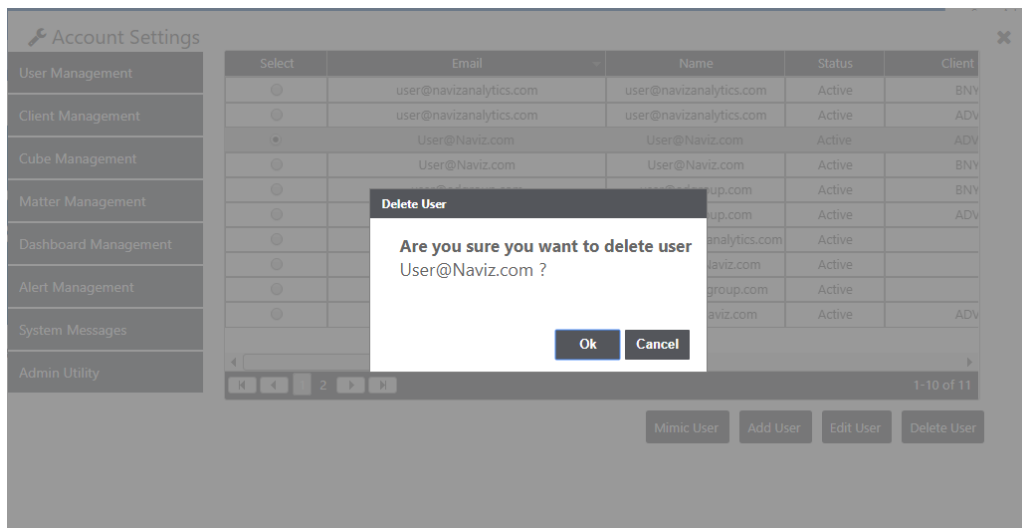
- Clicking on OK will redirect the user to the workspace page logged in as mimic user. This way the Super Admin user can view the dashboard and functionalities available to that user.
- In order to come back to the original user, the Super admin has to click on “Exit mimic” in the user profile menu.



- On clicking “Exit mimic” comes back to workspace page logged in as Super Admin user. After exiting the mimic, Financial dashboard will be displayed as it is the landing dashboard as shown below.



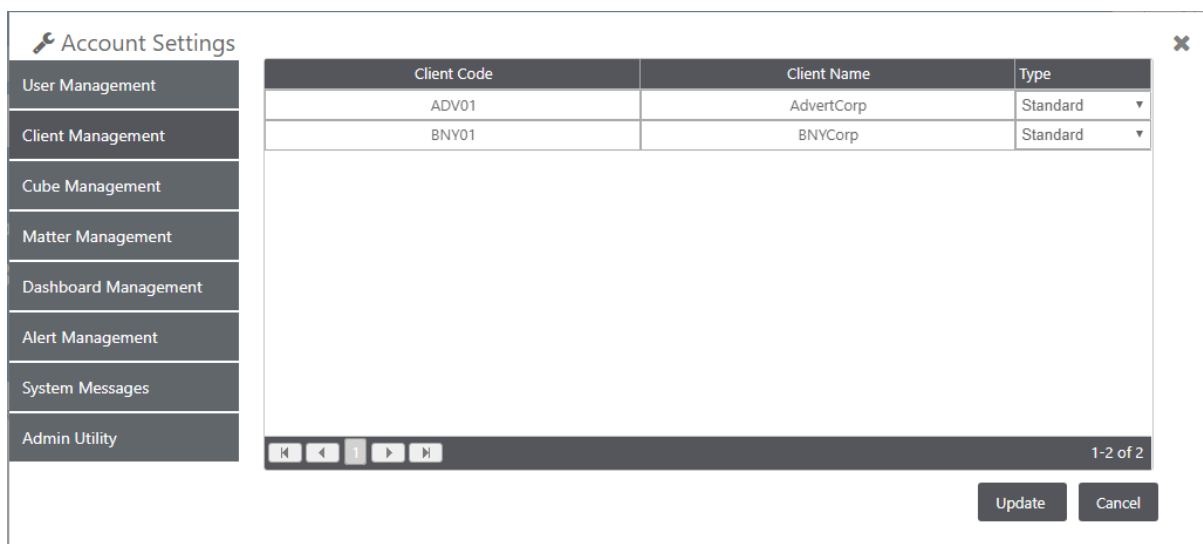
- To delete a user, select the user and click on delete.



- On successful deletion, the user is not actually removed from the database but, the user is deactivated.

iii. Client Management

- This tab is only available for Super Admin. It consists of the following columns:
 - Client Code: Client id from the database
 - Client Name: Name of the client
 - Type: Type of Client(Standard/Premium)



- On clicking the update button, it updates the changes made to the type of client.
- The client type can be changed by clicking on the dropdown in the **Type**. There are two options **Standard** and **Premium**.

iv. Cube Management

- Cube Management tab is only available for Super Admin. This tab consists of cube information in Naviz. The following columns are shown in the tab:



- Logical Name: Logical name of the cube
- Server Name: Name of the server where the cube resides
- Backup Server Name: Name of the server where the backup is done
- Database Name: Name of the database where the data is processed to form a cube.
- Cube Name: Name of the cube
- Client Name: Names of the client to which the cubes are associated.
- Security Fact Name
- Security Dimension Name
- Security Dimension Attribute Name

Account Settings

User Management

Client Management

Cube Management

Matter Management

Dashboard Management

Alert Management

System Messages

Admin Utility

Select	Logical Name	Server Name	Backup Server Name	Database Name	Cube Name	Client Name	Security
<input type="radio"/>	GlobalCube	.	.	GlobalDB01	Globalcube		Use
<input type="radio"/>	ADV01	.	.	NavigateDB02	NavigateCube	AdvertCorp-AD...	Use
<input type="radio"/>	BNY01	.	.	NavigateDB01	NavigateCube	BNYCorp-BNY01	Use

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Add Cube Edit Cube Delete Cube

Add Cube Details

Logical Name:

Server:

Backup Server Name:

Database:

Cube:

Security Measure:

Security Dimension:

Security Attribute:

☐ Is Global Cube?

Client: ☐ AdvertCorp ☐ BNYCorp

[Add Cube Names](#)


Save Cancel

v. Matter Management

- The functionality of Matter Management is available for both Super Admin and POD Admin.



- A Super Admin can view/edit all matters whereas a POD Admin can view/edit matters related to the client the user belongs to.
- Matter Management tab shows the following columns:
 1. Matter Name: Name of the case
 2. Matter Start Date: Start date of the case
 3. Client Code: The code given to a particular client
 4. Client Name: The name of the client that particular matter belongs to.
 5. Status : Active or Purged
 - Active(A): The matters exist and are in use
 - Purged(P): Purged matters are the matters that are not in use and removed permanently, they cannot be retrieved again.
 6. Assigned Users: The list of users assigned to the case

 Account Settings ✕

User Management

Client Management

Cube Management

Matter Management

Dashboard Management

Alert Management

System Messages


Admin Utility

Select	Matter Name	Matter Start Date	Client Code	Client Name	
<input type="radio"/>	ADV0110001		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110002		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110003		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110004		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110006		ADV01	AdvertCorp	
<input type="radio"/>	ADV013PGIL		ADV01	AdvertCorp	
<input type="radio"/>	ADV0199999		ADV01	AdvertCorp	
<input type="radio"/>	ADV01ACCLR		ADV01	AdvertCorp	
<input type="radio"/>	ADV01ADMUN		ADV01	AdvertCorp	
<input type="radio"/>	ADV01AGCID		ADV01	AdvertCorp	

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Edit Matter

- On clicking Edit Matter button, the following screen comes up and the user can provide access to other users

 Account Settings ✕

User Management

Client Management

Cube Management

Matter Management

Dashboard Management

Alert Management

System Messages

Admin Utility

Select	Matter Name	Matter Start Date	Client Code	Client Name	
<input type="radio"/>	ADV0110001		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110002		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110003		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110004		ADV01	AdvertCorp	
<input type="radio"/>	ADV0110006		ADV01	AdvertCorp	
<input type="radio"/>	ADV013PGIL		ADV01	AdvertCorp	
<input type="radio"/>	ADV0199999		ADV01	AdvertCorp	
<input type="radio"/>	ADV01ACCLR		ADV01	AdvertCorp	
<input type="radio"/>	ADV01ADMUN		ADV01	AdvertCorp	
<input type="radio"/>	ADV01AGCID		ADV01	AdvertCorp	

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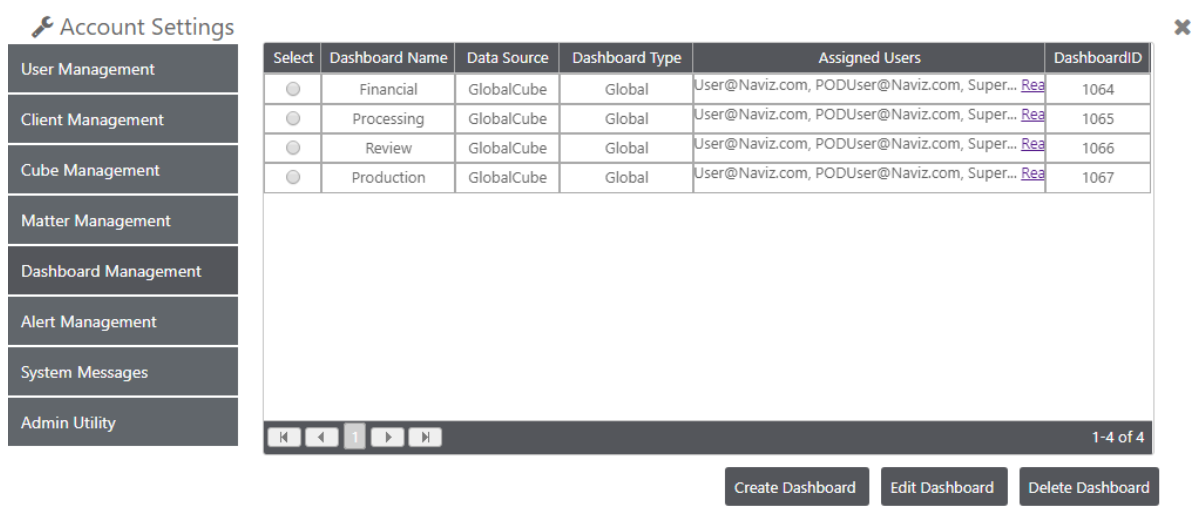
Edit Matter



- The pop up displays the Matter Name, the client it belongs to and the users assigned to it. The user can edit as required and click on Save Otherwise Cancel.

vi. Dashboard Management

- This tab is available for both Super Admin and POD Admin.
- Super admin can create global dashboards and pod admin can create custom dashboards.
- Pod admin associated to a **Standard** client have access only to edit a custom dashboard whereas pod admin associated to a **Premium** client have access to create, edit and delete a custom dashboard.



Account Settings

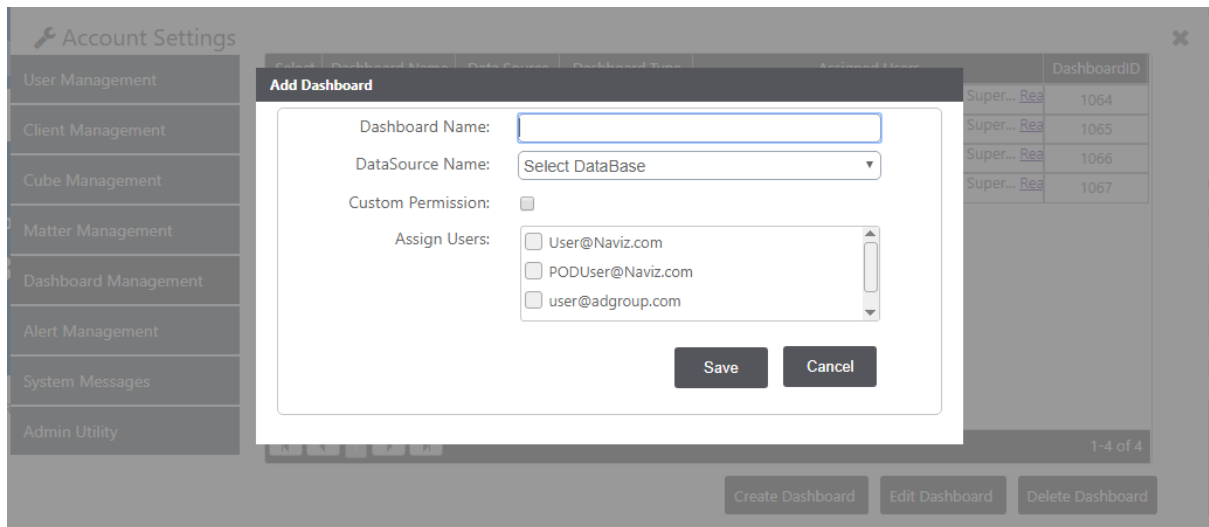
Select	Dashboard Name	Data Source	Dashboard Type	Assigned Users	DashboardID
<input type="radio"/>	Financial	GlobalCube	Global	User@Naviz.com, PODUser@Naviz.com, Super... Rea	1064
<input type="radio"/>	Processing	GlobalCube	Global	User@Naviz.com, PODUser@Naviz.com, Super... Rea	1065
<input type="radio"/>	Review	GlobalCube	Global	User@Naviz.com, PODUser@Naviz.com, Super... Rea	1066
<input type="radio"/>	Production	GlobalCube	Global	User@Naviz.com, PODUser@Naviz.com, Super... Rea	1067

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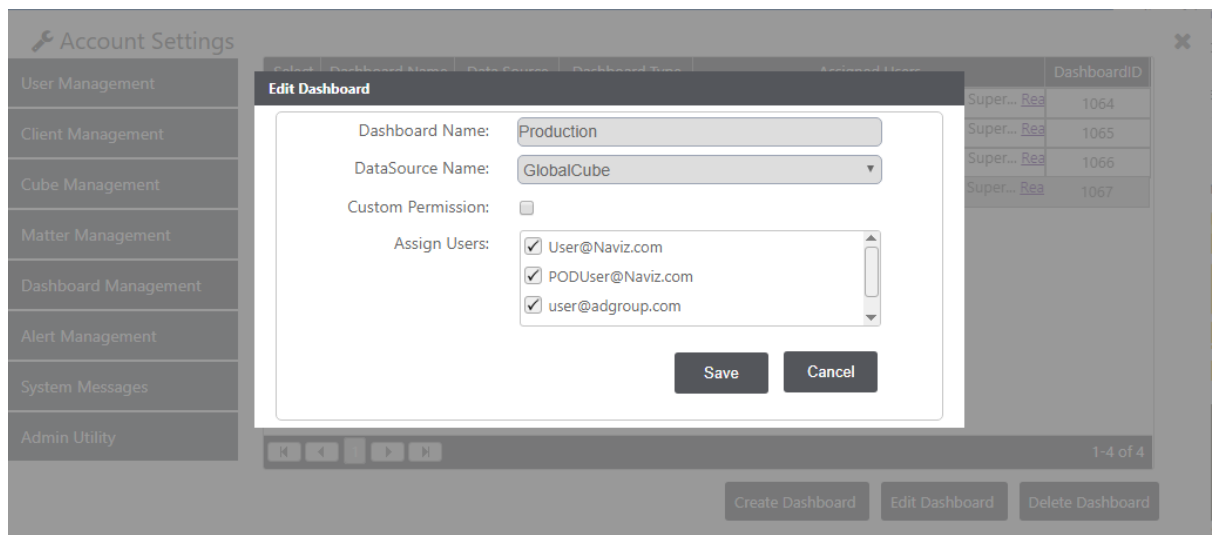
Create Dashboard Edit Dashboard Delete Dashboard

- Dashboard Management tab lists all the dashboards that are created in the following format.
 - Dashboard Name: Name of the dashboard
 - Data Source Name: Name of the cube from where data is retrieved from
 - Dashboard Type: Shows the type of the Dashboard: Global or Custom
 - Global Dashboards: Created by Super admin
 - Custom Dashboards: Created by Pod admin
 - Assign Users: Displays the list of the users who have permission to access a particular dashboard.
 - Dashboard ID: Shows the ID assigned to a particular dashboard.
- While Creating a dashboard, the user has to enter the following details:
 - Dashboard Name: Name of the dashboard
 - Data Source Name: Name of the cube from where data is retrieved from
 - Custom permission
 - Assign Users: Displays the list of the users who have permission to access a particular dashboard.

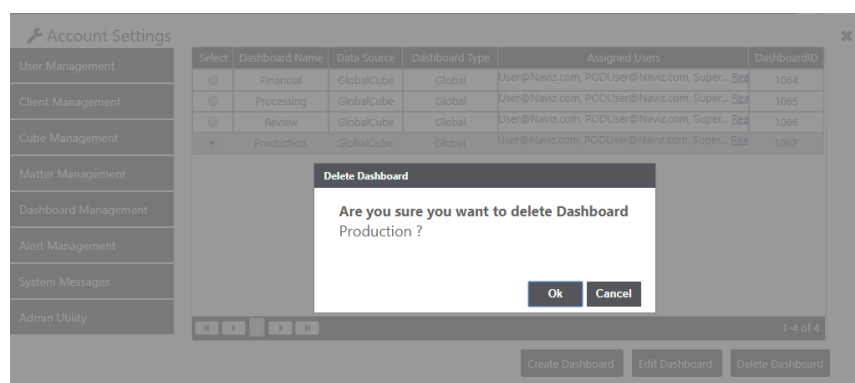




- While editing a dashboard, the user can update the custom permission and also assign users to the dashboard.



- To delete a dashboard, select a dashboard and click on delete dashboard. You will see a message as shown below



- By clicking on “OK”, the dashboard will be deleted from the database.
- Similarly, a pod admin can create, edit and delete a custom dashboard, if the pod admin is associated to a **Premium** client. If the pod admin associated to standard client, then they can just edit a custom dashboard.

vii. Alert Management

- This tab is available only for Super Admin user. The user can view all types of alerts and enable or disable them by checking/unchecking them.
- Alert Management tab shows the following columns:
 1. Alert Id
 2. Alert Name
 3. Enable (Checkbox)
- When the Enable field is checked, then the alerts will be sent to the users, when they perform actions specified in the Alert Management as shown below.



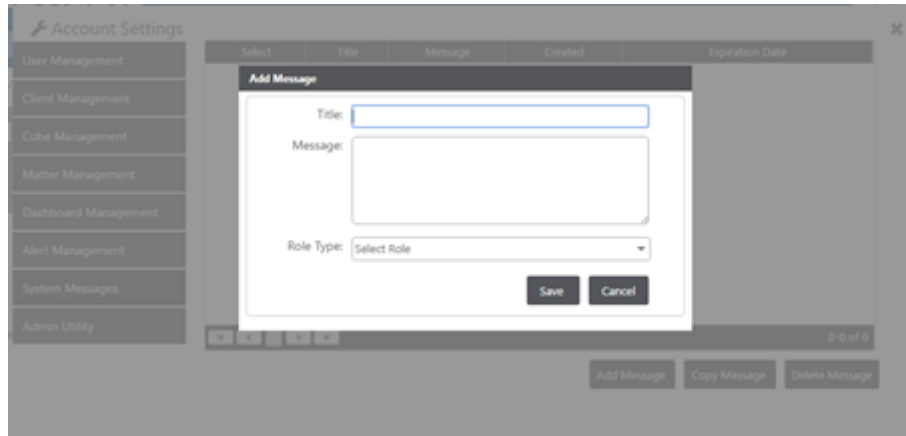
Alert ID	Alert Name	Enable
1	New Dashboard	<input checked="" type="checkbox"/>
2	Dashboard Modification	<input checked="" type="checkbox"/>
3	Data Updates	<input checked="" type="checkbox"/>
4	Permission Changes	<input checked="" type="checkbox"/>
5	Password Reset	<input checked="" type="checkbox"/>
6	System Messages	<input checked="" type="checkbox"/>

- After making enabling/ disabling the alerts, the user has to click on save to save the settings to the database.

viii. System Messages

- This functionality is available for both Super Admin user and POD Admin User
- This tab consists of the following columns:
 1. Title: Title of the message
 2. Message: Content of the message
 3. Created: The date when this message was created
 4. Expiration Date: The date when the message expires
- The user can add/copy/delete the message
- While adding a message, the user has to enter the three columns: Title, Message and the type of user the message has to be sent to.
- While editing or copying the message, the user has to edit three columns: Title, Message and the type of user the message has to be sent to.

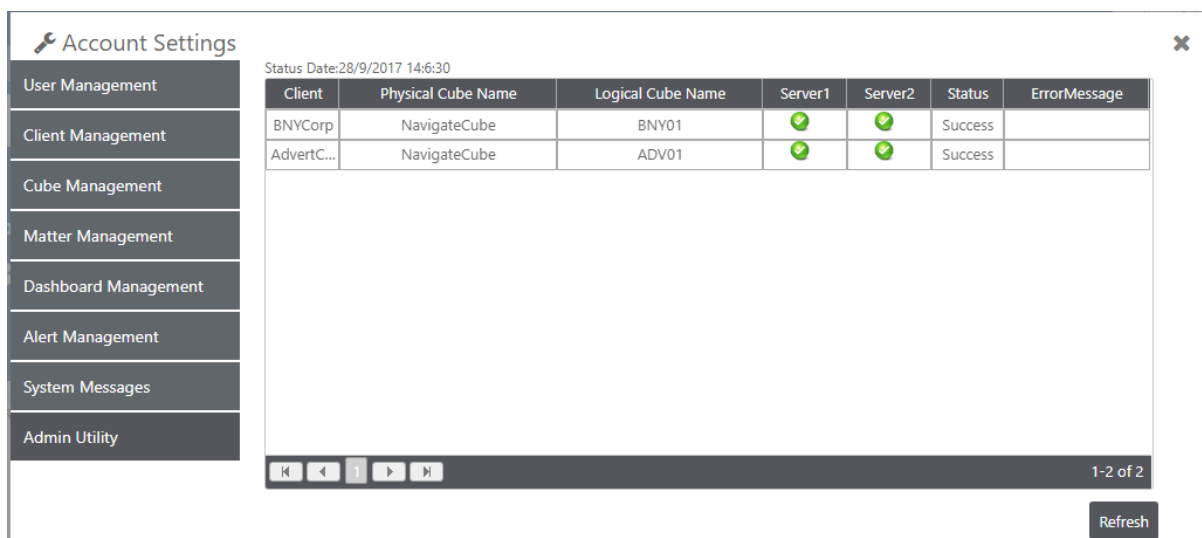




- Based on the role selected alerts will be sent to the users associated to that particular role. The users will receive those messages as alerts.

ix. Admin Utility

- This tab is available only for Super Admin.
- Admin Utility tab consists of the following columns:
 - Client: Name of the client
 - Physical Cube Name: Physical name of the cube used to get the data from for the client
 - Logical Cube Name: Logical Name of the cube
 - Server1
 - Server2
 - Status
 - Error Message
- Refresh button refreshes the data in the table.



Client	Physical Cube Name	Logical Cube Name	Server1	Server2	Status	ErrorMessage
BNYCorp	NavigateCube	BNY01	✓	✓	Success	
AdvertC...	NavigateCube	ADV01	✓	✓	Success	

