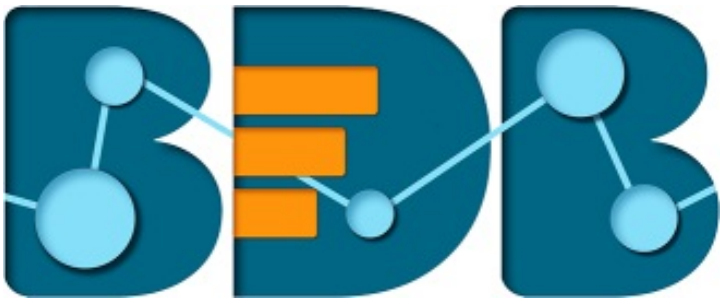


User Guide

Business Story R-3.2

Contents

1. About this Guide

1.1. Document History

The following table gives an overview of the most recent document updates:

Product Version	Date (Release date)	Description
BizViz Business Story 2.0	February 21st, 2016	The first release of the document
BizViz Business Story 2.1	May 25th, 2016	Updated document
BizViz Business Story 2.5	November 9th, 2016	Updated document
BizViz Business Story 2.5.3	March 16th, 2017	Updated document
BizViz Business Story 3.0	August 31st, 2017	Updated document
BizViz Business Story 3.0	October 26th, 2017	Modified document
BizViz Business Story 3.2	February 2nd, 2018	Updated document

Note: Business Story was introduced as an integrated feature to the BDB Platform in the release of version 2.0, so the '**Product Version**' displayed in the above table refers to the Platform Release version.

1.2. Overview

This guide covers:

- Introduction and steps to access the BizViz Business Story
- Steps to create and modify a Business Story
- Options assigned to a Business Story

1.3. Target Audience

This document is aimed at business users who use the BizViz Business Story to create their business stories and get more profound insights into their business data.

2. Introducing BizViz Business Story

2.1. Introduction

The BizViz Business Story is an advanced data visualization feature of the BizViz Platform. It helps users to create rich, interactive data visualization to present complex, related data. The entire process of creating a business story out of the selected data is easy, quick, and exciting. Users can choose a data source, 'drag and drop' the required values (Dimensions/Measures), and get promptly generated views based on the selected data values. Users can save the relevant views on the storyboard to create their personalized business stories.

2.2. Prerequisites and Supported Devices

- A browser that supports HTML5
- Operating System: Windows 7

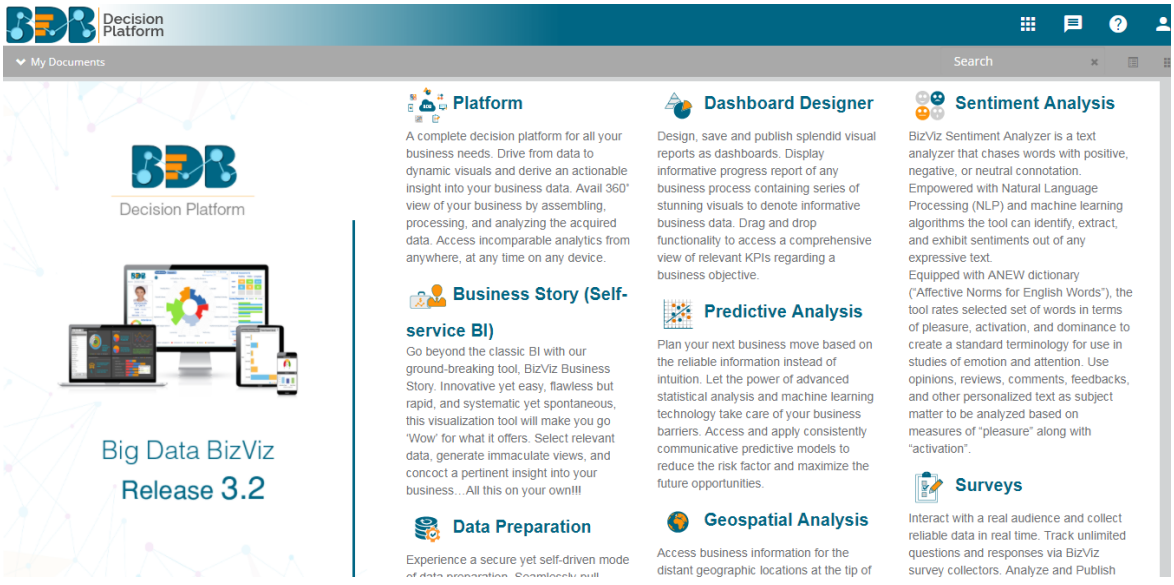
- Basic understanding of the BizViz Server
- Permission to access, create, and modify the Data Stores under the Data Center module of the BDB Platform.

3. Getting Started with BizViz Business Story

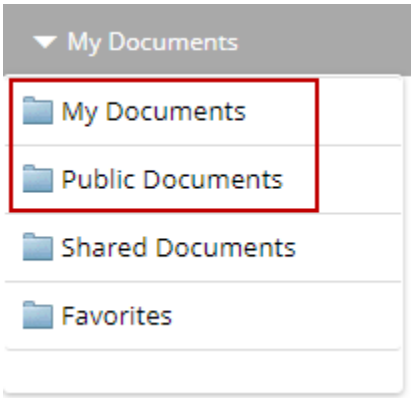
This section covers how to access the Business Story on the BizViz Platform.

i) Open BizViz Enterprise Platform Link: http://apps.bdbizviz.com/app/
ii) Enter your credentials to log in to the platform.
iii) Click '**Login**'

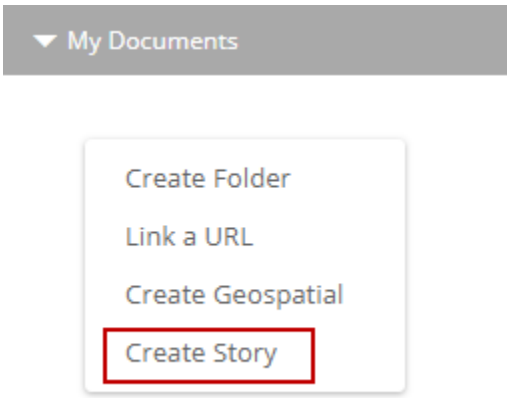
iv) BizViz Platform home page will open.



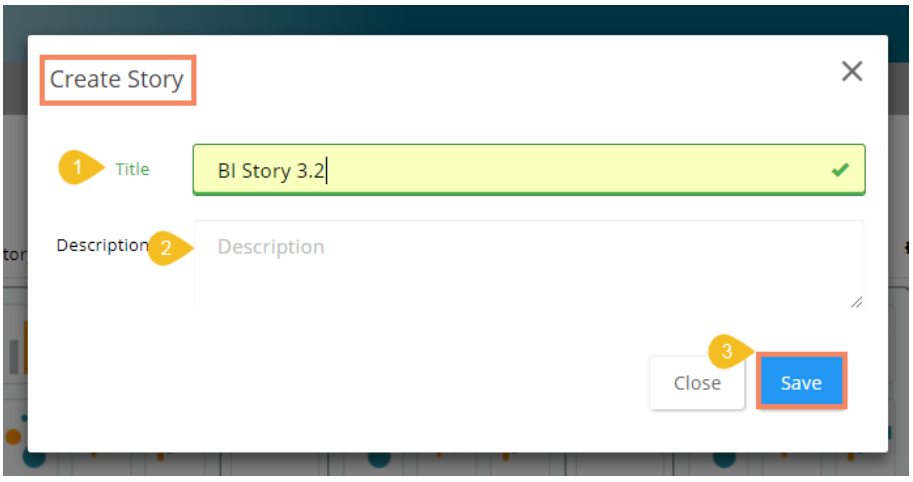
v) Select '**My Documents**' or '**Public Documents**' using the My Documents drop-down menu.



vi) Use a right-click anywhere on '**My Documents**' or '**Public Documents**'
vii) A context menu opens.
viii) Select '**Create Story**' option from the context menu.



ix) A new window pops-up.
x) Fill in the following information:
   1. **Title**: Enter a title for the story document
   2. **Description**: Describe the story document (optional)
xi) Click '**Save**'



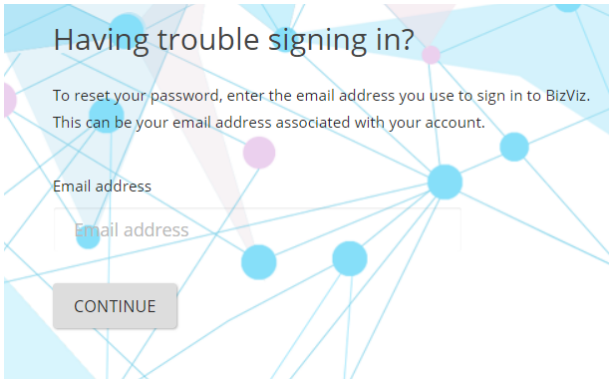
xii) The story document will be created under the selected document space.

3.1. Forgot Password Option

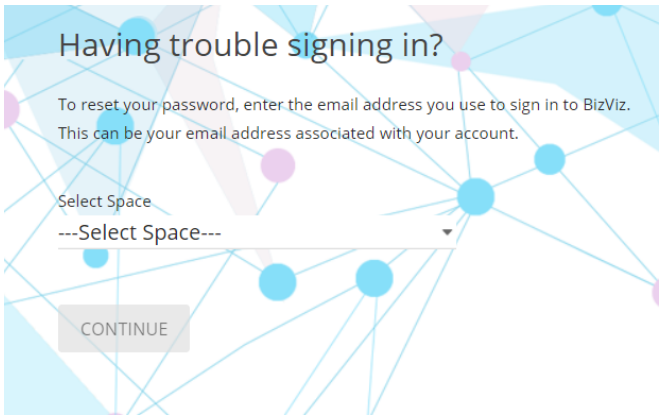
Users are provided with a choice to change the password on the Login page of the platform.

i) Navigate to the Login page.
ii) Click '**Forgot Password?**' option.

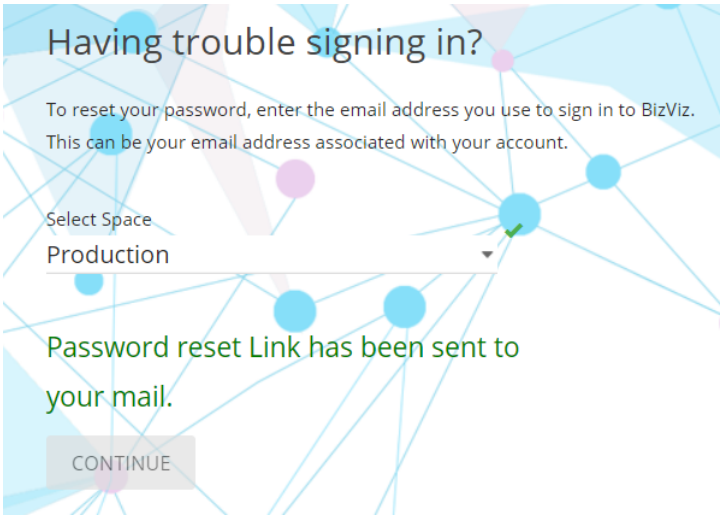
iii) Users will be redirected to a new window.
iv) Provide the email id that is registered with BDB to send the reset password link.
v) Click '**Continue**' option.



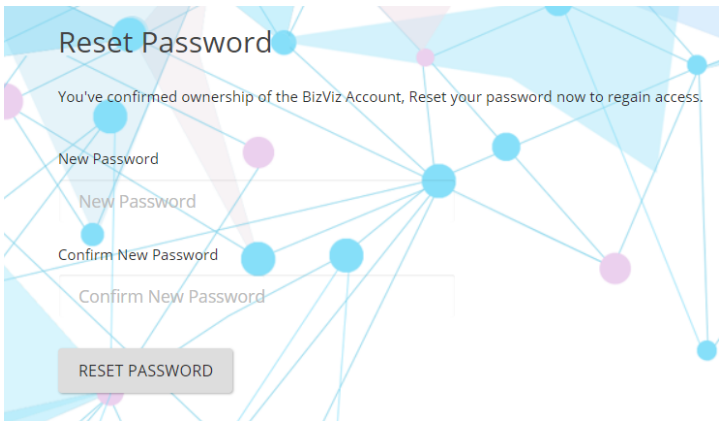
vi) Users will be redirected to select a space and click the ‘Continue’ option.



vii) A notification will appear stating that the reset password link has been sent to the registered email.



viii) Click the link from your registered email
ix) Users will be redirected to the ‘Reset Password’ page to set a new password
x) Set a new password
xi) Confirm the newly set password
xii) Click ‘RESET PASSWORD’ option



xiii) The password will be successfully reset for the selected BDB account.

4. Creating a Business Story

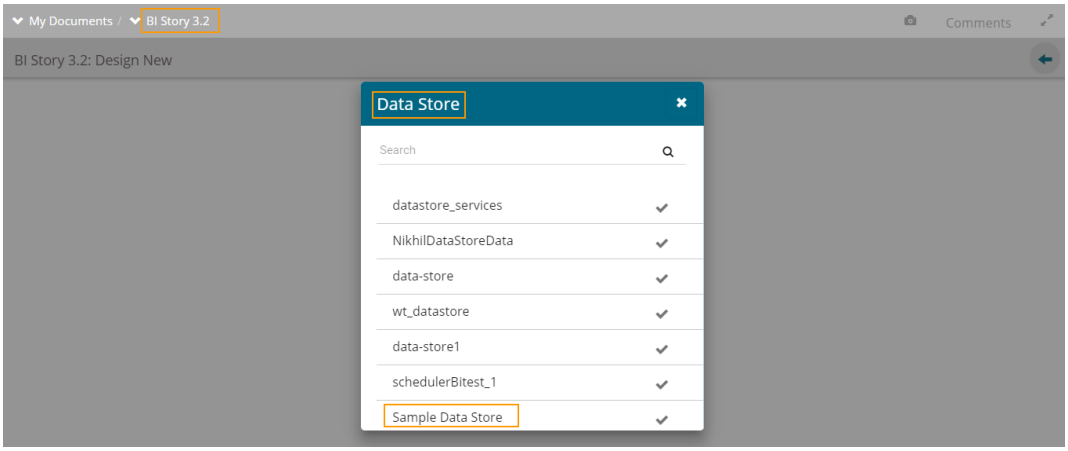
After creating a story document in the '**My Documents**' or '**Public Documents**' users will be redirected through the following steps to create a business story/report.

4.1. Selecting a Data Source

This section explains steps to select a data store for creating a business story.

i) By clicking '**Save**' on the '**Create Story**' pop-up window, Users will be redirected to select a data store.

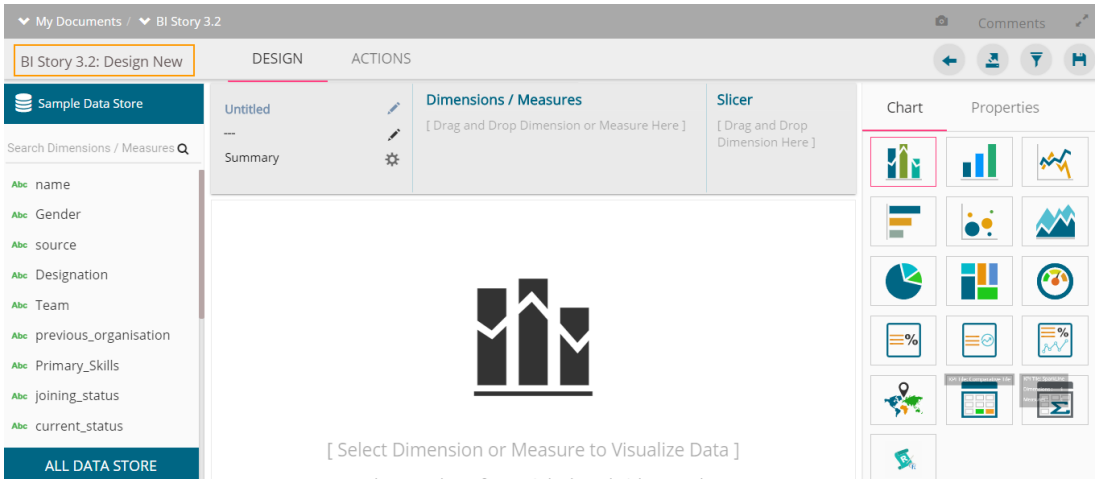
1. Search a data store using the '**Search**' bar (if needed).
2. Select a data store from the displayed list by clicking the checkmark ✔ option.



4.2. Designing a New View

This page explains steps to create a new view.

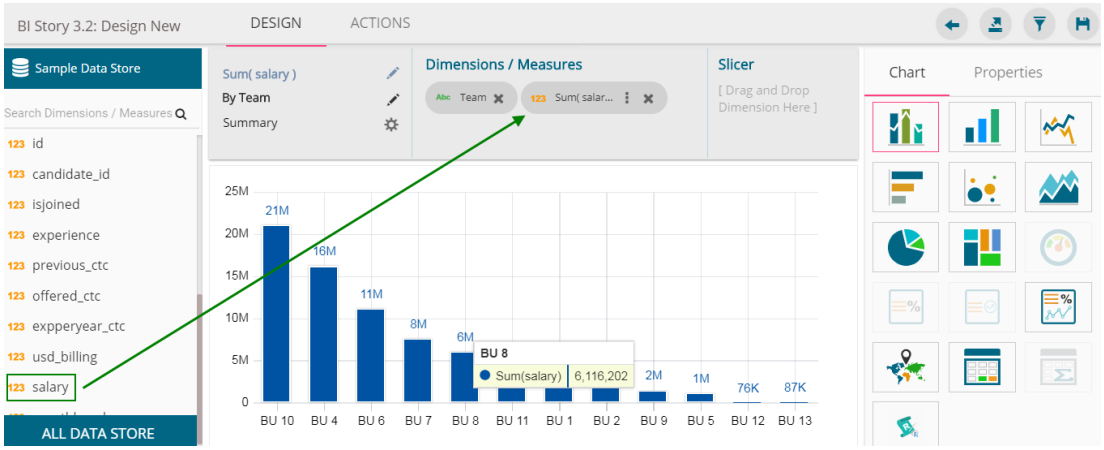
i) On selecting a data store, users will be redirected to the following page to design a new view.



ii) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).

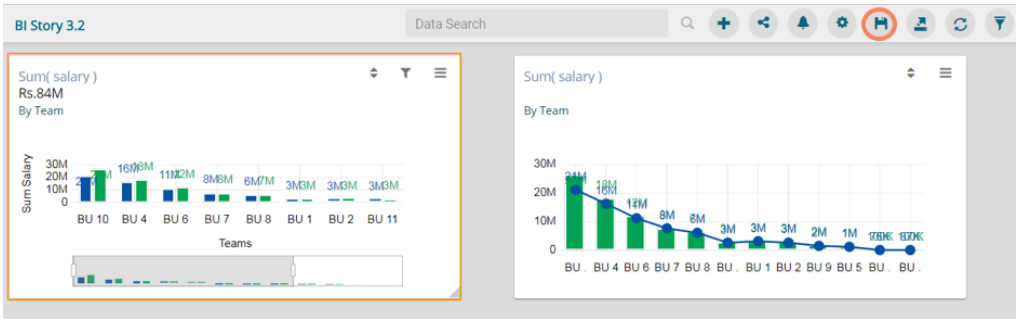
iii) A graphical view (based on the selected dimensions/measures) will be created and displayed instantly. (The mixed chart type opens by default)

iv) Click **'Save'** icon



v) The newly created view will be saved on the Storyboard.

vi) Users need to click the **'Save'** option to save the added view to the storyboard.

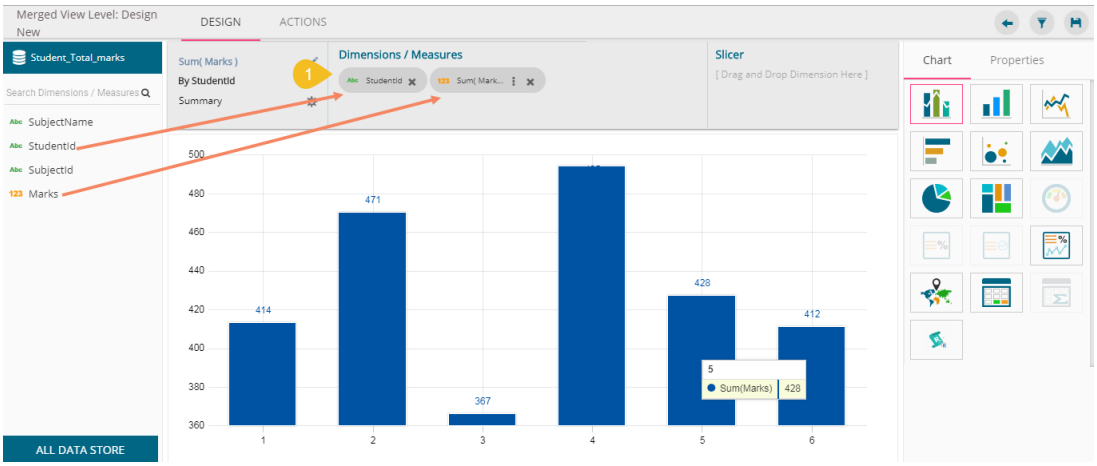


Note: Users can change a datastore/merged datastore by using the '**All DATA STORE**' option provided on the Design New page.

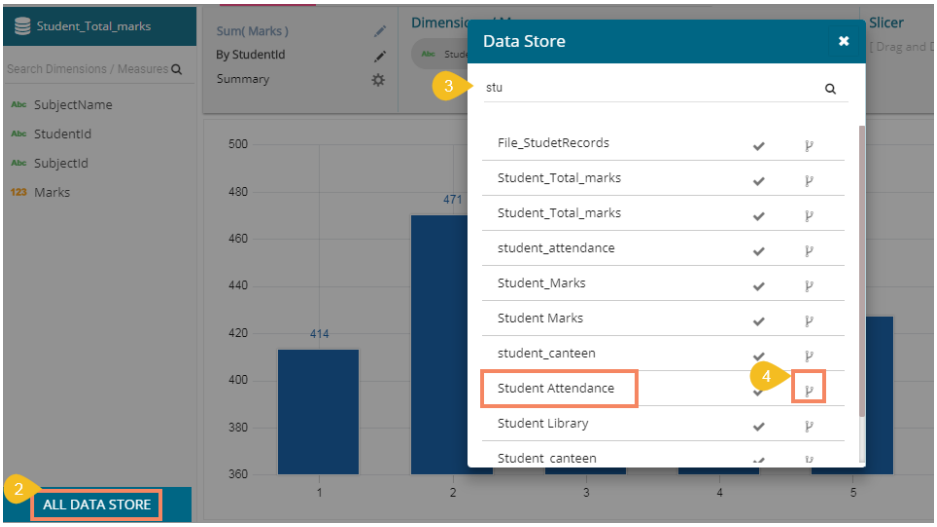
4.2.1. Datastore Merge at View Level

Users can merge multiple data stores at view level to compare different measure values across the merged datastores.

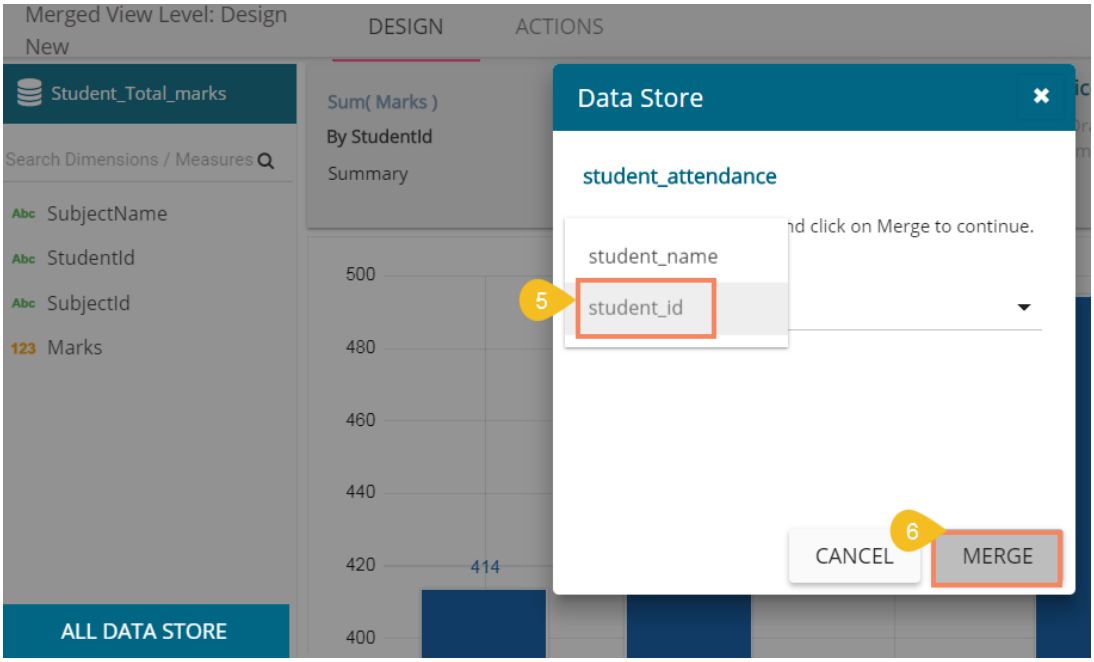
i) Drag and drop dimension and measure to the Design New page to create a view.



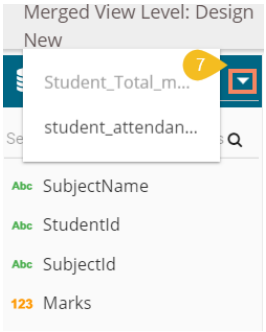
ii) Click '**ALL DATA STORE**' option
iii) Search for a datastore using the search bar
iv) Click '**Merge**' icon for the selected datastore



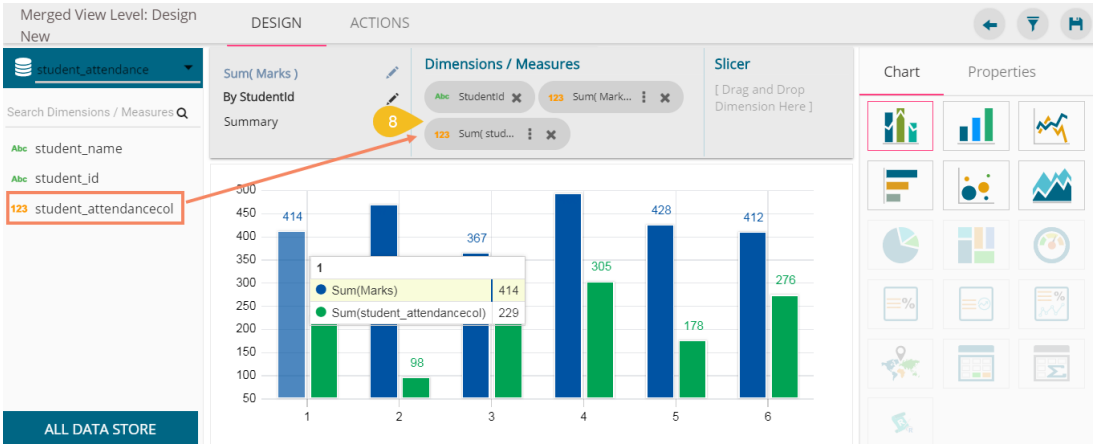
v) Users will be redirected to select a related field from the drop-down
vi) Click on the '**MERGE**' option



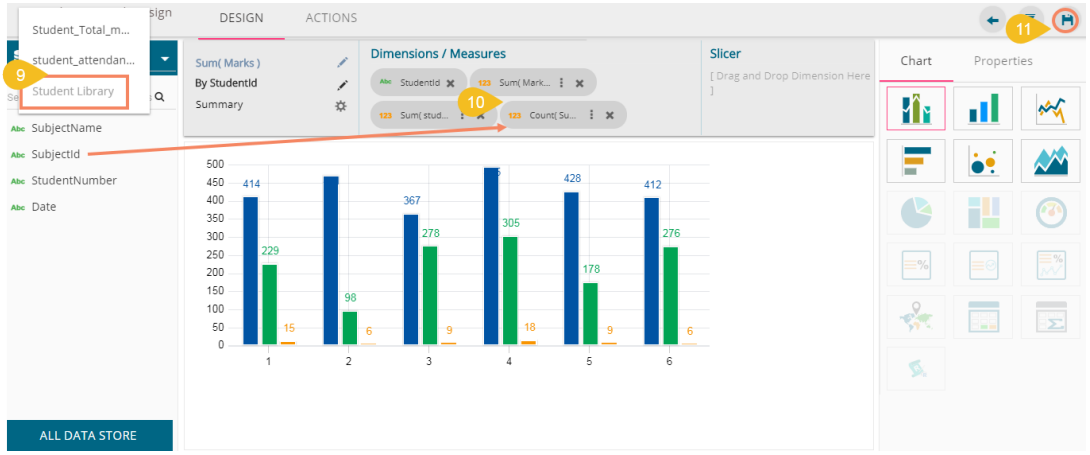
vii) The selected datastore will be added to the datastore space, and a drop-down menu will be displayed to choose any datastore.



viii) Drag and drop a measure from the newly added datastore to create a comparative view



ix) Users can add multiple datastores by using the same set of steps.
x) Drag the required measures to add the corresponding fields in the view.
xi) Click 'Save' icon.



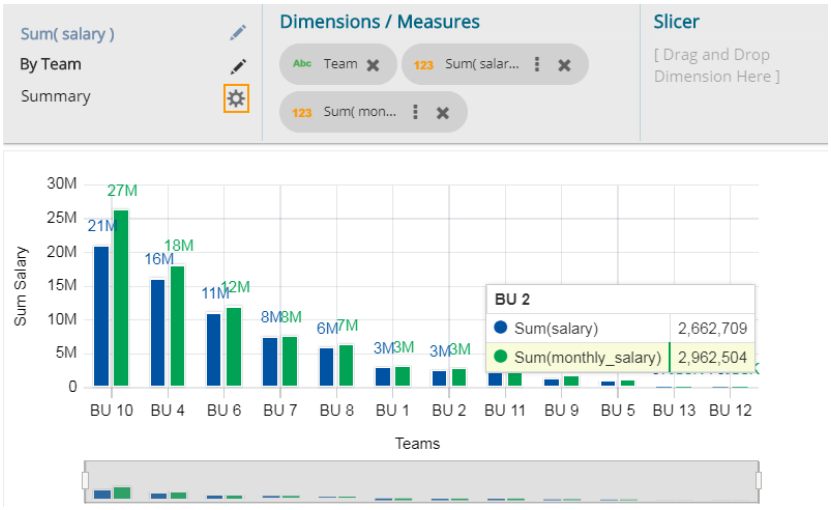
xii) The view will be saved on the storyboard.

Note: All the merged datastores will be saved for the saved view. Users can modify the view by selecting the '**Edit**' option from the storyboard.

4.2.2. Measure Summary

Users can access summary properties by clicking on the '**Summary**' option on the '**Design New**' page.

i) Click **'Settings'** ⚙ via the view page.

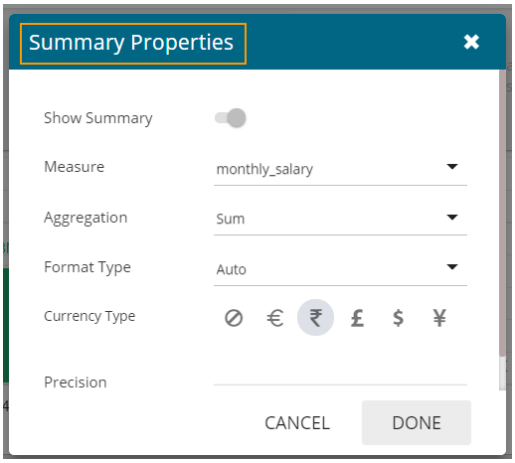


ii) A window pops-up.

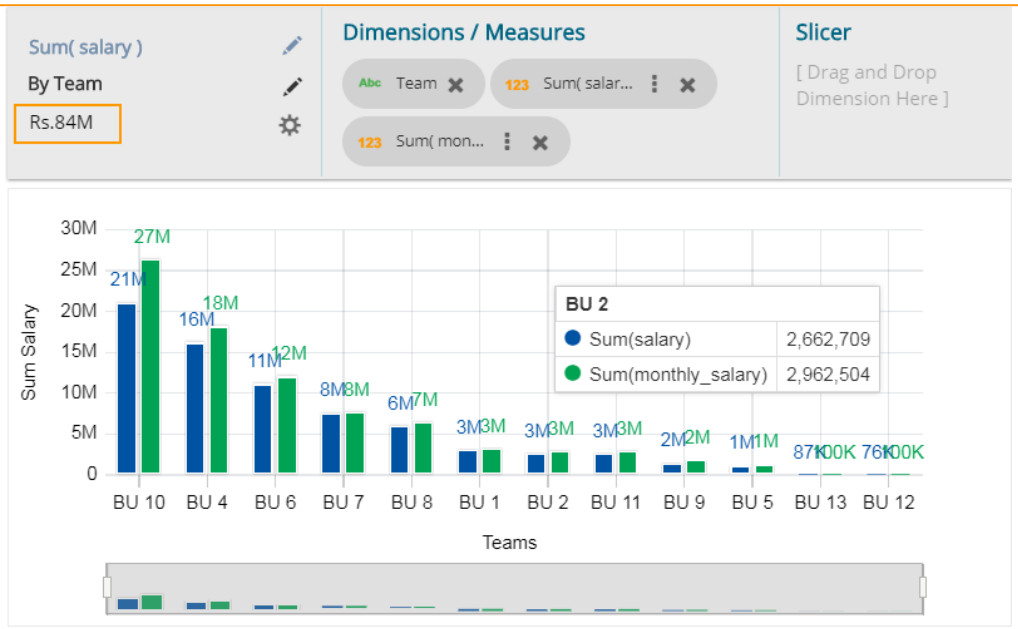
iii) Set the following details:

a) Show Summary: Enable or disable the summary option
b) Measure: Select a measure from the drop-down menu
c) Aggregation: Select an aggregation type from the drop-down menu
d) Format Type: Select a format type from the drop-down menu
e) Currency Type: Select a currency symbol from the available choices
f) Precision: Select a number to up to what the precision value can be displayed

iv) Click **'DONE'**



v) The measure summary value will be displayed on the view page by enabling **'Show Summary'** option.



4.2.3. Series Properties

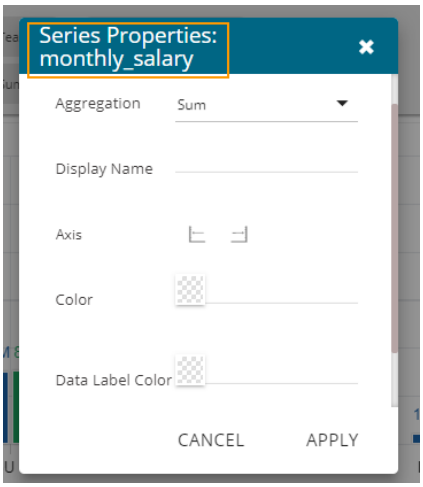
The Series Properties is given to change the display of the selected measure in a selected view.

i) Navigate to the Design New page for a view that has at least one selected measure value.

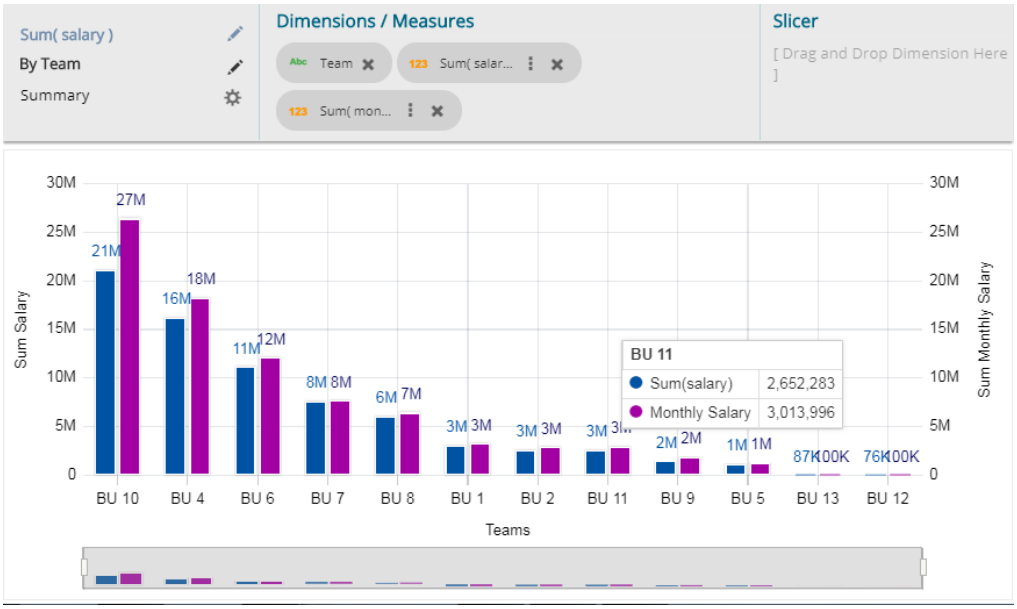
ii) Click the **'Series Properties'** option ⋮ provided next to the selected measure.

iii) Users can set the following properties from a pop-up window:
   a. Aggregation: Select an aggregation option from the drop-down menu
   b. Display Name: Enter the title for the measure to be displayed in the data label
   c. Axis: Select an axis out of the given choices
   d. Color: Select a color of the chart presentation from the given menu
   e. Data Label Color: Choose a color for data label from the given menu

iv) Click **'APPLY'** option.



v) The selected measure properties will be applied to the view.



Note:

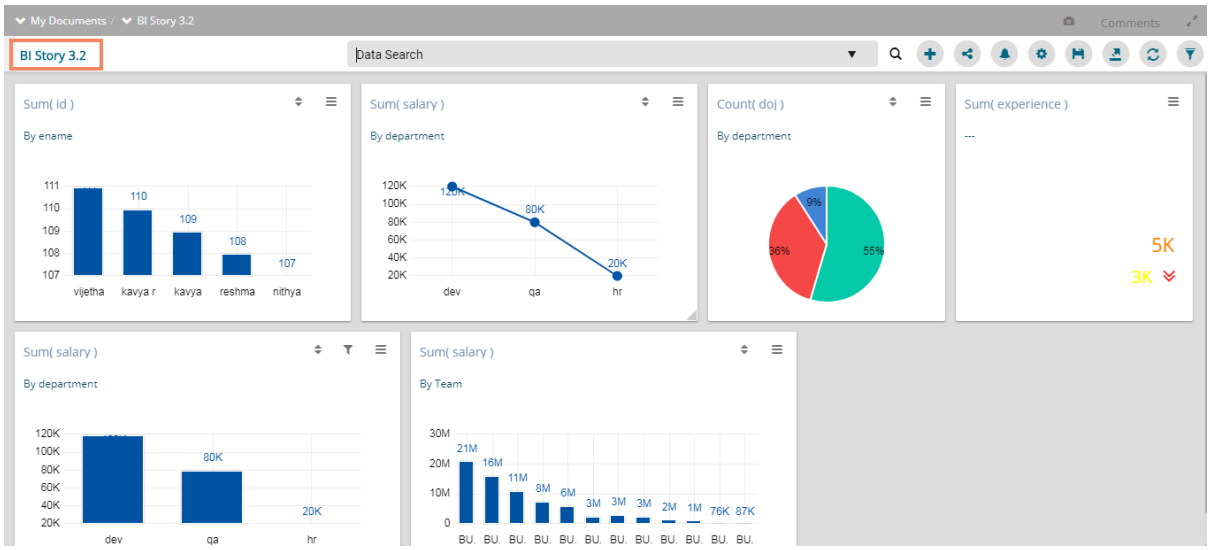
a. Users need to refresh the selected data store to avail the data in the Business Story Views.
b. View specific chart properties can be accessed from the 'Properties' tab.
c. Users can change or modify the view title by clicking on the edit options provided next to the view name.
   Click '**Edit**' icon > Modify/change the title for the selected measure or dimension > click the '**Checkmark**' icon to save the change.

d. There are some other icons provided on the design new page as listed below:

Icon	Name	Description
	Back	To redirect users on the storyboard page
	Export	To export the created view in preview mode
	View Filter	To apply filter conditions on the view
	Save View	To save the newly designed view on the Storyboard.
	Save Screen Shot	To capture and save the screenshot
Comments	Comments	To allow users to describe the story
or	Full Screen/Reduce Size	To display the Story Board in the full-screen view OR Reduces the Story Board display screen.
	Edit	To modify or changes the storyboard title

4.3. Storyboard

Users can add multiple Views on a single screen denoted as a Story Board. Users can add any number of Views based on various data stores on a single storyboard. Users can create a new View, apply Filter to a View, and save an altered View using the storyboard.

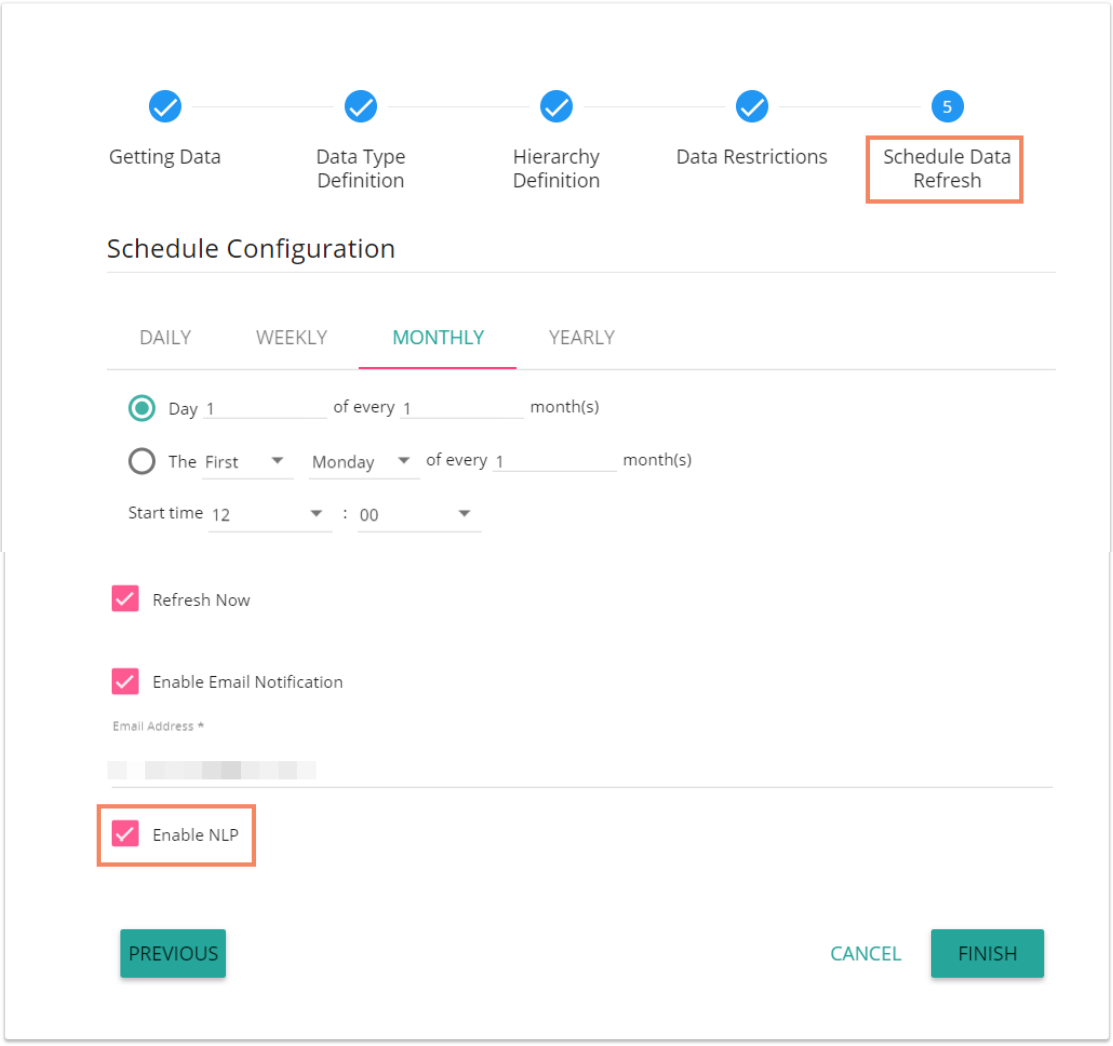


Icon	Name	Description
	Click to Edit	To edit the story title
	Save	To save the modified story title
	Data Search Bar	To search the queried data from the data store.
	Create New View	To redirect users to the story designer page to create a new view.
	Shared Views	To add a shared view to the storyboard
	Alert Center	To redirect users to schedule an alert.
	Change Theme	To select a display theme for the story.
	Save Story	To save modified views on the Story Board.
	Export	To export the story as CSV, XLSX, PDF, PPT format
	Refresh Views	To refresh the views on the storyboard
	Global Filter	To filter multiple views on a Story Board.
	Save Screen Shot	To save the screenshot
Comments	Comments	To allow users to describe the story
or	Full Screen/Reduce Size	To display the Story Board in the full-screen view OR Reduces the Story Board display screen.

4.3.1. Data Search Bar

The '**Data Search Bar**' helps users to quest for a specific data all through the saved views and instantly displays the query results.

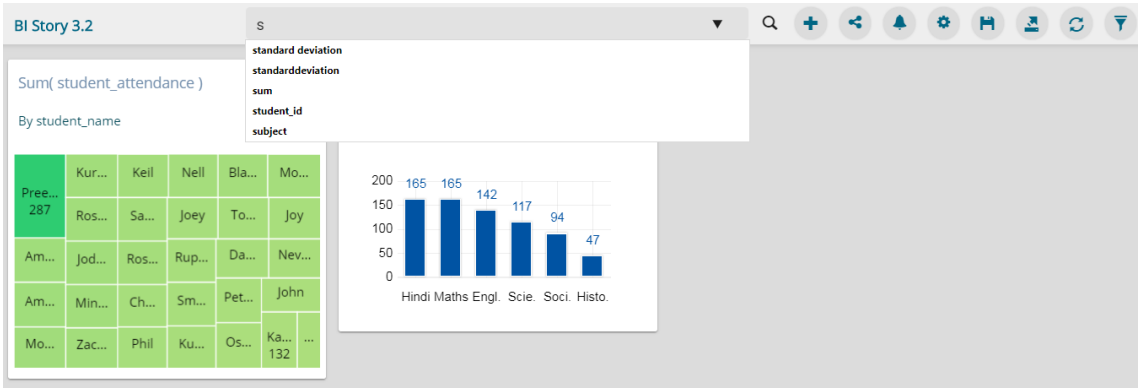
i) Enable NLP services for a data store via the '**Schedule Data Refresh**' page.



ii) Create and Save some views based on the same data store (for which NLP is enabled) and save them on a storyboard.

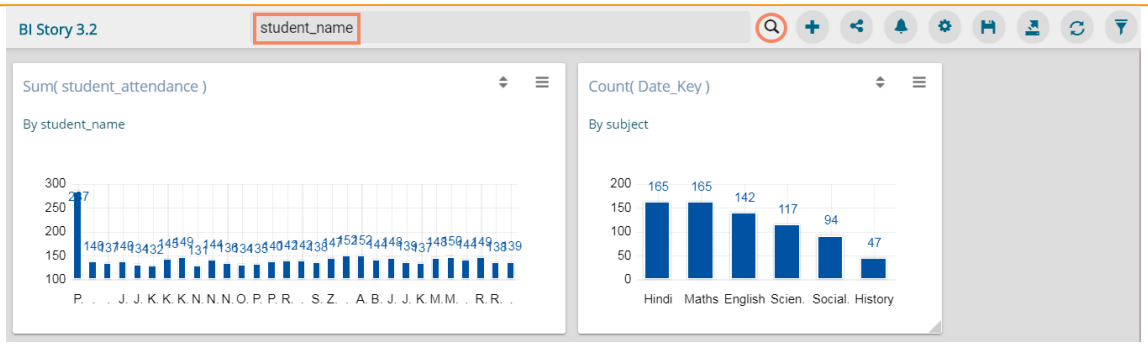
iii) Search data through the '**Data Search Bar**' (The '**Data Search Bar**' incorporates data that confines to the saved views on the selected storyboard).

iv) Users will get autosuggestions for the term they desire to search.

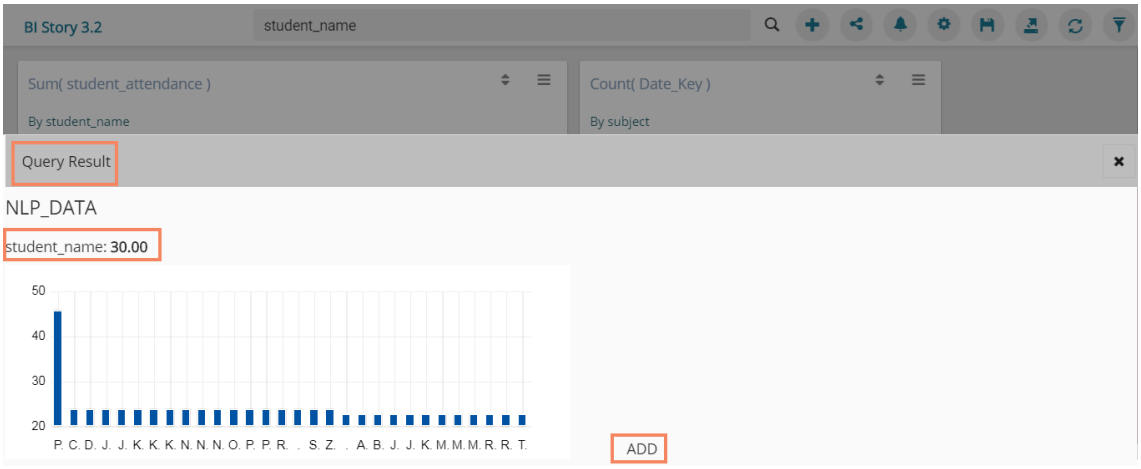


v) Select a term from the suggested option or type it in the search bar.

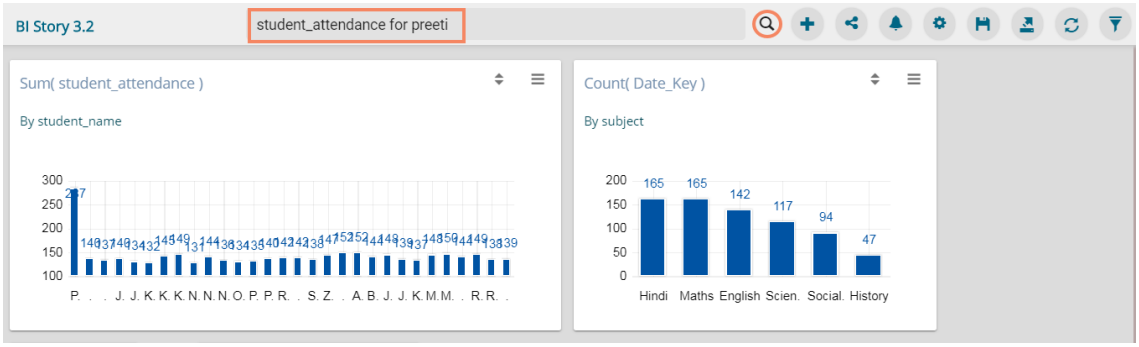
vi) Click the '**Search**' icon



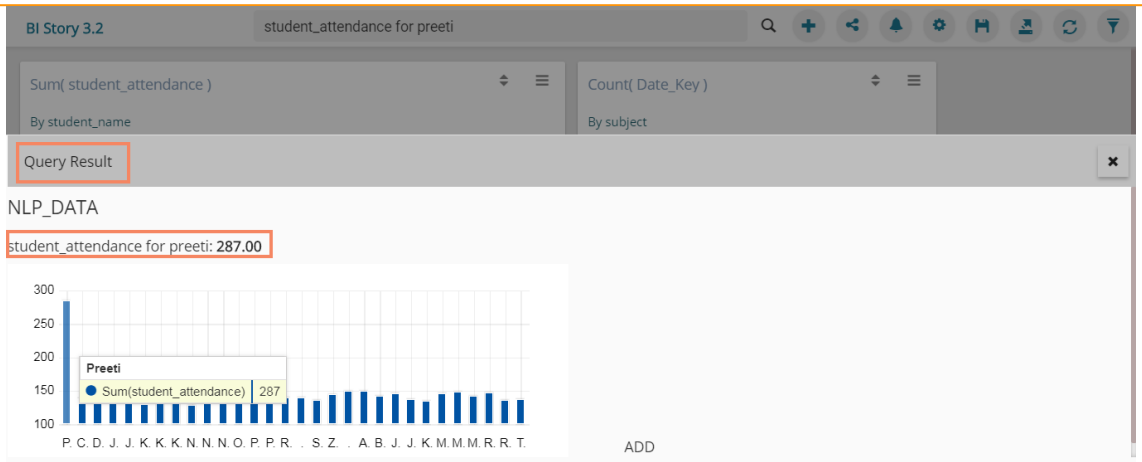
vii) The search result will be reflected in a chart at the bottom of the storyboard.
viii) Click '**ADD**' to add the chart to the story.



ix) Users can search deep into the data dimension by using a specific drilling value.
E.g. Student attendance for a specific student



x) The query result will be displayed as below:



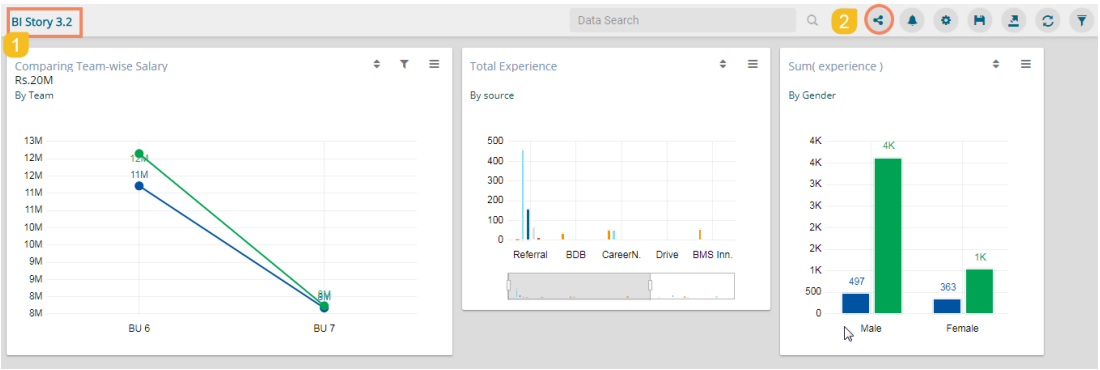
Note: By default, the column chart will appear while displaying the searched data through the Data Search Bar.

4.3.2. Shared Views

Users can use already existing views based on a data store using the **'Shared Views'** icon.

i) Navigate to the storyboard.

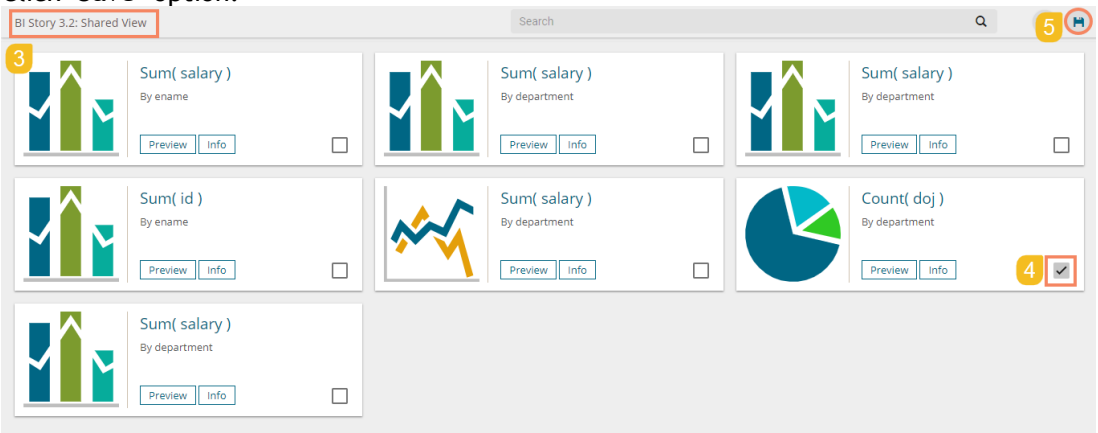
ii) Click **'Shared Views'** icon.



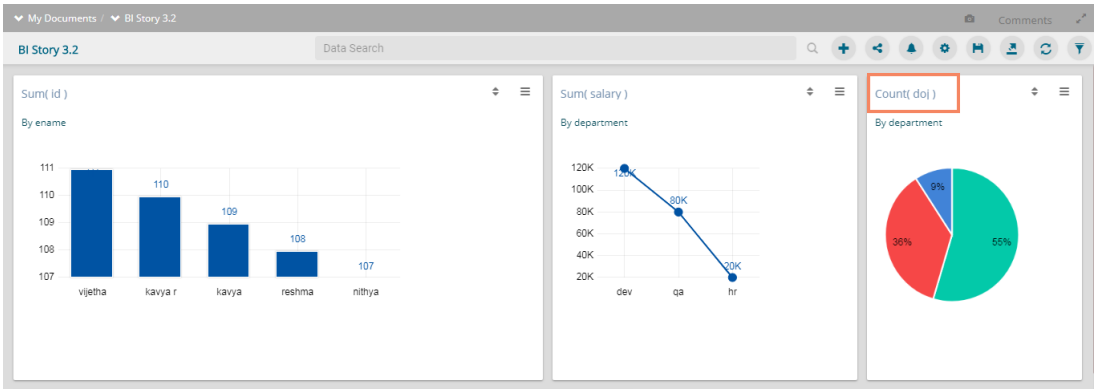
iii) Users will be redirected to choose a shared view.

iv) Select a shared view by a checkmark in the box.

v) Click **'Save'** option.



vi) The selected shared view will be added to the storyboard.

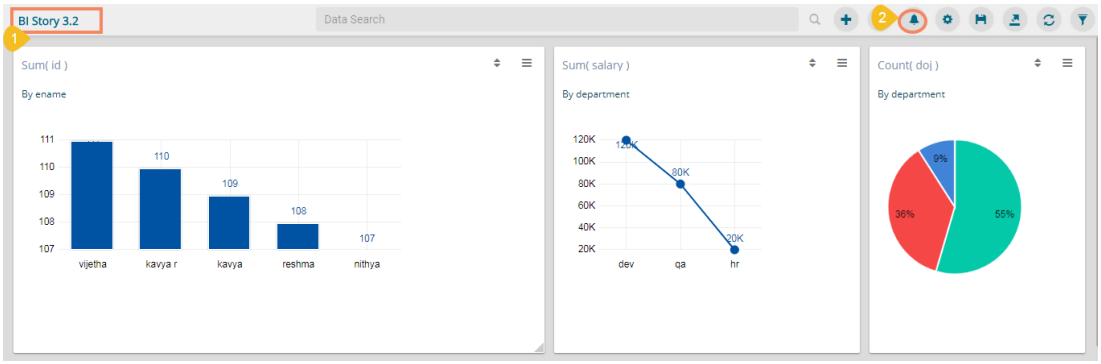


4.3.3. Alert Center

The alert center triggers alerts based on the lower threshold and upper threshold values for the defined dimension or measure.

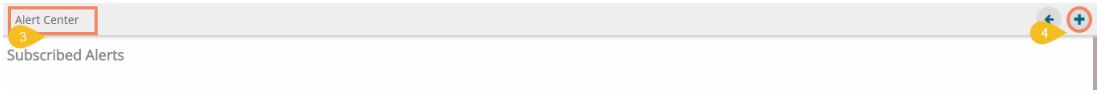
i) Navigate to the Story Board.

ii) Click the '**Alert**' icon.



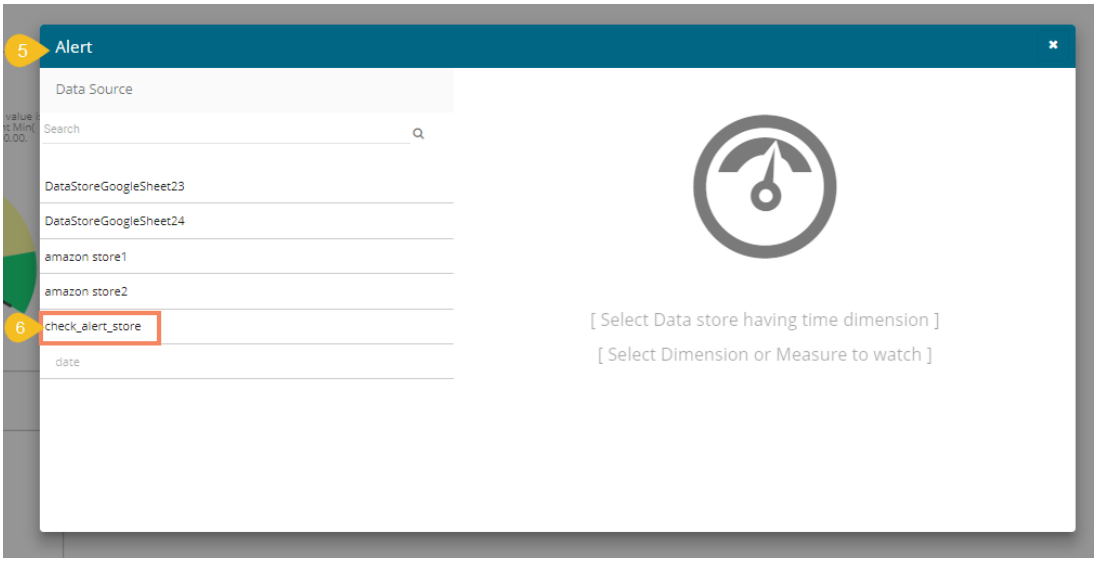
iii) The users will be redirected to the next page to subscribe alerts.

iv) Click '**Create New Alert**' option



v) A new window will pop-up to display a list of the available data stores.

vi) Users need to select a datastore containing time dimension from the list.

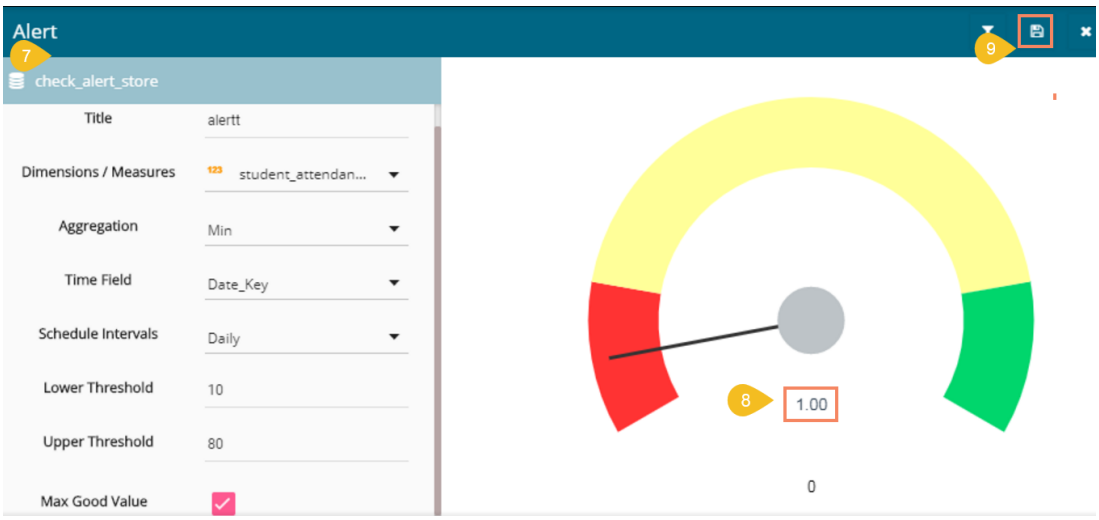


vii) By selecting a data store (data source), the following fields will be displayed to fill the required information:

a. Title: Give a title to the created alert
b. Dimension/Measures: Select a dimension or measure from the drop-down list
c. Aggregation: Select an aggregation type from the drop-down list
d. Time Field: Select a time field from the drop-down menu
e. Schedule Intervals: Select a time range to schedule the refresh intervals using the drop-down menu
f. Lower Threshold: Set a value as a lower threshold (the default value for this field is 0)
g. Upper Threshold: Set a value as an upper threshold (the default value for this field is 100)
h. Max Good Value: Enable/disable the **'Max Good Value'** by a checkmark in the box.

viii) The selected information will be displayed through a Semi-Gauge on the right side of the screen with the value (E.g., in this case, the semi-gauge image shows a count of 12 teams)

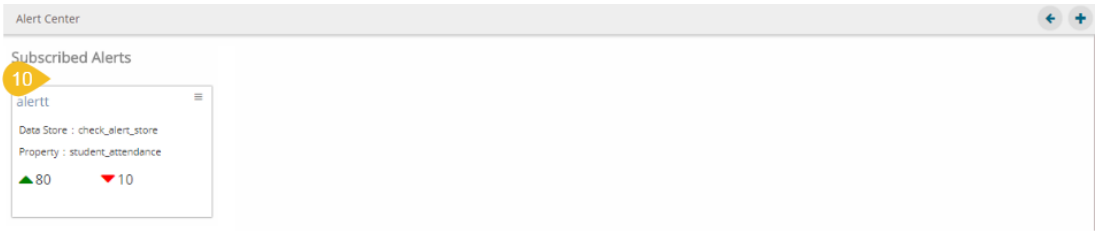
ix) Click the **'Save'** icon.



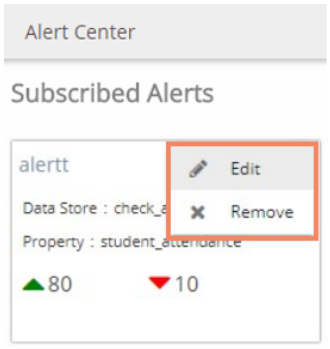
Note:

a. If users select a dimension from the Dimensions/Measures field then, only **'Count'** option will be accessed from the **'Aggregation'** field.
b. By enabling or disabling **'Max Good Value,'** the sequence of colors in the semi gauge image will change from 'green-yellow-red' to 'red-yellow-green.'

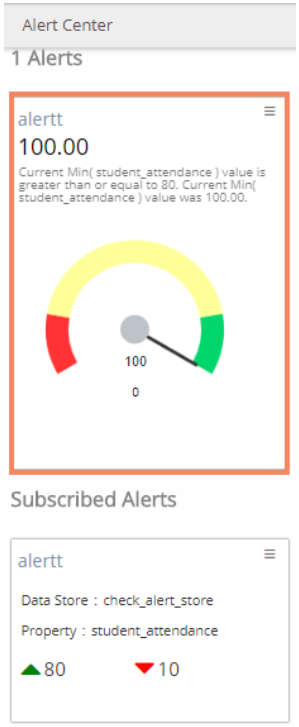
x) The newly created alert will be added to the Subscribed Alert page.



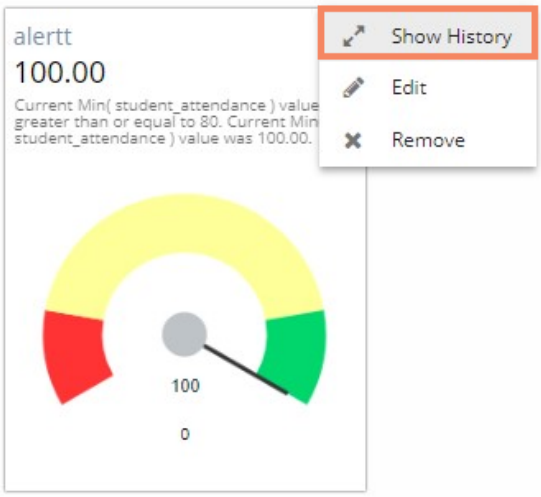
xi) Click the '**Options**' icon ☰ to get '**Edit**' and '**Remove**' options as shown below:



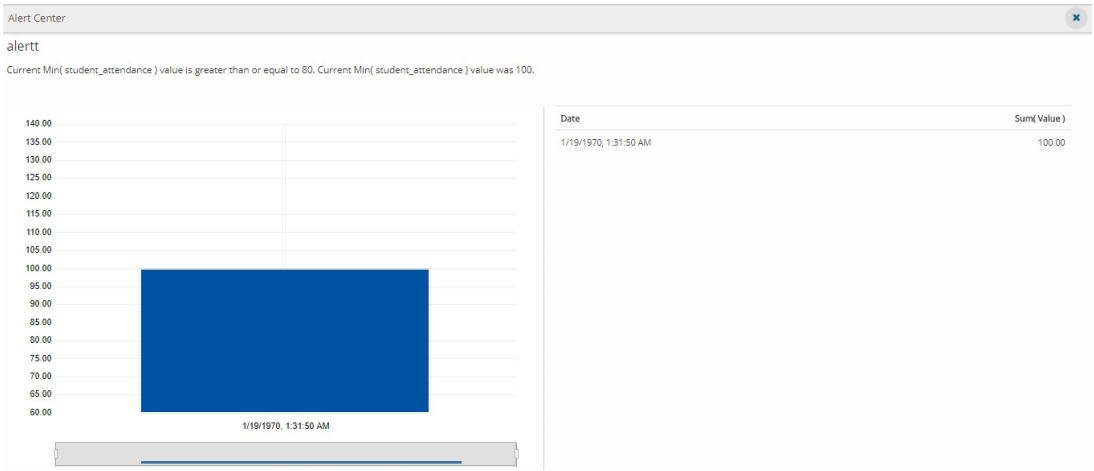
xii) The triggered alerts will be displayed under the '**Alert Center**' with a brief explanation of the change in the set alert thresholds.



xiii) Users can click '**Show History**' to display alert history for the triggered alert.



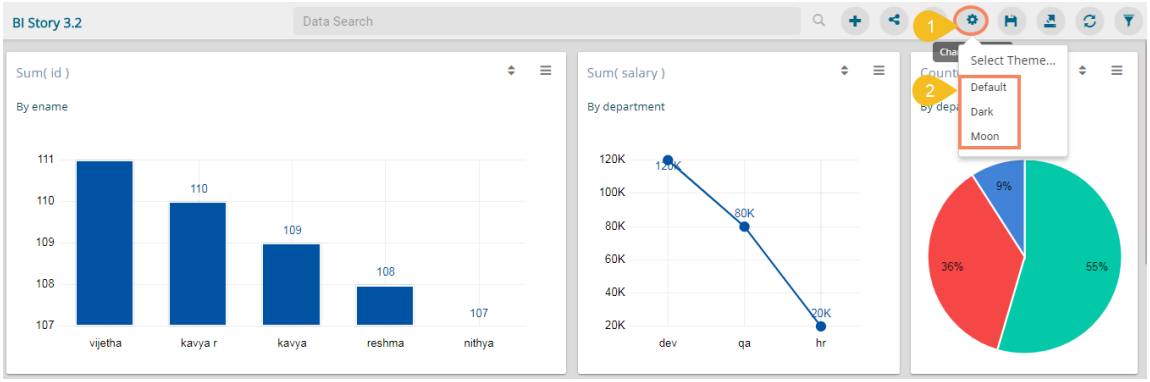
xiv) Users will be redirected to the below given page displaying the Alert history.



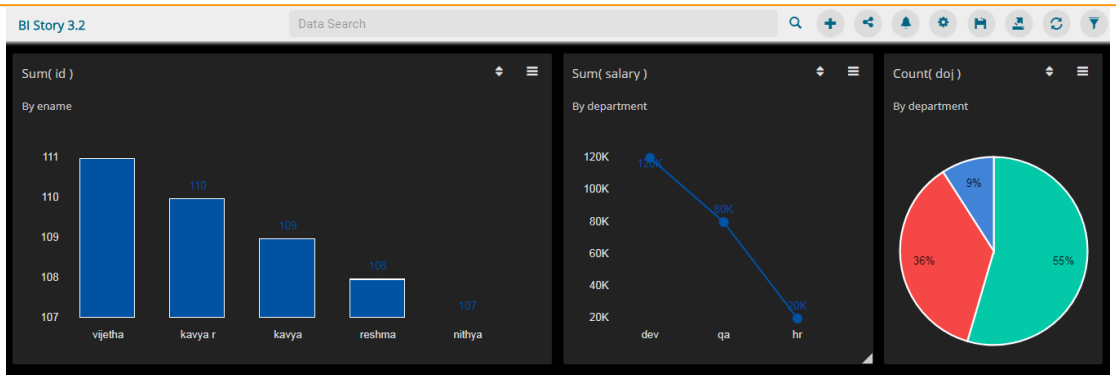
4.3.4. Change Theme

Users can change the look and feel of the entire story through this option.

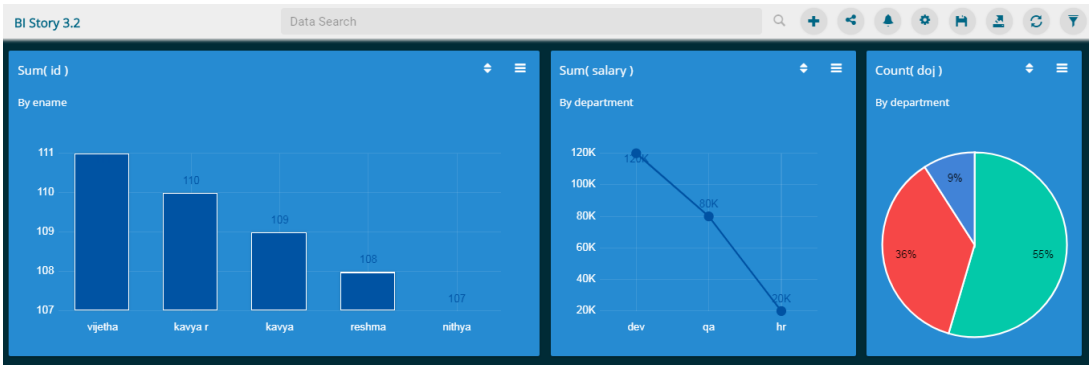
i) Click the '**Change Theme**' icon from the storyboard.
ii) The available themes for the story will be displayed in the context menu.



iii) Select a theme from the context menu to change the display of the views on the Storyboard. E.g. The image displays the views in the '**Dark**' theme.



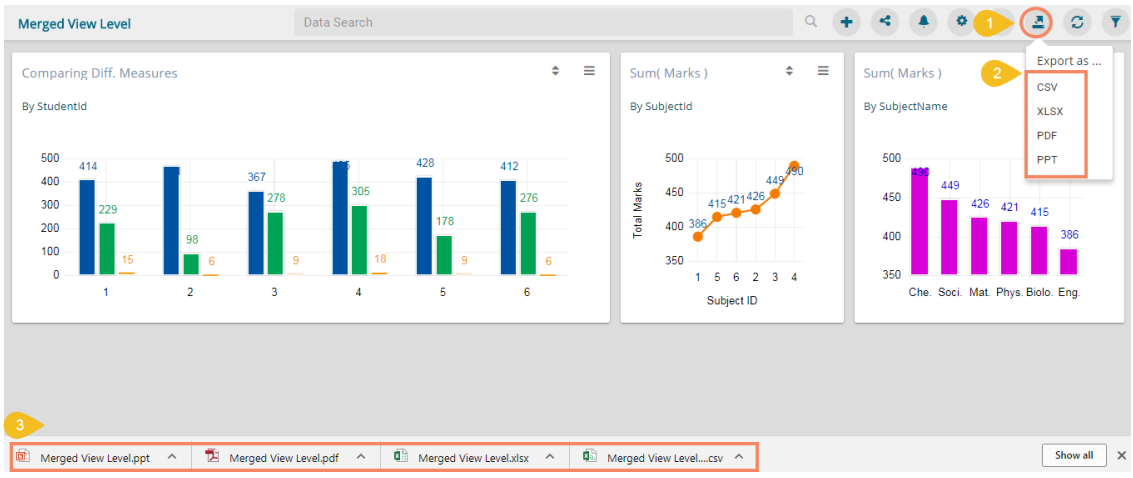
The following image displays the views in the '**Moon**' theme.



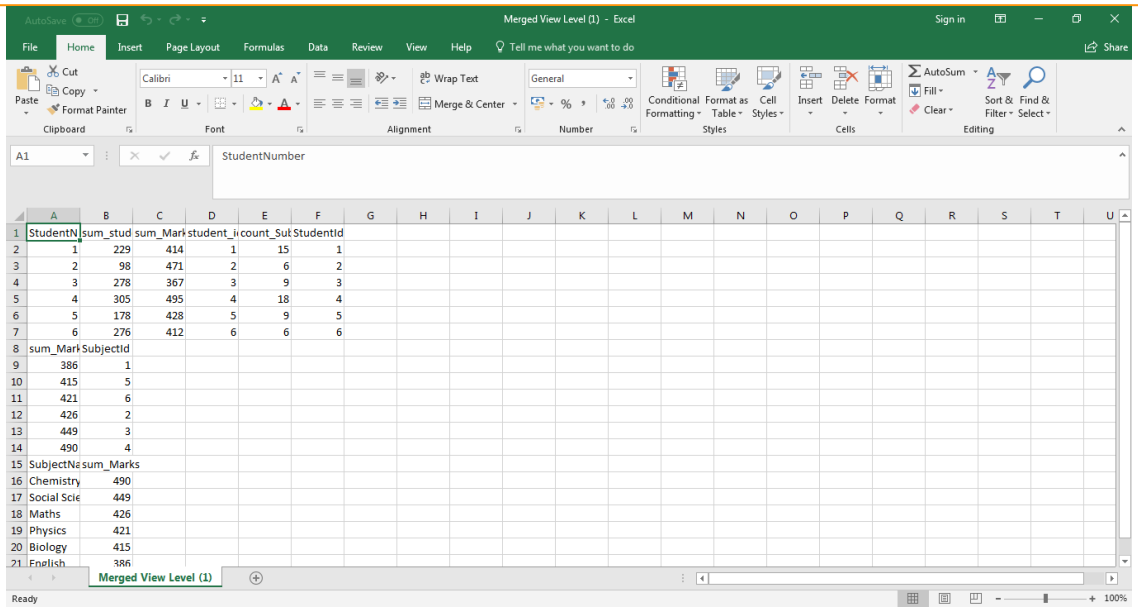
4.3.5. Export

Users can export business story in the various format via the '**Export**' option.

i) Click the '**Export**' option from the storyboard.
ii) Select an export option from the context menu.

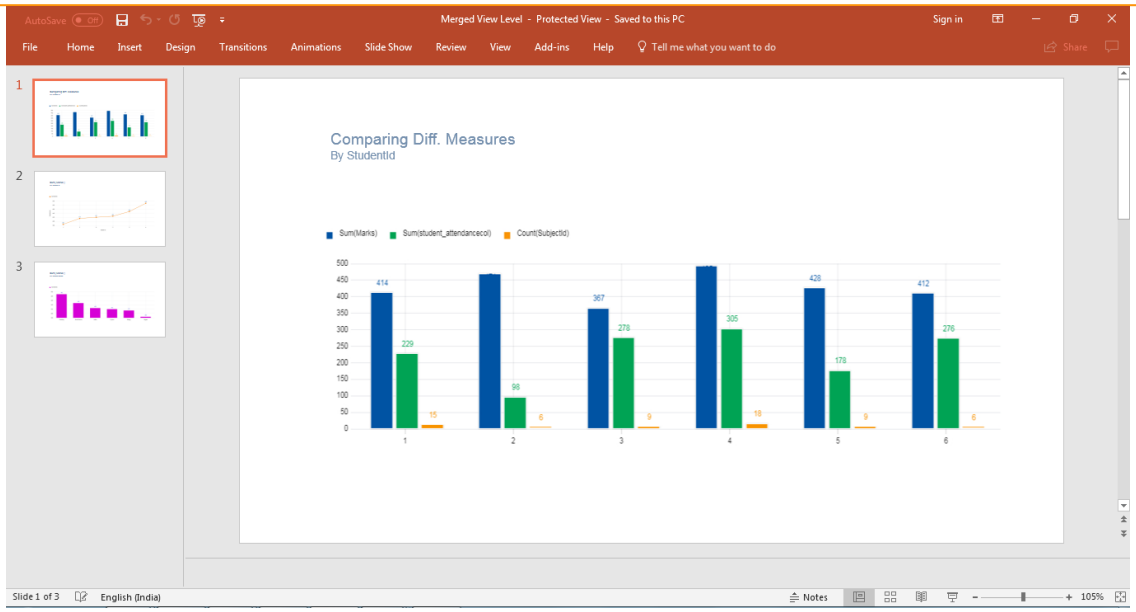


iii) The story will be downloaded in the selected export option.
   a. By clicking '**CSV**' and '**XLSX**' options the story, data will be saved in the excel format.



b. By clicking '**PDF**' option the story views are saved in the PDF format.

c. By clicking '**PPT**' option the story views are saved in the PPT format.



4.3.6. Options Assigned to a View

The following options supported by a view can be accessed from the Storyboard.

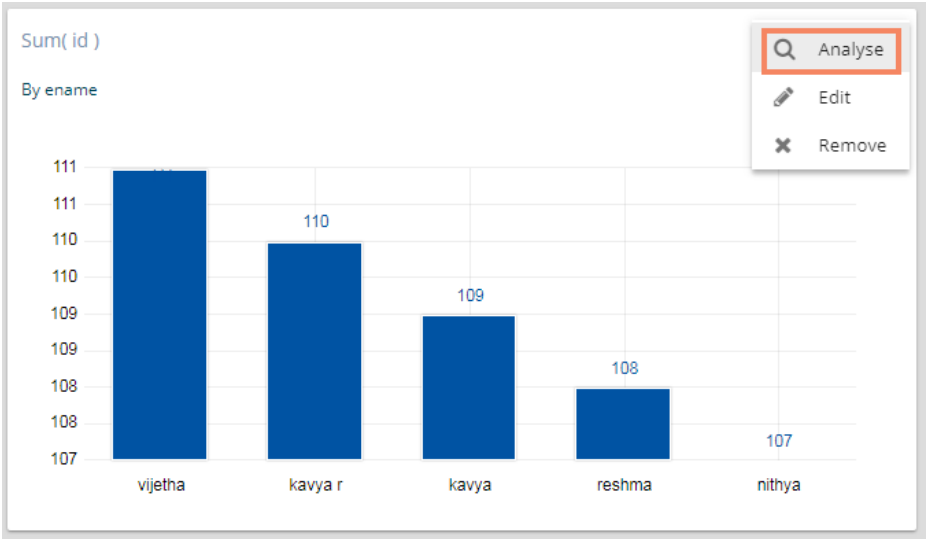
4.3.6.1. Analyze

i) Select a view from the Story Board.

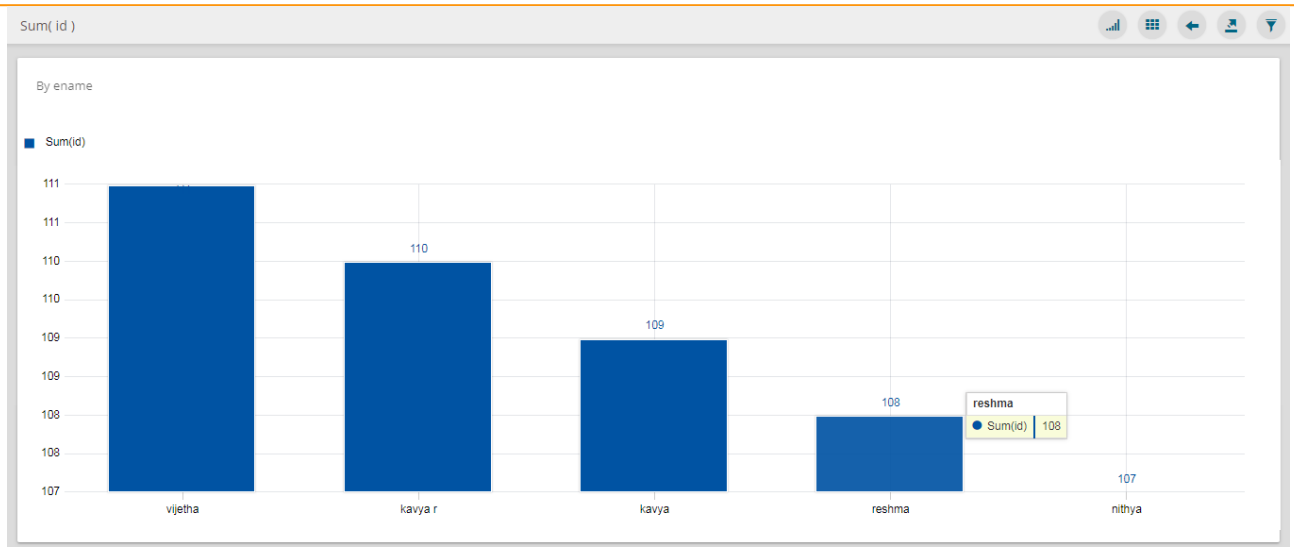
ii) Click the '**Options**' icon

iii) A context menu appears with various options.

iv) Select '**Analyse**' from the context menu.



v) The full-screen display of the selected view will be shown.

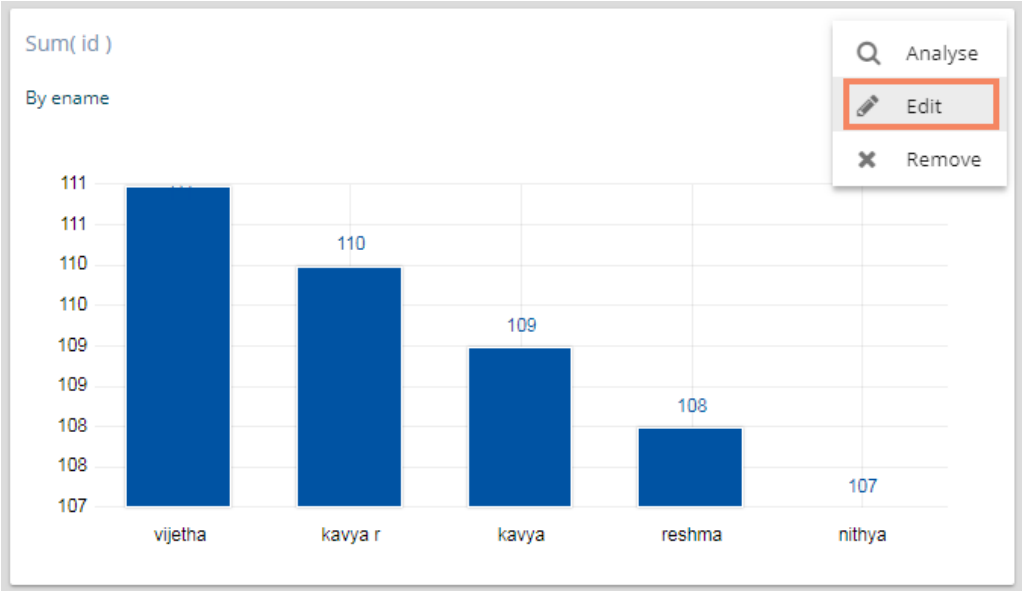


vi) Users can select any of the following options to analyze a Business Story view:

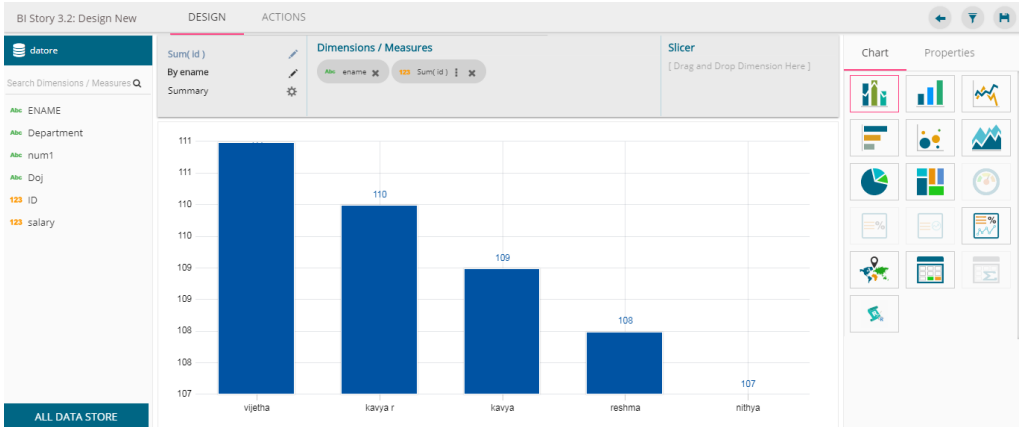
Option	Name	Description
	Chart	Displays data in a chart view
	Grid	Displays data in a grid view
	Back	Directs back to the Story Board
	Export	Exports the Story as CSV/XLSX/PDF/PPT file
	View Filter	Displays filter panel to apply or edit view specific filter conditions

4.3.6.2. Edit

i) Select a view from the Story Board.
ii) Click the '**Options**' icon
iii) Select '**Edit**' from the context menu.



iv) Users will be directed to the designer page.
v) Edit the required details. (If required)
vi) Click '**Save**' option.



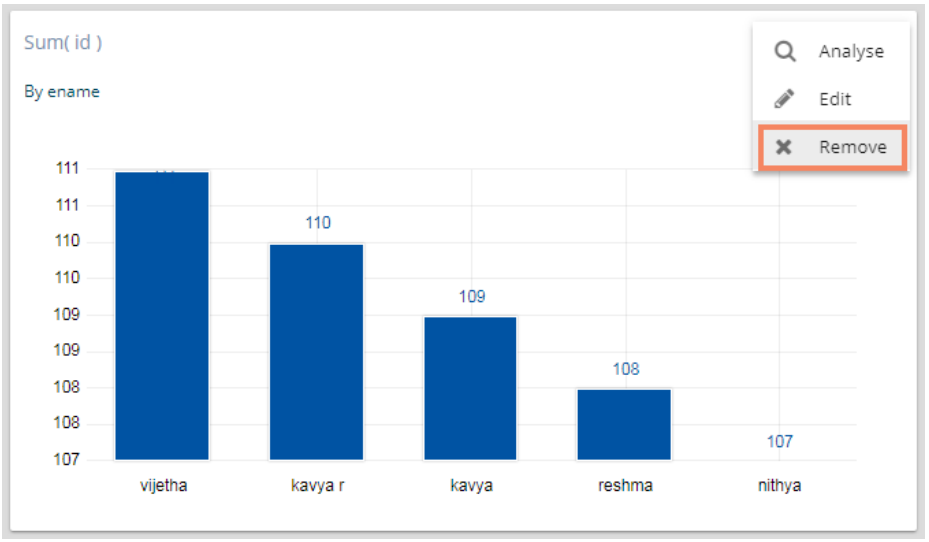
vii) The modified view will be saved successfully on the Story Board.

4.3.6.3. Remove

i) Select a view from the Story Board.

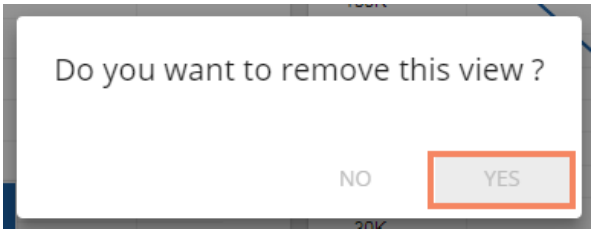
ii) Click the '**Options**' icon

iii) Select '**Remove**' from the context menu.



iv) A new window pops-up to confirm the removal of the view.

v) Click '**Yes**'.



vi) The selected view will be removed from the storyboard.

4.4. Data Interactions/Exploration

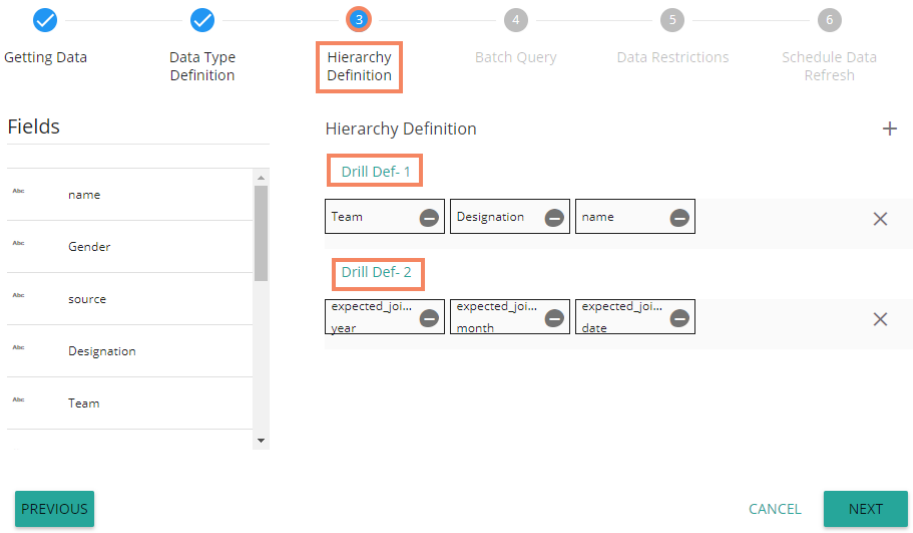
Views shared on the storyboard can display some interactions based on the applied functionalities. This section aims to describe '**Automatic Data Drill**' and '**Actions.**'

4.4.1. Automatic Data Drill

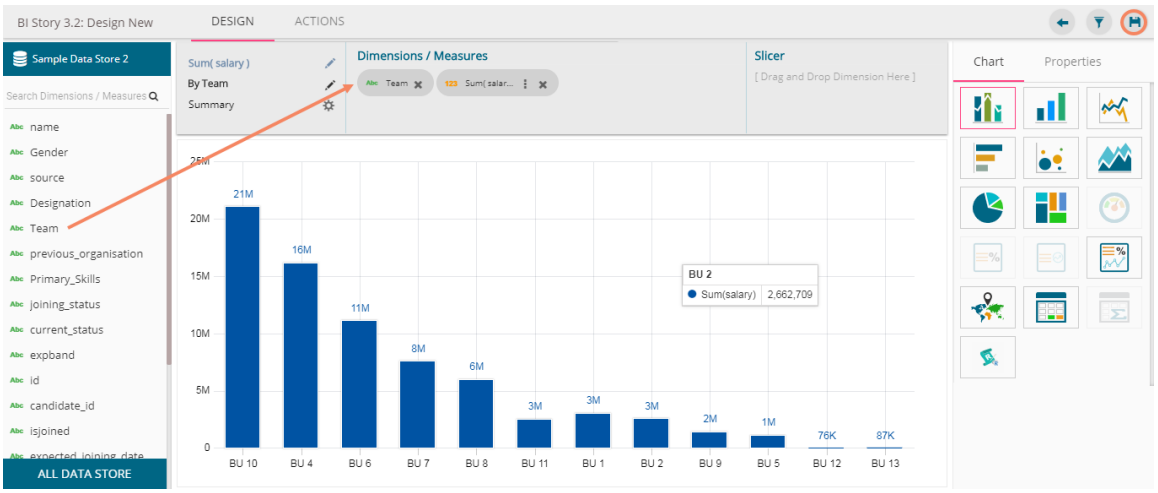
The Auto Data Drill allows users to drill down in the time values of a saved view on the storyboard of a Business Story.

Users must define a hierarchical pattern for the time values in a data store via the '**Hierarchy Definition**' option of a Data Store.

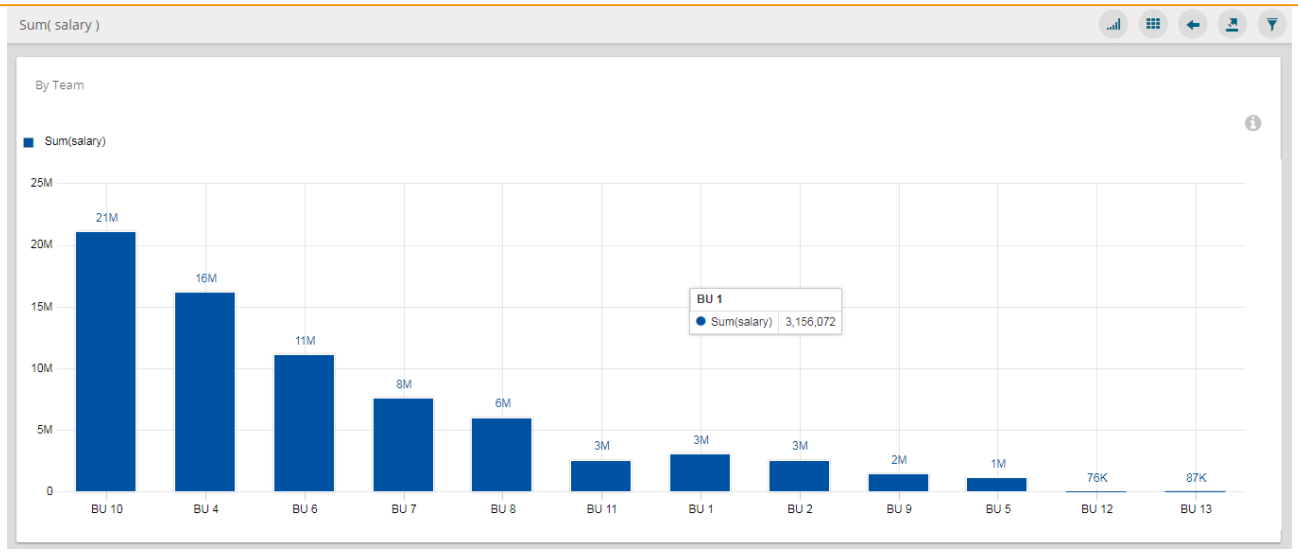
i) Navigate to the '**Hierarchy Definition**' tab (while creating a data store).
ii) Drag and drop a time dimension into the '**Drill Def**' box to configure the drill path.
iii) The dragged time dimension will split into three granularities (E.g., Year>Month>Date)
iv) Click '**Next.**'
v) Create a data store successfully.



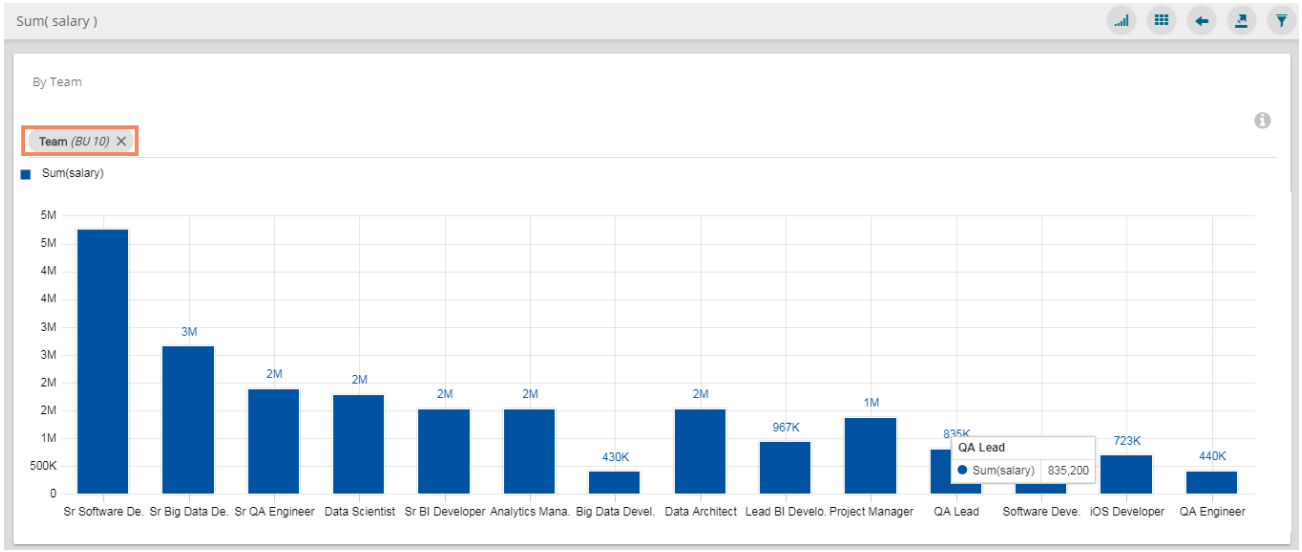
vi) Select the data store with the defined drill path to create a new view.
vii) Select the dimension for which the drill path has been defined and drag to create a view.
viii) Click '**Save**' option to save the view on the Storyboard.



ix) Access the saved view on the storyboard by double clicks on it.
x) Users will be directed to the '**Analyse**' window displaying team as the highest-level granularity of data drill.



xi) Click on a team to display the designation wise break up for the selected team (E.g., The following image displays designations for the team BU-10).



xii) Click on a designation to see the names of the employee (E.g., the following image displays names of all the software engineers inside the team BU-10).

Note:

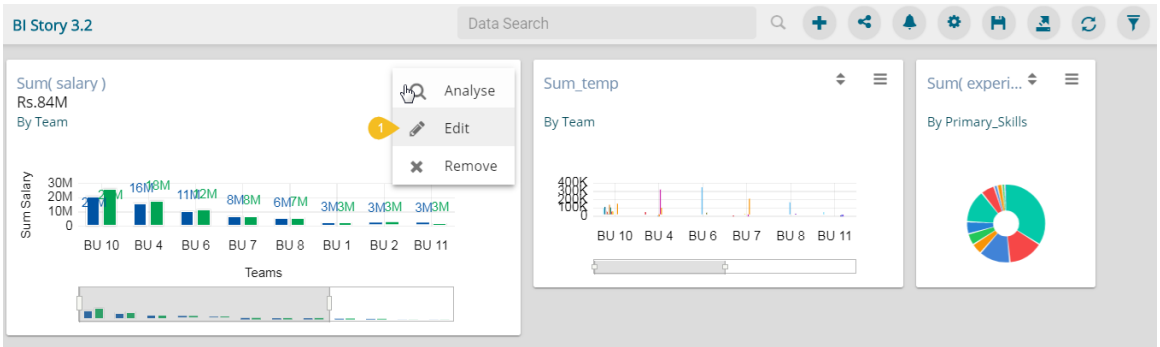
a. Users can also define a hierarchy for the date dimensions using the '**Hierarchy Definition**' tab of a datastore and avail the drill-down functionality for a saved view that contains the same date field.
b. Users can also open a saved view via the '**Analyze**' option.

4.4.2. Actions

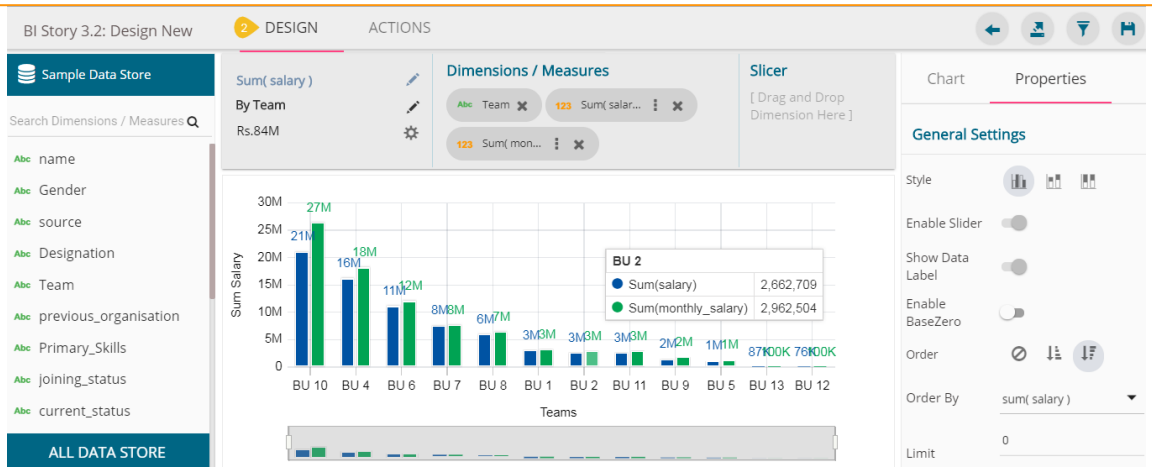
The '**Actions**' tab provided under '**Design New**' mode is a next level of applying the Global Filter. The suggested new feature will enable users to select multiple views of the storyboard to filter based on a specific view. By default, custom filtering will be enabled on single click for all the views wherein 'interactions' has been enabled through the '**Action**' tab.

i) Navigate to the Storyboard.

ii) Select '**Edit**' view from the '**Options**' menu.



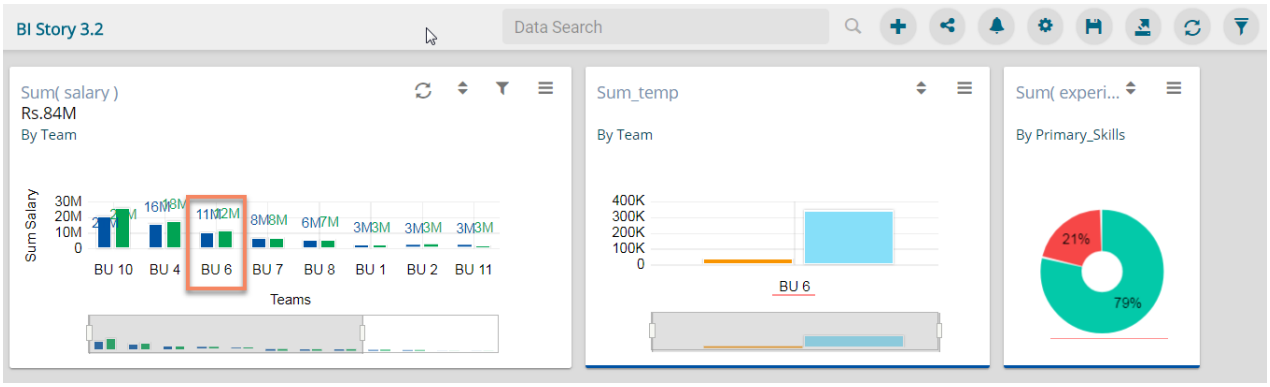
iii) The '**Design**' tab will open by default for the selected view.



iv) Click '**ACTIONS**' tab.
v) Click '**Interactions**' option from the displayed settings list.
vi) Enable interactions among the selected view (displayed as a chart) and the other views by a checkmark in the given box.
vii) Click '**Save**' option.

viii) Users will be redirected to the Storyboard with a pop-up message stating that the storyboard views are updated.
ix) Select any one-dimension value from the view which was selected to develop a dependency, the other views will be filtered accordingly. The affected views will be highlighted for the seamless understanding of users.

E.g., BU 6 has been selected from the first view in the below given image. The other two charts are also filtered with the selected data value.

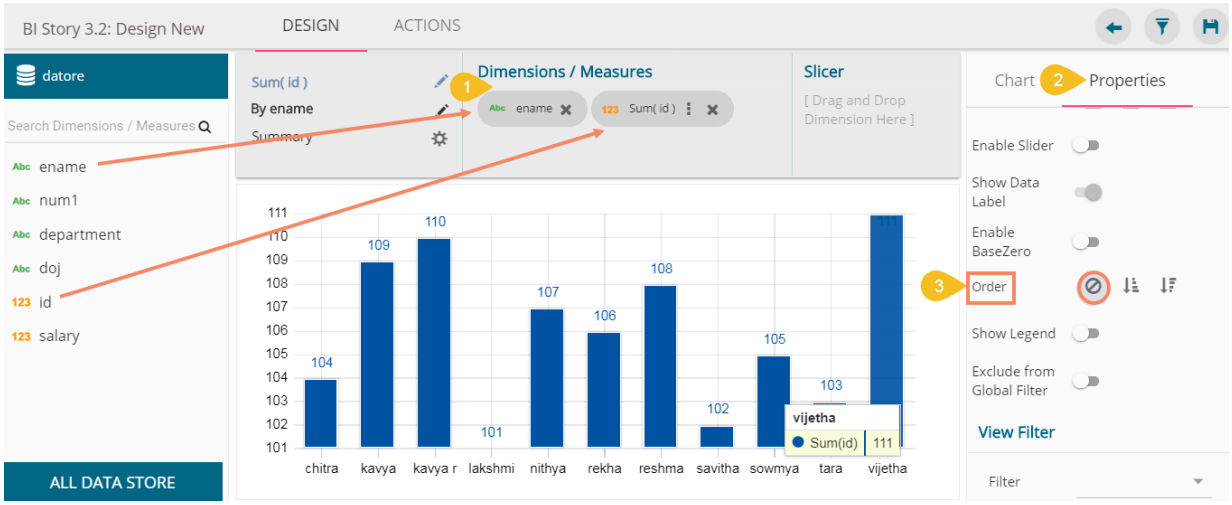


Note: The '**ACTIONS**' tab also offers '**Custom Fields**' option to be applied on the KPI Comparative tile. Please refer the KPI Comparative Tile to understand '**Custom Fields**' functionality.

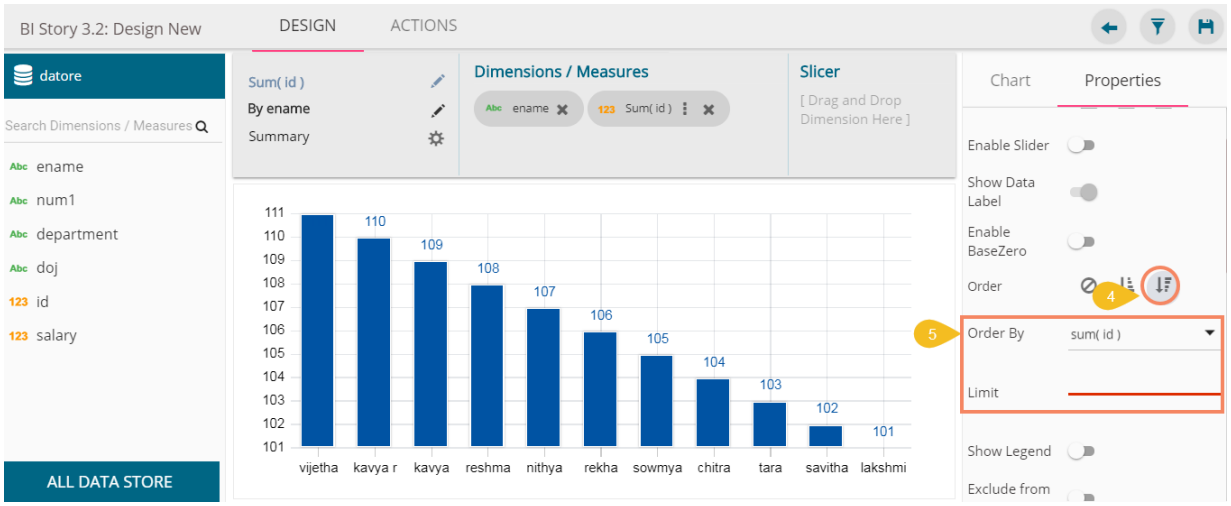
4.4.3. Sorting by Limit

The sorting by '**Limit**' option is provided in the chart Properties to display the selected data values in the chart.

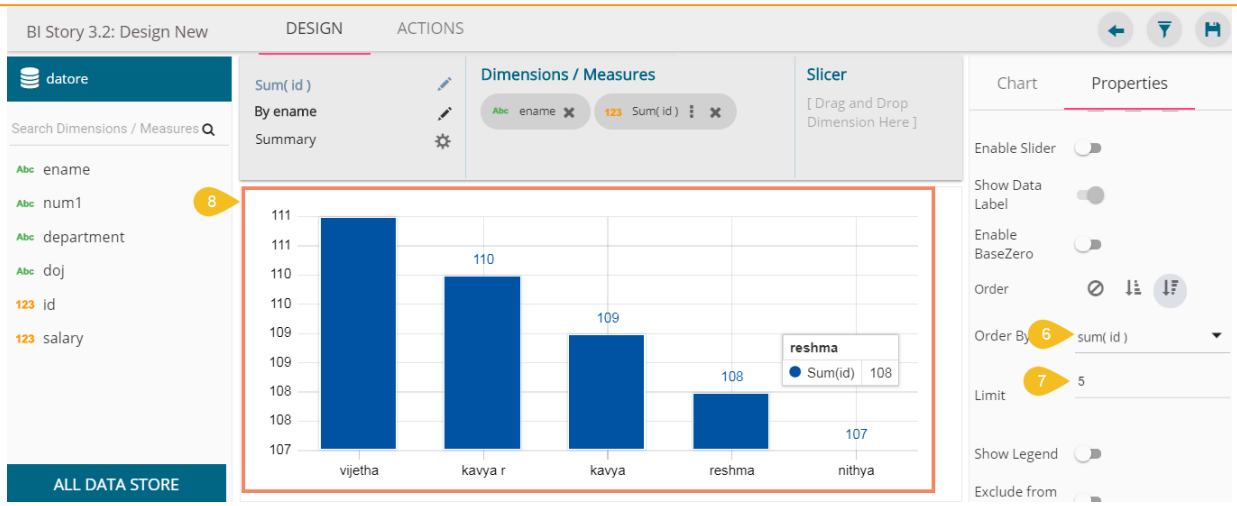
i) Drag and Drop the desired dimensions and measures to create an instant view.
ii) Open '**Properties**' tab with a click.
iii) The chart will be displayed by the none '**Order**' selected by default.



iv) Select an order option by choosing an ascending or descending icon.
v) The '**Order By**' and '**Limit**' options will be displayed.

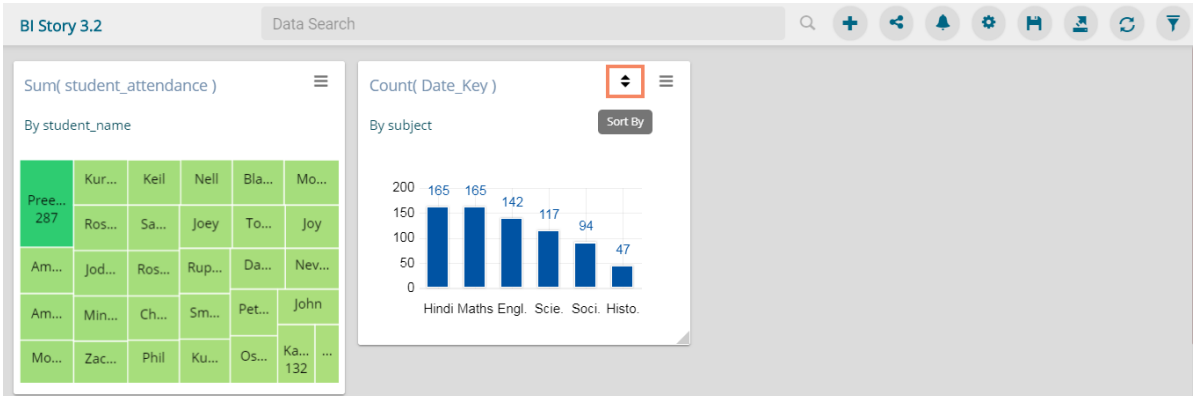


vi) Select a dimension or measure value from the drop-down to display the data value in the selected order
vii) Insert a number to add a limit to the displayed values by using the '**Limit**' option.
viii) The chart will display data as per the set limit in the selected order.



NOTE:

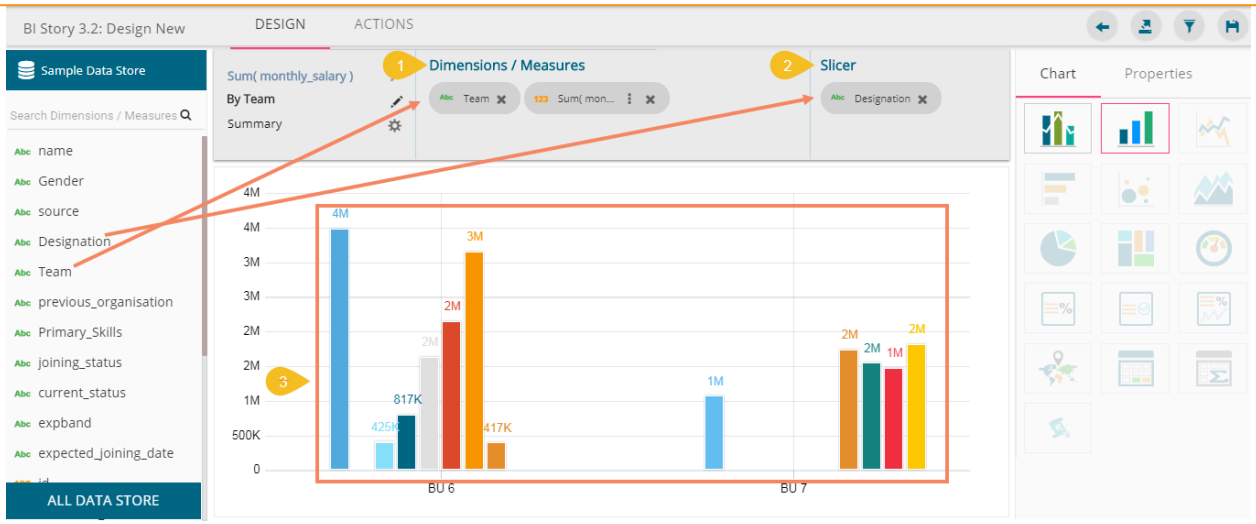
a. This feature does not work for KPI tile, Semi Gauge, Map, TreeMap Chart, and Metric Summary.
b. The view specific '**Sort By**' option can be accessed from the storyboard.



4.5. Adding a Slicer

Users can add a further dimension to the created view using the '**Slicer**' option.

i) Drag and drop required dimension and measure in the '**Dimensions/ Measures**' column on the designer page.
ii) Drag and drop another dimension as '**Slicer.**'
iii) It will display slices in the created view based on the second-dimension value via a column chart (by default)
E.g. The following image shows designation wise salary for teams BU 6 and BU 7 through Column Stack Chart.



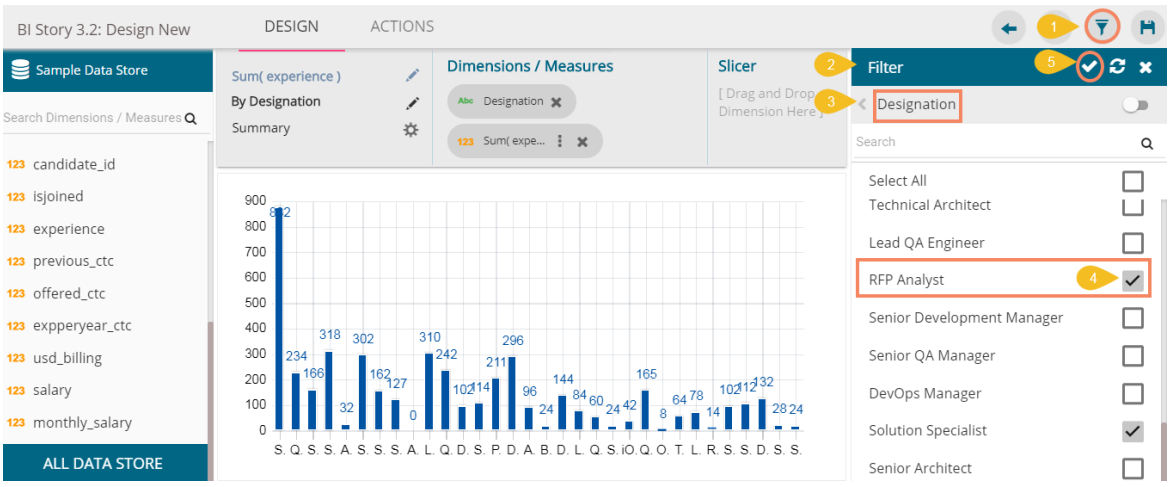
Note: Slicer will support the selection of only one dimension and one measure in the '**Dimension/Measures**' space. Another dimension should be added to the '**Slicer'** space**.**

4.6. Applying Filters

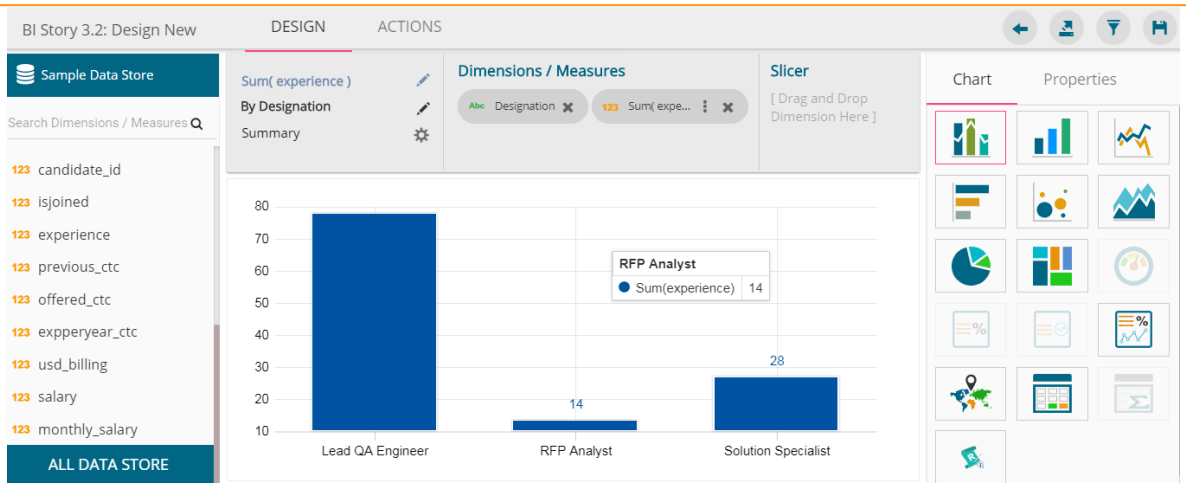
BDB Business Story offers series of filters to customize your interactive visual report. The filters can be applied at the view level as well as to the entire business story.

4.6.1. View Specific Filter

i) Click '**Filter**' option from the design mode of a view.
ii) A filter panel opens with the list of available filter values.
iii) Click on a filter value to display a list containing all the sub-filter values.
iv) Select a sub-filter value by check marking the box.
v) Click the '**Apply**' option.

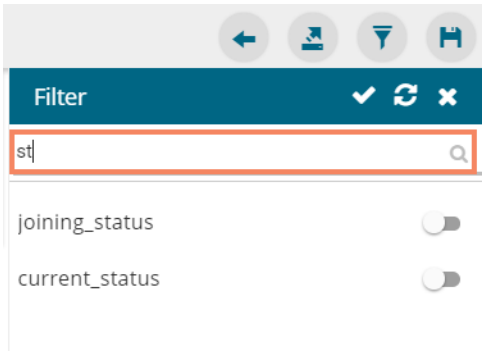


vi) The selected filter values will be applied to the concerned view.

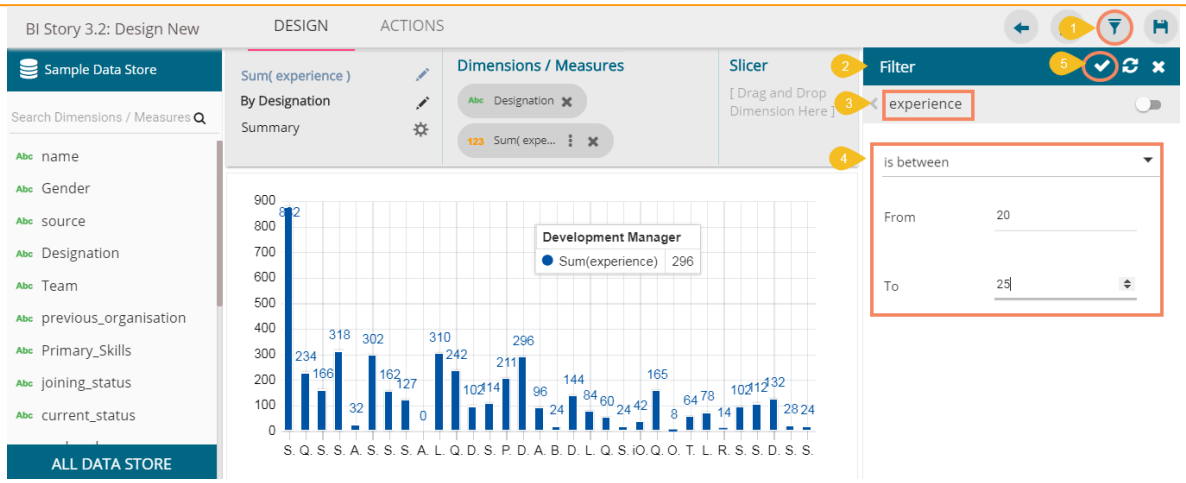


Note:

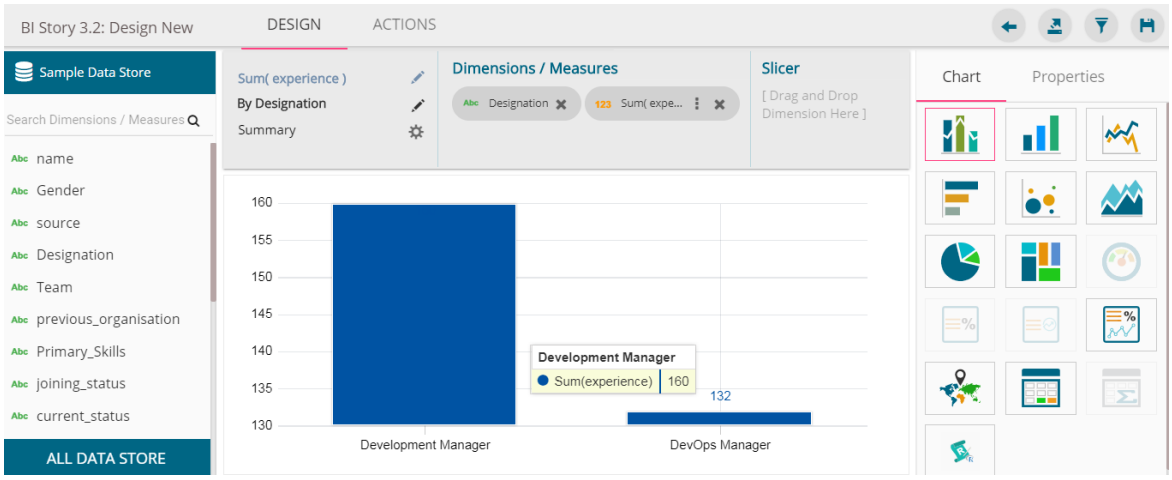
a. A '**Search**' bar has been provided for the View Filter panel to search a Dimensions, Measures, and Time value from the available list.



b. Users need to click '**Apply**' button while enabling or eliminating the view specific filter values to reflect the same in the displayed chart.
c. Users can insert, modify, or remove a view specific filter via '**Analyse**' option.
d. The View Filter will be ineffective when the selected view is inserted into a story and the Global Filter is applied to it.
e. Users can add a view filter based on the '**Measures**' values.
   i) Open the Filter panel on the Design New page.
   ii) All the selected dimensions and measures will be listed.
   iii) Select a measure as a filter value.
   iv) Select a condition from the drop-down menu.
   v) Click '**Apply**'.

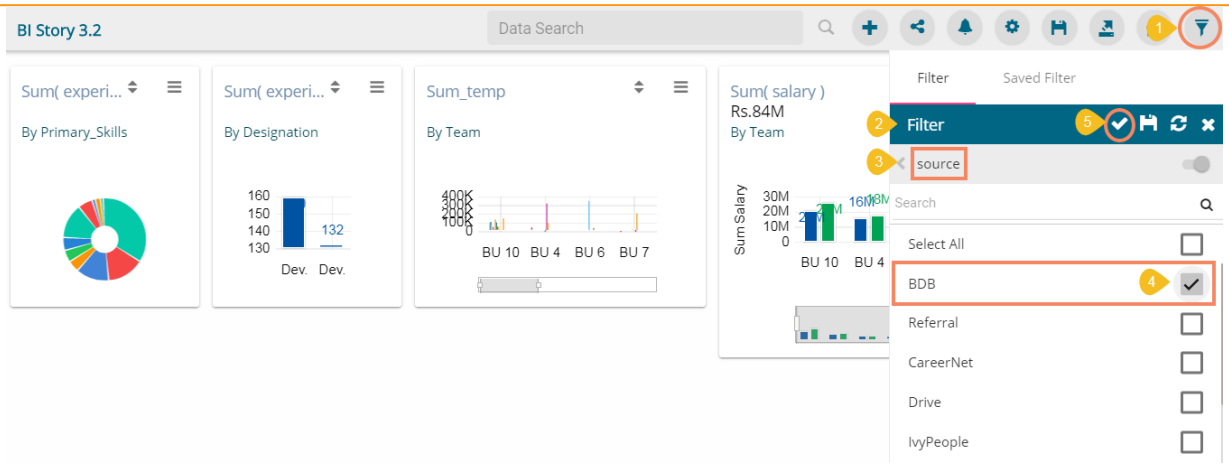


vi) The view will be modified according to the selected filter value.

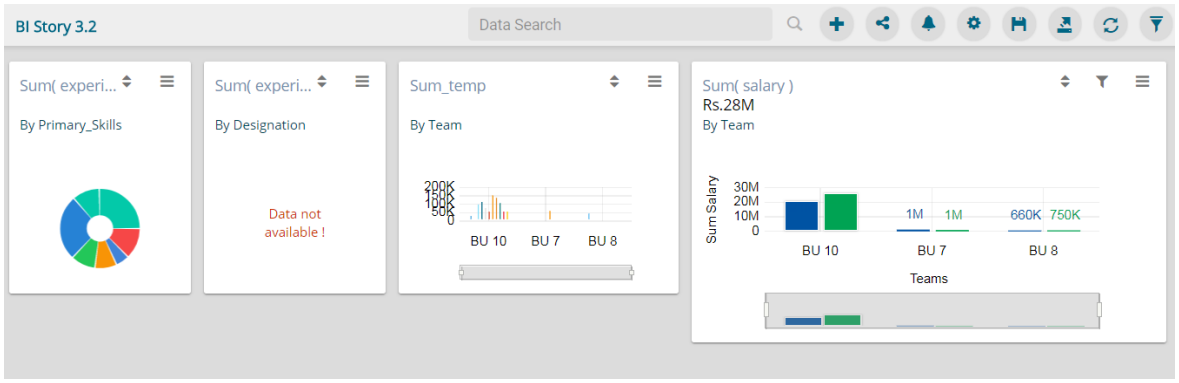


4.6.2. Global Filter

i) Click '**Global Filter**'  on the Story Board.
ii) A filter panel opens with the list of filter values.
iii) Click on a filter value to display a list containing all the sub-filter values.
iv) Use a check mark in the checkbox to select a sub-filter value.
v) Click '**Apply**'.

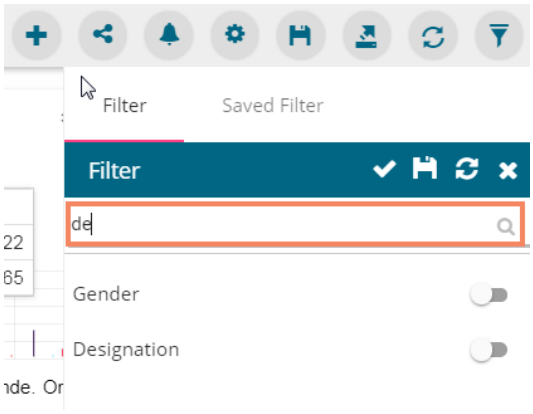


vi) The global filter will be applied to all the concerned views on a Storyboard.



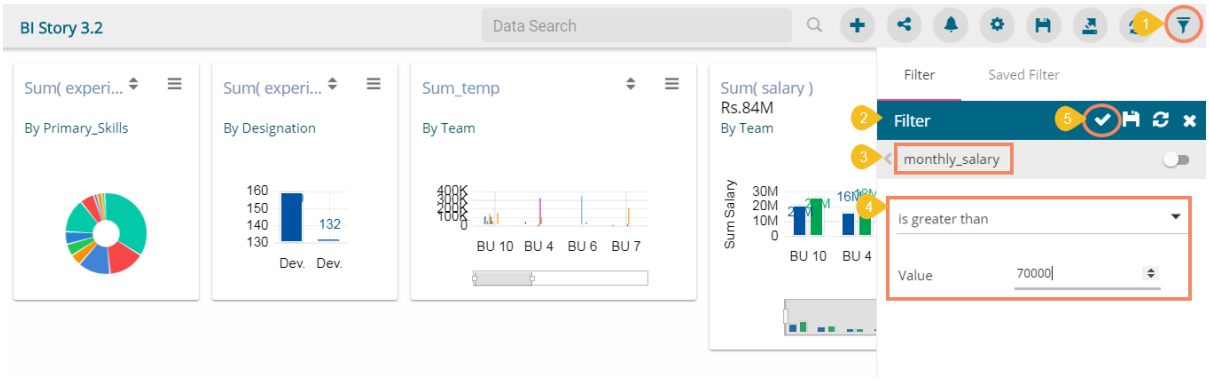
Note:

b. A '**Search**' bar has been provided for the Global Filter panel to search the available Dimensions, Measures, and Time values.

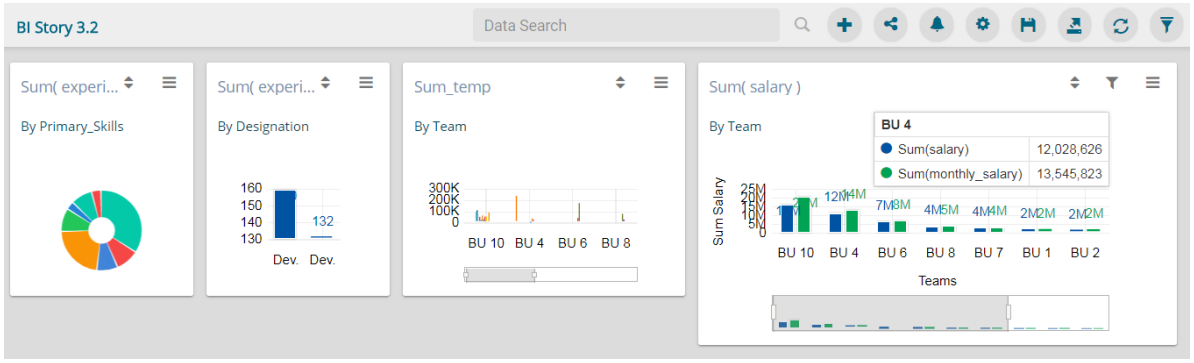


c. The global filter can be applied only to those views on the storyboard where the filter values are used as dimensions.
d. Global filter when applied to various views on a storyboard, subdues the view specific filter values.
e. Users can insert views created via different data stores on one Story Board. By default, the Global filter panel will display all the available filter values across the data stores.
f. Users can add a global filter based on the '**Measures**' values.

i) Click the '**Global Filter**' icon
ii) The Filter panel will be opened on the Story Board.
iii) Select a measure as a filter value.
iv) Select a condition from the drop-down menu.
v) Click '**Apply**'.



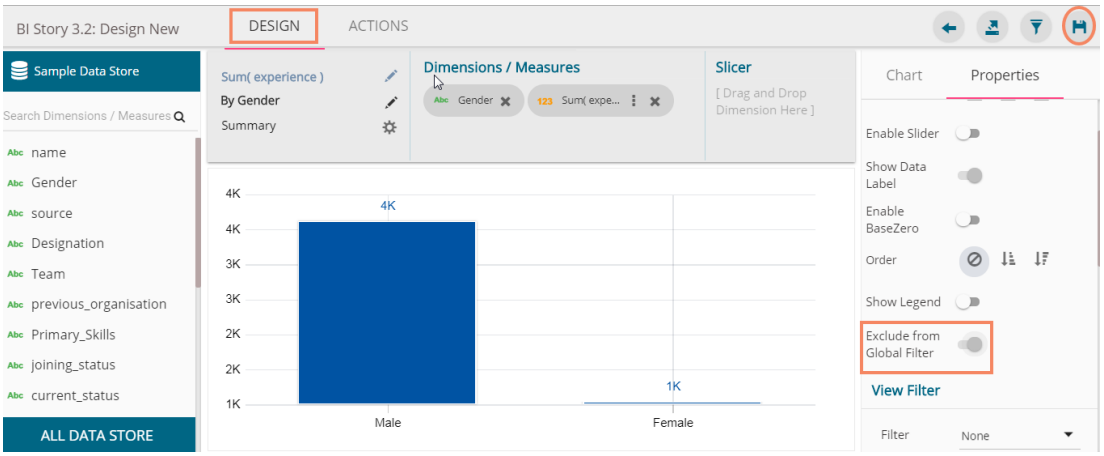
g. The selected filter value will be applied to all the saved views on the storyboard.



4.6.2.1. Exclude from the Global Filter

The Global filter values are applied to all the available views on a storyboard. Users can exclude a specific view from the Global Filter effect by selecting the '**Exclude from the Global Filter**' option.

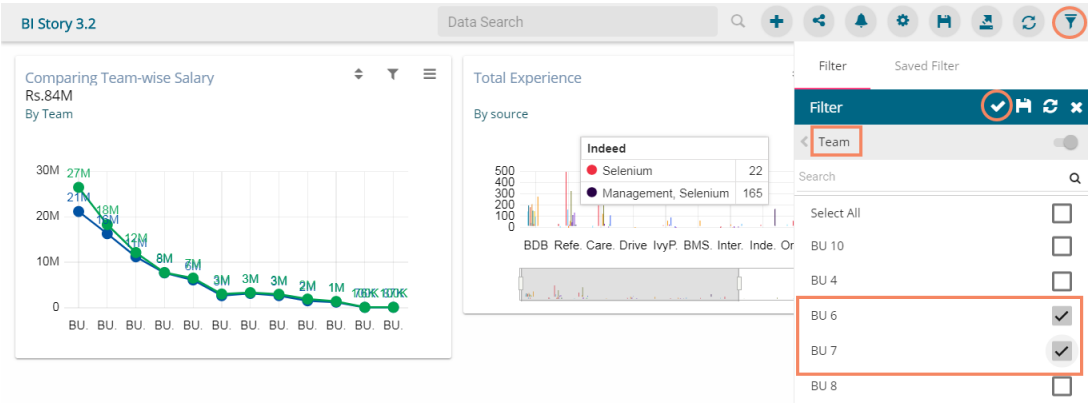
i) Navigate to the '**Design**' mode of a view you wish to exclude from the Global filter effect
ii) Enable the '**Exclude from Global Filter**' option from the '**Properties**' tab
iii) Click '**Save**' option.



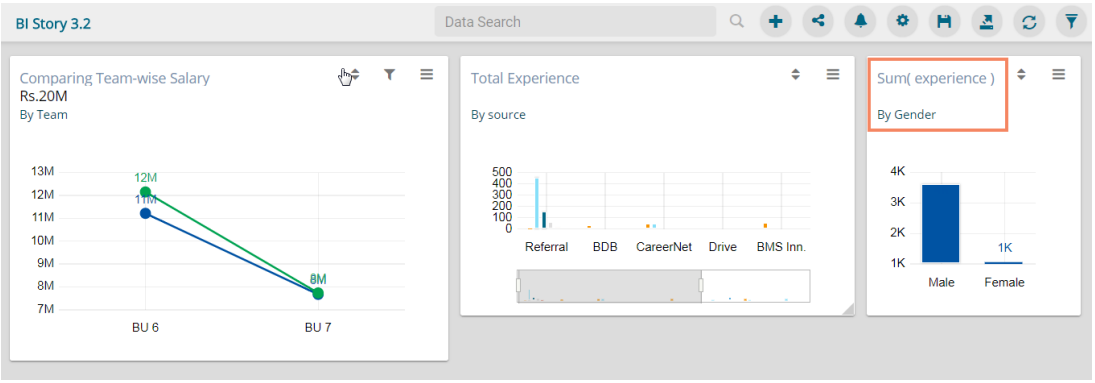
iv) Users will be redirected to the Storyboard.
v) Click the '**Filter**' option and select a global filter value (in this case, it is BU 6 and BU 7

Teams).

vi) Click the '**Apply**' option.



vii) All the views will be modified according to the Global filter, but the selected view will be excluded from the Global filter.



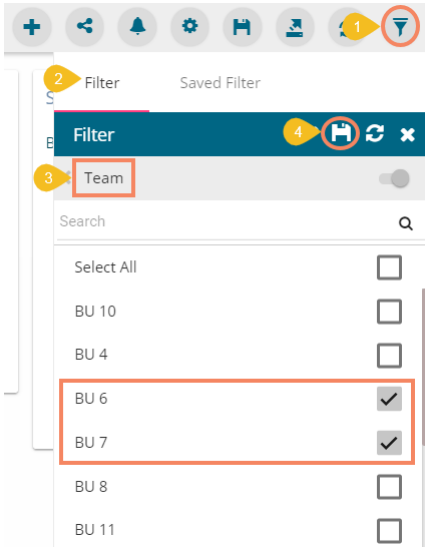
4.6.3. Saving a Global Filter

i) Click '**Global Filter**' option.

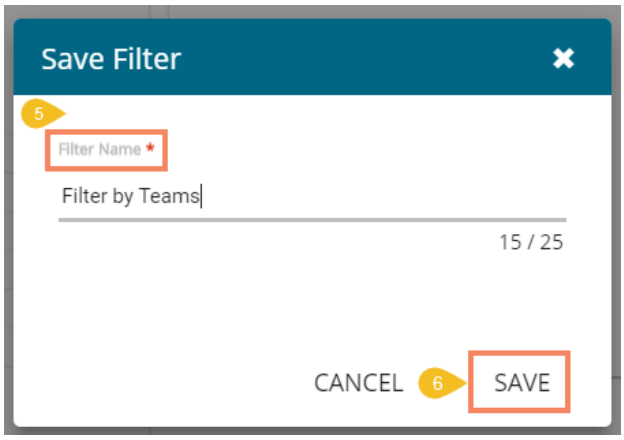
ii) Select the '**Filter**' tab.

iii) Select a filter value by check marks. E.g. In this Case, team BU 6 and BU 7 are the selected filter values.

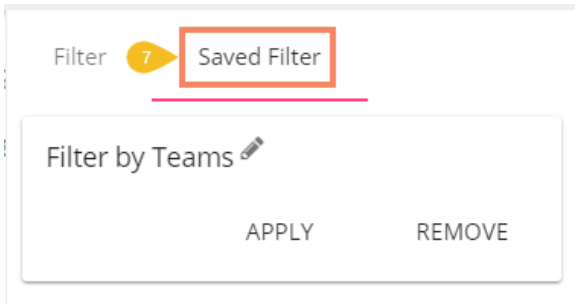
iv) Click '**Save**' option.



v) Users need to give a name for Filter in the 'Save Filter' pop-up window.
vi) Click '**SAVE**' option.



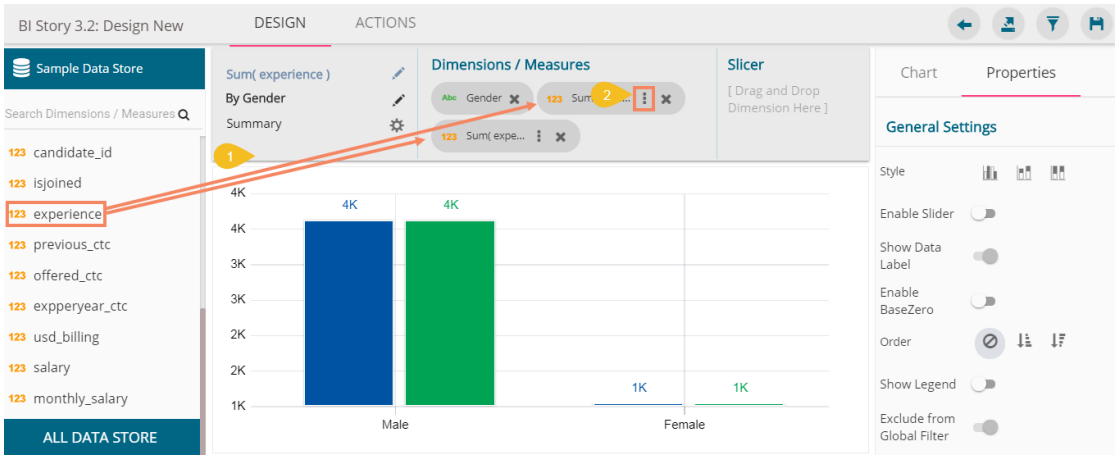
vii) The filter will be stored under the '**Saved Filter**' tab. (The same will be notified by a pop-up message.)



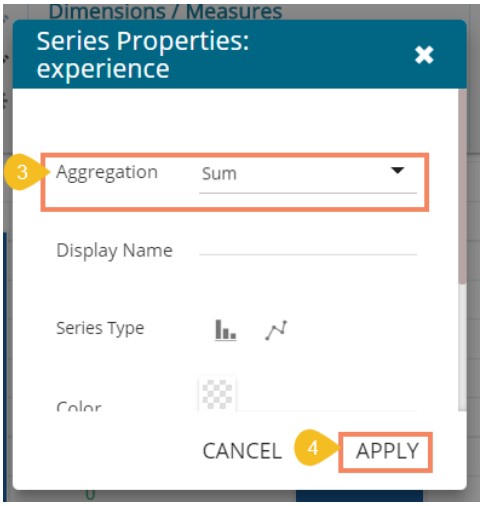
4.6.4. Measure Filter

Users can apply measure filter via the series properties. Users can compare different values for the same attribute based on the applied filter conditions using this feature.

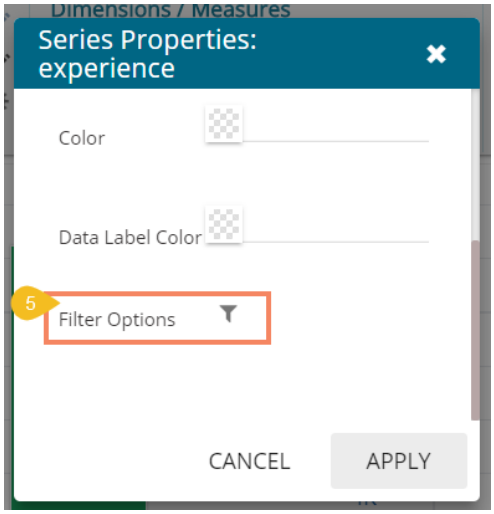
i) Select a Measure value from the list of the available dimensions and measures and drop it twice on the canvas.
ii) Click the '**Series**' icon to open the measure specific Series Properties.



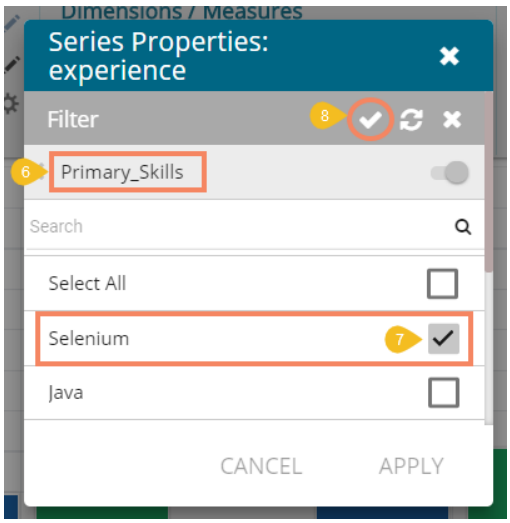
iii) Make sure that the '**Aggregation**' type is similar to both the selected measures.
iv) Click '**Apply**' to modify the aggregation values, if they were not exactly for the measures.



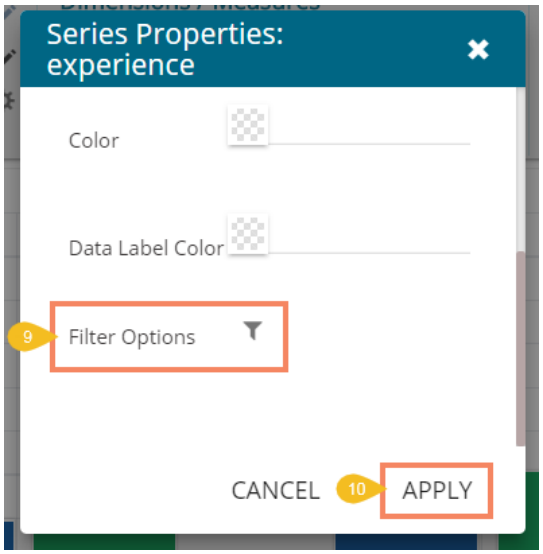
v) Scroll down the Series Properties to get the **'Filter Options'**
vi) Click the **'Filter'** icon to get all the available filter values.



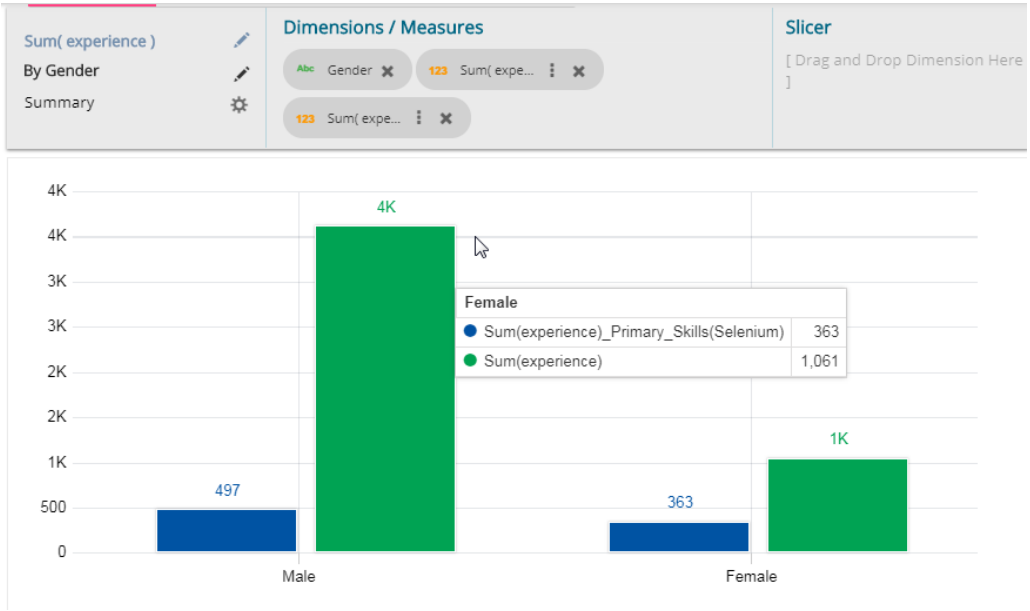
vii) Select stringent filter conditions using checkmarks in the given boxes. (E.g. In this case, **'Primary_Skills'** is a broad filter condition under which **'Selenium'** is a specific filter choice.)
viii) Apply it using the **'Apply Filter'** icon.



ix) Users will be redirected to the screen displaying the '**Filter**' icon.
x) Click '**Apply**' option.



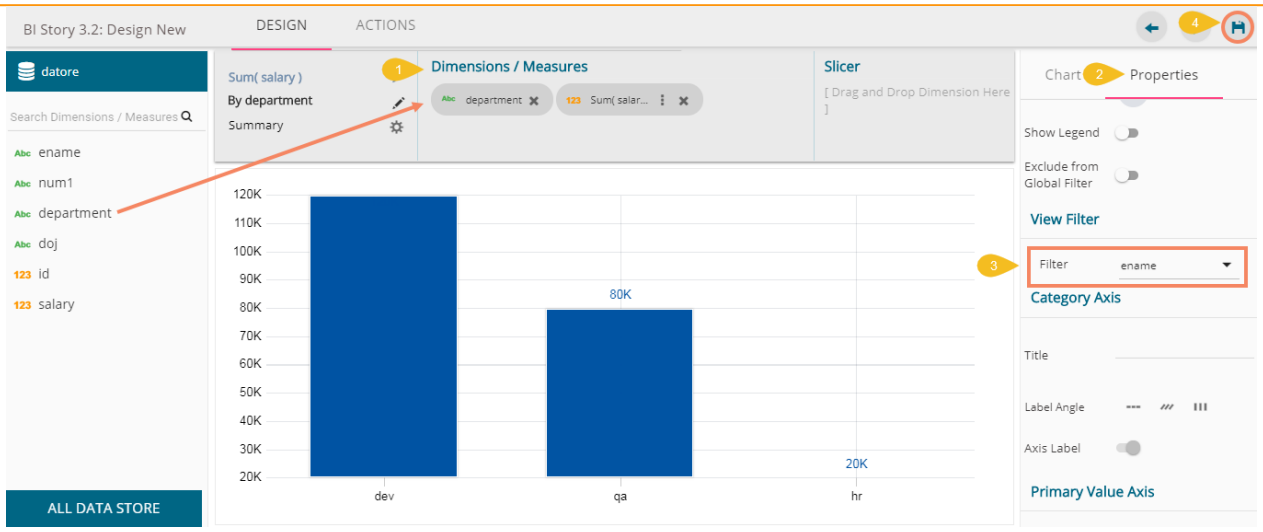
xi) The view will be filtered according to the set Measure Filter condition.



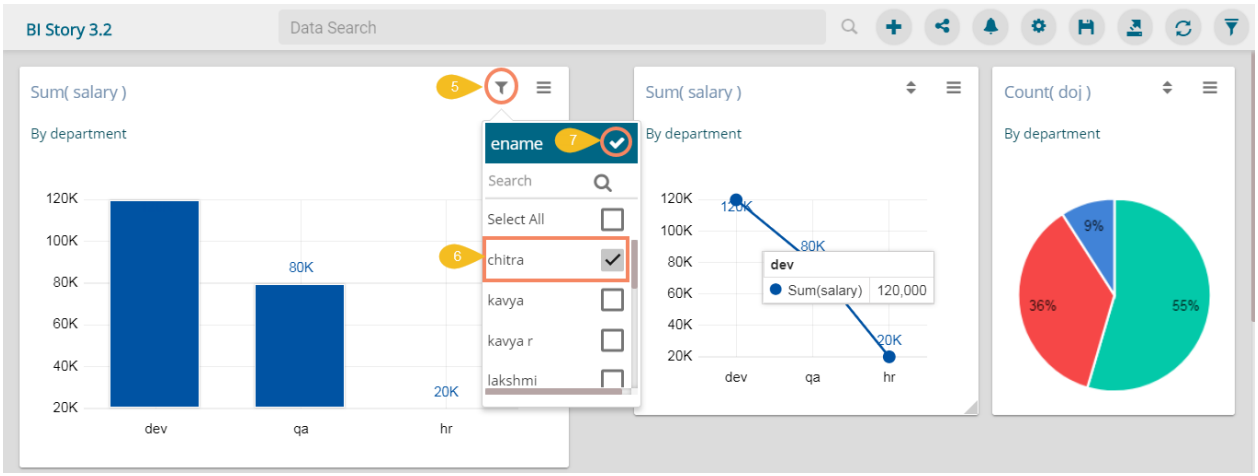
4.6.5. Custom View Filter

Users can access this filter option from the chart properties that will be reflected in a chart on the storyboard when the view is saved.

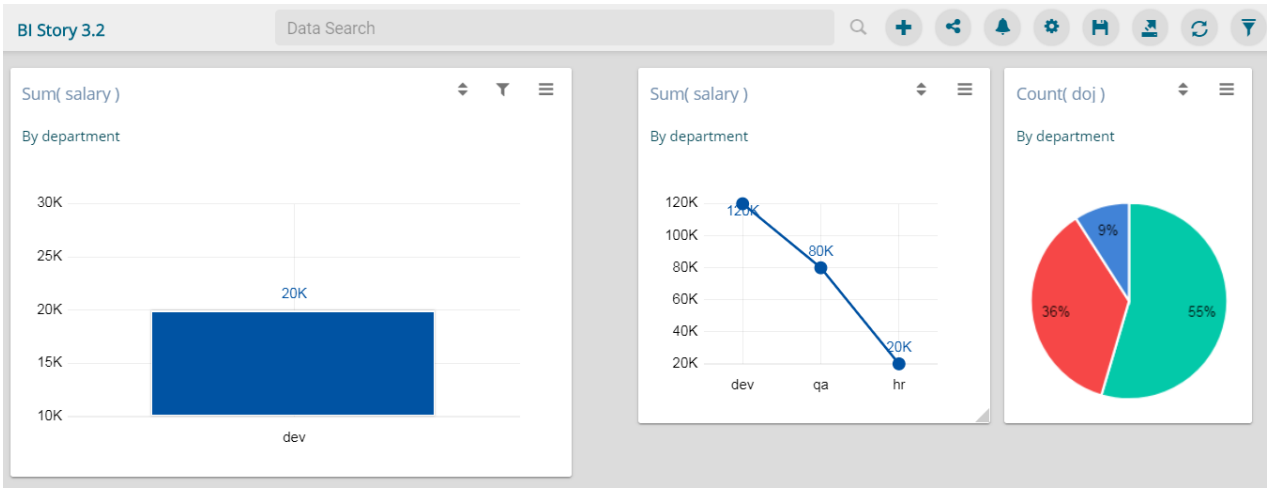
i) Create a view by drag and drop of the desired dimension and measure to represent the selected data values through a chart. (By default, it will select the Mixed Chart)
ii) Open '**Properties**' tab.
iii) Select a '**Filter**' option using the drop-down menu. (In this case, employee name has been selected as a filter condition)
iv) Click '**Save**' option to save the view on the storyboard.



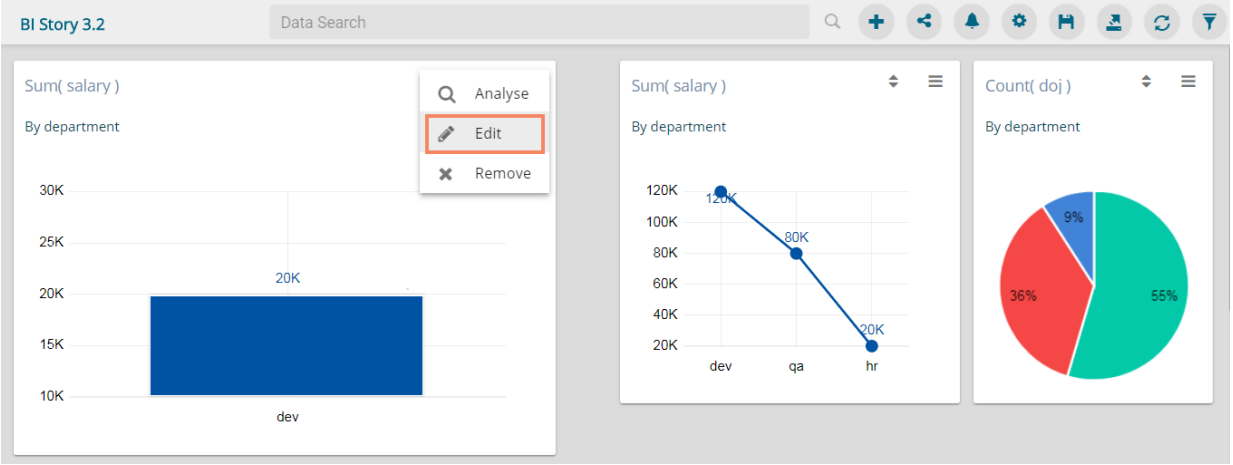
v) Click the '**Filter**' option
vi) Select a filter value.
vii) Click the '**Apply**' option.



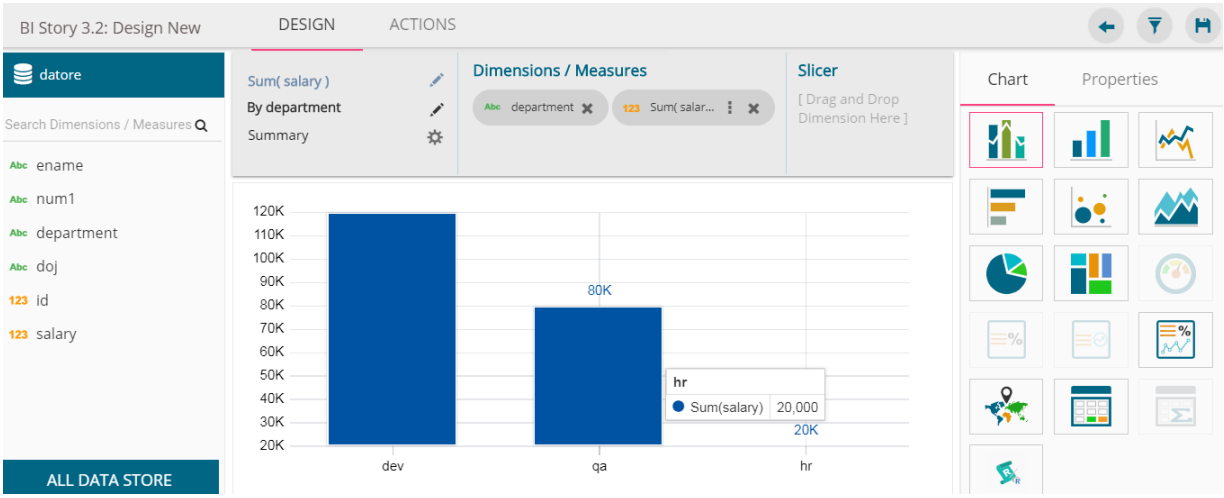
viii) The view will be customized as per the selected filter condition on the Storyboard.



ix) Click '**Edit**' option for the same view



x) The custom filter condition will not be adequate when the view opens in the Design Space.

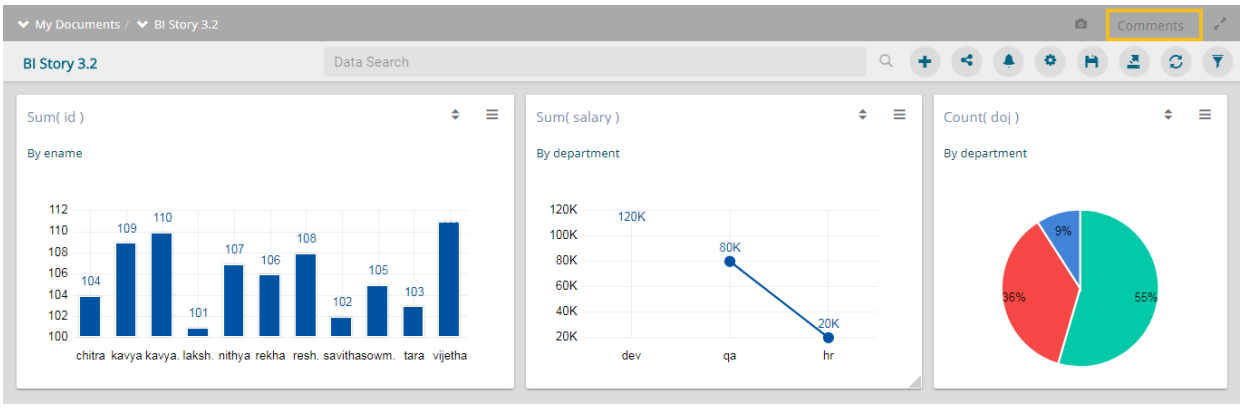


Note: This choice is not available for the Semi Gauge chart, KPI Tile, KPI Comparative Tile, Matrix Summary.

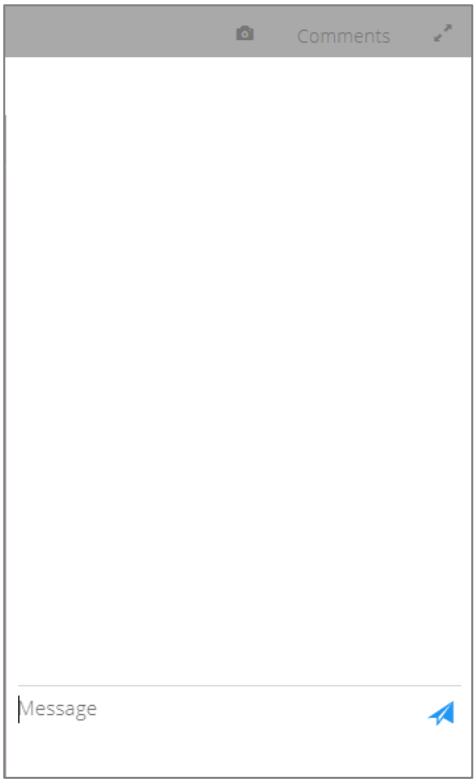
4.7. Comments

Users can access '**Comments**' option on the menu row while designing a story.

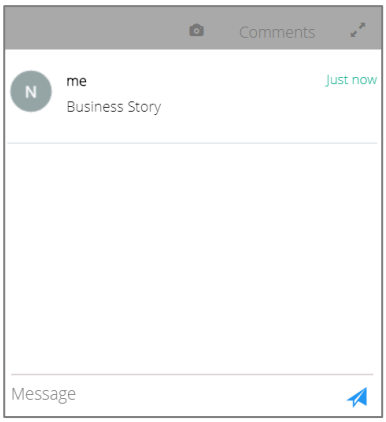
i) Click '**Comments**' from the Header panel.



ii) A new window will open below.
iii) Space to insert a message can be seen at the end of the window.
iv) Type a comment in the given '**Message**' space.
v) Click '**Send**'



vi) The entered comment will be sent to the '**Comments**' window.



Note:

a. '**Comments**' feature is enabled for all the users who can access the story document.
b. The inserted comments will display user initials and record of time.

5. Charts & Properties

This section explains all the available views and view properties provided in the Business Story workspace.

5.1. Mixed Chart

The Mixed Chart is a combination of line chart and column chart. It can plot 3-series of data on the graph. It is primarily used to emphasize different series of information.

Best situation to use Mixed Chart: To compare multiple categories

Example: To analyze company's budget v/s revenue.

Variations of this chart:

Use stacked Column charts: Multiple categories can be clubbed together on top of each other which makes addressing multiple questions easier.

Use columns side by side: Comparison between multiple categories becomes easier instead of toggle between charts and data.

Add color for quick insight: Where displaying columns with colors will make users pay immediate attention to the essential tasks.

Properties:

i) **General Settings**

a. Style: Select a style to display the data
b. Order: Select a sequence for displaying data
    i. None
    ii. Ascending
    iii. Descending
    iv. Manual Sort: Users can manually sort the dimensions by using the indicator signs
c. By selecting an order, users will be required to configure the following fields:
    i. Order By- Select a value option from the drop-down menu to order sequence of the data
    ii. Limit- Set a number to display the requested data by this limit
d. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
e. Show Data Label: Data label will be displayed by turning on the radio button
f. Enable Base Zero: Base will be presented from Zero by turning on the radio button
g. Show Legend: Displays legend by turning on the radio button
   After enabling 'Show Legend,' users need to select the following information:
    i. Legend Style: Select one of the following options by using the drop-down menu
        1. Fixed
        2. Floating
    ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option from the drop-down menu.
        1. Vertical
        2. Horizontal
h. Enable Slider: Slider will be displayed by turning on the radio button

ii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)

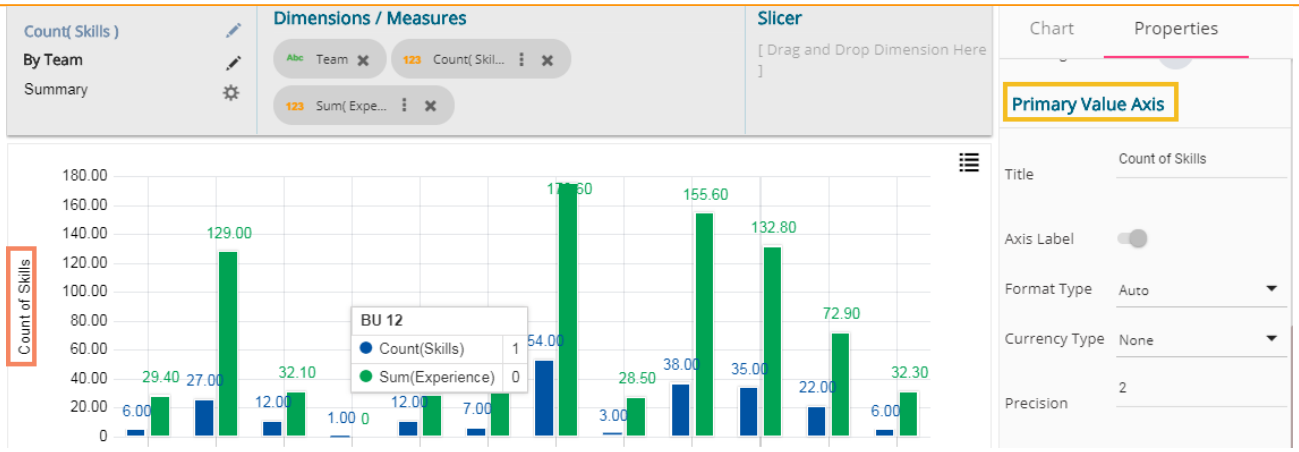
iii) Category Axis

a. Title: Provide a title for the axis
b. Axis Label: Enable the category axis label by turning on the radio button
c. Label Angle: Select a display angle for the axis label

E.g., 'Teams' is the title for the category axis.

iv) Primary Value Axis

a. Title: Provide a title for the Primary Value Axis
b. Axis Label: Enable the Primary Value Axis label by turning on the radio button
c. Format Type: Select a desired format type from the drop-down menu
d. Currency Type: Select a currency symbol to be displayed in the view
e. Precision: Set the after-decimal value (It will show up to 5 precision)

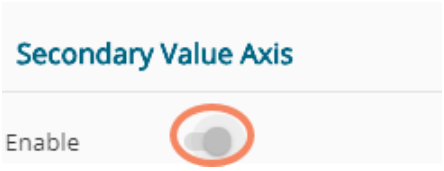


v) Secondary Value Axis

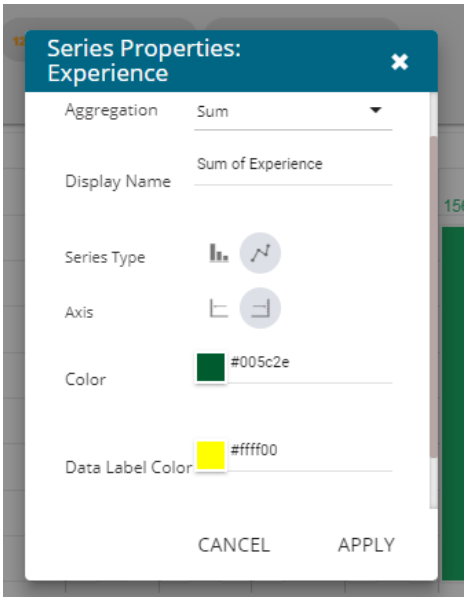
Properties for the Secondary Value Axis will be displayed when two measures are dragged on the canvas.

Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display same on the chart

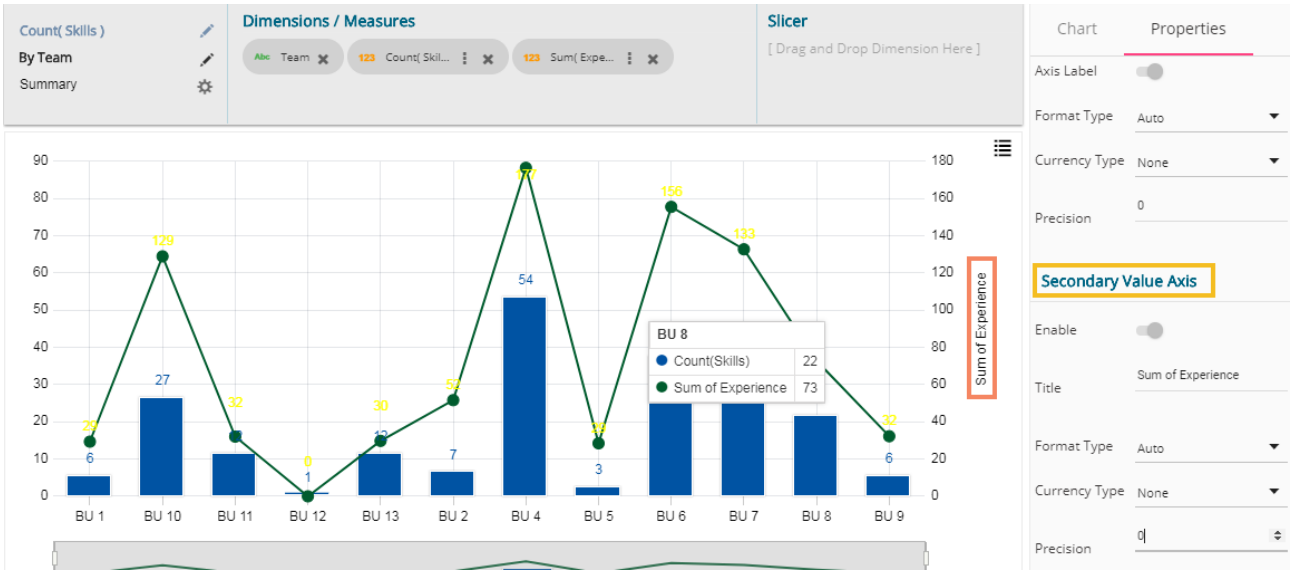
a. Access Secondary Value Axis using the 'Properties' tab and enable it.



b. Click '**Series Properties**' ⋮ provided next to the measure name
c. A new window will open
d. Configure the required details:
   i. Aggregation-select an aggregation using the drop-down menu (By default, it will show the second aggregation type that is 'Sum')
   ii. Display Name- provide a name for to be displayed in the legend
   iii. Series Type- select a series type to display the secondary value
   iv. Axis-select an axis to display the values of the second measure
   v. Color- select a color for the series
   vi. Data Label Color-select a color for the Data Label
   vii. Click 'APPLY'



e. Navigate to the '**Properties**' tab
f. Configure the following options for the Secondary Value Axis
    i. Title: Provide a title for the Secondary Value Axis
    ii. Format Type: Select a desired format type from the drop-down menu
    iii. Currency Type: Select a desired currency symbol from the list
    iv. Precision: Set the after-decimal value (It will display up to 5 precision)



5.2. Column Stack Chart

Column charts are used when users want to compare the values of individual data points with another. They help in bringing out the highs and lows of the data set.

Best Situation to use Column charts: Column charts are suitable for displaying data sets with negative values

Example: To find the best and worst performers in an organization

Variations of this chart

Use stacked Column charts: Where multiple categories can be clubbed together on top of each other which makes addressing numerous questions easier.

Use column side by side: Where comparison between multiple categories becomes easier instead of toggling between charts.

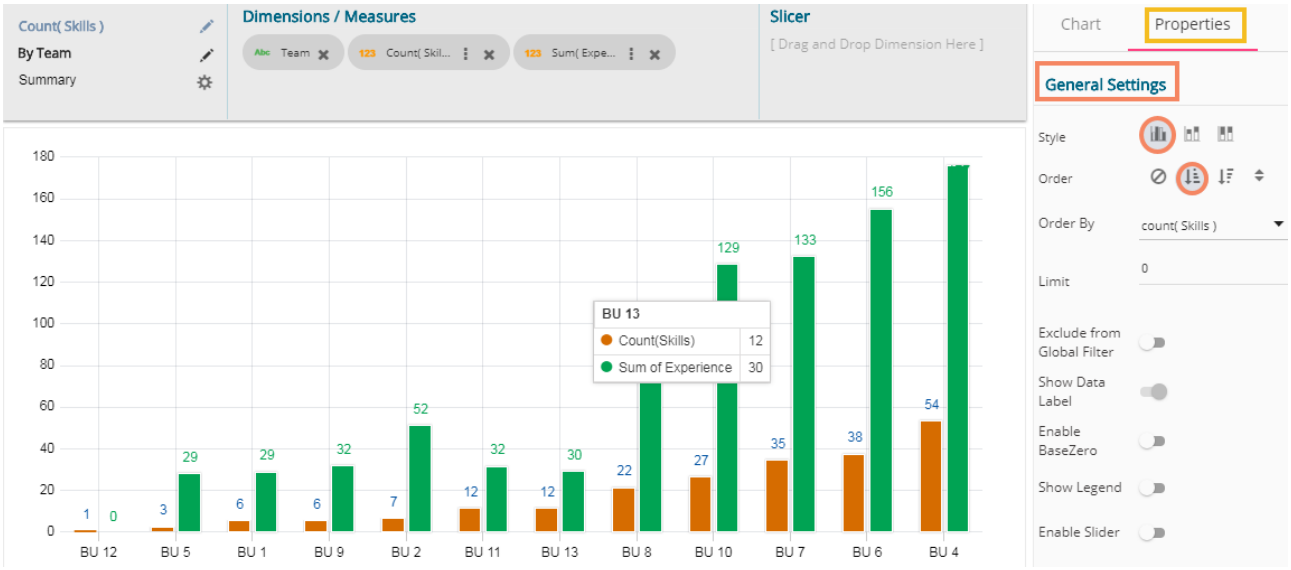
Add color for quick insight: Displaying the columns with colors will make users to pay immediate attention to the essential tasks.

Properties:

i) General Settings

a. Style: Select a style to display data
    i. Cluster
    ii. Stack
    iii. Stack Percentage
b. Order: Select a sequence for displaying data
    i. None
    ii. Ascending
    iii. Descending

c. By selecting an order, users will be required to configure the following fields:
    i. Order By- Select a value option from the drop-down menu to order sequence of the data
    ii. Limit- Set a number to display the ordered data by this limit
d. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
e. Show Data Label: Data label will be displayed by turning on the radio button
f. Enable Base Zero: Base will be displayed from Zero by turning on the radio button
g. Show Legend: Displays legend by turning on the radio button
After enabling 'Show Legend,' users need to select the following information:
    i. Legend Style: Select one of the following options by using the drop-down menu
        1. Fixed
        2. Floating
    ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' option is 'Fixed.' Users need to select an option from the drop-down menu.
        1. Vertical
        2. Horizontal
h. Enable Slider: Slider will be displayed by turning on the radio button



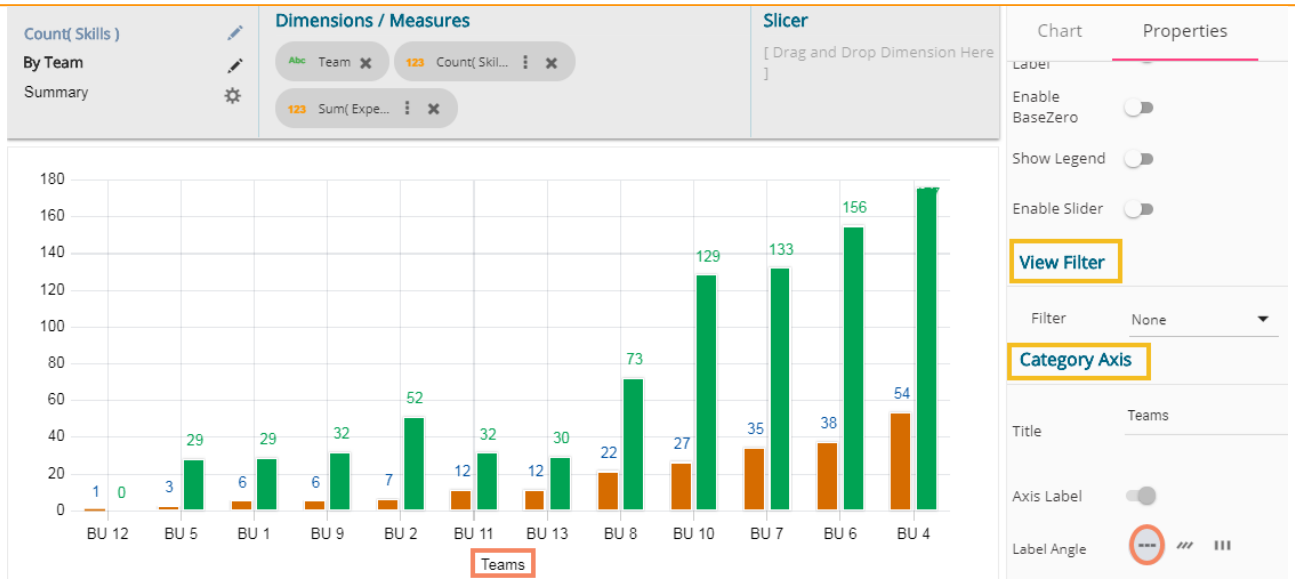
ii) View Filter

a. Filter: Select a filter condition using the drop-down menu

iii) Category Axis

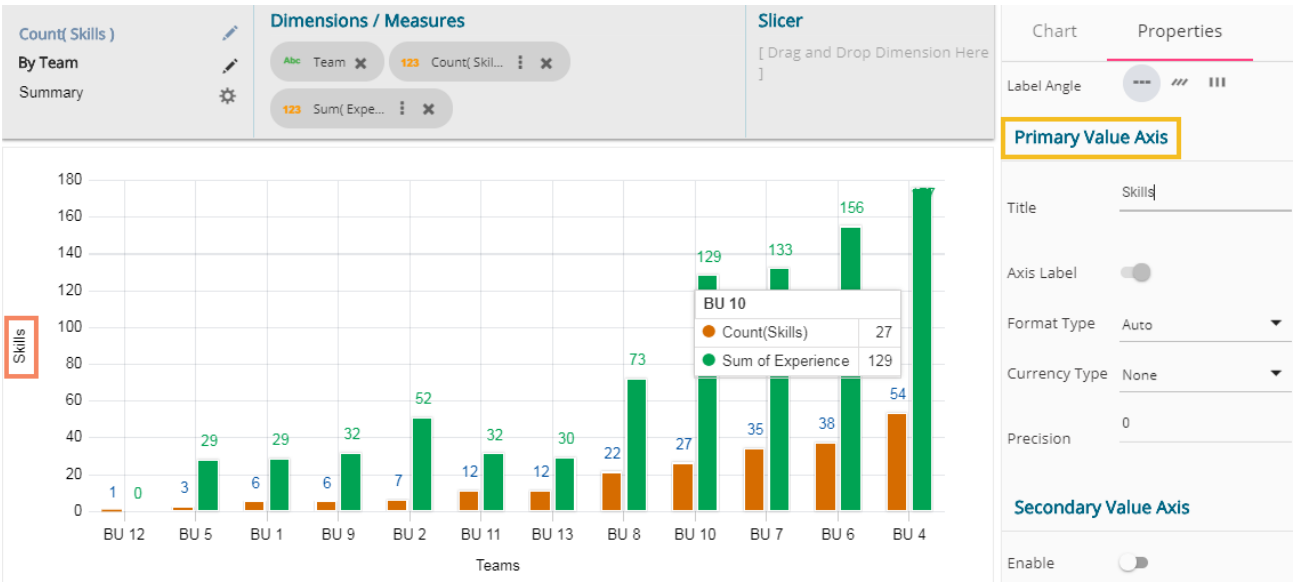
a. Title: Provide a title for the axis
b. Axis Label: Enable the category axis label by turning on the radio button
c. Label Angle: Select a display angle for the axis label

E.g., 'Teams' is the title for the category axis.



iv) Primary Value Axis

f. Title: Provide a title for the Primary Value Axis
g. Axis Label: Enable the Primary Value Axis label by turning on the radio button
h. Format Type: Select a desired format type from the drop-down menu
i. Currency Type: Select a currency symbol to be displayed in the view
j. Precision: Set the after-decimal value (It will show up to 5 precision)

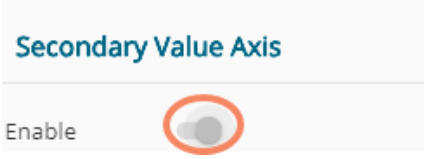


v) Secondary Value Axis

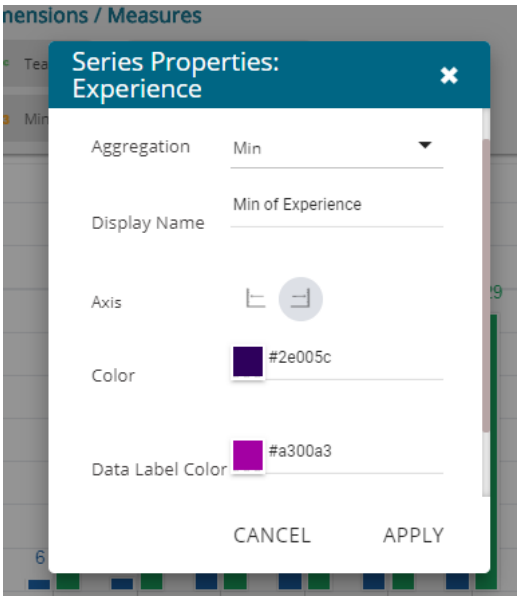
Properties for the Secondary Value Axis will be displayed when two measures are dragged on the canvas.

Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display same on the chart

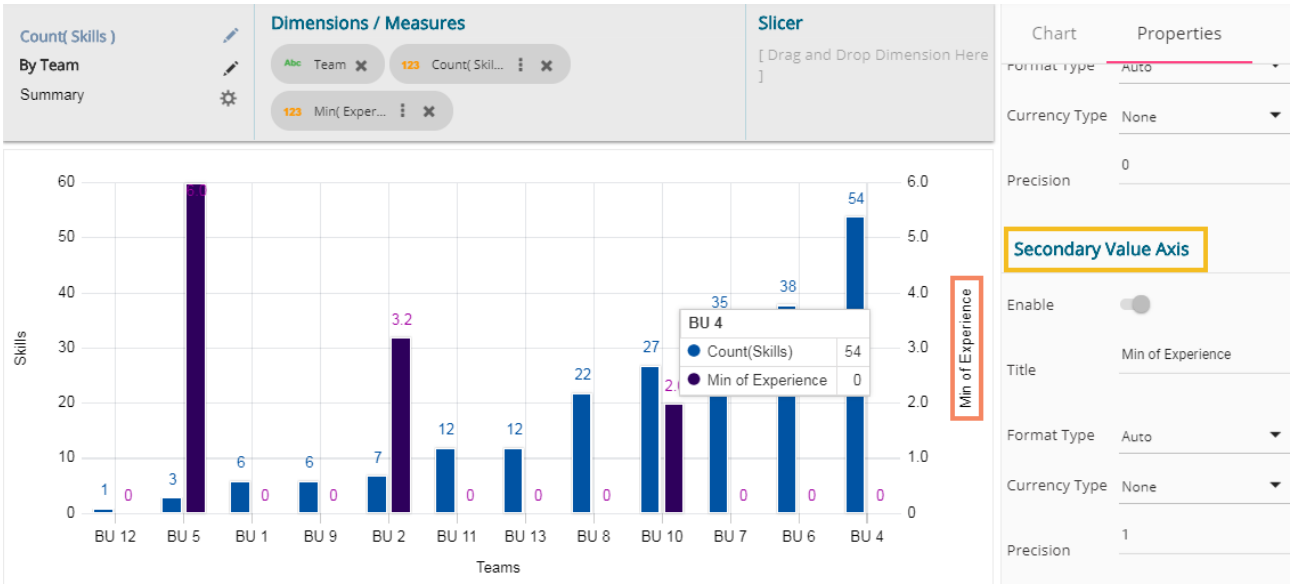
a. Access Secondary Value Axis using the 'Properties' tab and enable it.



b. Click '**Series Properties**' ⋮ provided next to the measure name
c. A new window will open
d. Configure the required details:
    i. Aggregation-select an aggregation using the drop-down menu (By default, it will show the second aggregation type that is 'Sum')
    ii. Display Name- provide a name for to be displayed in the legend
    iii. Axis-select an axis to display the values of the second measure
    iv. Color- select a color for the series
    v. Data Label Color-select a color for the Data Label
    vi. Click 'APPLY'



e. Navigate to the '**Properties**' tab
f. Configure the following options for the Secondary Value Axis
    i. Title: Provide a title for the Secondary Value Axis
    ii. Format Type: Select a desired format type from the drop-down menu
    iii. Currency Type: Select a desired currency symbol from the list
    iv. Precision: Set the after-decimal value (It will display up to 5 precision)



Note: This chart type can display both primary and secondary value axis in column format.

5.3. Line Chart

Line charts connect individual numeric data points to create a sequence of values. They are primarily used to display trends over a period.

Best Situation to use Line Charts:

View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

Variations of this chart

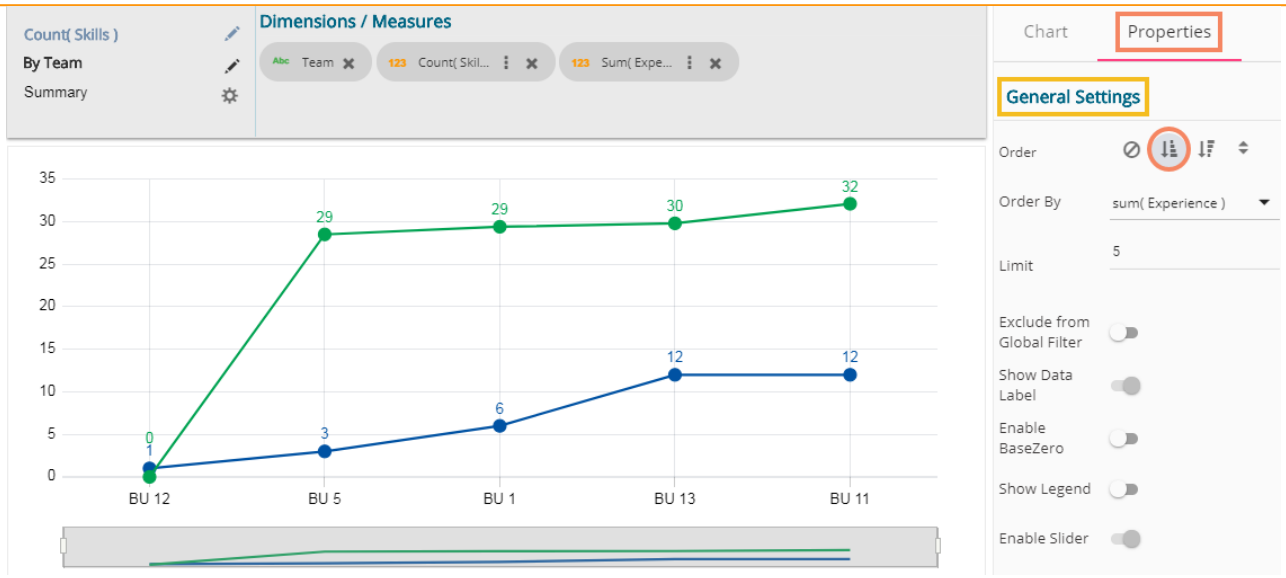
Mixed Chart- Combine a line graph with column charts to provide visual cues for further investigation

Example: A column chart representing the numeric score of students combined with the line chart corresponding proficiency score

Properties:

i) General Settings

a. Order: Select a sequence for displaying data
   i. None
   ii. Descending
   iii. Ascending
b. By selecting an order, users will be required to configure the following fields:
   iii. Order By- Select a value option from the drop-down menu to order sequence of the data
   iv. Limit- Set a number to display the ordered data by this limit
c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
d. Show Data Label: Data label will be displayed by turning on the radio button
e. Enable Base Zero: Base will be displayed from Zero by turning on the radio button
f. Show Legend: Displays legend by turning on the radio button
   After enabling 'Show Legend,' users need to select the following information:
   i. Legend Style: Select one of the following options by using the drop-down menu
      1. Fixed
      2. Floating
   ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option from the drop-down menu.
      1. Vertical
      2. Horizontal
g. Enable Slider: Slider will be displayed by turning on the radio button



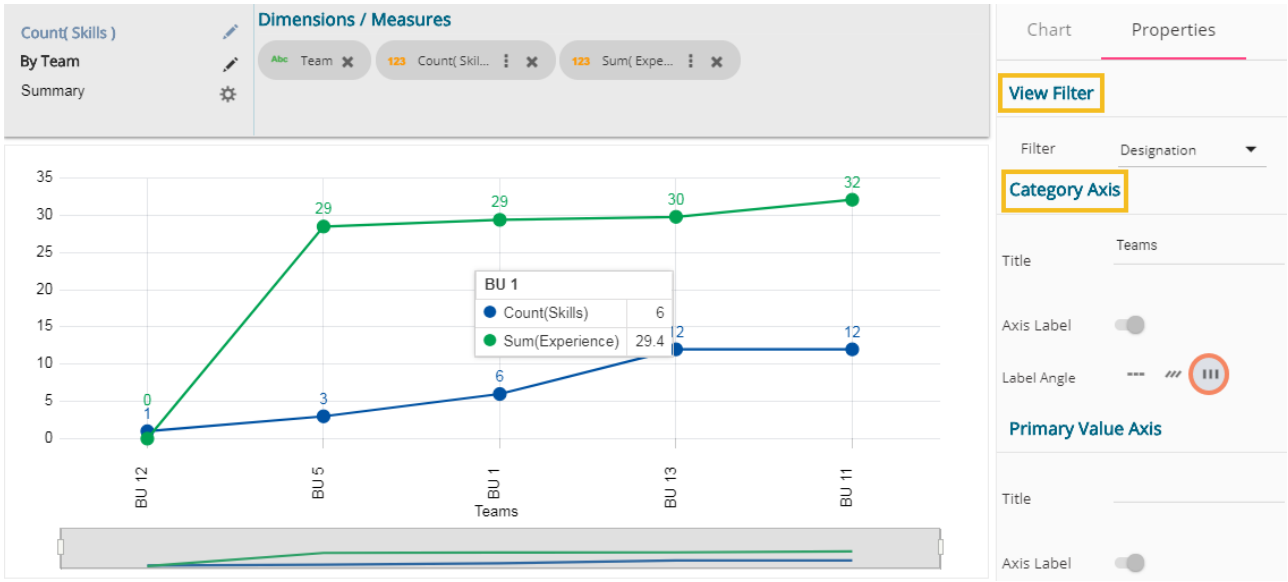
ii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'Designation' is the selected filter condition in the following image)

iii) Category Axis

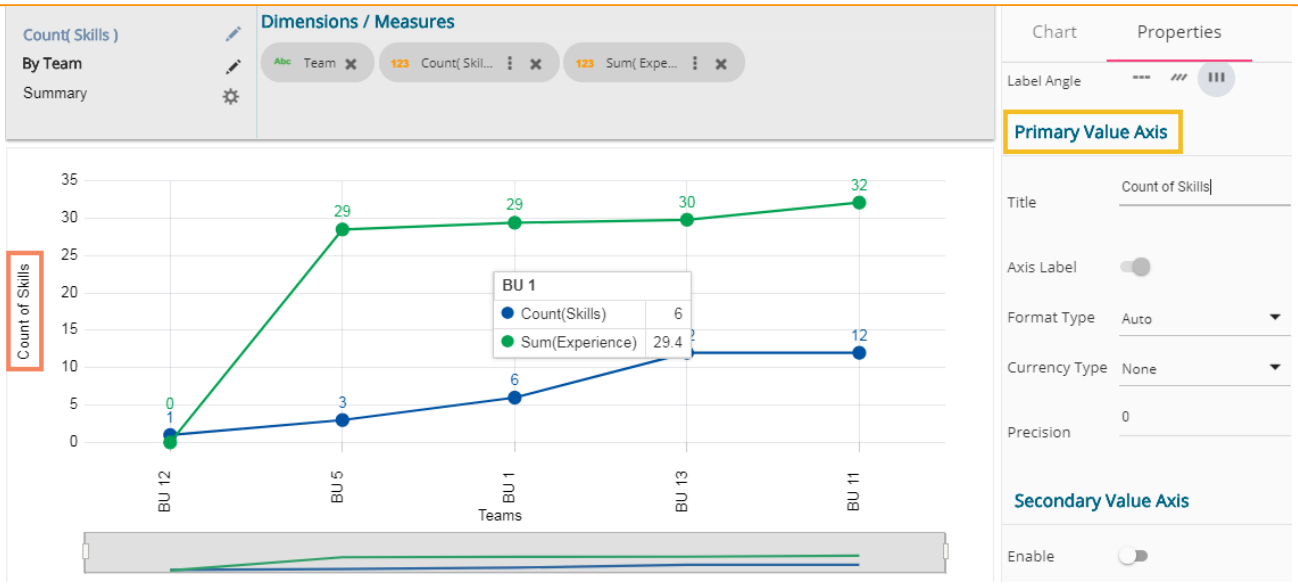
a. Title: Provide a title for the axis
b. Axis Label: Enable the category axis label by turning on the radio button
c. Label Angle: Select a display angle for the axis label

E.g., 'Teams' is the title for the category axis.



iv) Primary Value Axis

a. Title: Provide a title for the Primary Value Axis
b. Axis Label: Enable the Primary Value Axis label by turning on the radio button
c. Format Type: Select a desired format type from the drop-down menu
d. Currency Type: Select a currency symbol to be displayed in the view
e. Precision: Set the after-decimal value (It will show up to 5 precision)

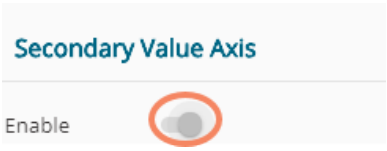


v) Secondary Value Axis

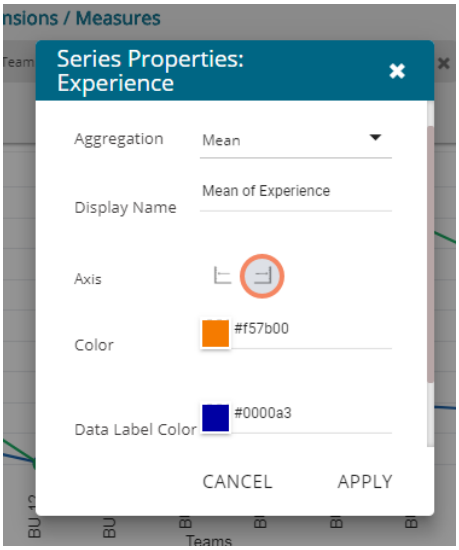
Properties for the Secondary Value Axis will be displayed when two measures are dragged on the canvas.

Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display the same on the chart

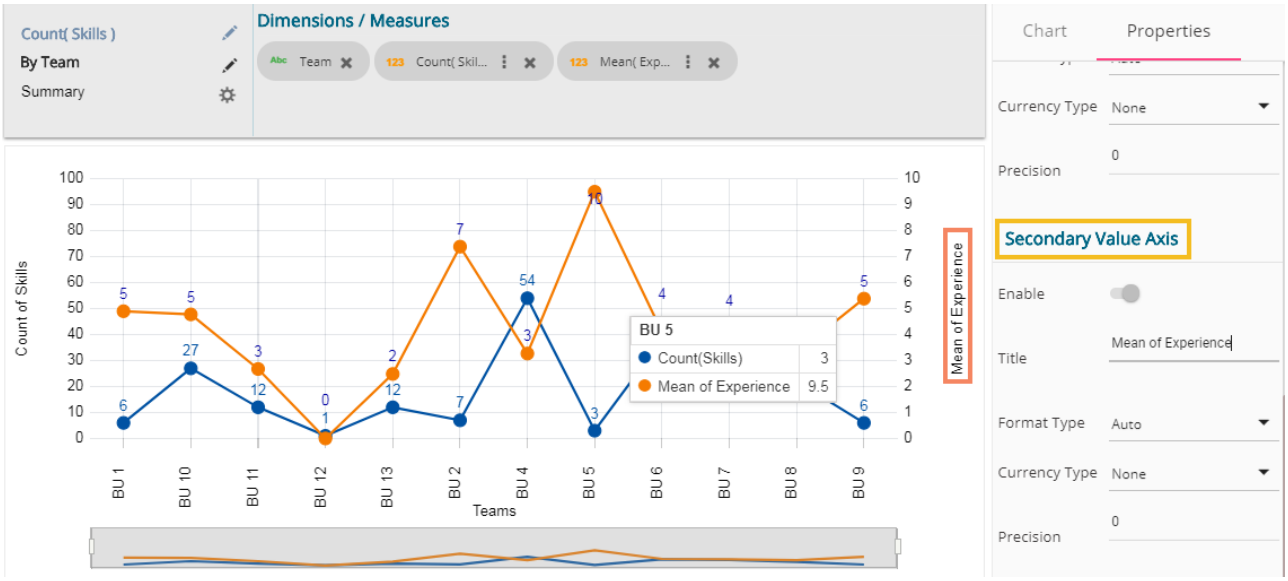
a. Access Secondary Value Axis from the 'Properties' tab and enable it.



b. Click '**Series Properties**' ⋮ provided next to the measure name
c. A new window will open
d. Configure the required details:
   i. Aggregation-select an aggregation using the drop-down menu. By default, it will show the second aggregation type that is 'sum'
   ii. Display Name- provide a name for to be displayed in the legend
   iii. Axis-select an axis to display the values of the second measure
   iv. Color- select a color for the series
   v. Data Label Color-select a color for the Data Label
   vi. Click 'APPLY'



e. Navigate to the **'Properties'** tab
f. Configure the following options for the Secondary Value Axis
    i. Title: Provide a title for the Secondary Value Axis
    ii. Format Type: Select a desired format type from the drop-down menu
    iii. Currency Type: Select a desired currency symbol from the list
    iv. Precision: Set the after-decimal value (It will display up to 5 precision)



Note: This chart type can display both primary and secondary value axis in line format.

5.4. Bar Chart

Bar Charts are useful for comparing classes, categories, or groups of data. They are one of the most commonly used types of the graph because they are simple to create and very easy to interpret.

Best situation to use bar chart: When the data set is small, it would be more accessible to the end user to interpret data. Observations can be performed over a period.

Examples:

a. Quarterly sales of an organization
b. Percentage of change in sales or revenue can be indicated

Variations of this chart:

Add color for quick insight: Displaying the bars with colors will make users to pay immediate attention to the essential tasks.

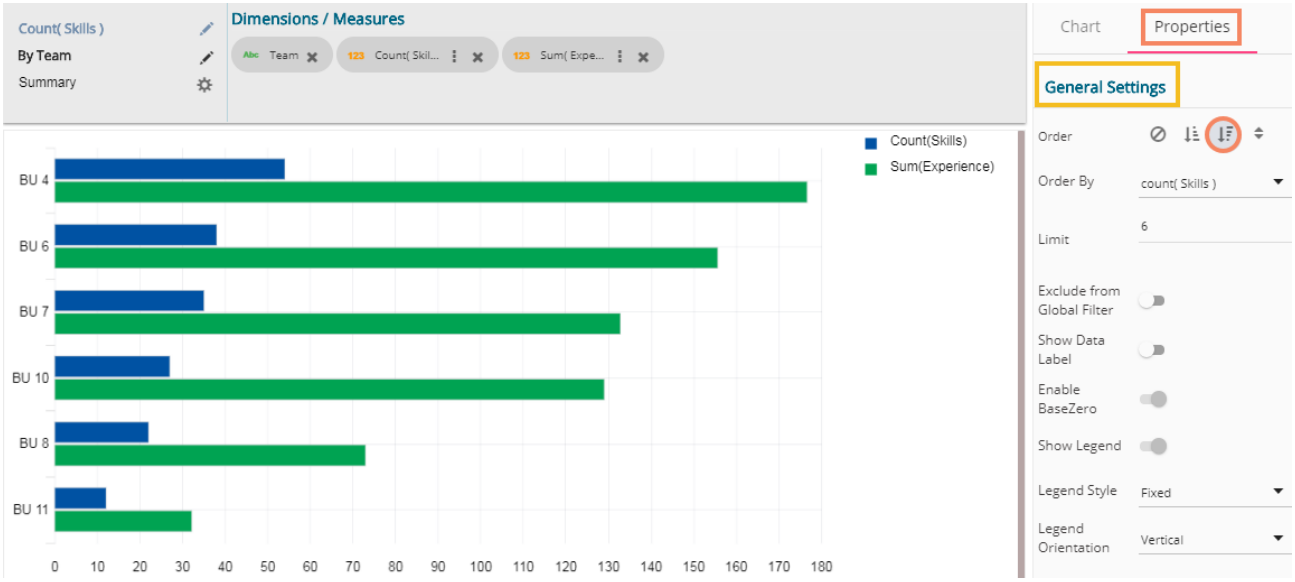
Use bar side by side: Where comparison between multiple categories becomes easier instead of toggle between charts.

Properties:

i) General Settings

a. Order: Select a sequence for displaying data
    i. None
    ii. Ascending
    iii. Descending

b. By selecting an order, users will be required to configure the following fields:
    v. Order By- Select a value option from the drop-down menu to order sequence of the data
    vi. Limit- Set a number to display the ordered data by this limit
c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
d. Show Data Label: Data label will be displayed by turning on the radio button
e. Enable Base Zero: Base will be displayed from Zero by turning on the radio button
f. Show Legend: Displays legend by turning on the radio button
After enabling 'Show Legend,' users need to select the following information:
    i. Legend Style: Select one of the following options by using the drop-down menu
        1. Fixed
        2. Floating
    ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed'. Users need to select an option from the drop-down menu.
        1. Vertical
        2. Horizontal



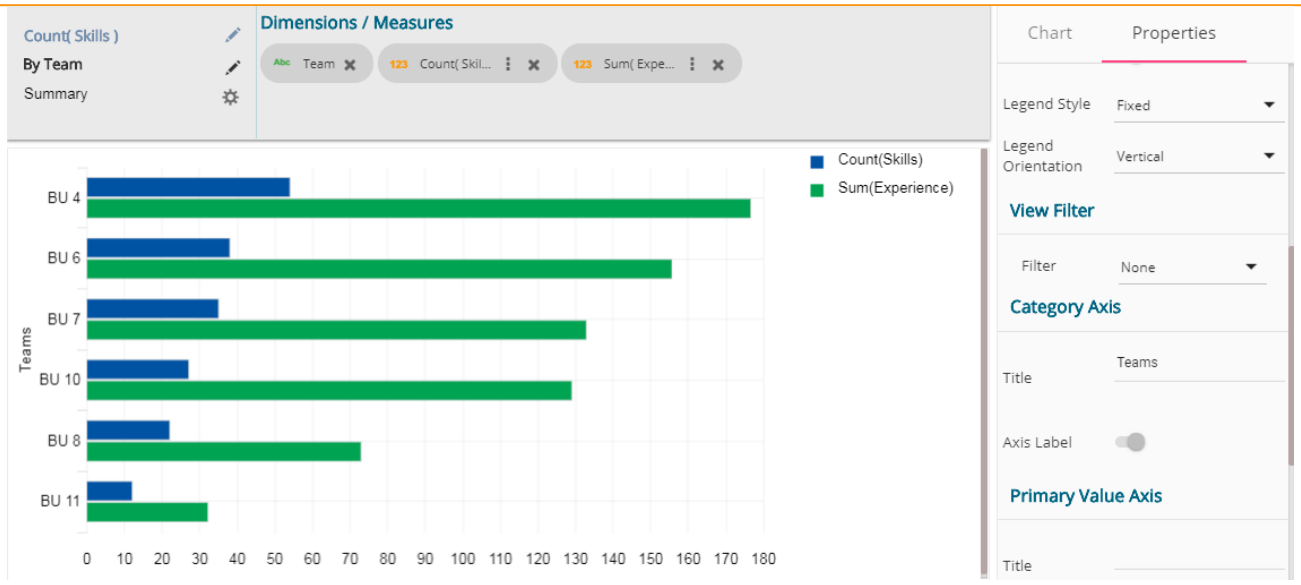
ii) View Filter

a. Filter: Select a filter condition using the drop-down menu

iii) Category Axis

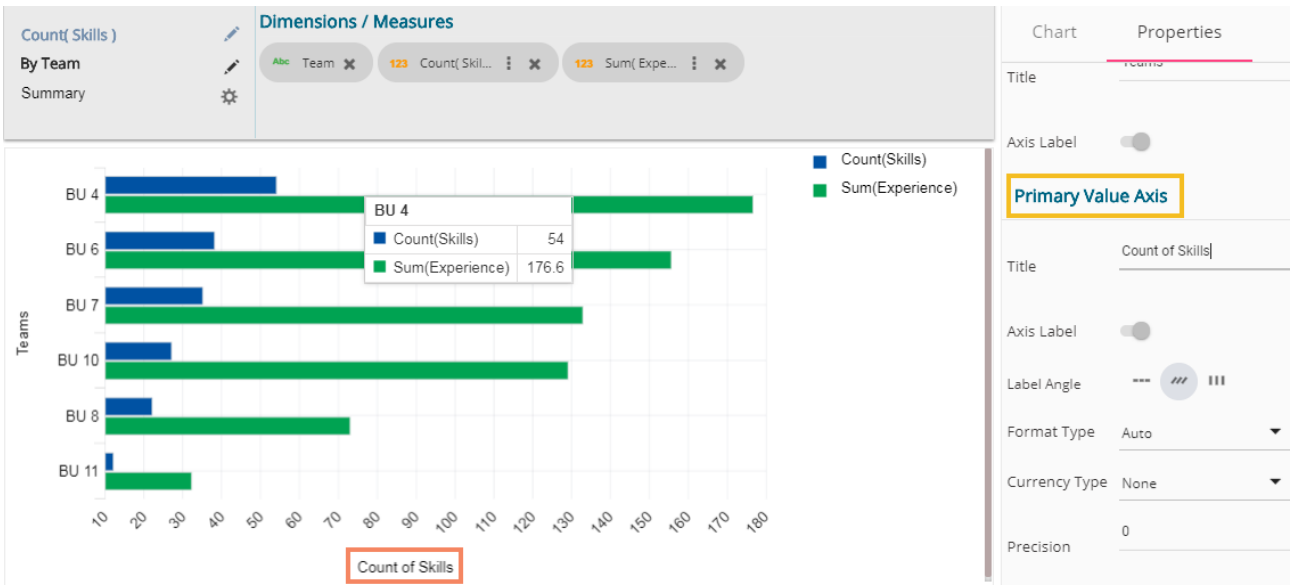
a. Title: Provide a title for the axis
b. Axis Label: Enable the category axis label by turning on the radio button
c. Label Angle: Select a display angle for the axis label

E.g., 'Teams' is the title for the category axis.



iv) Primary Value Axis

a. Title: Provide a title for the Primary Value Axis
b. Axis Label: Enable the Primary Value Axis label by turning on the radio button
c. Format Type: Select a desired format type from the drop-down menu
d. Currency Type: Select a currency symbol to be displayed in the view
e. Precision: Set the after-decimal value (It will show up to 5 precision)



5.5. Bubble Chart

A Bubble chart visualizes data set in three of four dimensions. The first two aspects are used as coordinates like x-axis and y-axis. The remaining two are used to represent color and size of the bubbles. Mostly used to plot financial data.

Best situation to use a Bubble Chart:

Three Data Series: If your data has three series each containing values then you can use bubble chart for better representation. The values determine the sizes of the bubble.

Properties:

i) General Settings

a. Order: Select a sequence for displaying data
   i. None
   i. Ascending
   ii. Descending

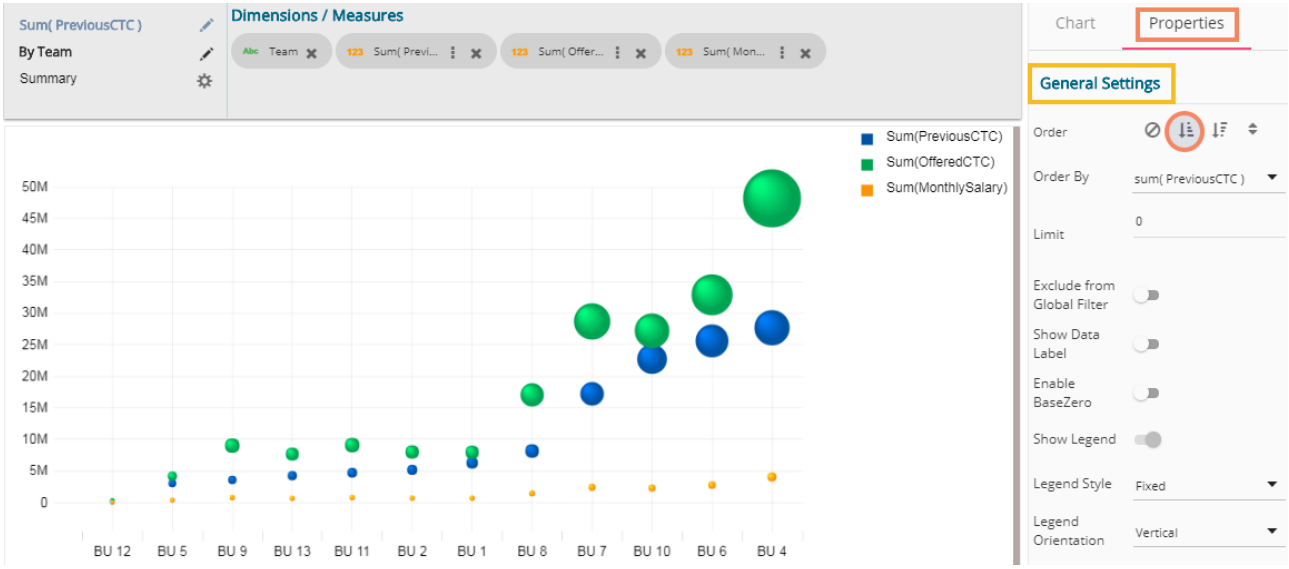
b. By selecting an order, users will be required to configure the following fields:
   i. Order By- Select a value option from the drop-down menu to order sequence of the data
   ii. Limit- Set a number to display the ordered data by this limit

c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button

d. Show Data Label: Data label will be displayed by turning on the radio button

e. Enable Base Zero: Base will be displayed from Zero by turning on the radio button

f. Show Legend: Displays legend by turning on the radio button
   After enabling 'Show Legend,' users need to select the following information:
   i. Legend Style: Select one of the following options by using the drop-down menu
      1. Fixed
      2. Floating
   ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed'. Users need to select an option from the drop-down menu.
      1. Vertical
      2. Horizontal



ii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)

iii) Category Axis

a. Title: Provide a title for the axis

b. Axis Label: Enable the category axis label by turning on the radio button

c. Label Angle: Select a display angle for the axis label

E.g., 'Teams' is the title for the category axis.

iv) Primary Value Axis

a. Title: Provide a title for the Primary Value Axis
b. Axis Label: Enable the Primary Value Axis label by turning on the radio button
c. Format Type: Select a desired format type from the drop-down menu
d. Currency Type: Select a currency symbol to be displayed in the view
e. Precision: Set the after-decimal value (It will show up to 5 precision)

5.6. Area Chart

An area chart or area graph displays graphically quantitative data. It is based on the line chart. The primary use of area charts is to show trends over a period.

Best situation to use Area Chart: To showcase data that depicts a time-series relationship

Examples:

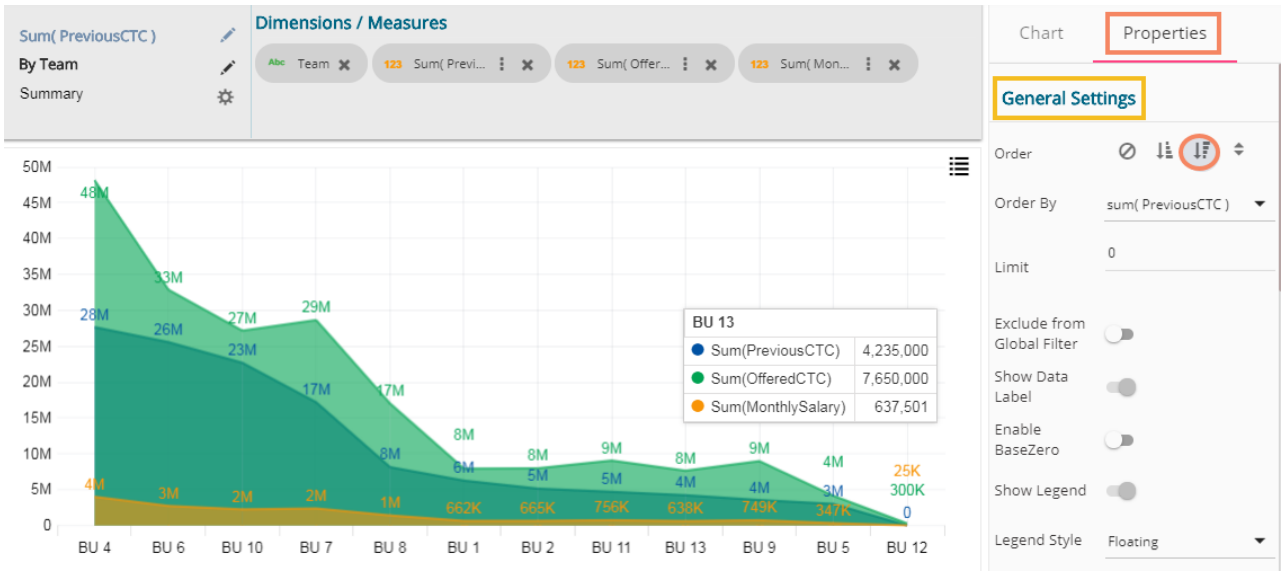
- To view the sales of a manufacturer over a period.
- To display quarter wise revenue growth of an organization.

Variations of this chart: Line charts

Properties:

ii) General Settings

a. Order: Select a sequence for displaying data
   i. None
   ii. Ascending
   iii. Descending
b. By selecting an order, users will be required to configure the following fields:
   iii. Order By- Select a value option from the drop-down menu to order sequence of the data
   iv. Limit- Set a number to display the ordered data by this limit
c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
d. Show Data Label: Data label will be displayed by turning on the radio button
e. Enable Base Zero: Base will be presented from Zero by turning on the radio button
f. Show Legend: Displays legend by turning on the radio button
   After enabling 'Show Legend,' users need to select the following information:
   i. Legend Style: Select one of the following options by using the drop-down menu
      1. Fixed
      2. Floating
   ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed'. Users need to select an option from the drop-down menu.
      1. Vertical
      2. Horizontal



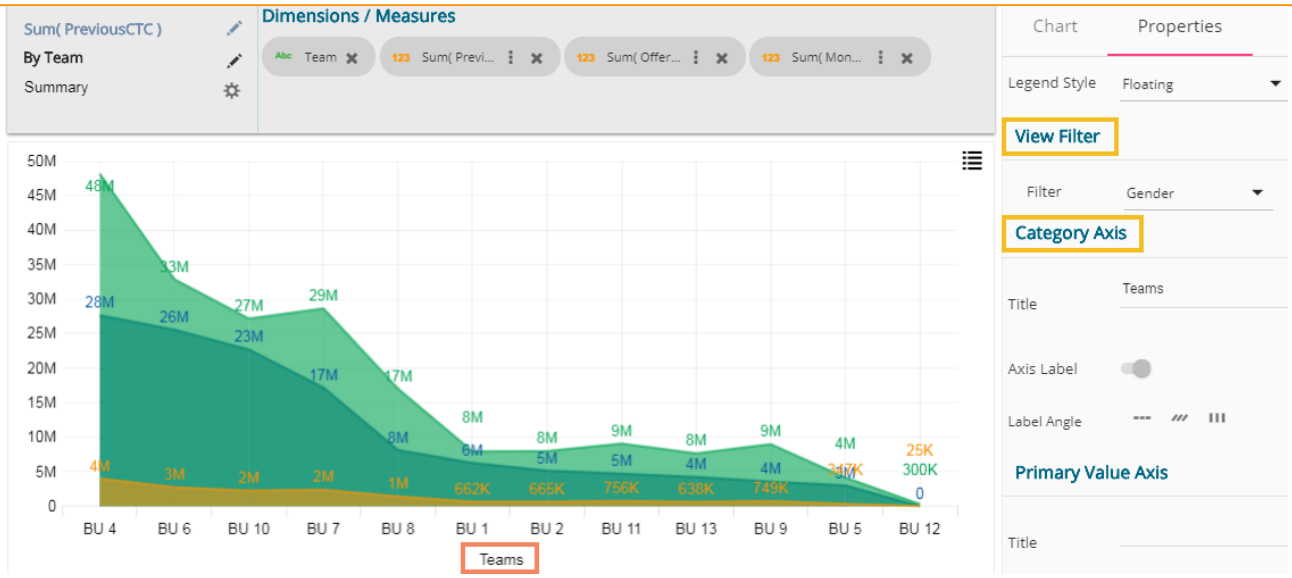
iii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)

iv) Category Axis

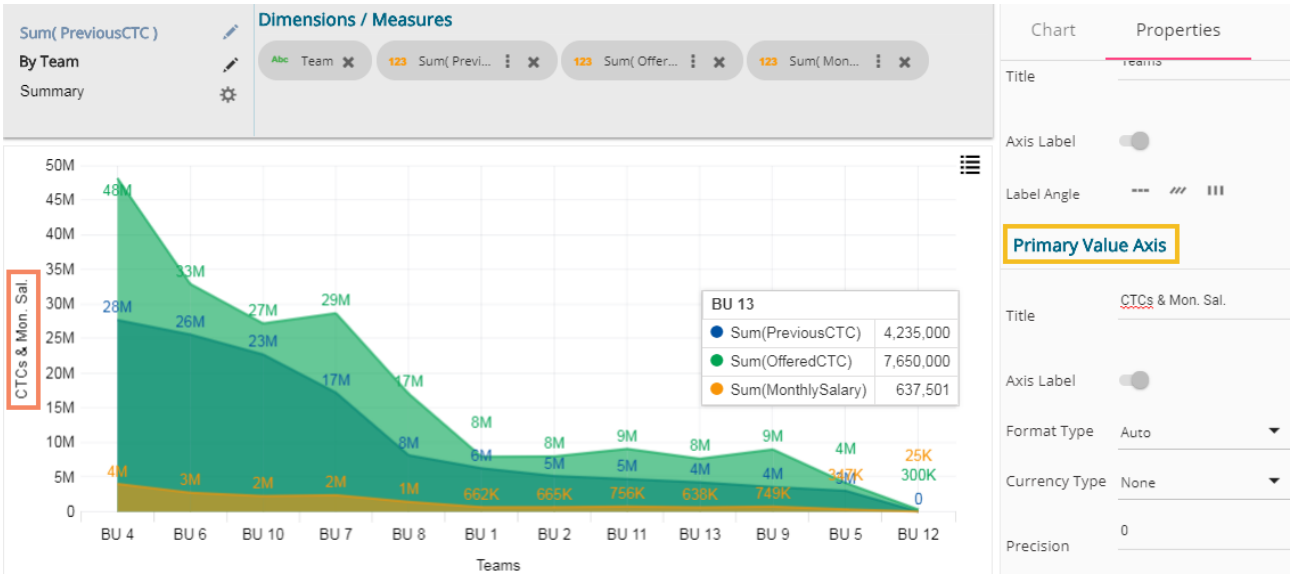
a. Title: Provide a title for the axis
b. Axis Label: Enable the category axis label by turning on the radio button
c. Label Angle: Select a display angle for the axis label

E.g., 'Teams' is the title for the category axis.



v) Primary Value Axis

f. Title: Provide a title for the Primary Value Axis
g. Axis Label: Enable the Primary Value Axis label by turning on the radio button
h. Format Type: Select a desired format type from the drop-down menu
i. Currency Type: Select a currency symbol to be displayed in the view
j. Precision: Set the after-decimal value (It will show up to 5 precision)



5.7. Pie Chart

The most widely used chart to show proportions, percentages and categorizes information is the Pie Chart. It is mainly used for comparison where the users can find out quickly which category is most popular and which is least.

Best situation to use Pie Chart:

Mainly used for comparison of categories available on the pie to find out top performers and least performers. Better for viewing if the category is limited to 6 or fewer.

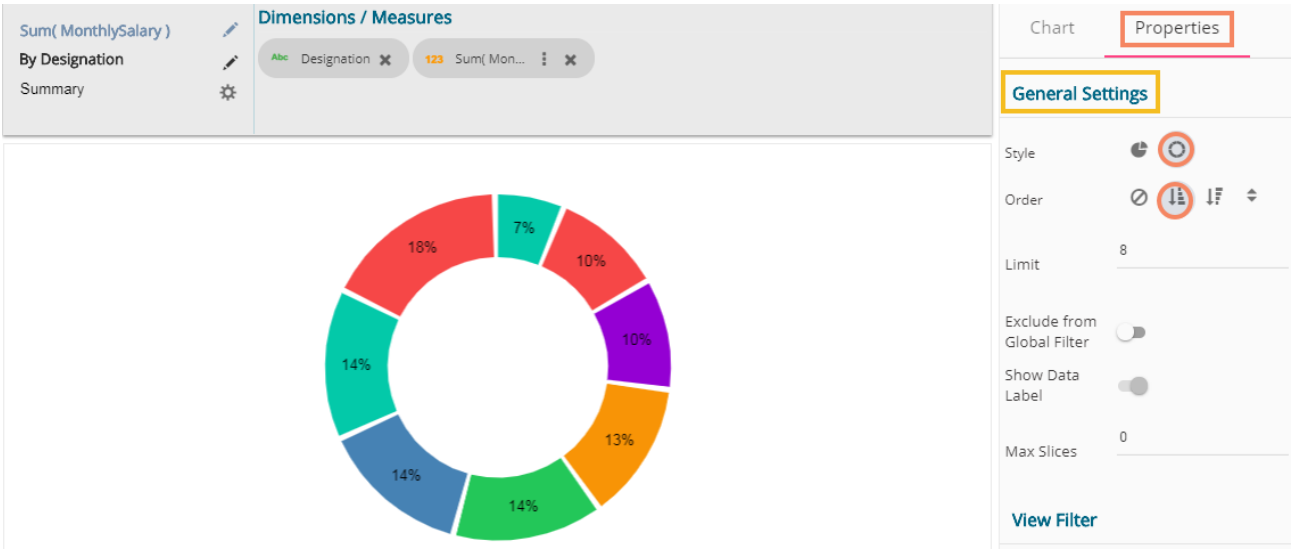
Variations of this chart:

Pie-Doughnut: Doughnut charts are like Pie-chart if wished users can switch from pie-chart to a doughnut chart.

Properties:

i) General Settings

a. Style: Select a style to display data
   i. Pie
   ii. Doughnut
b. Order: Select a sequence for displaying data
   i. None
   ii. Ascending
   iii. Descending
c. By selecting an order, users will be required to configure the following fields:
   i. Limit- Set a number to display the ordered data by this limit
d. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
e. Show Data Label: Data label will be displayed by turning on the radio button
f. Max Slices: Set a number to limit the maximum displayed slices in the chart

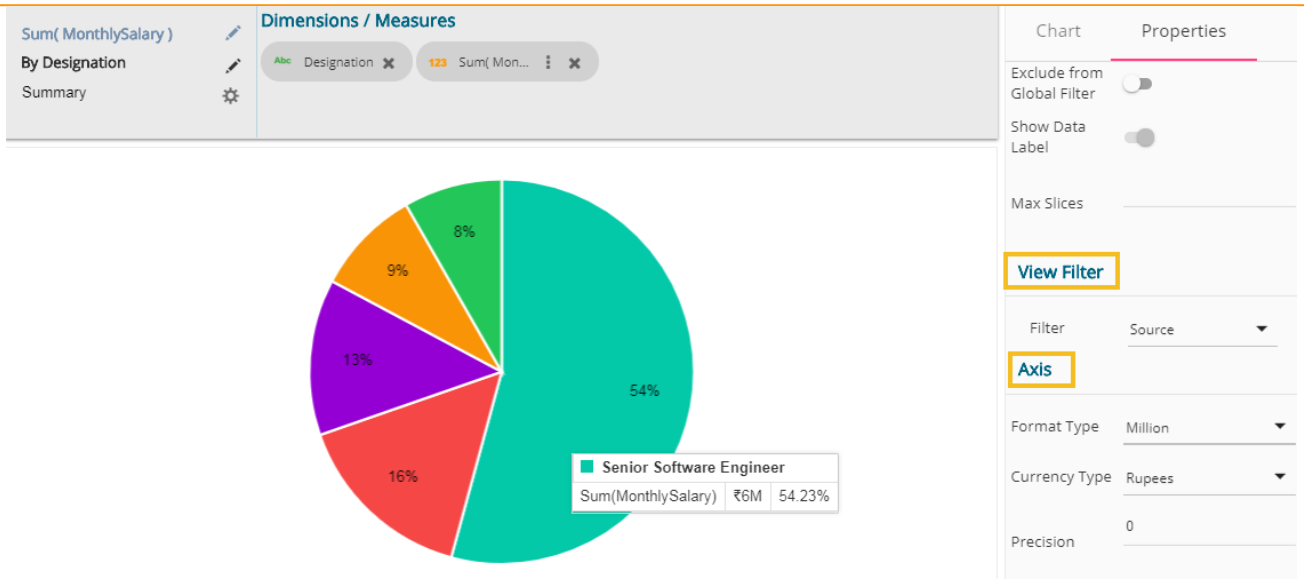


ii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)

iii) Axis

a. Format Type: Select a desired format type from the drop-down menu
b. Currency Type: Select a currency symbol to be displayed in the view
c. Precision: Set the after-decimal value (It will show up to 5 precision)
   E.g., the below given image displays 'Sum of Monthly Salary' for Senior Software Engineer in six million rupees as selected currency type is 'rupees' and format type is 'million'.



5.8. TreeMap Chart

The TreeMap charts are mainly used to demonstrate ssvast amounts of classified data. It can be the best choice when users want to view all their hierarchical data at one time. Each rectangle represents a branch in a tree, and it also shows how much data it comprises. The size and position of the boxes are based on the quantitative variable used for the chart. Patterns across the data can be identified using the size and color of the boxes.

Best situation to use TreeMap:

To view all the hierarchical data at one time.

Variations of this chart:

Each rectangle can be colored differently so users can understand by a quick glance how the hierarchical data is structured.

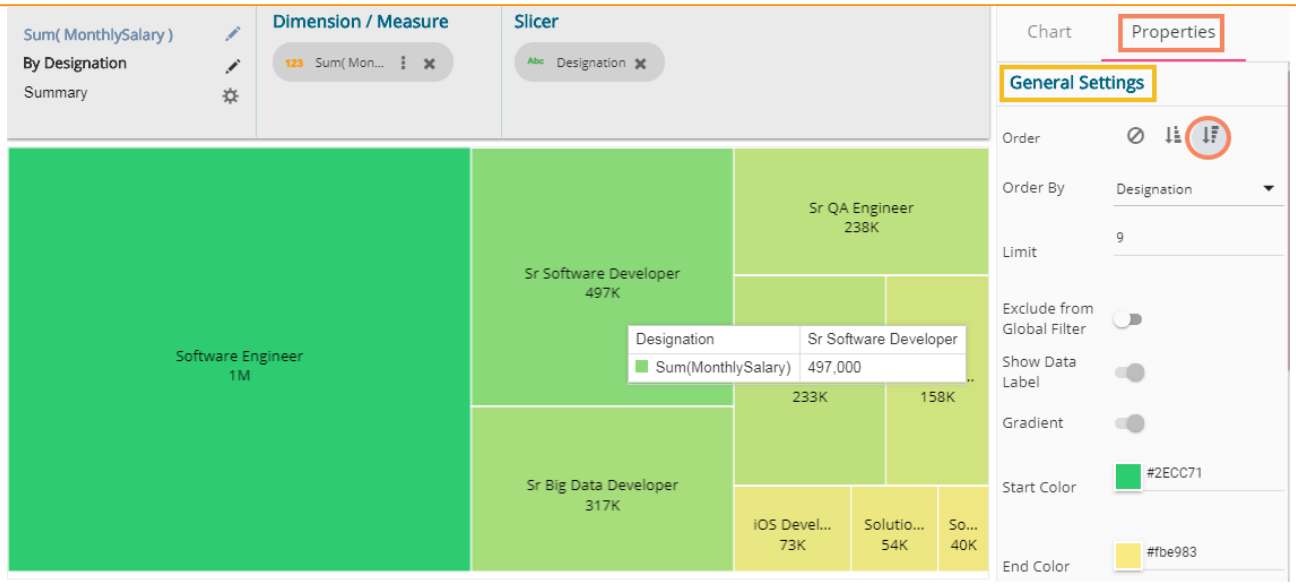
Properties:

i) General Settings

a. Order: Select a sequence for displaying data
   i. None
   ii. Ascending
   iii. Descending

a. By selecting an order, users will be required to configure the following fields:
   v. Order By- Select a value option from the drop-down menu to order sequence of the data
   vi. Limit- Set a number to display the ordered data by this limit

b. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
c. Show Data Label: Data label will be displayed by turning on the radio button
d. Gradient: Enable or disable color gradient effect on the chart by using the radio button. By enabling the 'Gradient' option users will be redirected to set 'Start Color' and 'End Color' from the respective menus.

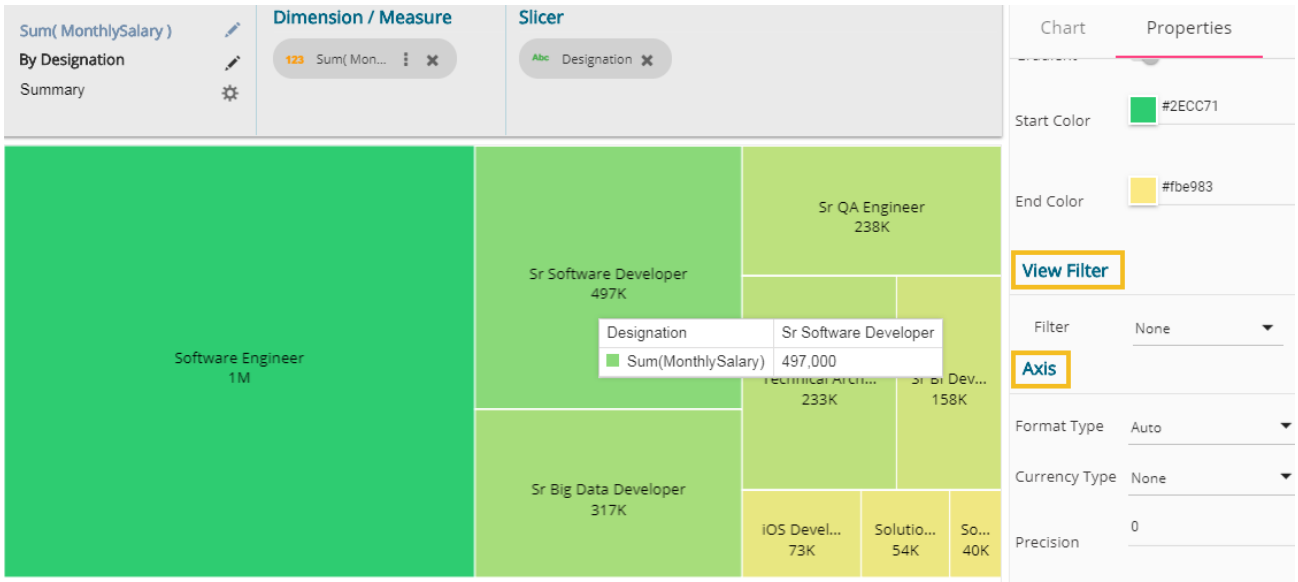


ii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)

iii) Axis

a. Format Type: Select a desired format type from the drop-down menu
b. Currency Type: Select a currency symbol to be displayed in the view
c. Precision: Set the after-decimal value (It will show up to 5 precision)
E.g., the below given image displays that Sum of Monthly Salary for Senior Software Engineer is six million rupees.



5.9. Semi Gauge Chart

Semi-Gauge charts contain a semi-circle with the needle pointing at the target value. They indicate a specific dataset by utilizing a semi-circle that changes color to indicate whether the monitored data is within the defined limits. Users need to set limits (minimum and maximum values) for the gauge scale and various colors to indicate the pre-determined ranges. The '**Show Alert**' option has been provided to indicate the situation when the target values cross the set limits.

Gauges are used in dashboards, real-time monitors, and reports. They can display Key Performance Indicators (KPIs), progress indicators, and quantity indicators.

Best Situation to use Semi-Gauge:

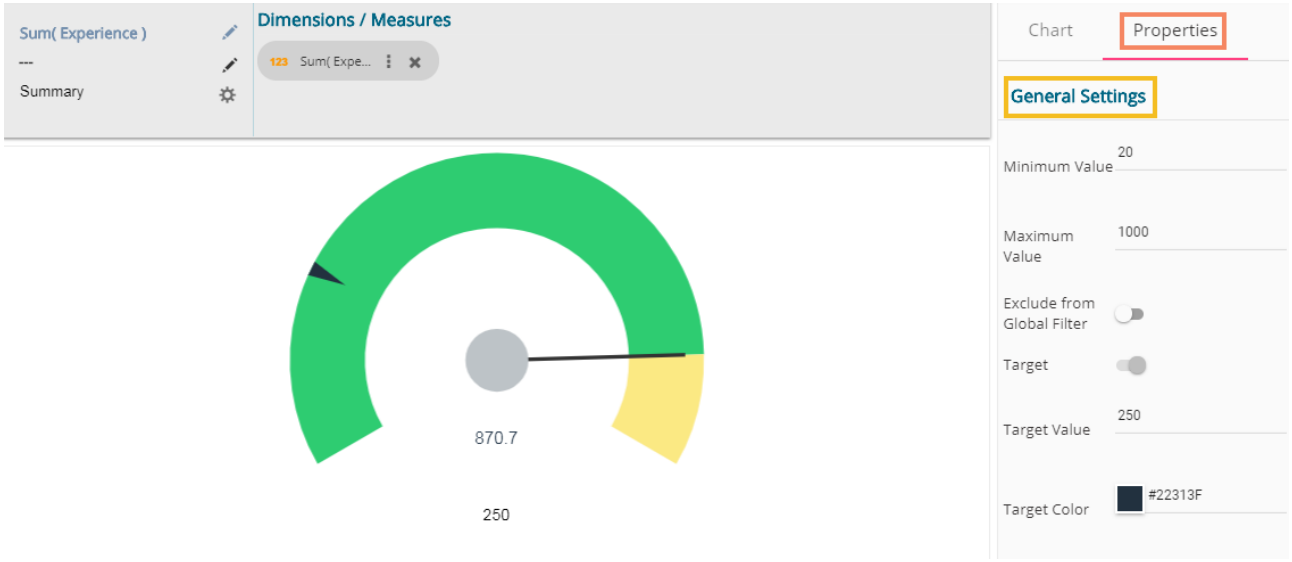
To monitor any performance that contains predefined ranges

Examples:

The overall performance of a student/class in an examination.

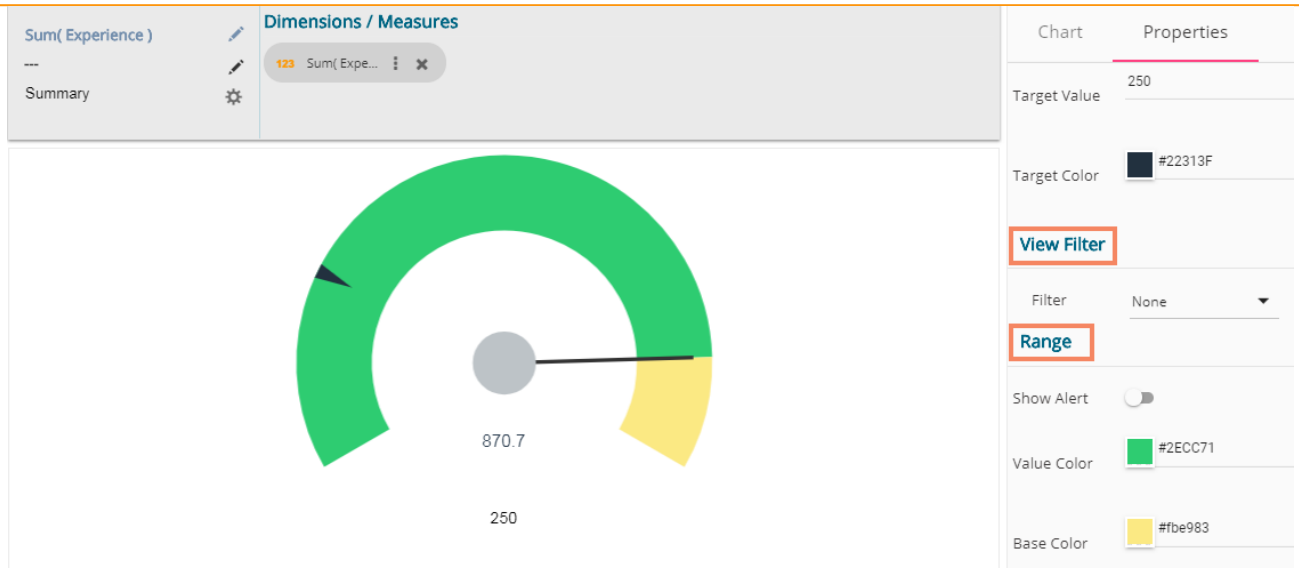
Properties:

i) General Settings
   a. Minimum Value: Set a minimum value to be shown on the chart (It should be less than the maximum set value)
   b. Maximum Value: Set a maximum value to be displayed on the chart (It should be more than the minimum set value)
   c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
   d. Target: Enable target by turning on the radio button
   e. Target Value: User-defined value to set a target
   f. Target Color: Set a target color

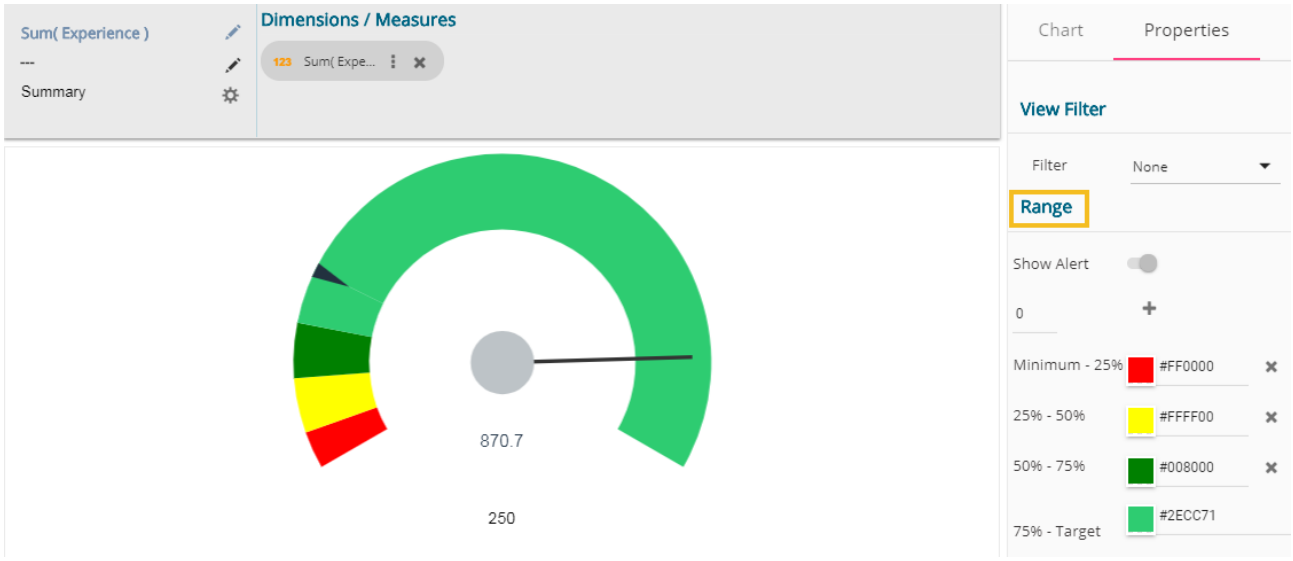


ii) View Filter
   a. Filter: Select a filter condition using the drop-down menu

iii) Range
   a. Show Alert: Enable various ranges (in %) by turning on the radio button
   b. Value Color: Set a value color
   c. Base Color: Set a base color



The following image displays various ranges when '**Show Alert**' option is enabled.



Note:

a. Target value should be included in the range of minimum and maximum set values.
b. Semi-Gauge supports only one measure value. It converts the selected dimension into the measure by default.

5.10. KPI Tile

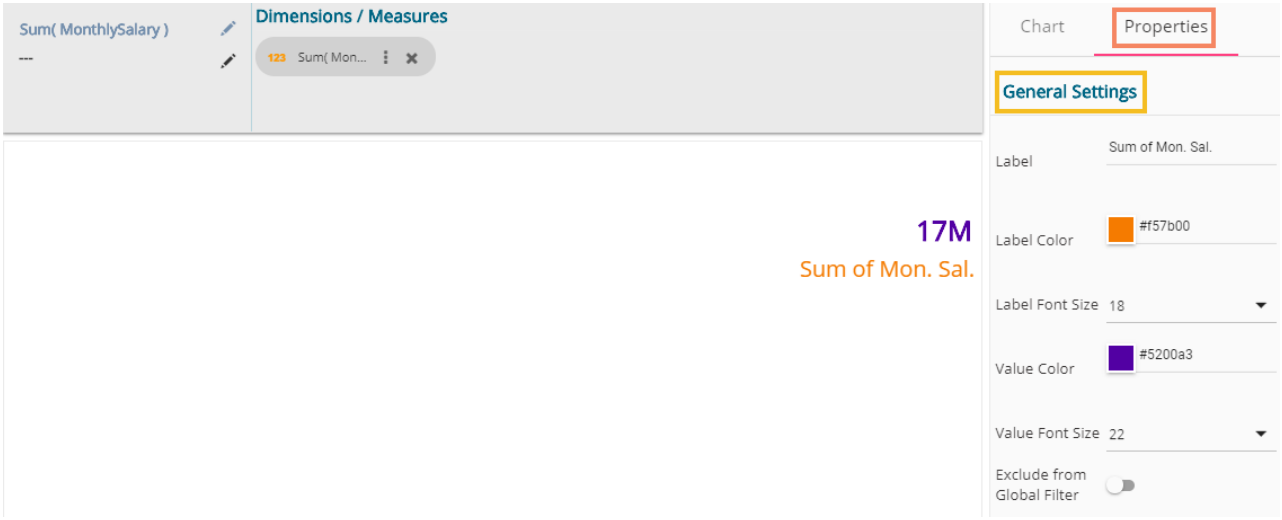
The KPI Tile will display the sum of quantity for active evaluation.

Properties:

i) General Settings

a. Label: Insert Label for the displayed value
b. Label Color: Select a label color from the menu
c. Label Font Size: Set the font size for the label
d. Value Color: Select a value color from the menu
e. Value Font Size: Set the font size of the displayed value

f. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button



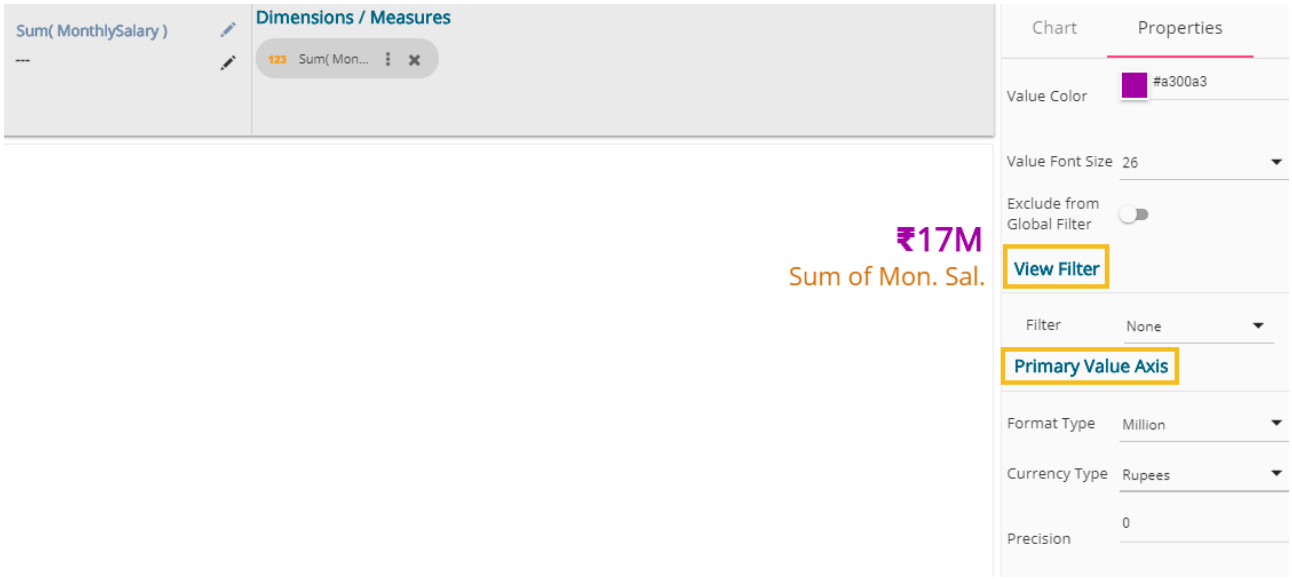
ii) View Filter

a. Filter: Select a view filter condition from the drop-down menu

iii) Primary Value Axis

a. Format Type: Select a desired format type from the drop-down menu
b. Currency Type: Select a currency symbol to be displayed in the view
c. Precision: Set the after-decimal value (It will show up to 5 precision)

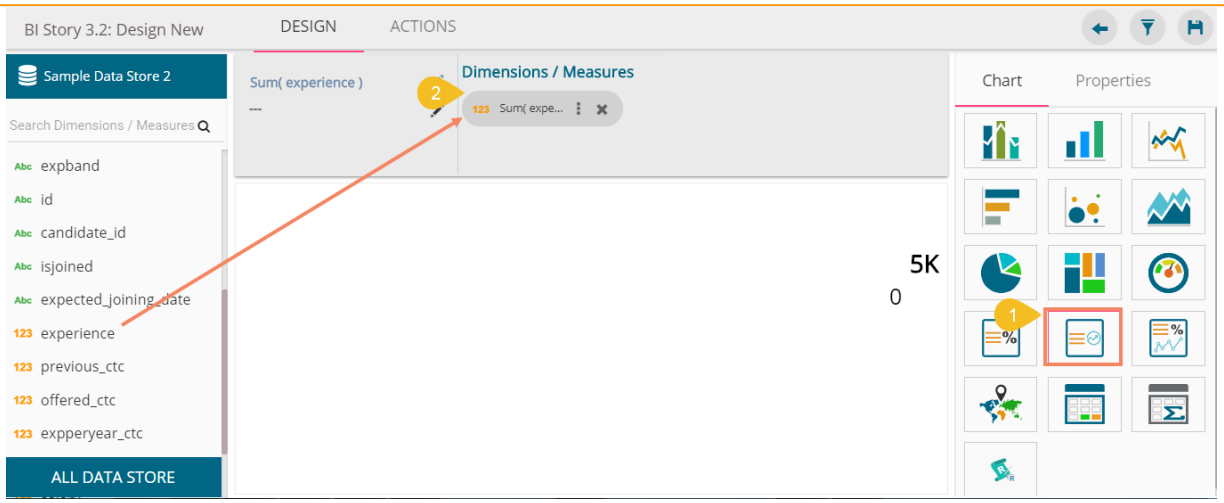
E.g., the below given image displays that Sum of Monthly Salary in 17 Million INR.



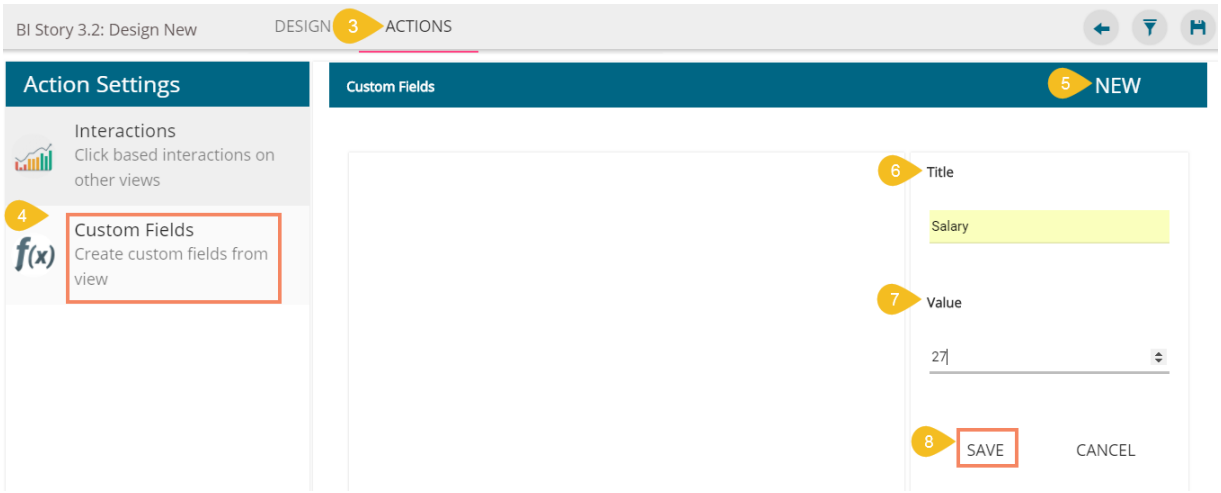
5.11. KPI Comparative Tile

KPI comparative Tile compares one measure value against the other selected measure values.

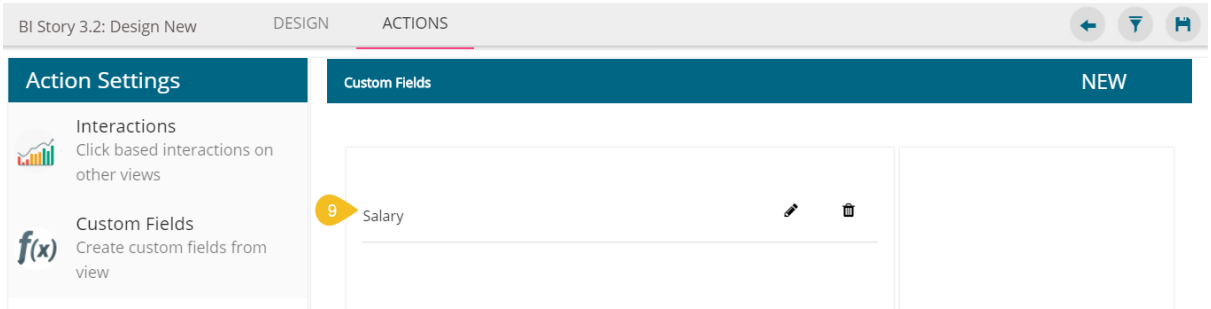
i) Select the '**KPI Comparative Tile**' component from the list of charts
ii) Drag a Measure value to the workspace (A dimension will be converted into the measure if dragged to the workspace)



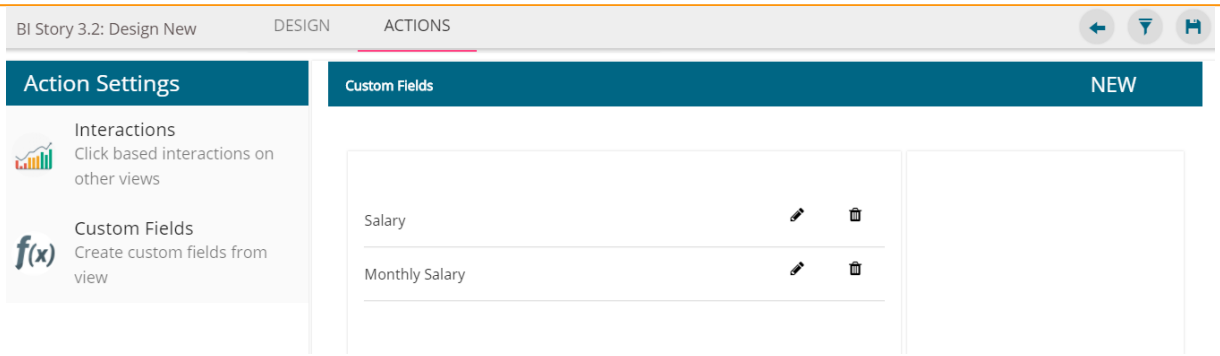
iii) Navigate to the '**ACTIONS**'
iv) Select the 'Custom Fields' option.
v) Click 'NEW'.
vi) Provide a Title.
vii) Set Value by using the value indicators.
viii) Click 'SAVE'.



ix) A new Custom Field will be created and added to the Custom Fields page.

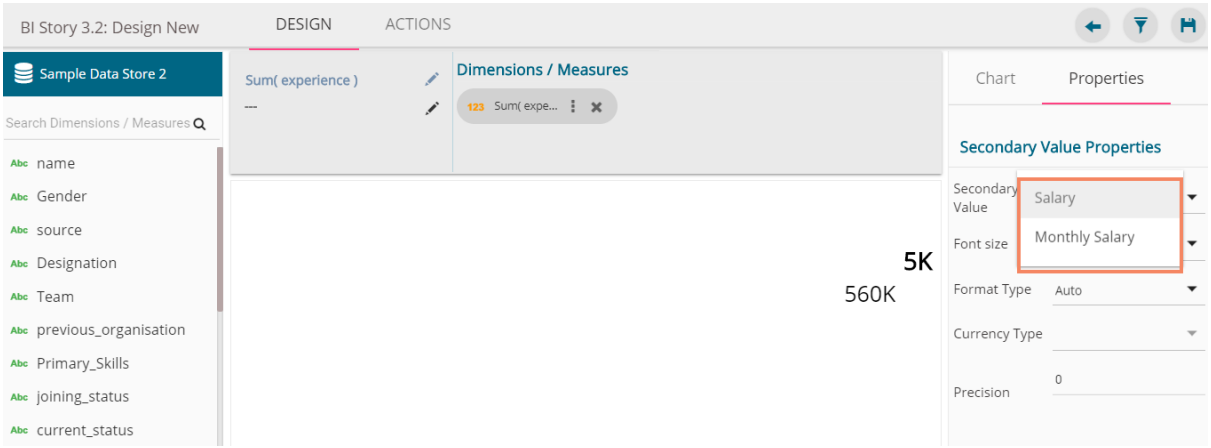


x) Users can create multiple custom fields by following the above steps. (E.g. Monthly Salary is another custom field.)



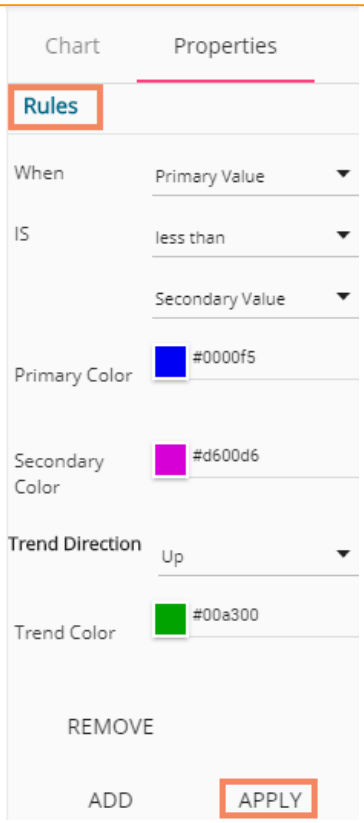
xi) Configure the required fields for the '**Secondary Value Properties**'

a. Secondary Value: Select a secondary value from the drop-down menu
b. Font Size: Set font size for the secondary value
c. Format Type: Select a Format type from the drop-down menu
d. Currency Type: Select a currency type from the drop-down menu
e. Precision: Set after decimal value using this field

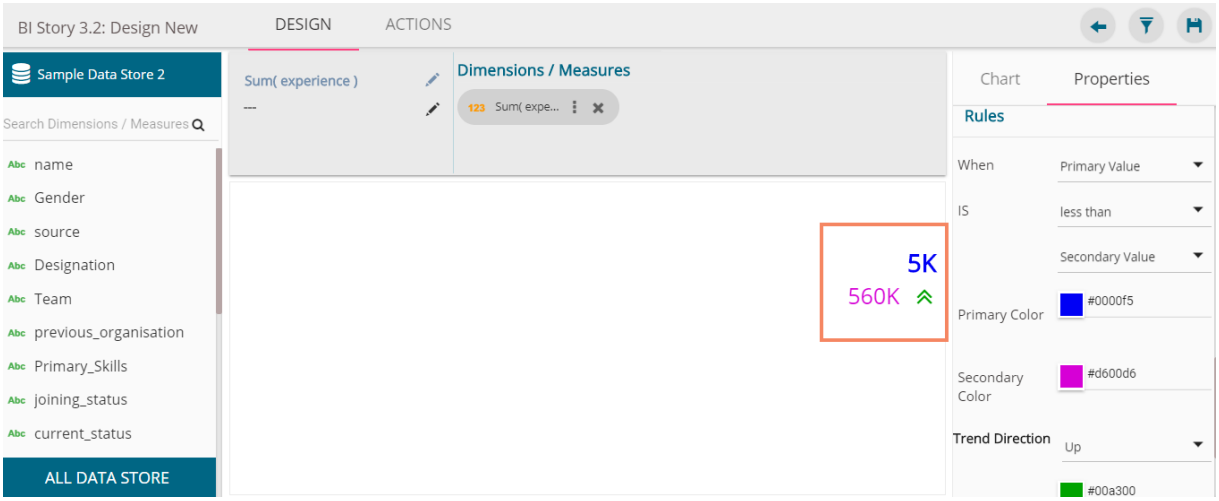


xii) Configure the required '**Rules**' fields as shown in the following image:

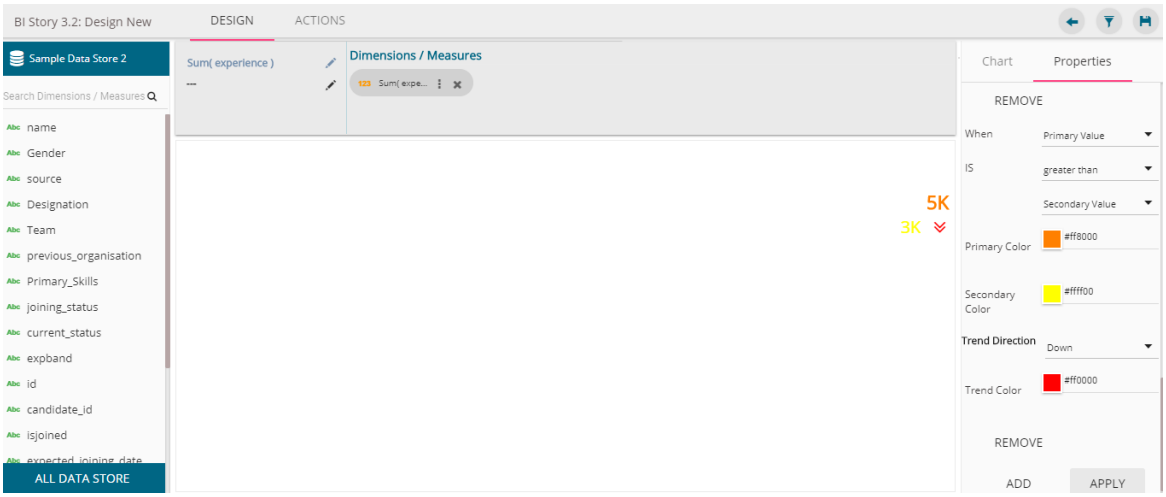
a. When: Select an option using the drop-down menu
    i. Primary Value
    ii. Secondary Value
b. IS: Select a condition and the remaining value field using the drop-down menu
c. Primary Color: Select a color for the primary value field
d. Secondary Color: Select a color for the secondary value field
e. Trend Direction: Select a trend direction using the drop-down menu
f. Trend Color: Select a trend color from the menu
g. REMOVE: Selecting this option removes the added rules
h. ADD: Selecting this option adds a new rule configuration
i. APPLY: Selecting this option applies the current configuration of the rule.



xiii) The displayed Primary and Secondary values will be shown in the selected colors if the rule condition is met.

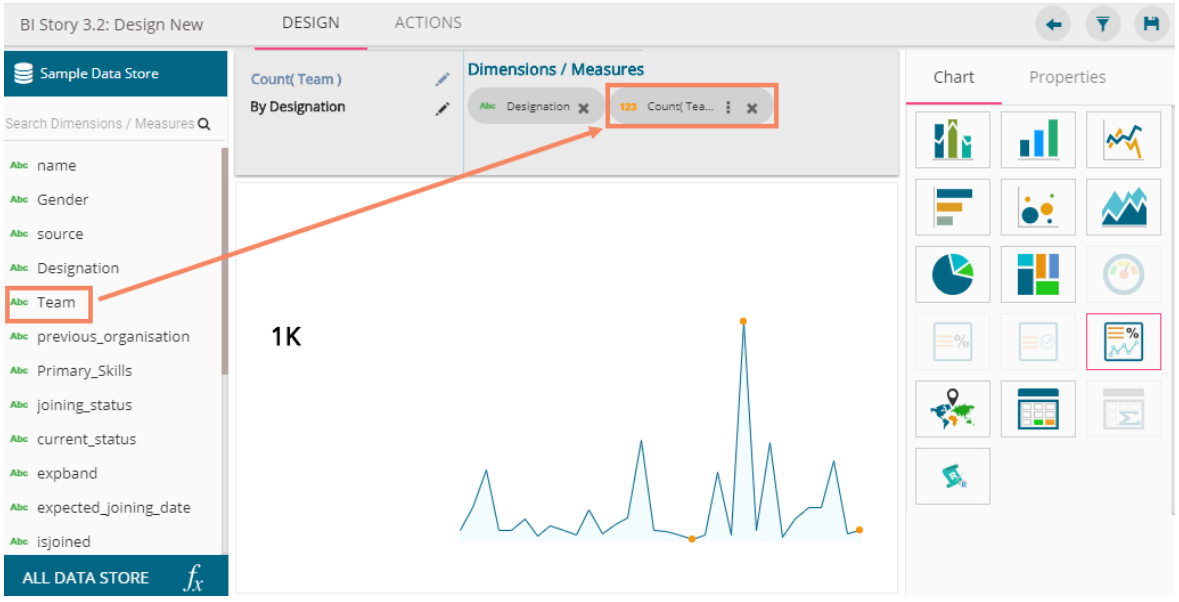


xiv) Users can set multiple '**Rules**' by configuring the required fields as described above; the KPI Tile Visualization will reflect the important changes as per the selected rule.



5.12. KPI Sparkline

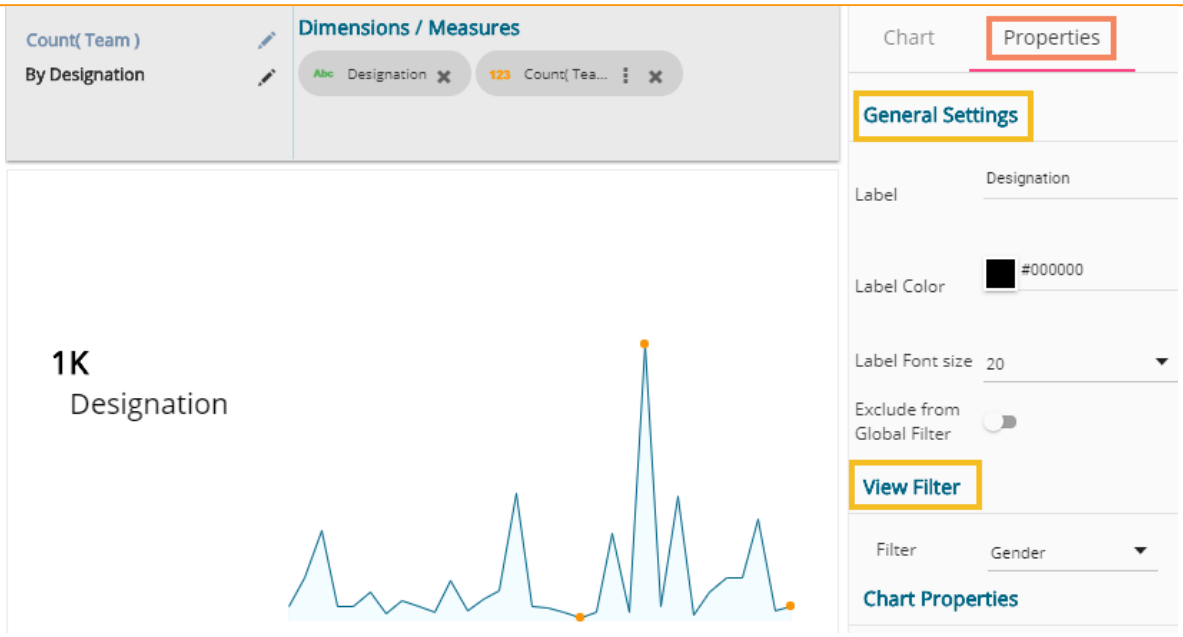
The KPI Sparkline combines KPI tile and Sparkline visualization in a single view. It facilitates the users to see KPIs and trends in the same view. The visualization type supports one Dimension and One measure. It will not consider the 3rd dragged value and converts the second Dimension in a Measure if dragged on the canvas.



Properties:

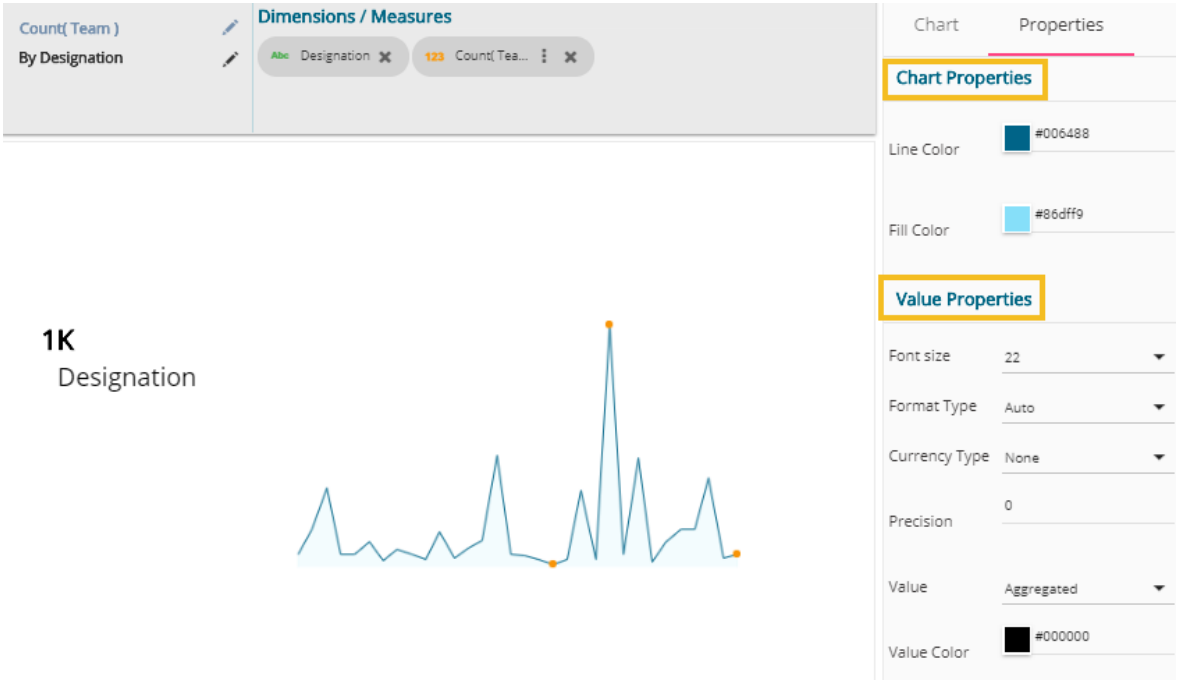
i) General Settings:
   a. Label: Provide a label name by using this field
   b. Label Color: Select a label color from the menu
   c. Label Font Size: Set the label font size
   d. Exclude from Global Filter: Enabling this option will exclude the selected view from the Global Filter condition

ii) View Filter:
   a. Filter: Select a filter condition to be applied to the view on the storyboard.



iii) Chart Properties:
   a. Line Color: Select a line color for the Sparkline chart
   b. Fill Color: Select a fill color for the Sparkline chart

iv) Value Properties:
   a. Font Size: Set Font size of the displayed value using the drop-down menu
   b. Format Type: Select a format type using the drop-down menu
   c. Currency Type: Select a currency type using the drop-down menu
   d. Precision: Set the after decimal value to be displayed
   e. Value: Select an option from the drop-down menu
      i. Aggregation
      ii. Last
   f. Value Color: Select a value color from the menu



5.13. Map Chart

A Map chart allows users to position their data in a geographical context using different data layers. Users can create a view based on the selected dimensions/measures that represents data in the region. The designated area will be colored based on the data. Users have the provisions to change the visualization.

Best Situation to Use Map:

To represent any information in geographical context.

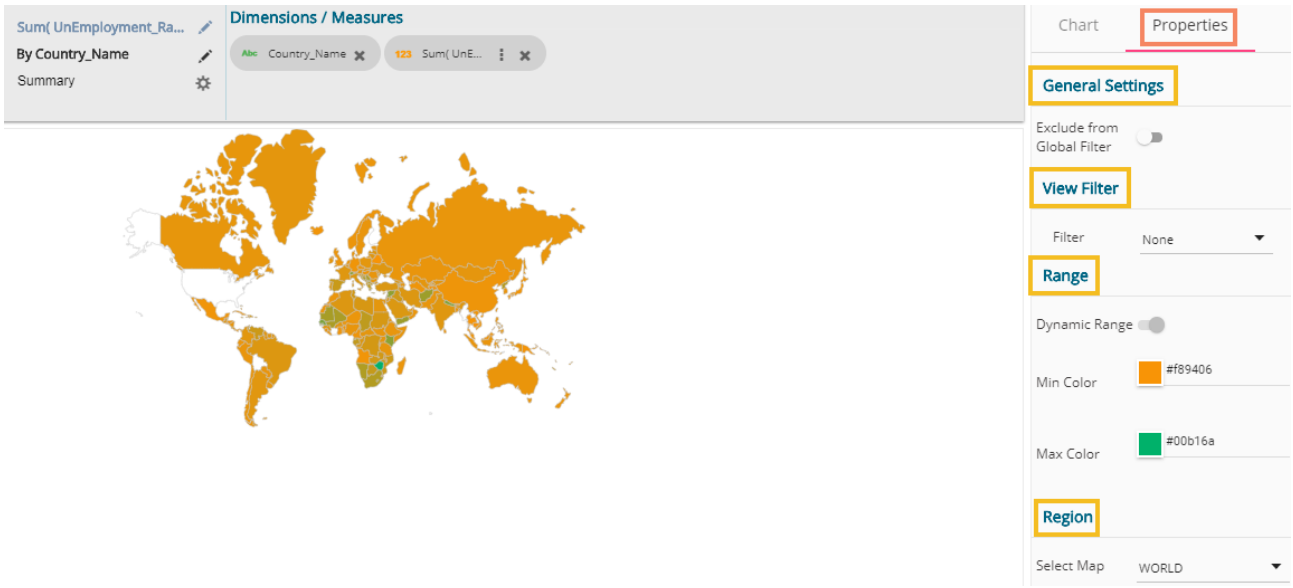
Examples:

The unemployment rate in the geographical context of Asia.

Chart Properties:

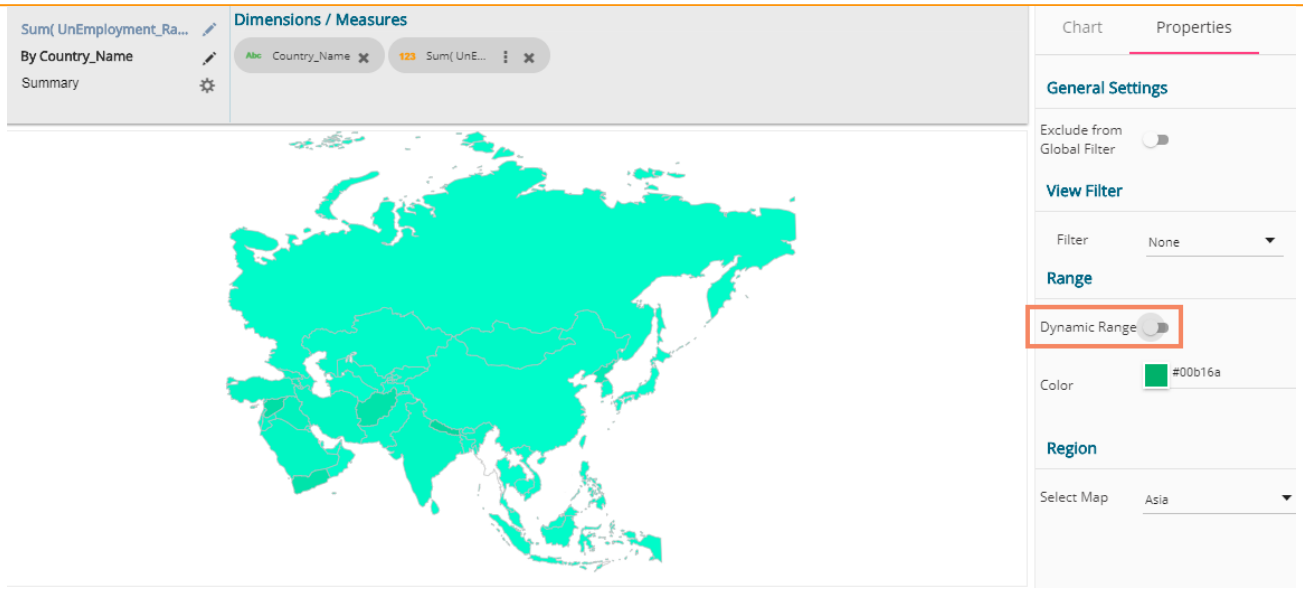
i) Range
   a. Dynamic Range: Enable or disable the dynamic range.
   b. Min Color
   c. Max Color

ii) Region
   a. Select Map: Select a region using the drop-down menu.



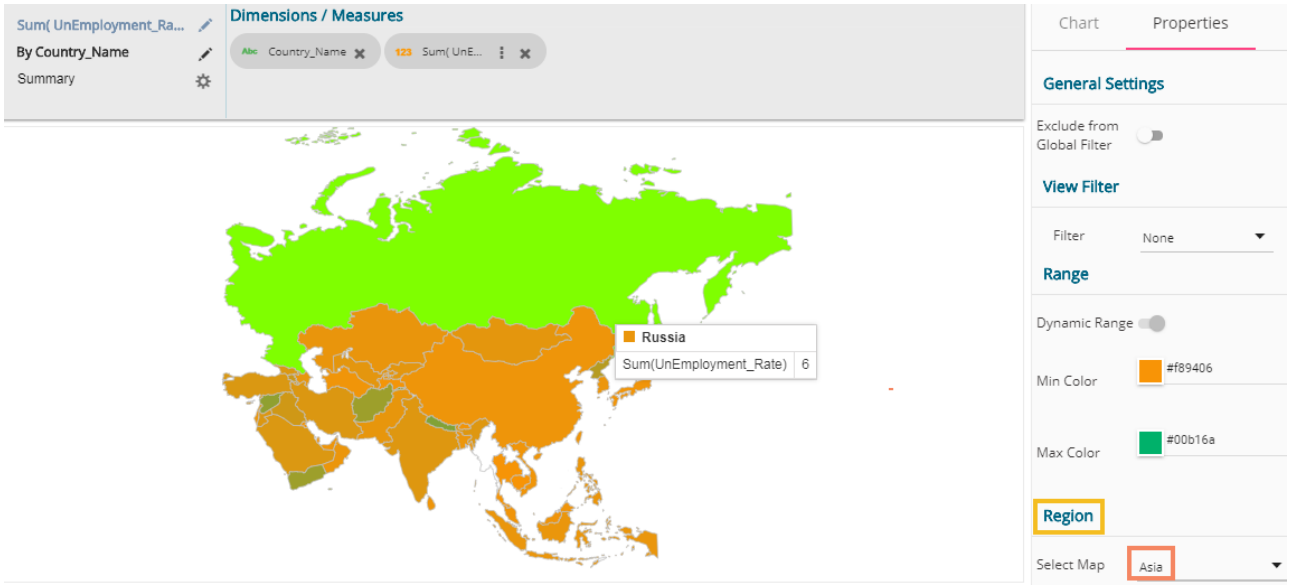
Note:

a. By disabling the dynamic range, the map will redraw with the selected '**Max Color.**' The user can change the color by clicking '**Color**' option.
   i. Disable the dynamic range.
   ii. The entire map will be drawn in the selected Max color (by default).



b. Based on the selected '**Region**,' the displayed visualization gets changed.

i. Select a map using the '**Region**' drop-down menu.
ii. The map of the selected region will be highlighted based on the chosen dimensions and measures.



5.14. Data Grid

Users can see data in tabular format by selecting the Data Grid component from the chart list. Multiple values can be displayed via Grid visualization.

Chart Properties:

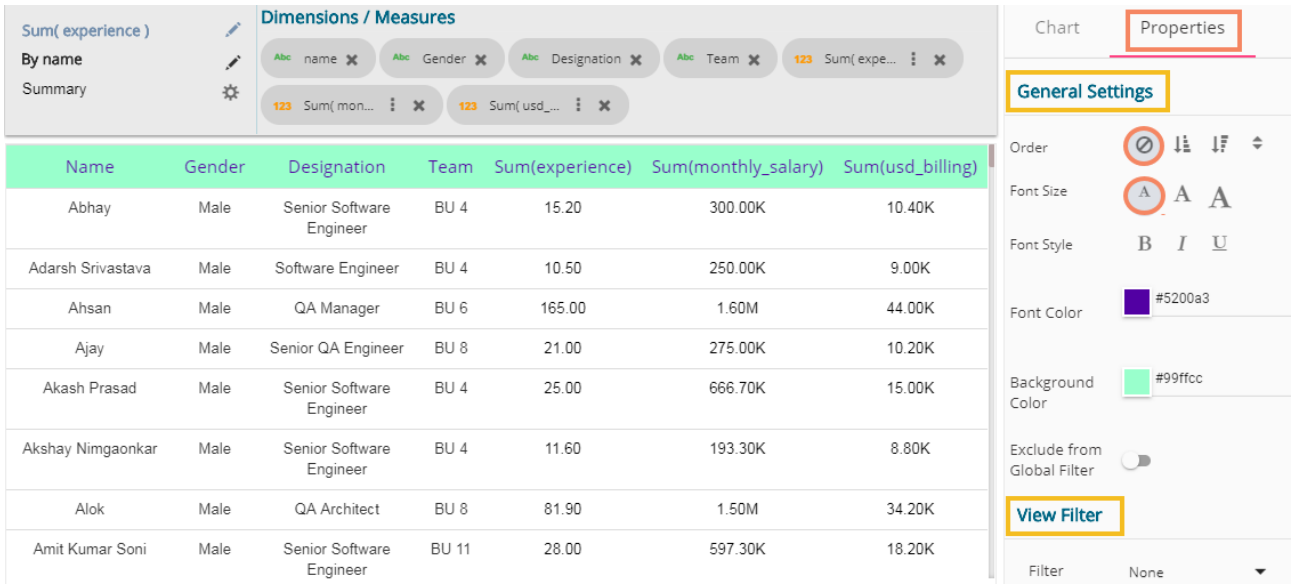
i) General Settings
   a. Order: Users can order the displayed data by selecting an option from the given choices:
      i. Ascending,
      ii. Descending
      iii. None

iv. Users can also apply 'Order By' option on the dimensions chosen or Measures to display the determined order

b. Font Size: Select a font size out the given choices
c. Font Style: Select a font style out of the given choices
d. Font Color: Select a font color using the menu
e. Background Color: Select a background color using the menu
f. Exclude from Global Filter: Enabling this option will exclude the view from the Global filter condition

ii) View Filter

a. Filter: Select a filter condition from the drop-down menu



Name	Gender	Designation	Team	Sum(experience)	Sum(monthly_salary)	Sum(usd_billing)
Abhay	Male	Senior Software Engineer	BU 4	15.20	300.00K	10.40K
Adarsh Srivastava	Male	Software Engineer	BU 4	10.50	250.00K	9.00K
Ahsan	Male	QA Manager	BU 6	165.00	1.60M	44.00K
Ajay	Male	Senior QA Engineer	BU 8	21.00	275.00K	10.20K
Akash Prasad	Male	Senior Software Engineer	BU 4	25.00	666.70K	15.00K
Akshay Nimgaonkar	Male	Senior Software Engineer	BU 4	11.60	193.30K	8.80K
Alok	Male	QA Architect	BU 8	81.90	1.50M	34.20K
Amit Kumar Soni	Male	Senior Software Engineer	BU 11	28.00	597.30K	18.20K

Note: Users will be redirected to the pop-up color menu by clicking on Font Color or Background Color option.

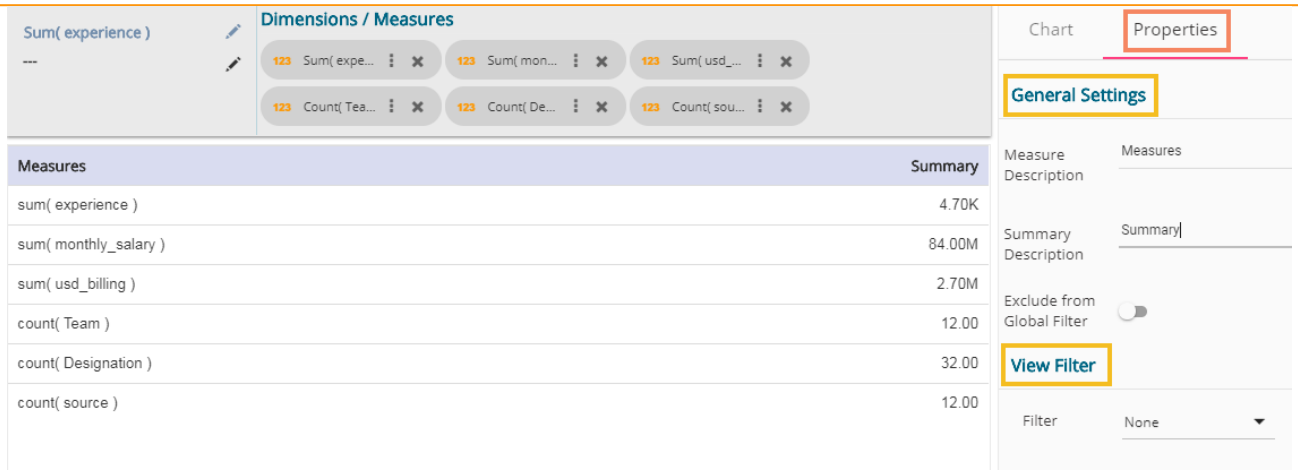
5.15. Metric Summary

The Metric Summary will display the measure wise summary. Users can select any number of dimensions and measures to show the metric summary.

Chart Properties:

i) General Settings

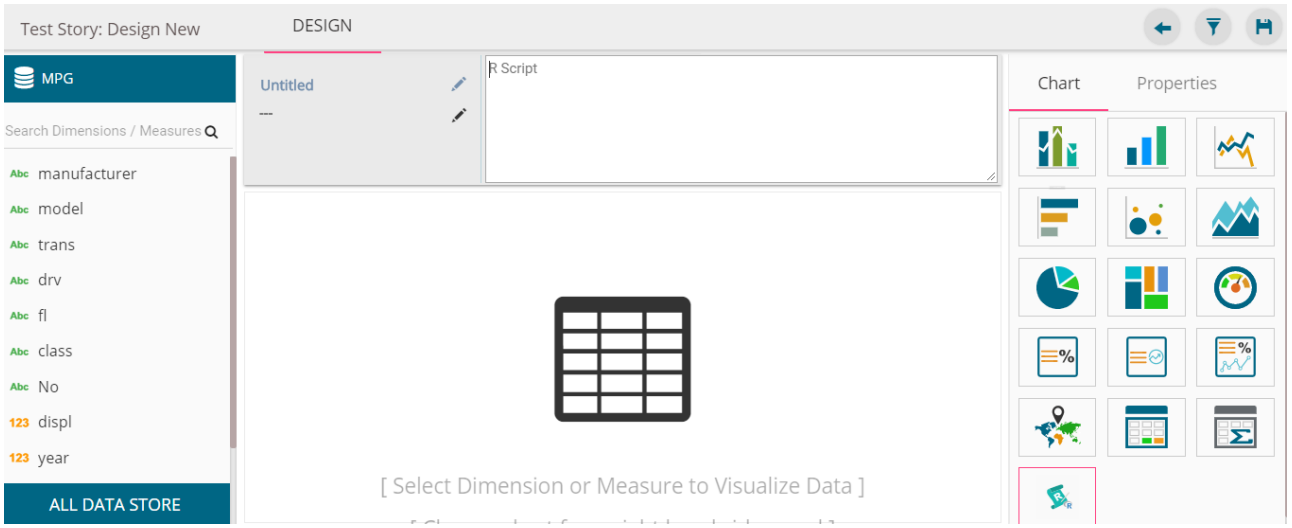
a. Measure Description: Provide heading for the selected dimensions or measures column.
b. Summary Description: Provide heading for the displayed summary column.
c. Exclude from Global Filter: Enabling this option will exclude the view from the Global



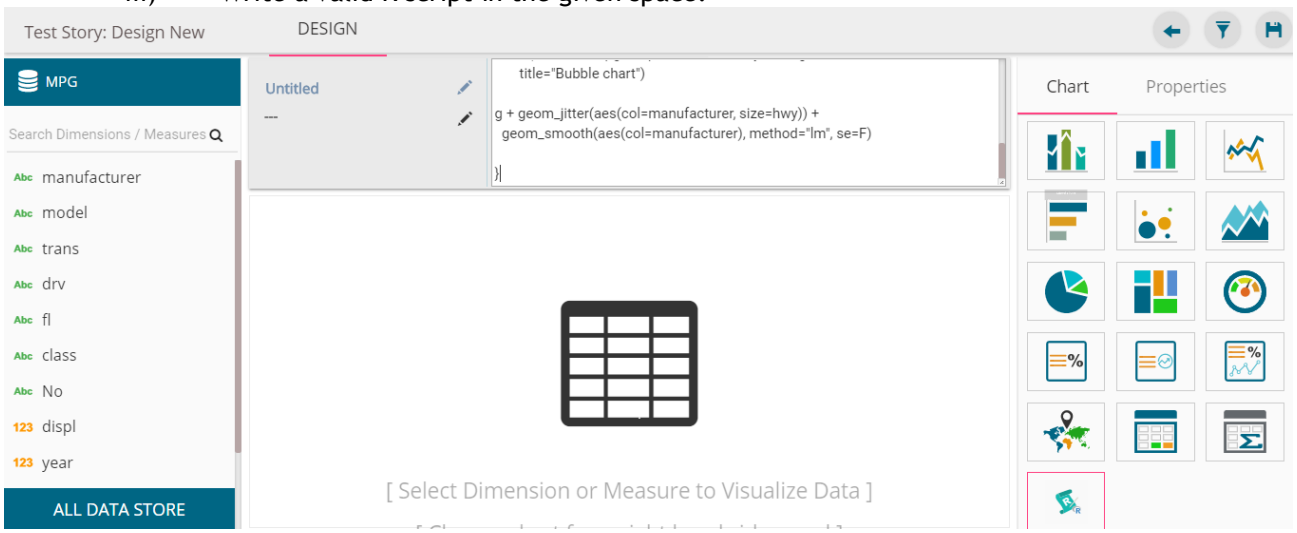
5.16. R

Users can see visualization based on their inserted R scripts using this component.

i) Users need to select a datastore to navigate on the Design New page
ii) Select R Server Visual component to visualize the data



iii) Write a valid R script in the given space.



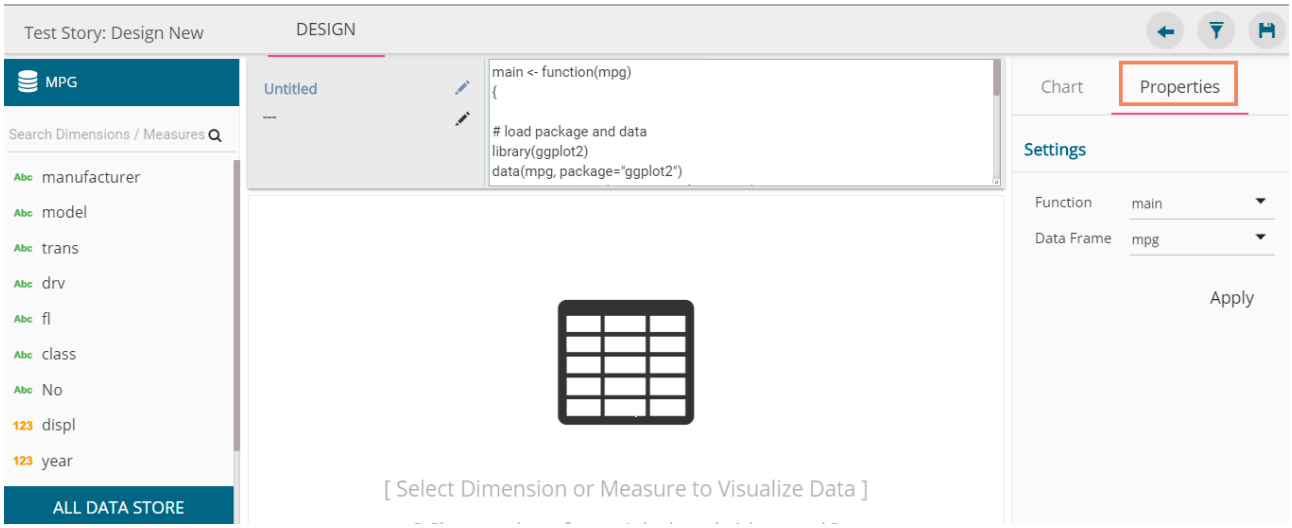
iv) Open '**Properties**' tab

v) Configure the below given Settings fields:

a. Function: Select an option from the drop-down menu

b. Data Frame: Select an option from the drop-down menu

vi) Click '**Apply**'



vii) Visualization based on the inserted R script will be displayed on the canvas.

6. Options

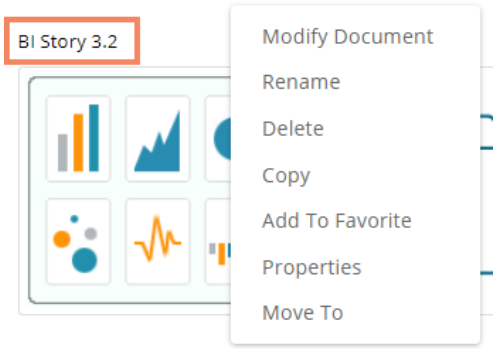
A story created under '**My Documents**' or '**Public Documents**' is credited with various options. This section describes all the options assigned to a Business Story document.

i) Navigate to 'My Documents' or 'Public Documents.'

ii) Select a story document.

iii) Click the '**Settings**' icon

iv) A context menu opens with the following options:



6.1. Modifying a Document

i) Select '**Modify Document**' from the options menu.

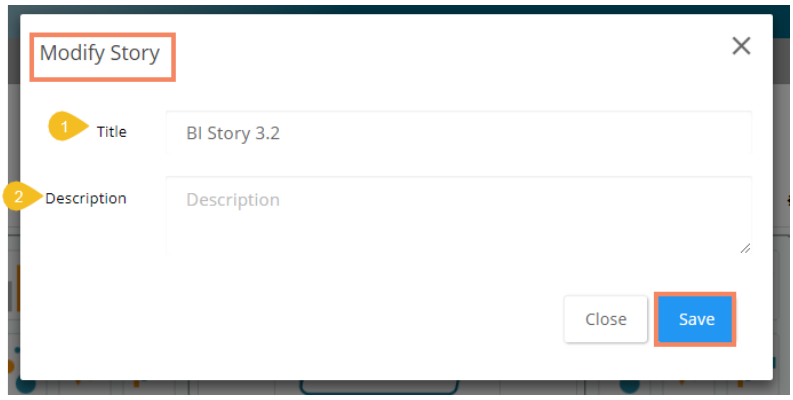
ii) A new window will pop-up.

iii) Modify the following information:

a. Title: Enter a title for the Business Story

b. Description: Describe the story (Optional)

iv) Click '**Save.**'



v) The information will be modified.

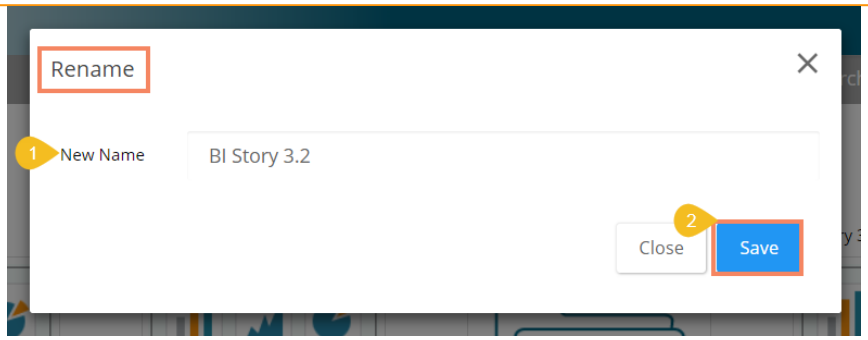
6.2. Renaming a Story Document

i) Select '**Rename**' from the Options menu.

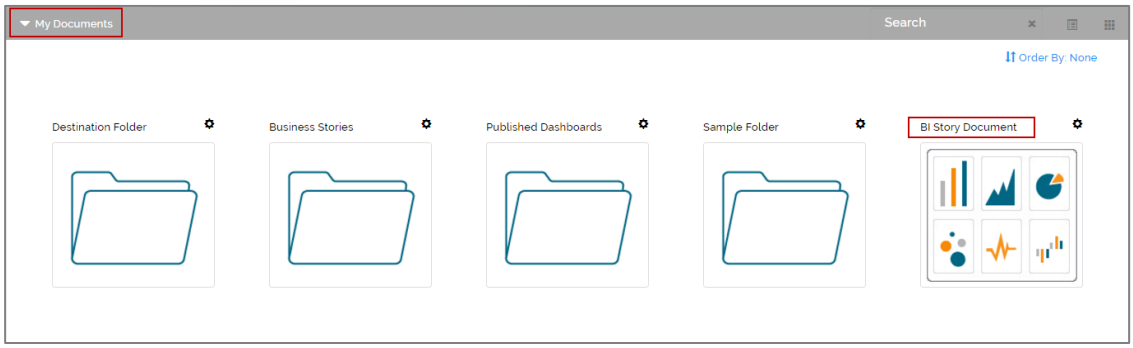
ii) A new window will pop-up.

iii) Enter '**New Name**' in the story document.

iv) Click '**Save.**'



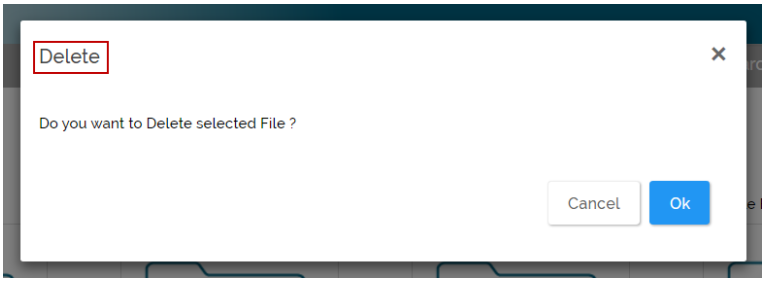
v) The story document name will be changed successfully.



6.3. Deleting a Business Story

i) Select a story document

ii) Click '**Settings**' for options
iii) Select '**Delete**'
iv) A new window will pop-up to assure the deletion
v) Click '**OK**'



vi) The selected story document will be removed.

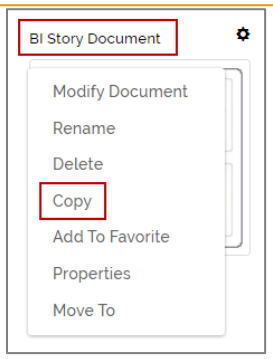
Note: '**Delete**' option is not provided to the story documents created or shared as the Public Documents.

6.4. Copying and Moving a Business Story

Users can copy a business story document and paste it into the selected place from the BizViz Platform.

i) Select a story document.

ii) Click '**Settings**' for options.
iii) Select '**Copy**.'

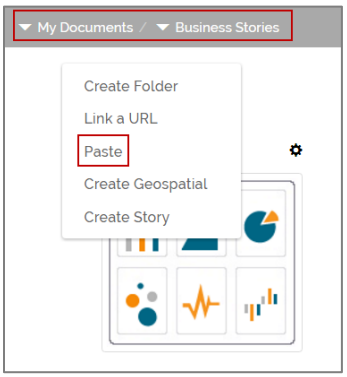


iv) Select another folder and click the 'Settings' icon

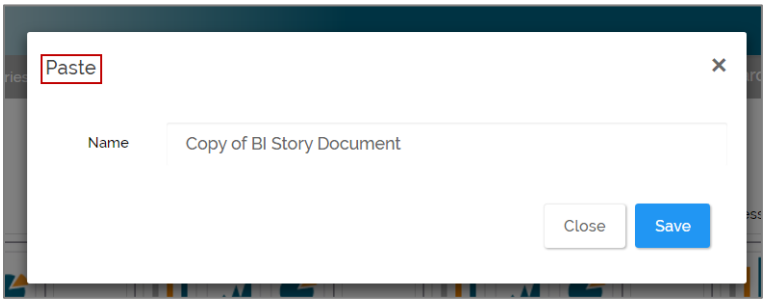
Or

Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere.

v) A context menu will appear with the 'Paste' option.
vi) Select '**Paste.**'



vii) A new window pops-up.
viii) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the story document (E.g., *BI Story Document* will have a new name *Copy of BI Story Document*).
ix) Click '**Save.**'



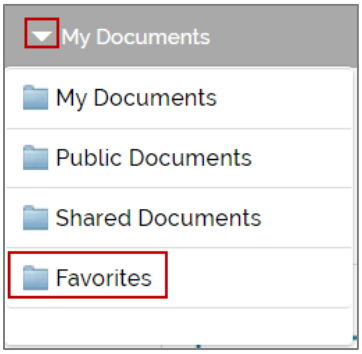
x) A message pops-up to assure that the copied story document has been posted successfully with a different name.
E.g., the following image shows that *BI Story Document* is named *Copy of BI Story Document* and has been copied to the '**Business Stories**' folder under '**My Documents.'**

6.5. Adding/Removing a Story Document to/from Favorites

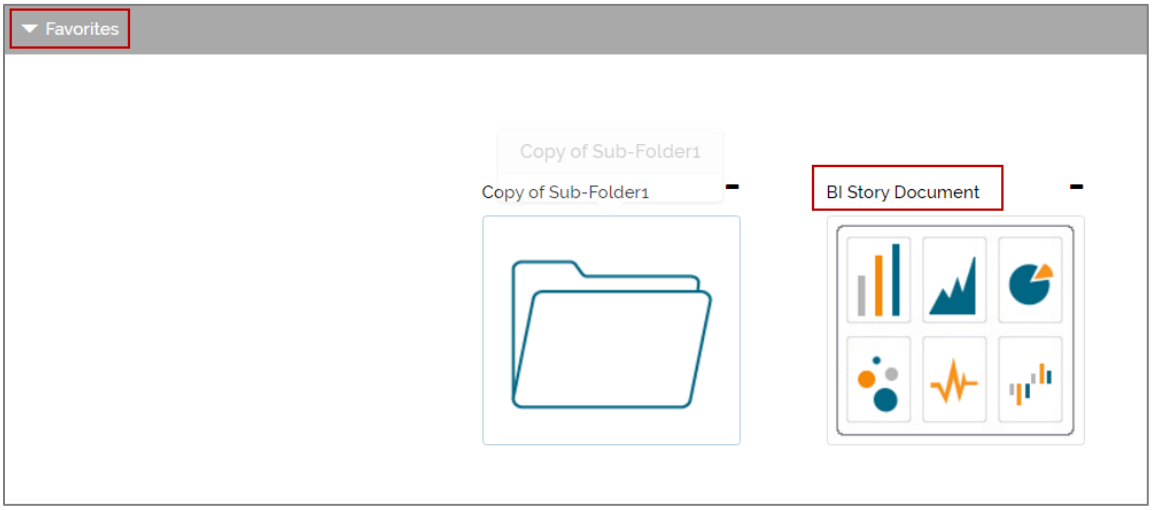
The user can add a business story document to or remove it from the Favorites.

i) Select a story document

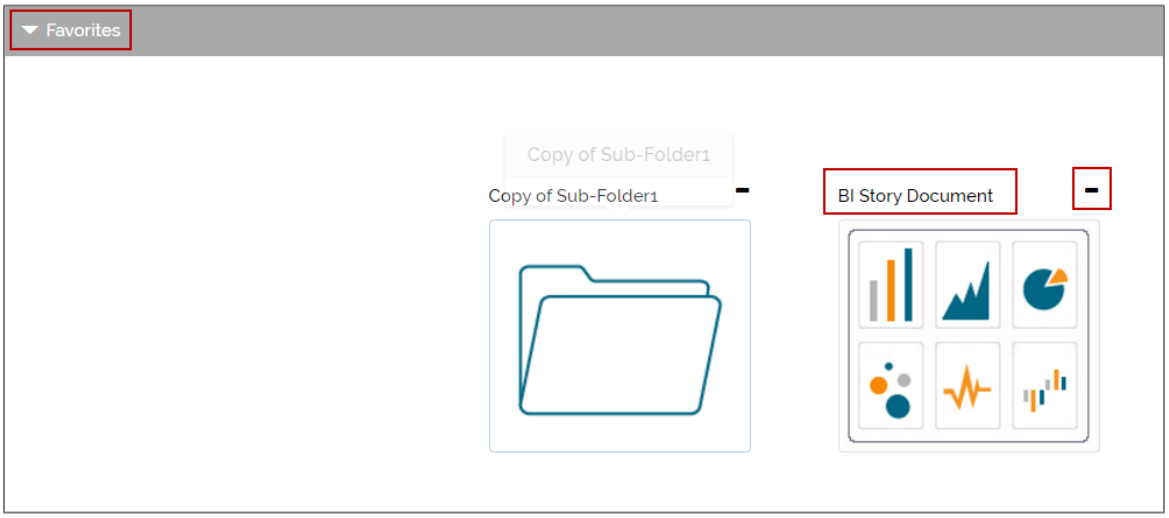
ii) Click '**Settings**' for options
iii) Select 'Add to Favorite'
iv) A new message pops-up, "Document added to Favorites."
v) Open '**Favorites**' using the '**My Document**' drop-down menu.



vi) The selected story document will be added to '**Favorites**.'



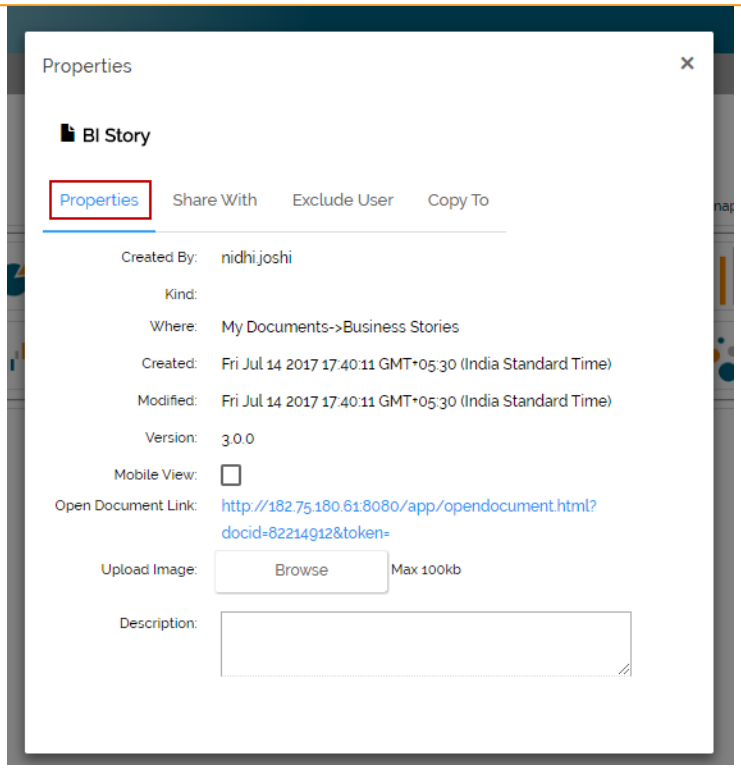
vii) Click the 'Remove' button [-] provided on the story document that has been added to 'Favorites.'



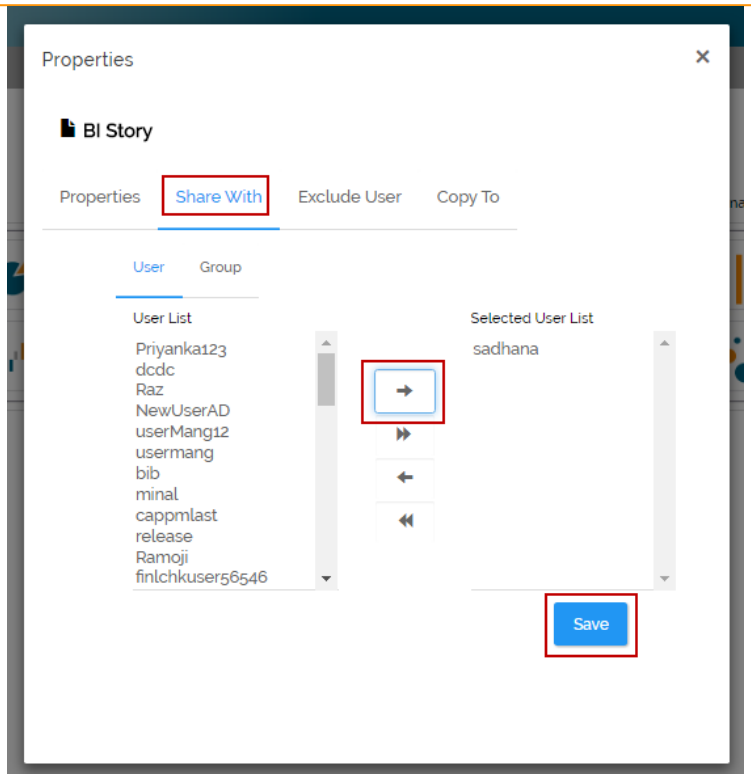
viii) A new message pops-up, "Document removed successfully!"
ix) The selected story document will be removed from '**Favorites**.'

6.6. Properties

i) Select a story document.
ii) Click '**Settings**' [⚙] for options.
iii) Select '**Properties**.'
iv) A new screen pops-up with four options:
   a. **Properties:** Business Story properties will be displayed.



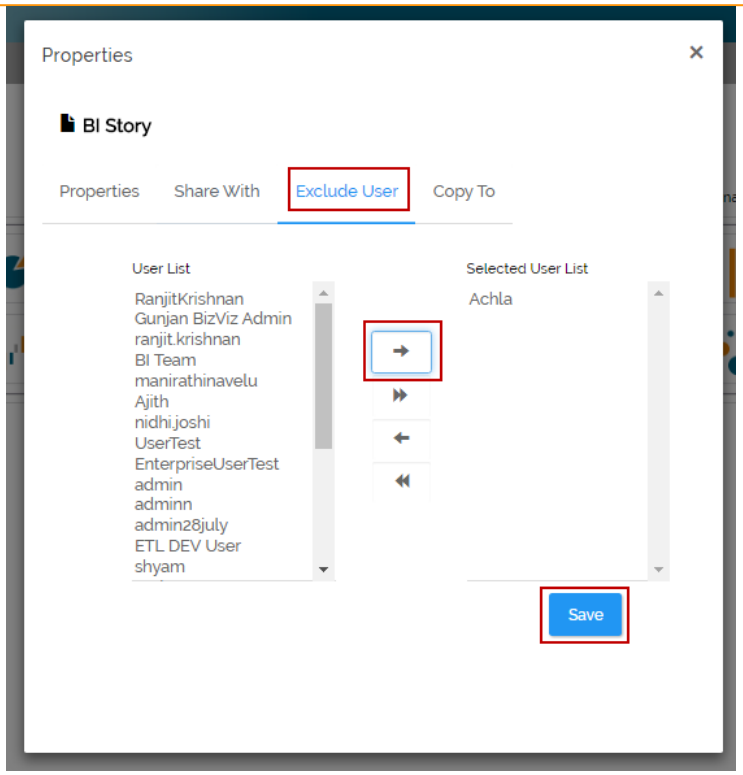
b. **Share With:** The story document will be shared with the selected user or user group.
   1. Select '**Share With**' on the Properties pop-up screen.
   2. Select a user or group from either the '**User List**' or '**Group List**.'
   3. Move the selected user or group to the '**Selected User List**' or '**Selected Group List**' using the arrows.
   4. Click '**Save**.'



5. The story document will be shared with the selected user or selected user group.

Note: If a story document is shared using this option, then the selected users or user groups will receive a view only copy.

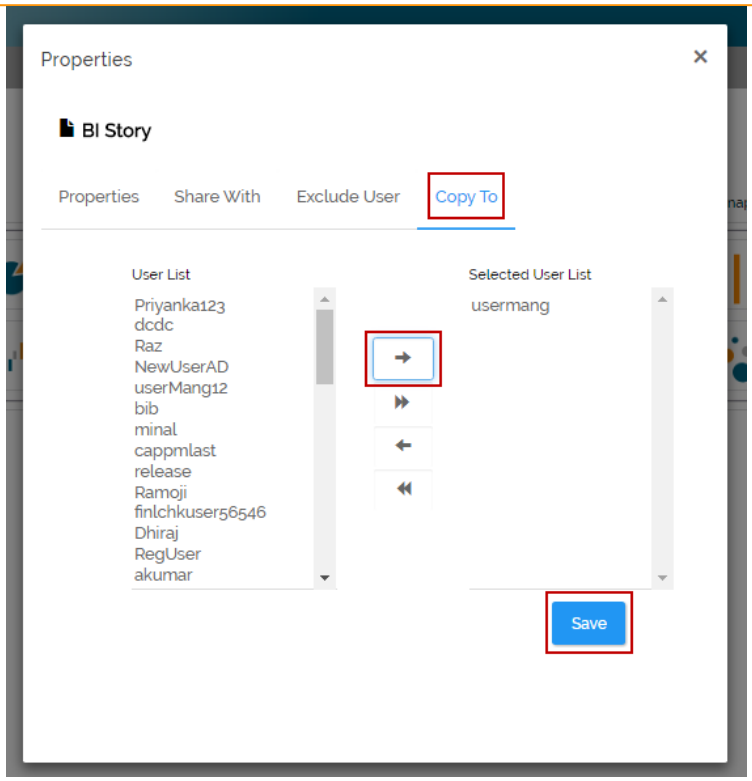
c. **Exclude User: The selected user will not be able to access the story document.**
   1. Select '**Exclude User**' on the Properties pop-up screen
   2. Select and move users from '**User List**' to '**Selected User List**' using the arrows
   3. Click '**Save**.'



4. The selected user will be unable to access the story document.

d. Copy to: A copy of the story document will be created and shared with the selected users.

1. Select '**Copy To**' from the Properties pop-up screen.
2. Select and move a user from '**User List**' to '**Selected User List**.'
3. Click '**Save**.'



4. A copy of the story document will be shared with the selected user.

Note: If a story document is shared using this option, then the selected users will have right to modify the received story.

6.7. Move To

i) Select a story document.

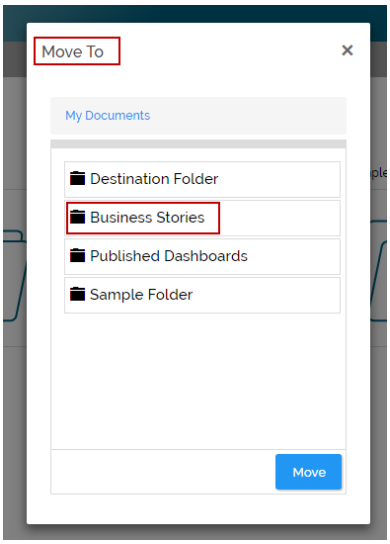
ii) Click '**Settings**' for options.

iii) Select '**Move To**'

iv) A new screen pops-up with available folder options

v) Select a folder or sub-folder.
(Click on button to open a list of available sub-folders)

vi) Click the '**Move**' button.



vii) The story will be moved to the selected folder or sub-folder.

Note: '**Move To**' option is not provided to the story documents created or shared as the Public Documents.

7. Signing Out

It is possible for a user to log out from the business story at any given stage.

Follow the below given steps to log out from the BizViz Platform.

i) Click the '**User**' icon  on the Platform home page.
ii) A menu appears with the logged in user details.
iii) Click '**Sign Out**.'
iv) Users will be successfully logged out of the **BizViz Platform**.

Note: Clicking on '**Sign Out**' will redirect the user back to the login page of the BizViz platform.