

**B3WAY PLATFORM MANUAL**

# CONFIDENTIALITY

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# INDEX



Platform



Usage tips and best practices



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 **PLATAFORM**

# ACCESS and LOGIN

Access to the platform must be done through the link:

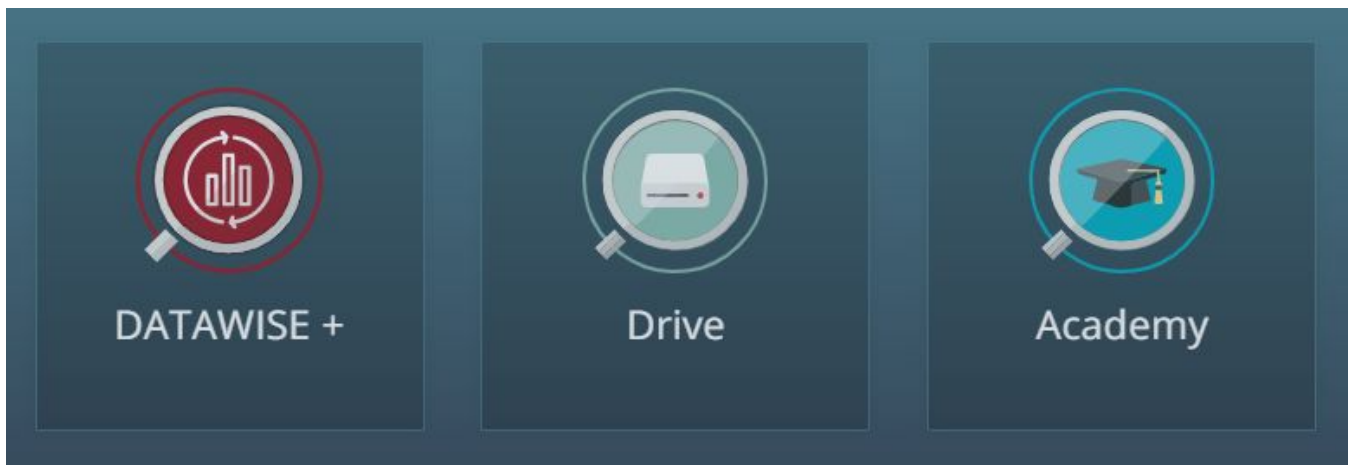
<https://b3way.neoway.com.br/>

The username and password for access will be granted within the SLA stipulated after signing the contract, when generated you will receive an email from [suporte.simm@neoway.com.br](mailto:suporte.simm@neoway.com.br) containing the information necessary for your first login. If you want to add or remove users, you must contact the commercial representative who supported you during the hiring process.

It is recommended to use the applications on operating systems Windows 8 (and higher) and OSX 10.6 (Snow Leopard) and higher, with Chrome browser version 49+.



# APPLICATIONS



On the homepage you will find three apps: DATAWISE+, Drive and Academy.

## DATAWISE +

It is the application that promotes Power BI integration and must be accessed to use the reports. Data visualization, table export and other Power BI features will be available on this tab. You view all your reports here.

## DRIVE

In this application you can view the temporary files, which are files exported by your organization recently, if you want to download a certain file again, this is a simplified path.

## Academy

By clicking on this button, you will be redirected to <https://academy.neoway.com.br/index.php>, your login will be enabled to access this platform only if any product contracted by you has video training.



# SUPPORT

In case of doubts or technical occurrences regarding the platform and the product, contact the support team at **0800 006 1661** or by email [suporte@neoway.com.br](mailto:suporte@neoway.com.br).



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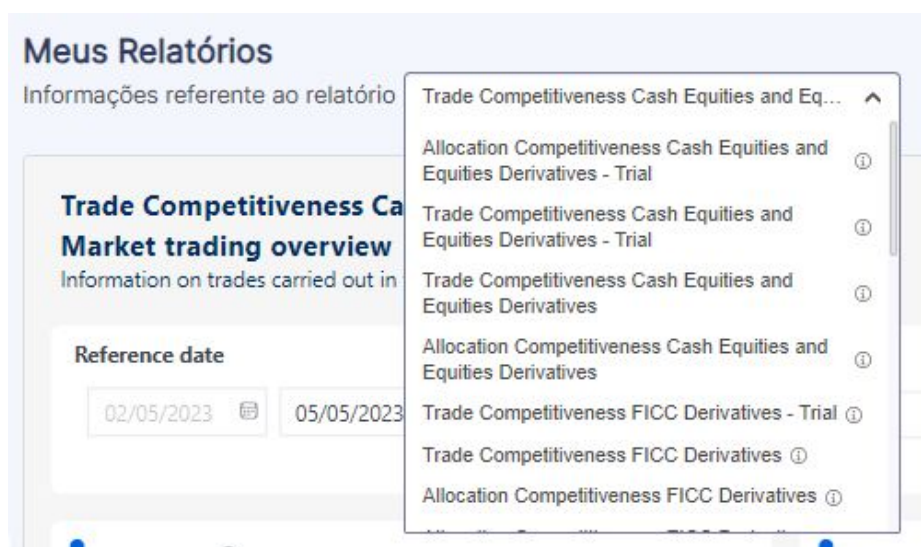



# **USAGE TIPS AND BEST PRACTICES**

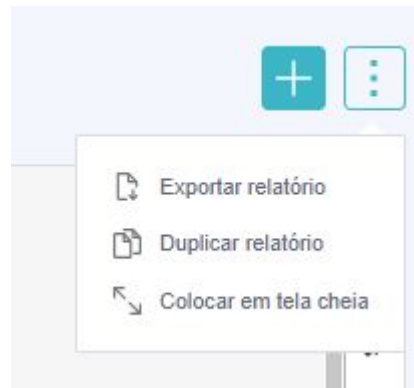


# NAVIGATION BETWEEN REPORTS


To change between standard or customized reports, use the selection bar shown in the image below. Standard reports are identified by the “i” on the right side, reports created or edited by you or someone else in your organization will not have the “i”. You can access and edit reports developed by anyone in your organization.

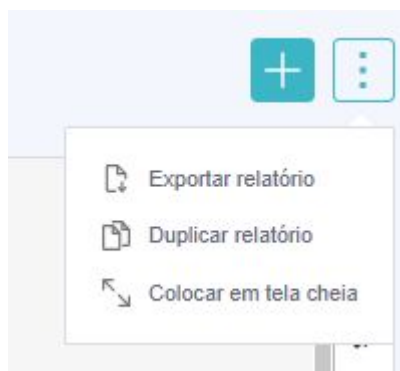


It is possible to download a “picture” of the report, in .pdf format, for this the path to be followed is the button  and in the sequence “Export report”.



# DUPLICATE REPORT

In case you want a report very similar to the standard one but with some peculiarity, it is possible to duplicate the standard report, that way there is no need to restructure the whole report again. For this, the path to be followed is the button  and in the sequence "Duplicate report", in the next screen you must type the name you want to give to this new report. In this new report you will be able to edit it.

A screenshot of a dialog box titled "DUPLICAR RELATÓRIO" (Duplicate Report). The dialog box has a close button (X) in the top right corner. Below the title, there is a label "Nome do Relatório" (Report Name) and a text input field with the placeholder text "Digite o nome do Relatório" (Enter the name of the Report). At the bottom of the dialog box, there are two buttons: "Cancelar" (Cancel) and "Duplicar Relatório" (Duplicate Report).

# CREATE REPORT

To create a complete report you must click on the “+” button and select the dataset to be used, the datasets will have the name of the standard reports.



A screenshot of a mobile application dialog box. The title bar at the top reads "SELECCIONE O CONJUNTO DE DADOS A SER UTILIZADO" with a close button (X) on the right. Below the title, the text "Conjuntos de Datos" is displayed. Underneath is a dropdown menu with the placeholder text "Seleccione o Conjunto de Datos" and a downward arrow icon. At the bottom of the dialog, there are two buttons: "Cancelar" (Cancel) and "Confirmar" (Confirm).



# DATA EXPORT

Data export is made possible by the default Power Bi mechanism, after selecting the “Export data” button in a given graph or table, a window like the image below will open for selection between data with current layout (.xlsx) or summarized data (.xlsx or .csv).



The name of the exported file will be the name of the chart or table from which it was derived in Power Bi. The filters applied to that data will be explained in the exported file, see example in the image below.

Filtros aplicados:cod\_mercadoria 15 superior por 03. Quantidade de Contratostipo\_investidor é PESSOA FISICAMétricas é D -01



# POWERBI FEATURES

## Focus mode

Focus mode is applied to individual report visuals or dashboard tiles. It extends the block or visual along with filters, menus and navigation panels.

Learn more by accessing [Display content in more detail: focus mode and full screen mode](#)

## Use visual table

A Power BI visual is built using data from the underlying datasets. If you're interested in seeing what goes on behind the scenes, Power BI shows you the data being used to create a visual.

Learn more by accessing [Show the data used to create a Power BI visual](#)





# PODER PARA SUAS DECISÕES

Serviços de dados confiáveis em um só lugar. Feito pra você,  
por quem mais entende de inteligência e negócios no Brasil.

Neoway

Uma empresa B3