



Software for
Business Intelligence

BizInt Smart Charts

Smart Chat: New Chart Creation Workflow and Template Management Features

1 May 2024

New Chart Creation Workflow

- No longer asked for a chart template during chart creation.
- A default "Editor's Choice" chart template is applied to all new charts during import.
- New features for applying and managing chart templates, including in Reference Rows.

Availability

- Chart Template changes are available today
- Drug Development Suite version 5.7.3
- Patents support in version 5.8.4

What are Chart Templates?

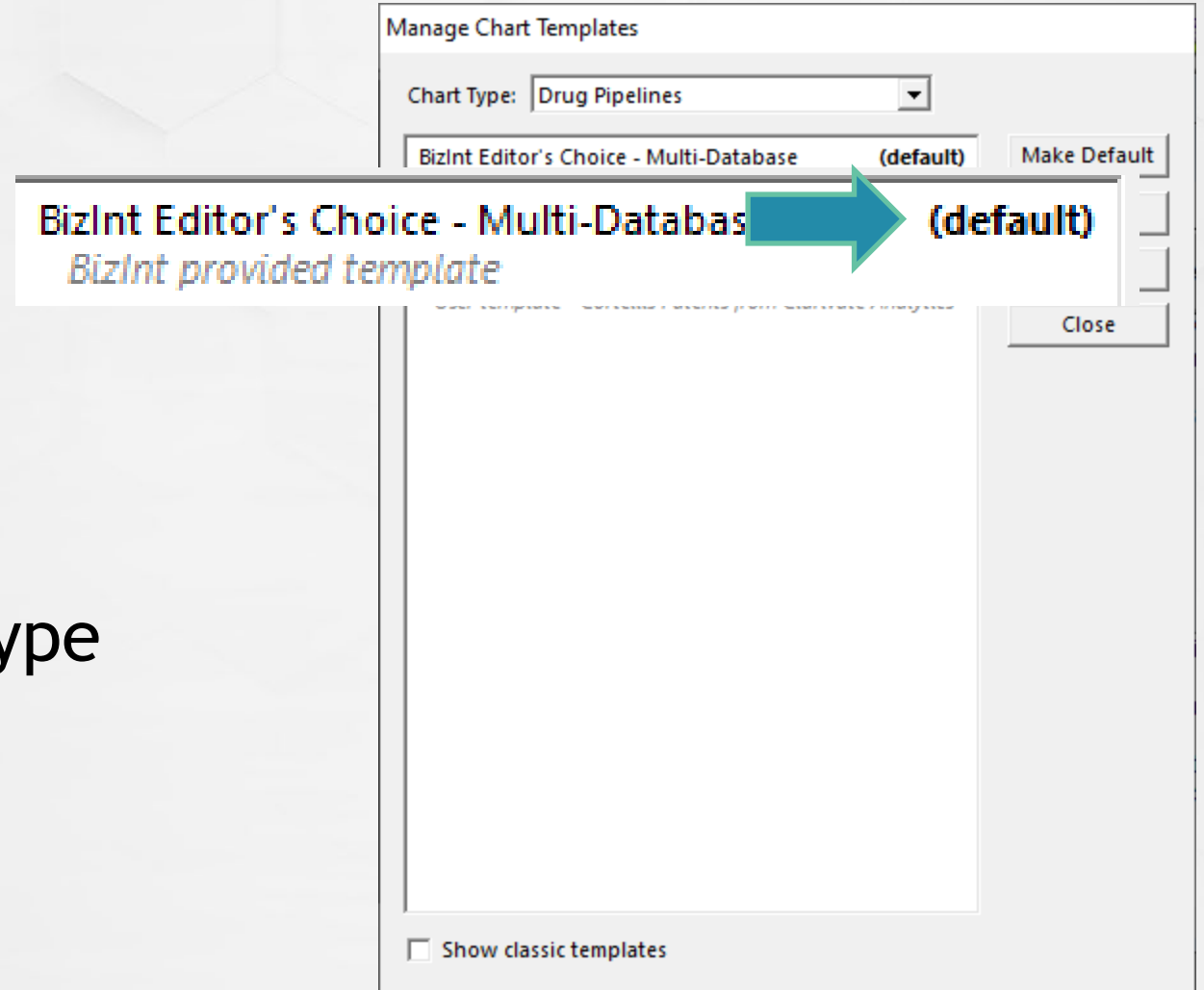
- Pre-defined selection of columns in a chart
- Includes column title, width, sort settings
- Also includes page setup (orientation, margins, etc)
- Applied to new charts
- Or existing charts [View](#) | [Apply Template](#)

Why use Chart Templates?

- Quickly format your report the way you want
- Different templates for different clients, exports, etc.

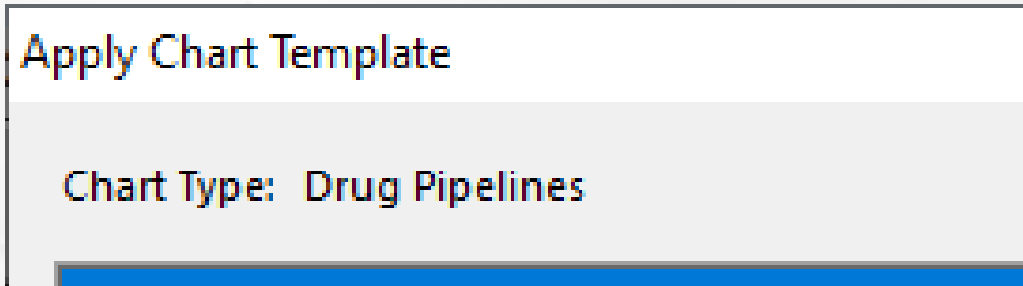
Default templates

- When you import data and create a chart, the default template is applied automatically
- Same template used when creating charts for a chart type

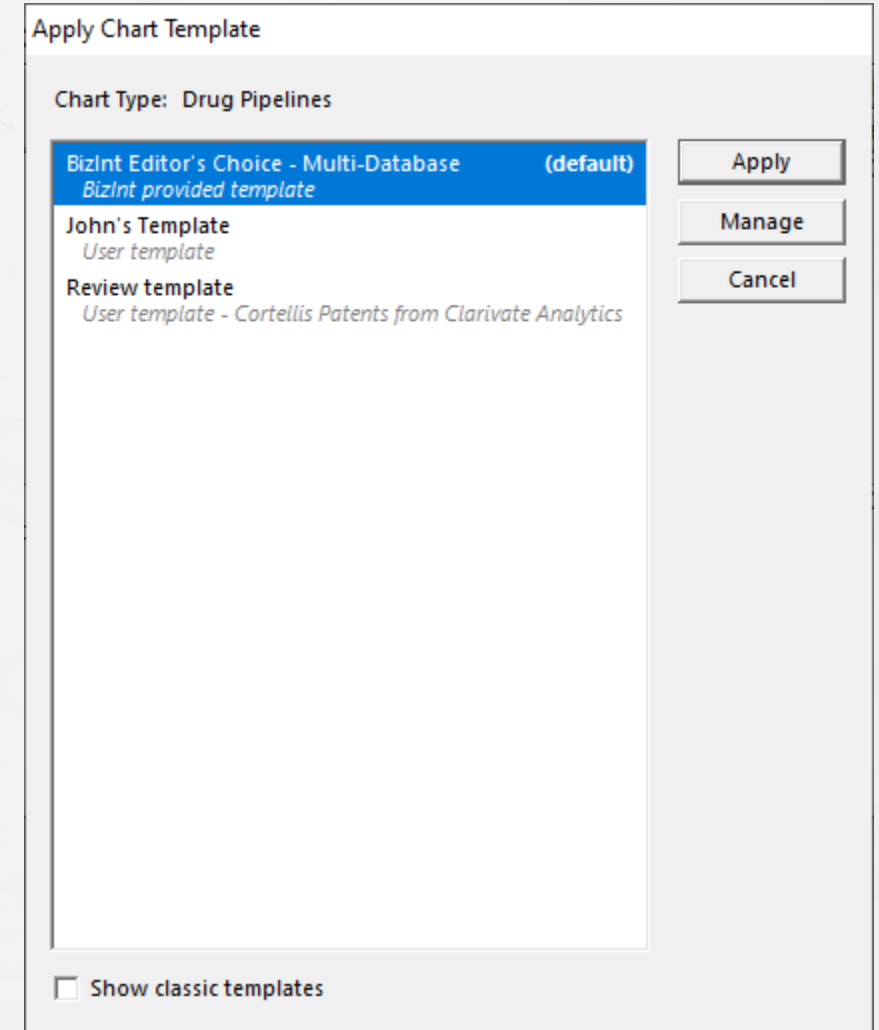
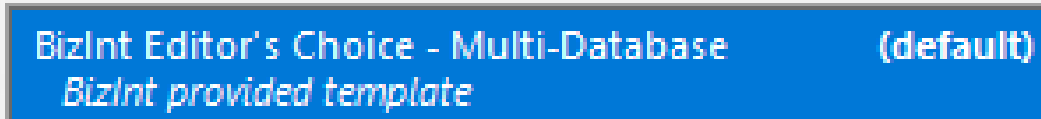


New dialog appearance

- The chart template dialogs have all been re-designed
- Identifies what type of chart this is

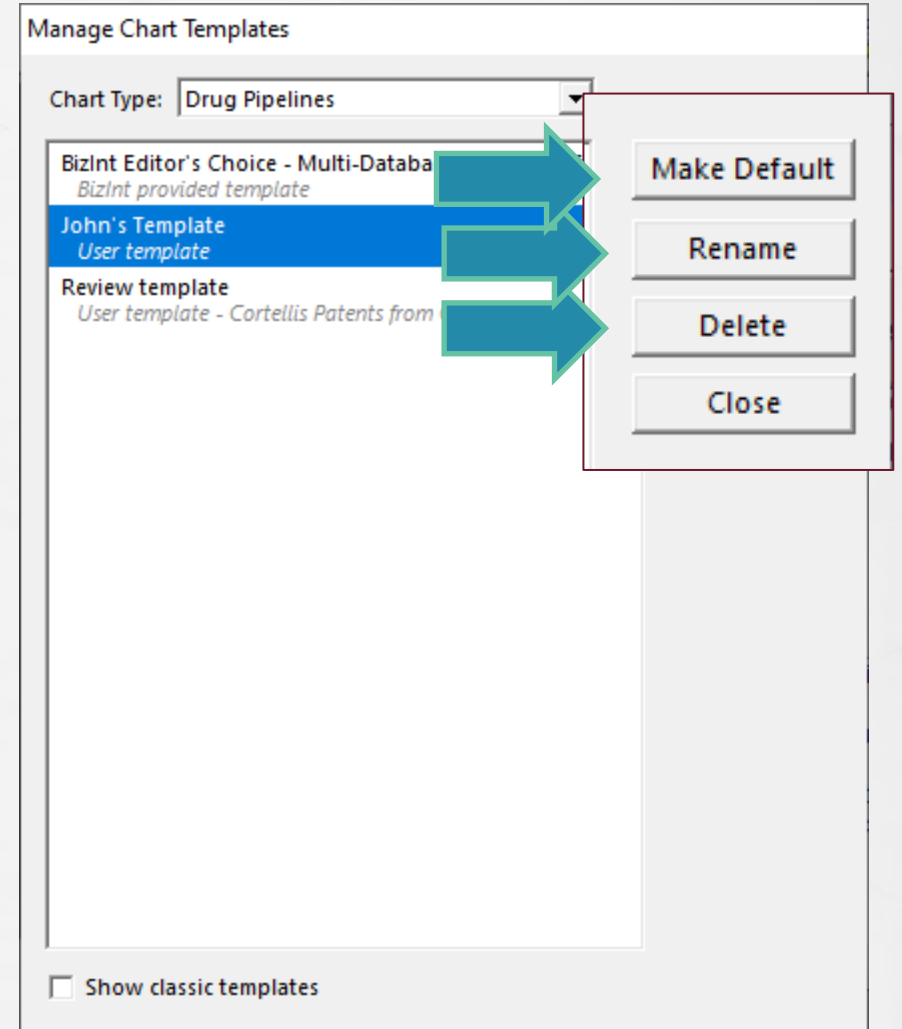


- List of dialogs contains more details



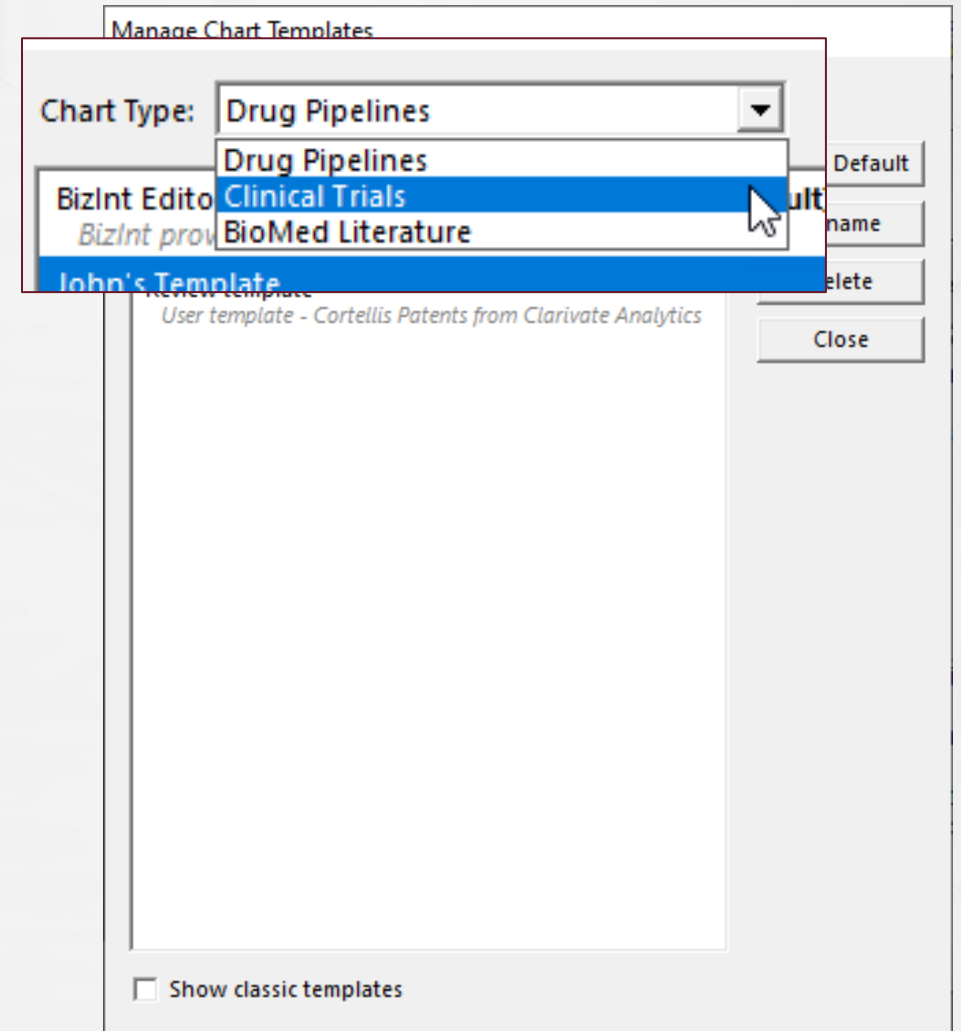
NEW Manage Templates command

- File menu or via Apply Template
- Rename a template*
- Delete a template*
- * user templates only
- Make a template the default template for that chart type






Manage Templates command

- Manage Templates starts with the chart type of the current chart
- You can select and manage templates for other types



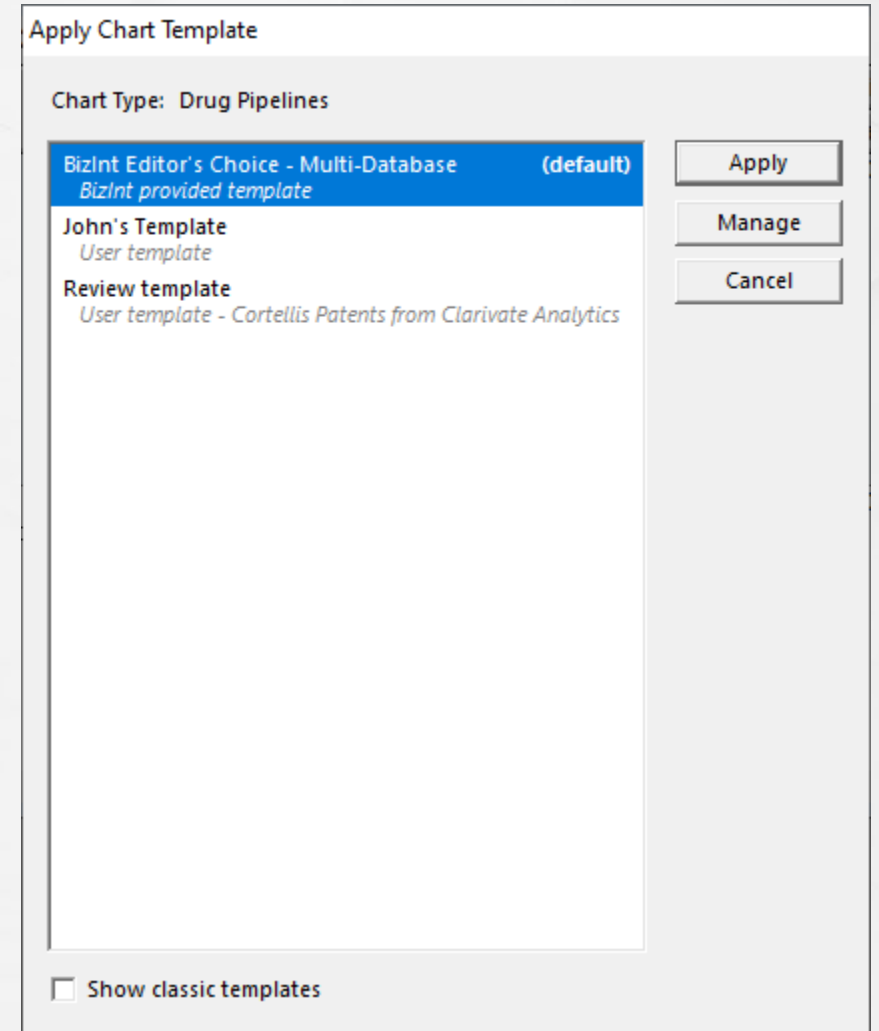
Long file names

- Chart template files now have long, descriptive file names
- Makes it easier to share files with your colleagues
- Find templates in `%appdata%\bizint\template`
- Older templates still have short file names

Name	Date modified	Type
 %CLIN.John_2s Favorite Template.ctt	3/2/2024 3:09 AM	CTT File
 %DRUJohn.ctt	5/29/2018 10:13 AM	CTT File
 %PATjame.ctt	6/7/2018 10:08 AM	CTT File

Use compatible templates

- You can apply any template for the same chart type to a chart
- Example: apply a chart template created from a combined chart to a chart from Cortellis
- Example: apply template from Cortellis to a chart from GlobalData



Classic templates

- Many old templates provided by BizInt are no longer shown
- Click “Show classic templates” to make them visible
- Want a classic template on your list all the time?
Apply it to a chart and save as a new template



Apply Chart Template

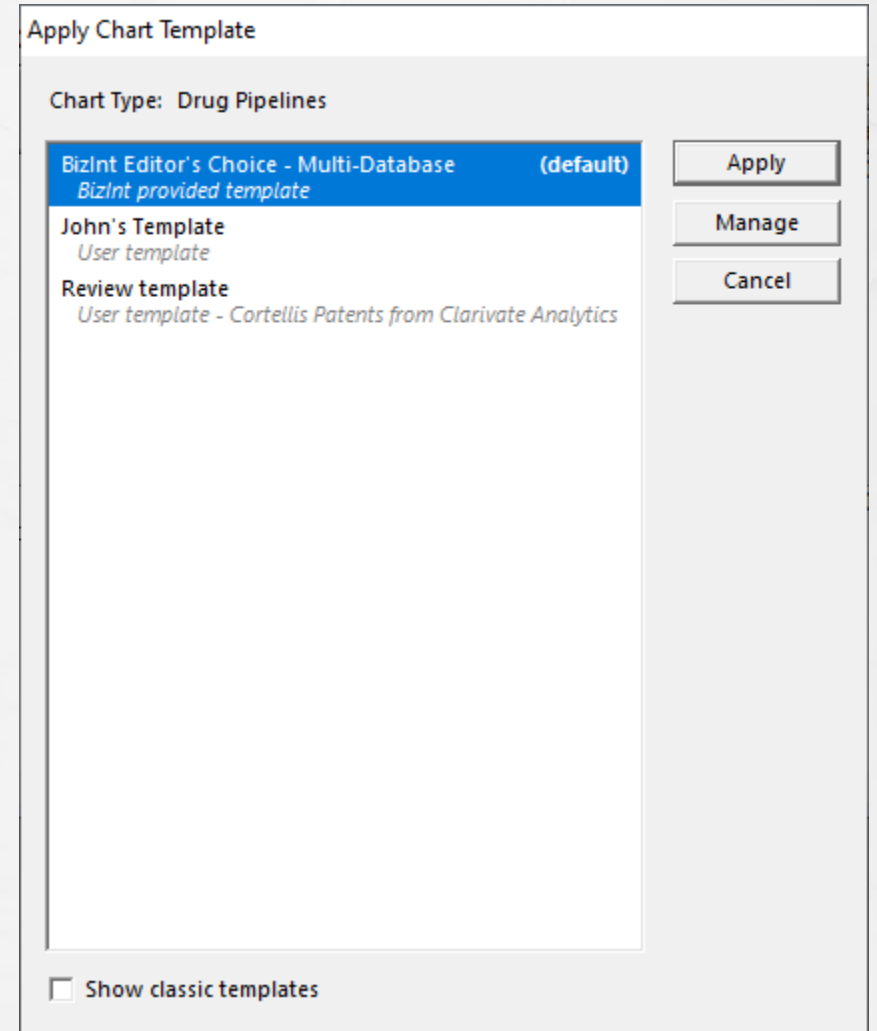
Chart Type: Drug Pipelines

Basic Information <i>BizInt provided template</i>	<input type="button" value="Apply"/>
BizInt Editor's Choice - Multi-Database (default) <i>BizInt provided template</i>	<input type="button" value="Manage"/>
Chemical Information <i>BizInt provided template</i>	<input type="button" value="Cancel"/>
Development History <i>BizInt provided template</i>	
Development Summary with Normalized Phase <i>BizInt provided template</i>	
Drug Names First <i>BizInt provided template</i>	
John's Template <i>User template</i>	
Key Attributes Chart <i>BizInt provided template - GlobalData Drugs</i>	
Latest Information <i>BizInt provided template</i>	
Review template <i>User template - Cortellis Patents from Clarivate Analytics</i>	

Show classic templates

Using compatible templates

- You don't have to design a template over and over again
- Some fields in a template might not be available in the chart
- If you have created templates in the past, you might want to remove some old copies





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THE JOURNEY CONTINUES...

Questions?
Requests?

support@bizint.com