

Business Story R-3.2



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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 21 st , 2016	The first release of the document
BizViz Business Story 2.1	May 25 th , 2016	Updated document
BizViz Business Story 2.5	November 9 th , 2016	Updated document
BizViz Business Story 2.5.3	March 16 th , 2017	Updated document
BizViz Business Story 3.0	August 31 st , 2017	Updated document
BizViz Business Story 3.0	October 26 th , 2017	Modified document
BizViz Business Story 3.2	February 2 nd , 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'

Welcome	to Big Data BizViz (BDB)	
Email		
		Decision Platform
Password		Big Data Pipeline Framework
	Forgot password?	Dashboard Designer
Enterprise	*	ETL (Self-Service Data Preparation)
		Geospatial Analysis (Location Intelligence
		Predictive Analysis
		• Play (Beta Release)
	Login	Self-Service BI (Business Story)
		Social Media Browser
		Sentiment Analysis
Copyright © 2015-2	018 BDB (BizViz Technologies Pvt Ltd)	Survey

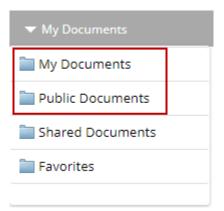
iv) BizViz Platform home page will open.



www.bdbizviz.com



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.

▼ My Documents				
	Create Folder			
	Link a URL			
	Create Geospatial			
	Create Story			

- 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'

Create Story	×
1 Title	BI Story 3.2
r Description 2	Description //
	Close Save
L	

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.

Welcome to Big Data BizViz (BDB)	
Email	
Password	Decision Platform
	Big Data Pipeline Framework
Forgot password?	Dashboard Designer ETL (Self-Service Data Preparation)
	Geospatial Analysis (Location Intelligence
	Predictive Analysis
	Play (Beta Release)
Login	Self-Service BI (Business Story)
	Social Media Browser
	Sentiment Analysis

- 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.

Having trouble signing in?
To reset your password, enter the email address you use to sign in to BizViz. This can be your email address associated with your account.
Select Space
Production
Password reset Link has been sent to
YOUR MAIL

- 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

Reset Password
You've confirmed ownership of the BizViz Account, Reset your password now to regain access.
New Password New Password Confirm New Password
Confirm New Password
RESET PASSWORD

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.

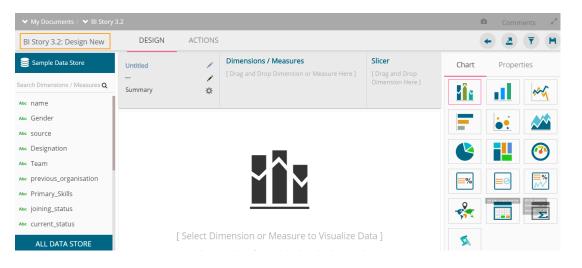
- i) By clicking 'Save' on the 'Create Story' pop-up window, Users will be redirected to select a data store.
 - 1. Search a data store using the 'Search' bar (if needed).
 - 2. Select a data store from the displayed list by clicking the checkmark \checkmark option.

✓ My Documents / ✓ BI Story 3.2						
BI Story 3.2: Design New			•			
	Data Store	×				
	Search	٩				
	datastore_services	~				
	NikhilDataStoreData	~				
	data-store	~				
	wt_datastore	~				
	data-store1	~				
	schedulerBitest_1	~				
	Sample Data Store	~				

4.2. Designing a New View

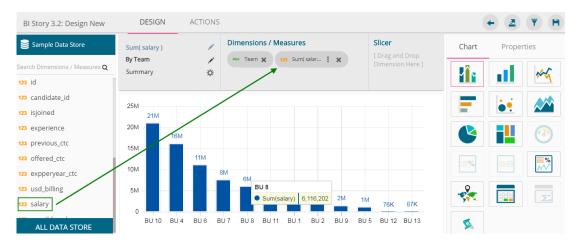
This page explains steps to create a new view.

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.

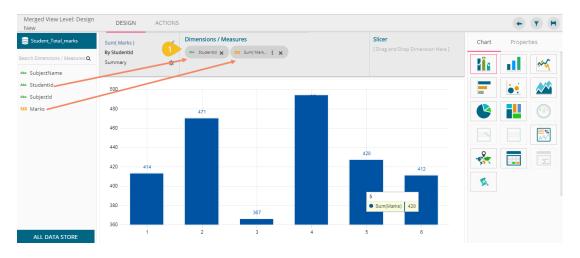
BI Story 3.2	Data Search	
Sum(salary) S.8.84M By Team 30M 100 BU 10 BU 4 BU 6 BU 7 BU 8 BU 1 BU 2 BU 11 Teams	By Team 30M 20M 10M 0	

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

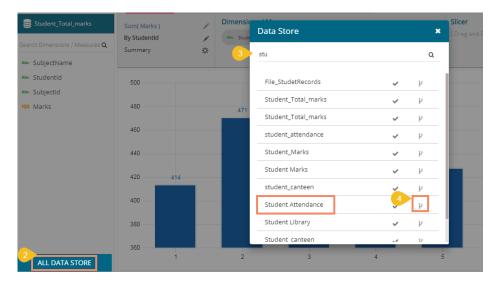
Users can merge multiple data stores at view level to compare different measure values across the merged datastores.

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





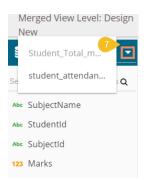
- ii) Click 'ALL DATA STORE' option
- iii) Search for a datastore using the search bar
- iv) Click 'Merge' icon for the selected datastore



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

Merged View Level: Design New	DESIG	N ACT	TIONS
Student_Total_marks	Sum(Marks		Data Store 🗙 i
Search Dimensions / Measures Q	By Studention	1	student_attendance
Abc Studentid	500	5	student_name
123 Marks	480		
	460		
	440		
	420	414	CANCEL 6 MERGE
ALL DATA STORE	400		

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

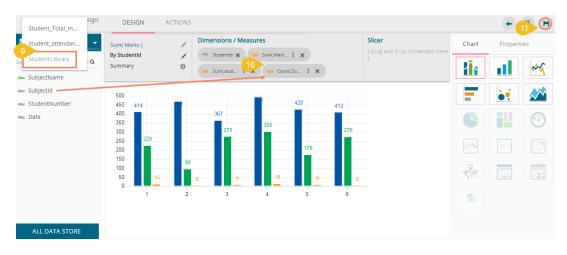




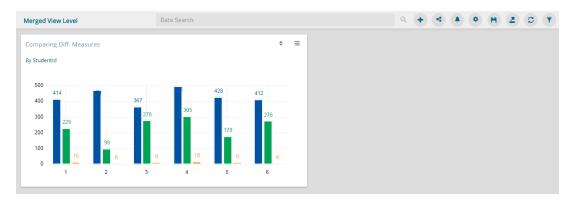
Merged View Level: Design New	DESIGN	ACTIONS						← ▼ H
Student_attendance	Sum(Marks)	1	Dimensions / Meas			icer Drag and Drop	Chart	Properties
Search Dimensions / Measures Q	By StudentId Summary	8	Abc Studentid 🗶 1	123 Sum(Mark 🚺 🤉		mension Here]		
Abc student_name								
123 student_attendancecol	450 414			42	8	412	-	
	400 350		367	305				
	250	Sum(Marks)	tendancecol) 229			276	≡%	
	200 — — — — — — — — — — — — — — — — — —				178		•	
	100	9	8					
ALL DATA STORE	1	2	3	4	5	6		

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.

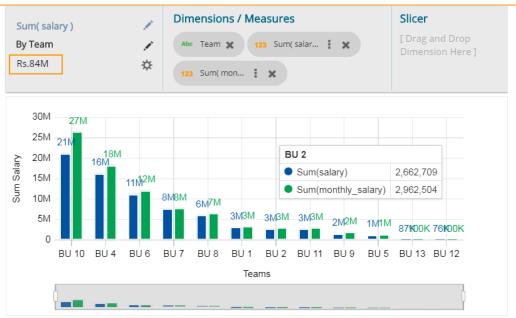


- ii) A window pops-up.
- iii) Set the following details:
 - a) Show Summary: Enable or disable the summary option
 - b) Measure: Select a measure from the drop-down menu
 - c) Aggregation: Select an aggregation type from the drop-down menu
 - d) Format Type: Select a format type from the drop-down menu
 - 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'

Summary Prope	rties	×
Show Summary	•	
Measure	monthly_salary	•
Aggregation	Sum	•
Format Type	Auto	•
Currency Type	Ø € ₹ £ \$	¥
Precision		
	CANCEL DON	IE

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.

Sum(salary)	1	Dimensions / Measures	Slicer
By Team	1	Abc Team 🗶 123 Sum(salar : 🗶	[Drag and Drop Dimension Here]
Summary	\$	123 Sum(mon	

- 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.

ea	Series Prope monthly_sal	erties: ary	×
iun	Aggregation	Sum	
T	Display Name		- 1
	Axis	<u> </u>	_
ł	Color	<u>**</u>	- 1
a e	Data Label Colo	or 🔛	_ [
		CANCEL	APPLY



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 \checkmark > Modify/change the title for the selected measure or dimension > click the 'Checkmark' icon \checkmark to save the change.

Sum(salary)	~
By Team	
Summary	☆

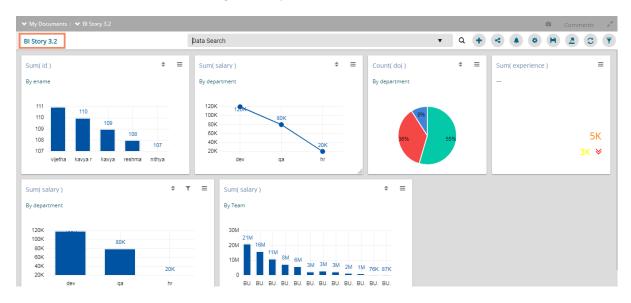
d. There are some other icons provided on the design new page as listed below:

Icon	Name	Description
+	Back	To redirect users on the storyboard page
	Export	To export the created view in preview mode
Ŧ	View Filter	To apply filter conditions on the view
Ħ	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						
Q	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.						
4	Shared Views	To add a shared view to the storyboard						
A	Alert Center	To redirect users to schedule an alert.						
\$	Change Theme	To select a display theme for the story.						
H	Save Story	To save modified views on the Story Board.						
	Export	To export the story as CSV, XLSX, PDF, PPT format						
C	Refresh Views	To refresh the views on the storyboard						
T	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						
e 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.



Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions	Schedule Data Refresh
Schedule Co	nfiguration			
DAILY	WEEKLY MOI	NTHLY YEARLY		
O Day 1	of every 1	month(s)		
O The First	▼ Monday ▼	of every 1 m	onth(s)	
Start time 12	▼ : 00	*		
Refresh Now				
 Refresh Now Enable Email N 	Notification			
Enable Email M				
Enable Email N	Notification			
Enable Email M				
Enable Email N Email Address *				

- 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.

BI Story	/ 3.2			9	5		•	Q	+	4	٥	H	 C	
				st	andard devia	ion								
Sum(s	tudent_	attenda	ance)		andarddevia ım	on								
By stude	ent_name	2			udent_id Ibject									
Pree	Kur	Keil	Nell	Bla	Mo	200 165 165 142								
287	Ros	Sa	Joey	То	Joy									
Am	Jod	Ros	Rup	Da	Nev	50 4 4 / 4 / 4 / 4 / 4 / 4 / 4 / 4 / 4 /								
Am	Min	Ch	Sm	Pet	John	Hindi Maths Engl. Scie. Soci. Histo.								
Mo	Zac	Phil	Ku	Os	Ka 132									

- v) Select a term from the suggested option or type it in the search bar.
- vi) Click the 'Search' icon Q



BI Story 3.2 student_name		Q + < + < H 2 C T
Sum(student_attendance) By student_name	\$ ≡	Count(Date_Key) $\Leftrightarrow \equiv$ By subject
300 250 2 7 200 14937493432 ⁴⁸⁴⁹ 37443834384042433847525344493937485944 100 P J. J. K. K. N. N. N. O. P. P. R S. Z A. B. J. J. K. M. M		200 165 165 165 142 117 94 47 0 Hindi Maths English Scien. Social. History

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.

BI Story 3.2	student_name			Q	+	4	۹	•	H	C	•
Sum(student_attendance)		• ≡	Count(Date_Key)			:	; ≡				
By student_name			By subject								
Query Result											×
NLP_DATA											
student_name: 30.00											
50											
40											
30											
20											
	P. P. R S. Z A. B. J. J. K. M. M. M. R.	R. T.	ADD								

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

BI Story 3.2 student_attendance for preeti	Q + < ▲ ◆ H ≥ C T
Sum(student_attendance) By student_name 300 250 260 149374934324949314438343640424336475255444493937485944493839 100 P J. J. K.K.K.N.N.O.P. P.R S.Z A.B. J. J. K.M.M R.R	$= \begin{array}{c} Count(Date_Key) \\ By subject \\ \hline \\ 200 \\ 150 \\ 100 \\ 0 \\ Hindi \\ Maths English Scien. Social. History \\ \hline \\ \end{array}$

x) The query result will be displayed as below:



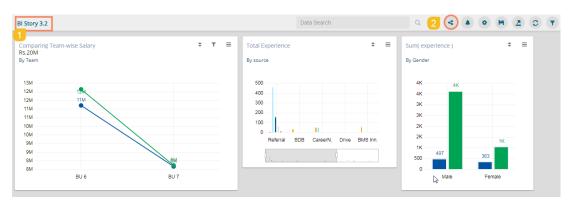
BI Story 3.2	student_attendance for preeti		Q + <		H 🛓 g 🔻
Sum(student_attendance) By student_name	\$ ≡	Count(Date_Key) By subject	÷	⇒ ≡	
Query Result					×
NLP_DATA student_attendance for preeti: 287.0	0				
300 250 200 150 Preeti 150 P. C. D. J. J. K. K. K. N. N. N. O. F	287 2 P. R. , S. Z. , A. B. J. J. K. M. M. M. R. R. T.	ADD			

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.
 - Click 'Save' option. BI Story 3.2: Shared View Search Q 50 Sum(salary) Sum(salary) Sum(salary) By ename By department By department Preview Info Preview Info Preview Info Sum(salary) Sum(id) Count(doj) By department By department By ename 4 🔽 Preview Info Preview Info Preview Info Sum(salary) By department Preview Info

V)



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

		۵			e.
BI Story 3.2	Data Search Q 🕂 < 🌲	0 H	<u>.</u>	C	₹
Sum(id) By ename 111 100 109 108 107 vjetha kavya r kavya reshma		6	55%	\$	

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.

BI Story 3.2	Data Search		Q	+	2 .	• 2	C T
Sum(id) By ename	÷ =	Sum(salary) By department	÷	=	Count(doj) By department	4	; ≡
111 110 109 109 108 107	107	120K 129K			9%	55%	
vijetha kavya r kavya reshma	nithya	dev qa hr					

- iii) The users will be redirected to the next page to subscribe alerts.
- iv) Click 'Create New Alert' 🕇 option

Alert Center	* +
Subscribed Alerts	

- 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.



Alert	
Data Source	
nd Search c	
DataStoreGoogleSheet23	
DataStoreGoogleSheet24	
amazon store1	
amazon store2	
check_alert_store	[Select Data store having time dimension]
date	[Select Dimension or Measure to watch]
L	

- 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 dropdown 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.

Alert		× 🖪 🕹
check_alert_store		
Title	alertt	
Dimensions / Measures	123 student_attendan ▼	
Aggregation	Min	
Time Field	Date_Key 🔻	
Schedule Intervals	Daily 🔻	
Lower Threshold	10	8 1.00
Upper Threshold	80	
Max Good Value		0

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.

Alert Center	(+ (+
Subscribed Alerts 10 alertt Dets Store : check_elert_store	
Property : student_attendance	

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

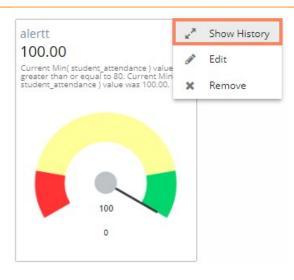
Alert Center		
Subscribed Ale	erts	
alertt	de la	Edit
Data Store : check_a		Remove
Property : student_a		nce
▲80 ▼	10	

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

Alert Center
1 Alerts
■ 100.00 Current Min(student, attendance) value is greater than or equal to 80. Current Min(student_attendance) value was 100.00.
0
Subscribed Alerts
alertt =
Data Store : check_alert_store
Property : student_attendance
▲80 ▼10

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.

ert Center		
rtt		
rent Min(student_attendance) val	lue is greater than or equal to 80. Current Min(student_attendance) value was 100.	
140.00	Date	Sum(Value
135.00	1/19/1970, 1:31:50 AM	100.01
130.00	1/19/19/0, 1:31:30 AM	100.00
125.00		
120.00		
120.00		
110.00		
105.00		
00.00		
95.00		
90.00		
85.00		
80.00		
75.00		
70.00		
65.00		
60.00	1/19/1970, 1:31:50 AM	
	Interterv, 1.51.50 Ann	
1		

4.3.4. Change Theme

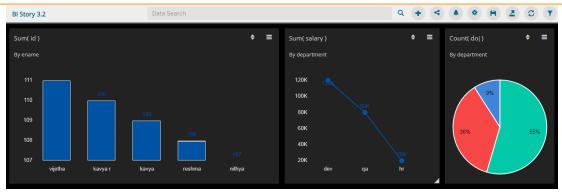
Users can change the look and feel of the entire story through this option.

- 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.

100 30	omparing Diff. Measures y Studentid			Sum(Marks) 2 Export as By SubjectName XLSX
	414 36 300 229 200 98 100 15 6	7 278 305 178 9 18 9	412 276 6 450 415 421 426 415 421 426 415 421 426 415 421 426 1 5 6 1 5 6 2 3 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 4 4 5 5 6 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 5 6 7 4 7 4 5 6 7 5 7 6 7 7 7 7 7 7 7 7 7 7 7 7 7	500 PPT 450 426 421 415 400 386

- 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.



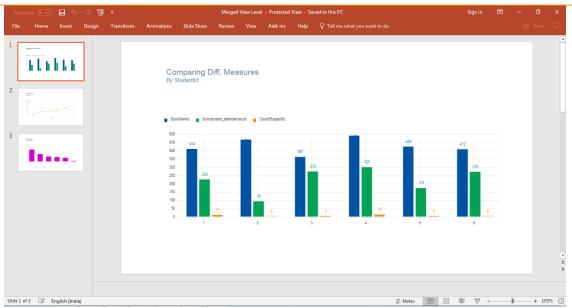
										Merged Vie	w Level (1)	- Excel						Sign in			o ×
	Home		Page l	Layout	Formulas	Data	Review	View	Help	🖓 Tell me w	hat you war										🖻 Sha
+ asie	Cut Copy Format Clipboard	Painter	BIU	•	• A • •	• = =	= 1	± ⊞ M	erge & Cento	Gene er • 🖙 •	% *	500 → 00 Fo	onditional Fo rmatting *	ormat as C Table + Styl	ell Inser	t Delete F	ormat	∑ AutoSum ↓ Fill ~ ♦ Clear ~ Ed	Sort & Filter • S	Ç Find & Gelect ≁	
A1	Ŧ	: ×	√ j	fe Stud	lentNumb	er															
	А	в	с	D	E	F	G	н	I	J	к	L	м	N	0	Р	Q	R	S	т	U
Stu	udentN_su	m_stud su	m_Marks	tudent_io	ount_Suks	StudentId															
	1	229	414	1	15	1															
	2	98	471	2	6	2															
	3	278	367	3	9	3															
	4	305	495	4	18	4															
	5	178	428	5	9	5															
	6	276	412	6	6	6															
su	m Mark Su	bjectId																			
	386	1																			
	415	5																			
	421	6																			
2	426	2																			
3	449	3																			
	490	4																			
i Su	bjectNasu	m Marks																			
	emistry	490																			
	cial Scie	449																			
Ma		426																			
9 Ph	ysics	421																			
	ology	415																			
		386																			
1 En																					

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

Merged View Level.pdf		1 / 3		¢	Ŧ	ē
	Comparing Diff. Measures ay Studentid Sum(Marks) Sum(student_attendanceco) Count(Subjectid)					
	500 450 414		428 412			
	400 367 360 229 260 229 200 229 69 150 6 99 0 15 6 6	305 9 10	276 178 9 6			≎ + -

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



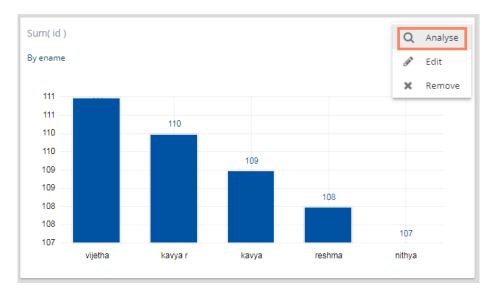


4.3.6. Options Assigned to a View

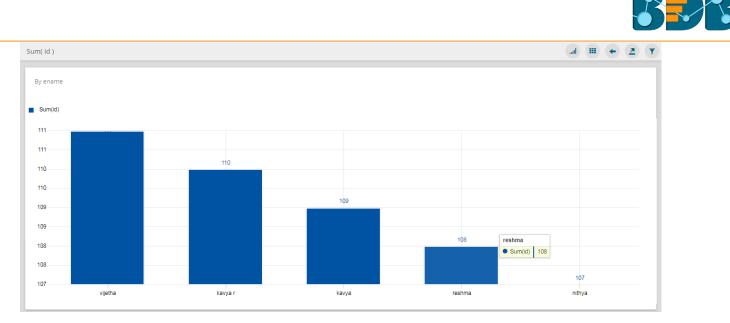
The following options supported by a view can be accessed from the Storyboard.

4.3.6.1. Analyze

- i) Select a view from the Story Board.
- ii) Click the '**Options**' icon \equiv
- 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.

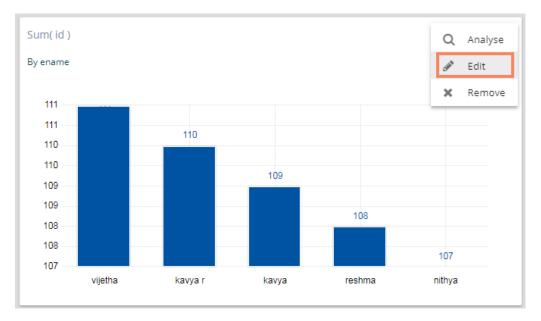


vi) Users can select any of the following options to analyze a Business Story view:

Option	Name	Description
ail	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
Ţ	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.

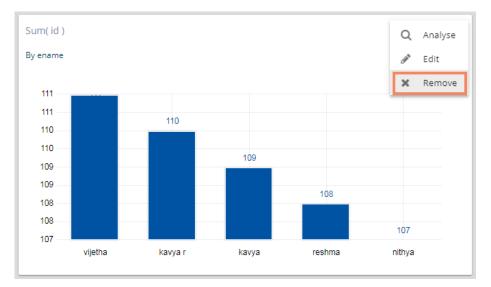




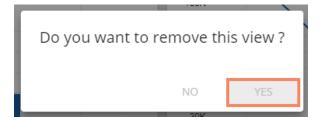
vii) The modified view will be saved successfully on the Story Board.

4.3.6.3. Remove

- i) Select a view from the Story Board.
- ii) Click the '**Options**' icon \equiv
- 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.

Ø	⊘	3	4	5	6
tting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Da Refresh
elds		Hierarchy Defi	nition		
name	Î	Drill Def- 1	Designation	name 🕒	
Gender					
source		Drill Def- 2		xpected_joi	
Designatio	'n	year	month C	late	
Team					
	•				
PREVIOUS				(CANCEL

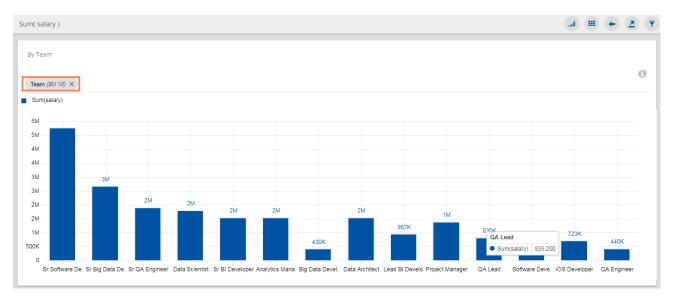
- vi) Select the data store with the defined drill path to create a new view.
- vii) Select the dimension for which the drill path has been defined and drag to create a view.
- viii) Click 'Save' option 💾 to save the view on the Storyboard.



- 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' \equiv menu.

BI Story 3.2	Data Search	
Sum(salary) Rs.84M By Team 20M 20M 20M 0 BU 10 BU 4 BU 6 BU 7 BU 8 BU 1 Teams		★ ≡ Sum(experi ◆ ≡ By Primary_Skills U 6 BU 7 BU 8 BU 11 p

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



BI Story 3.2: Design New	2 DESIGN	ACTIONS				+	• 🗷 🔻 H
Sample Data Store	Sum(salary)	1	Dimensions / Measures		Slicer	Chart	Properties
Search Dimensions / Measures Q	By Team Rs.84M	.∕ ☆	Abc Team 🗙 123 Sum(123 Sum(mon : 🗙	salar 🛛 🗙	Dimension Here]	General Sett	ings
Abc name						e. 1	
Abc Gender	30M					Style	
Abc SOURCE	25M 21N					Enable Slider	•
Abc Designation		18M M		BU 2		Show Data	-
Abc Team	20M - 161	11M ^{2M}		 Sum(salary) 	2,662,709	Label	
Abc previous_organisation		8	6M/M	Sum(monthly_salary	y) 2,962,504	Enable BaseZero	
Abc Primary_Skills	5M		3М3М _{ЗМ} 3М	3M ^{3M} 2M ^{2M} 1M1M	87100K 76100K	Order	0 11 IF
Abc joining_status		U4 BU6 B	3U7 BU8 BU1 BU2	BU 11 BU 9 BU 5	BU 13 BU 12		
Abc current_status			Teams			Order By	sum(salary)
ALL DATA STORE						Limit	0

- 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.

BI Story 3.2: Design New DESI		A H
Action Settings	Interactions	
Interactions Click based interactions on	Select views which have to be part of interaction	
other views	Drill By Select All	
f(x) Custom Fields Create custom fields from view	Sum_temp By Team 30M 27M 25M 21M 16M 15M 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	

- 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.

BI Story 3.2	Data Se	arch	Q + 4 4	• • H <u>a</u> c T
	g ≑ ▼ ≡	Sum_temp By Team 400K 300K 200K 100K 0 <u>BU 6</u>	÷ =	Sum(experi By Primary_Skills
Teams		· · · · · · · · · · · · · · · · · · ·		79%

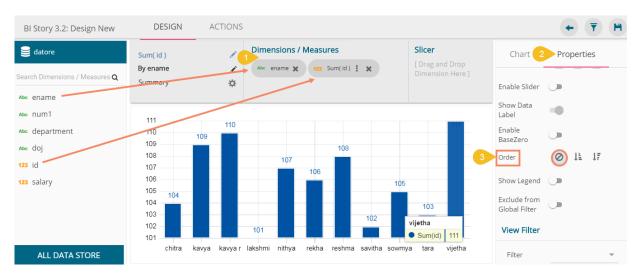


Note: The 'ACTIONS' tab also offers 'Custom Fields' option to be applied on the KPI Comparative tile. Please refer the KPI Comparative Tile to understand 'Custom Fields' functionality.

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.

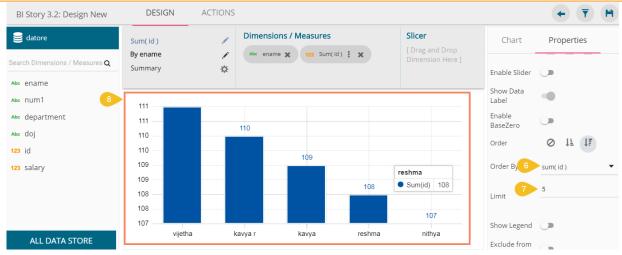


- iv) Select an order option by choosing an ascending or descending icon.
- v) The 'Order By' and 'Limit' options will be displayed.



- 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.

BI Story	/ 3.2			[Data Se	arch		Q,	+	4	۹	•	Ħ	 C	₹
	tudent_		ince)		=	•	Count(Date_Key) 主 E By subject Sort By								
Pree	Kur	Keil	Nell	Bla	Mo		200 165 165								
287	Ros	Sa	Joey	То	Joy										
Am	Jod	Ros	Rup	Da	Nev.		50 - 47								
Am	Min	Ch	Sm	Pet	John		Hindi Maths Engl. Scie. Soci. Histo.								
Mo	Zac	Phil	Ku	Os	Ka 132										

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.



BI Story 3.2: Design New	DESIGN	ACTIONS				€	T H
Sample Data Store	Sum(monthly_sa By Team	alary) 1 Dimensions /	Measures	2 Slicer	Chart	Propert	ies
Search Dimensions / Measures Q	Summary	*				. II	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Abc name							
Abc Gender	4M					ė	
Abc SOURCE	4M	4M					
Abc Designation	3M	ЗМ					
Abc Team						_	
Abc previous_organisation	3M	2M			≡%		
Abc Primary_Skills	2M	2M		2M 2M			
Abc joining_status	2M			^{2M} 1M			
Abc current_status	1M 3	817K	11		 y y		
Abc expband	500K	425k 417K					
Abc expected_joining_date							
	0	BU 6		BU 7			
ALL DATA STORE							

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.

BI Story 3.2: Design New	DESIGN	ACTIONS)
Sample Data Store	Sum(experience) By Designation Summary	/ / \$	Dimensions / Measures	Slicer 2 [Drag and Drop 3 Dimension Here	Filter 5	× © © <
 123 candidate_id 123 isjoined 123 experience 123 previous_ctc 123 offered_ctc 123 expperyear_ctc 123 usd_billing 123 salary 123 monthly_salary 124 LL DATA STORE 	300 234 200 166 100 - 32	02 310 162 ₂₂₇ 0 5.5.5.A.L.	296 242 211	64 78 102112 ³² 64 78 102112 ³² 7. L. R. S. S. D. S. S.	Select All Technical Architect Lead QA Engineer RFP Analyst Senior Development Manage Senior QA Manager DevOps Manager Solution Specialist Senior Architect	

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



BI Story 3.2: Design New	DESIGN	ACTIONS				← <u>3</u> ₹ H
Sample Data Store	Sum(experience) By Designation	1	Dimensions / Measures	Slicer [Drag and Drop	Chart	Properties
Search Dimensions / Measures Q	Summary	¢	Designation (12) Joint expent	Dimension Here]		
123 candidate_id123 isjoined	80			<u> </u>		
123 experience 123 previous_ctc	70 60		RFP Analyst			
123 offered_ctc	50		Sum(experience) 1	4		
123 expperyear_ctc123 usd_billing	40 <u> </u>		_	28	=%	
123 salary123 monthly_salary	20		14		**	
ALL DATA STORE		A Engineer	RFP Analyst Solut	ion Specialist	S a	

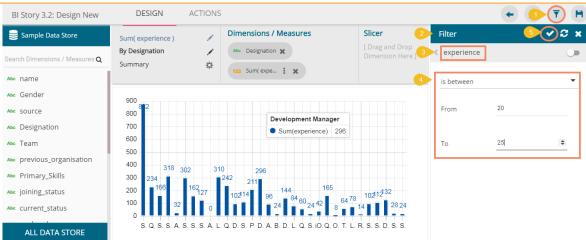
Note:

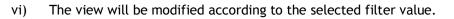
a. A 'Search' bar has been provided for the View Filter panel to search a Dimensions, Measures, and Time value from the available list.

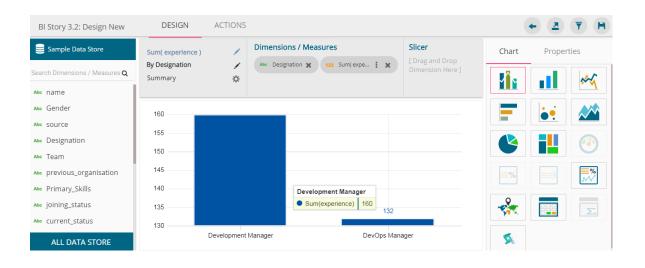
	← <u>3</u> ₹ ₩
Filter	<i>✓ €</i> ×
st	Q
joining_status	
current_status	

- 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'.









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'.



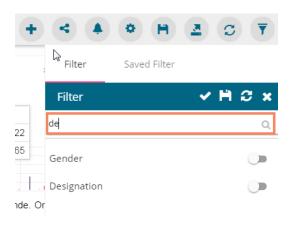
BI Story 3.2		Data Search		۹ +	<	• H 2 07
Sum(experi ♦ =	Sum(experi ♦ =	Sum_temp 🗢	≡	Sum(salary)	Filter	Saved Filter
By Primary_Skills	By Designation	By Team		Rs.84M By Team	Filter	5 ⊘ ∺∂×
				3	source	-0
	160			20M 20M 10M 0	Search	۹
	140 <u>132</u> 130 Day	BU10 BU4 BU6 BU7		BU 10 BU 4	Select All	
	Dev. Dev.	ų į			BDB	4 🗸
					Referral	
					CareerNet	
					Drive	
					IvyPeople	

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

BI Story 3.2		Data Search	
Sum(experi 🗢 🛛 🗮 By Primary_Skills	Sum(experi 🗢 🛛 🗮 By Designation	Sum_temp ♦ By Team	Sum(salary) Rs.28M By Team
	Data not available !	1986	≧ 30M 20M 10M 10M 1M 0 BU 10 BU 10 BU 7 BU 8 Teams

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'.



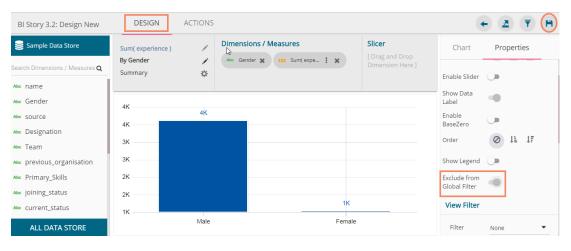
g. The selected filter value will be applied to all the saved views on the storyboard.

BI Story 3.2	Data Search	Q + < ▲ ♥ H <u>▲</u> Ø Ţ
Sum(experi By Primary_Skills Sum(experi By Designation 160 150 132 130 Dev. Dev. By Detail State St	Sum_temp By Team 300K BU 10 BU 4 BU 6 BU 8 C	Sum(salary) By Team By Team Bu 4 • Sum(salary) • Sum

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.

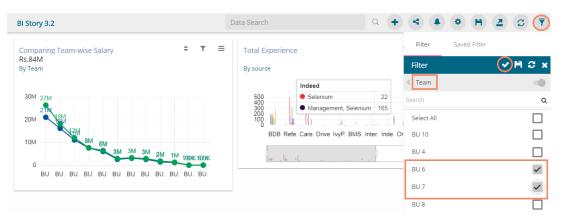
- i) Navigate to the 'Design' mode of a view you wish to exclude from the Global filter effect
- ii) Enable the 'Exclude from Global Filter' option from the 'Properties' tab
- iii) Click 'Save' option.



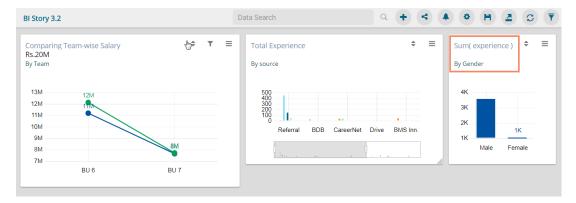
- iv) Users will be redirected to the Storyboard.
- v) Click the 'Filter' option and select a global filter value (in this case, it is BU 6 and BU 7



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.

+	۹ ۹	• •	a 🔹 🔽
5	Filter	Saved Filter	
Е	Filter		
3	Team		-0
	Search		Q
	Select All		
	BU 10		
	BU 4		
	BU 6		~
	BU 7		\checkmark
	BU 8		
	BU 11		



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

Save Filter	×
5 Filter Name *	
Filter by Teams	15/25
	CANCEL 6 SAVE

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

Filter 7	Saved Filter	
Filter by Tear	ms 🐠	
	APPLY	REMOVE

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.

BI Story 3.2: Design New	DESIGN	ACTIONS			← ≛	₹
Sample Data Store	Sum(experience)	1	Dimensions / Measures	Slicer	Chart Proper	ties
arch Dimensions / Measures Q	By Gender Summary	*	Abo Gender X 123 Sum 2 1	Dimension Here]	General Settings	
3 candidate_id 3 isjoined	1				Style	80
23 experience	4K 4K	4К	4К		Enable Slider 🔵	
3 previous_ctc 3 offered_ctc	зк ———				Show Data Label	
a expperyear_ctc	зк				Enable BaseZero	
usd_billing	2К				Order 🖉 🖡	↓₹
23 salary 23 monthly_salary	2К		1K	1К	Show Legend	
ALL DATA STORE		Male	Fe	male	Exclude from Global Filter	

- 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.



	Dimensions / Series Prope experience	
3	Aggregation	Sum
	Display Name	
	Series Type	<u>h.</u> ~
	Color	8
		CANCEL 4 APPLY

- v) Scroll down the Series Properties to get the 'Filter Options' \mathbb{T}
- vi) Click the 'Filter' icon to get all the available filter values.

Series Prope experience		×
Color	8	_
Data Label Colo	or 🔛	_
5 Filter Options	T	
	CANCEL	APPLY

- 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' Vicon.

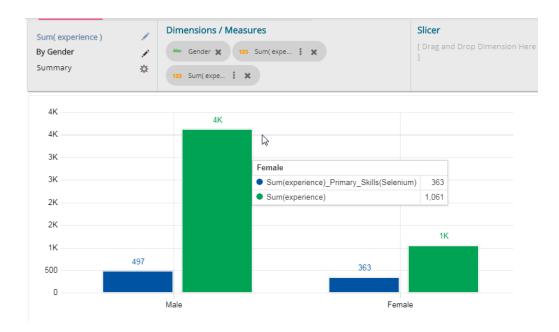
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*	Filter		<mark>₿</mark> ⊘2	×
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	Search			۹
	Select All			
	Selenium		7	~
	Java			
		CANCEL	APPL	Y



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

e	Series Prope experience	erties:	×
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	Data Label Colo	or	-
9	Filter Options	T	
			_
	_	CANCEL 10 APP	ΊLΥ

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



4.6.5. Custom View Filter

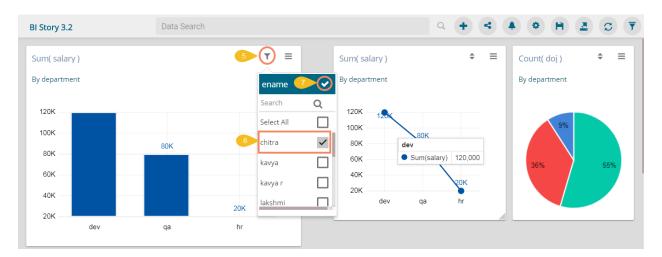
Users can access this filter option from the chart properties that will be reflected in a chart on the storyboard when the view is saved.

- 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.

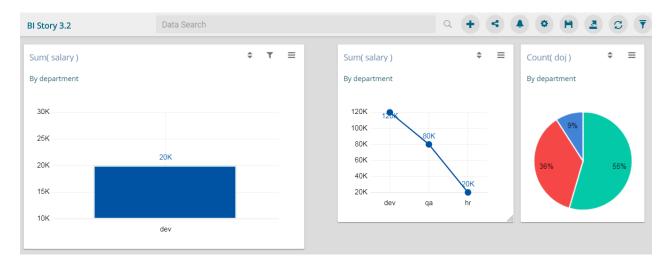


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ALL DATA STORE		dev	qa	hr	Primary Va	iue Axis

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

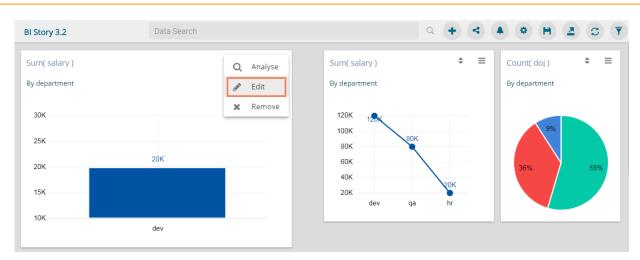


viii) The view will be customized as per the selected filter condition on the Storyboard.

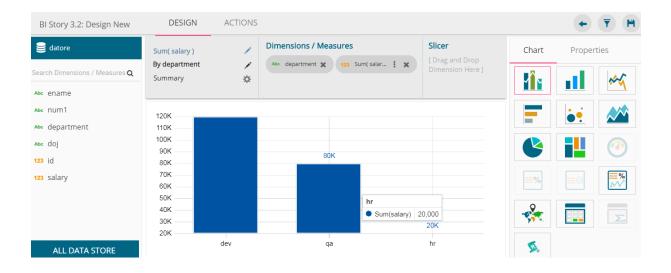


ix) Click 'Edit' option for the same view





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.

		🗖 Comments 🧭
BI Story 3.2	Data Search	4 + 4 + B Z C T
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- 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' 🗖

	Ø	Comments	20
Message			

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



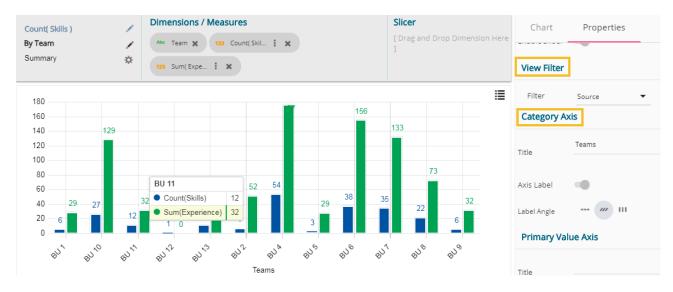


ii) View Filter

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)



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		0	_									_			

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.

Secondary	Valu	Je	Axi	s
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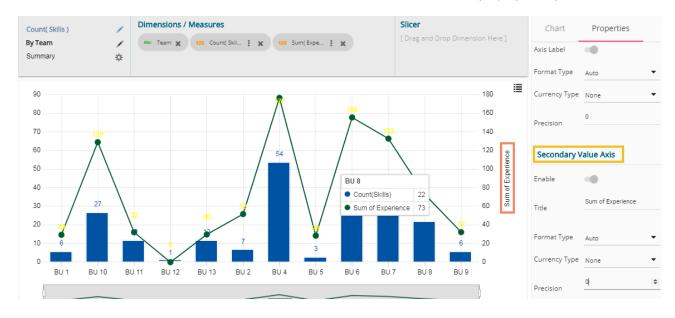
Enable

- 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'

Series Prope Experience	rties:	×	١
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Axis			
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Data Label Colo	r #ffff00		
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- e. Navigate to the 'Properties' tab
 - 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

f.

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
 - I. 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)

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v) Secondary Value Axis

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

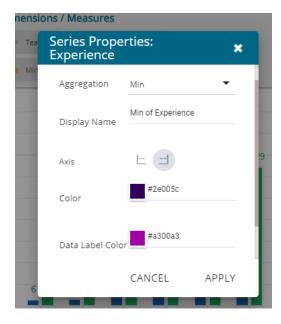
Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display same on the chart

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

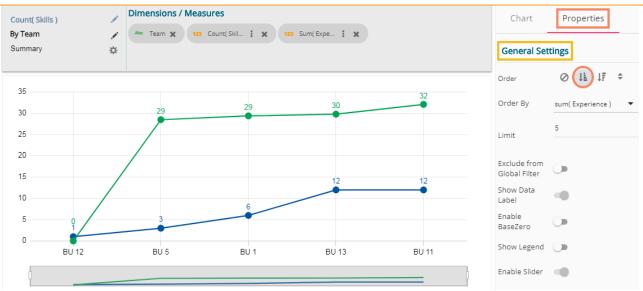
Example: A column chart representing the numeric score of students combined with the line chart corresponding proficiency score

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 dropdown 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)



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Count of Skills	15 10	/		Count(Sum(E)	Skills) 6 xperience) 29.4	12	Format Type Currency Type	Auto None
	5 0	1					Precision	0
		BU 12	BUS	Teams	BU 13	BU 11	Secondary \	/alue Axis
							Enable)

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' ^I 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'

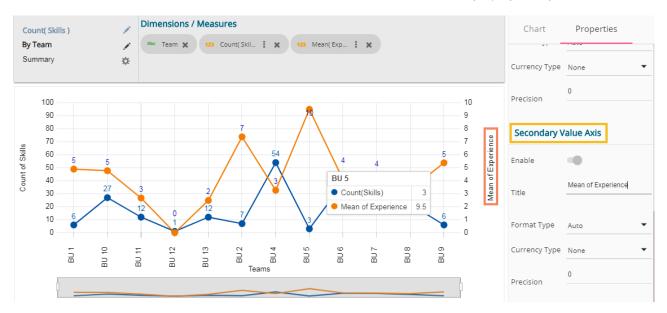
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e. Navigate to the 'Properties' tab

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.

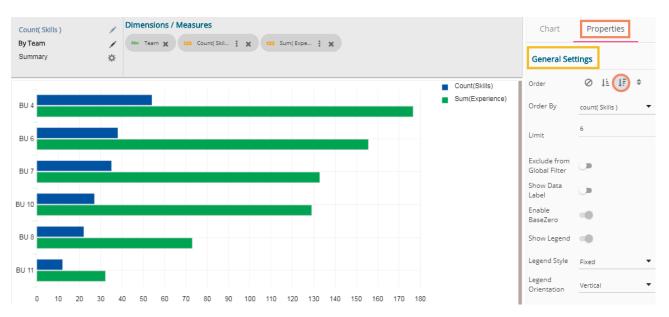
Properties:

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 dropdown menu.
 - 1. Vertical
 - 2. Horizontal

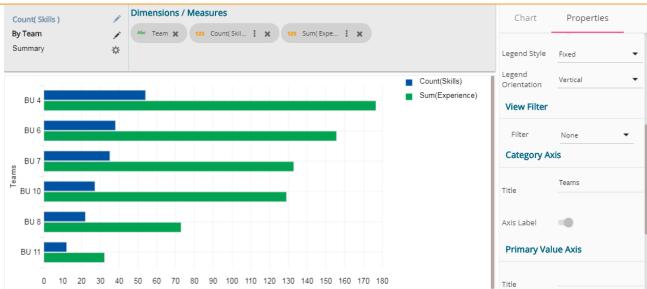


ii) View Filter

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)

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		Count(Skills)	Axis Label	•
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BU 7			Axis Label	
BU 10			Label Angle	/// 111
BU 8			Format Type	Auto
BU 11			Currency Type	None
20	10 30 K	8 8 1 8 ,8 ,8 ,9 ,9 ,9 ,9 ,8 ,8 ,8 ,8 ,8	Precision	0

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:

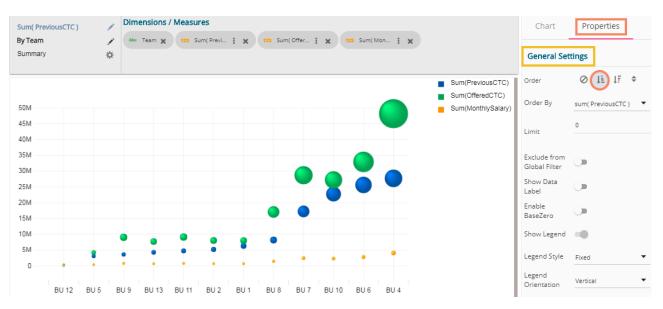
Three Data Series: If your data has three series each containing values then you can use bubble chart for better representation. The values determine the sizes of the bubble.



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 dropdown 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)

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	Sum(PreviousCTC)	Axis Label	•
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25M 20M		Axis Label	
15M 10M 5M	• • • • • •	Format Type	Auto
0		Currency Type	None
BU 12	BU5 BU9 BU13 BU11 BU2 BU1 BU8 BU7 BU10 BU6 BU4 Teams	Precision	0

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 dropdown menu.
 - 1. Vertical
 - 2. Horizontal



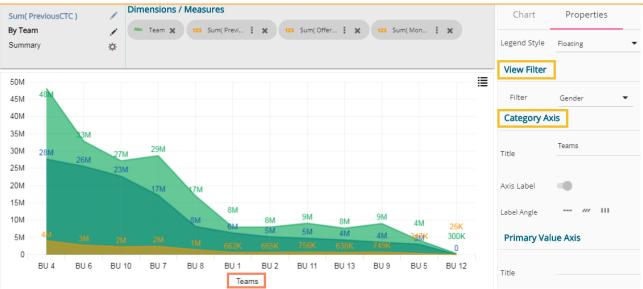
iii) View Filter

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)

um(PreviousCTC) y Team ummary	/ / \$	Dimen		Measure:	S	X 12	3 Sum(Offe	er I X	123 Sur	m(Mon	: ×	Chart Title	Properties
50M 45M 48M											I	Axis Label	/// 111
40M	м											Primary Val	ue Axis
30M - 28M		27M	29M						J 13			Title	CTCs & Mon. Sal.
25M		23M							Sum(Previo		4,235,000		
20M			17M	17M					Sum(Offere	,	7,650,000	Axis Label	-
15M								•	Sum(Month	lySalary)	637,501	AXIS Label	
10M				8M	8M	8M	9M	8M	9M			Format Type	Auto
5M <mark>4</mark> M 31				1M	6M 662K	5M 665K	5M 756K	4M 638K	4M 749K	4M 347K	25K 300K	Currency Type	None
0 BU 4 BL	6 B	U 10	BU 7	BU 8	BU 1	BU 2	BU 11	BU 13	BU 9	BU 5	BU 12	Precision	0
					Teams							1 CCISION	

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

Sum(MonthlySalary)	1	Dimensions / Measures	Chart	Properties
By Designation Summary	.∕ ☆	Abc Designation 🗙 123 Sum(Mon : 🗙	General Set	tings
			Style	e 🗿
			Order	⊘ 🕕 ↓፣ 🗘
		18% 7% 10%	Limit	8
		10%	Exclude from Global Filter	
		14%	Show Data Label	•
		13%	Max Slices	0
		14%	View Filter	

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'.



Sum(MonthlySalary) By Designation Summary \$		Chart Exclude from Global Filter	Properties
		Show Data Label	-0
	8%	Max Slices	
	9%	View Filter	
	13%	Filter	Source 🔻
	54%	Axis	
		Format Type	Million
	■ Senior Software Engineer Sum(MonthlySalary) ₹6M 54.23%	Currency Type	Rupees 🔻
		Precision	0

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.



Sum(MonthlySalary) 💦 🖉	Dimension / Measure	Slicer						Chart	Properties
By Designation 🖌 Summary	123 Sum(Mon 🚦 🗙	Abe Designation	Abc Designation 🗙					General Set	tings
		Sr Software De 497K	eveloper Designation		2:	Engineer 38K ware Develo	oper	Order By Limit Exclude from Global Filter	Designation 9
Software Er 1M	ngineer			eine contraite Dereisper thlySalary) 497,000 233K 158K			Show Data Label	•	
		Sr Big Data De 317K	veloper	iOS Dev 73K		Solutio 54K	So 40К	Gradient Start Color End Color	#2ECC71 #fbe983

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
- 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.

Sum(MonthlySalary) By Designation Summary	/ / *	Dimension / Measure	2	Slicer Abc Designation 🗙					Chart	Properties		
							Enginee 38K	er		Start Color End Color	#fbe983	
				Sr Software Developer 497K Designation Sum(MonthlySalary					View Filter	None 🔻		
Sof	ftware En 1M	gineer				ary) 497,000 233K 158K			Axis			
			Sr Dig Dat	ta Developer					Format Type Currency Type	Auto None		
					17K	iOS Deve 73K	el	Soluti 54K		So 40К	Precision	0

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:

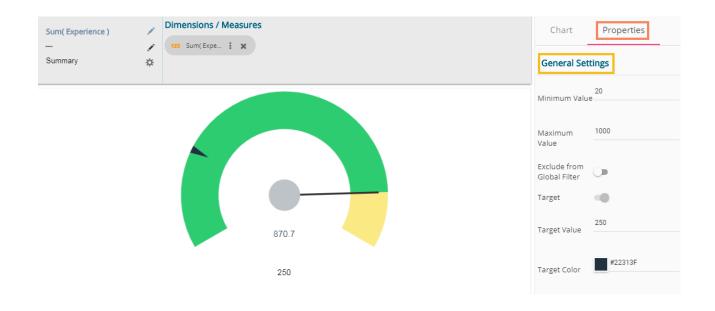
To monitor any performance that contains predefined ranges

Examples:

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

Properties:

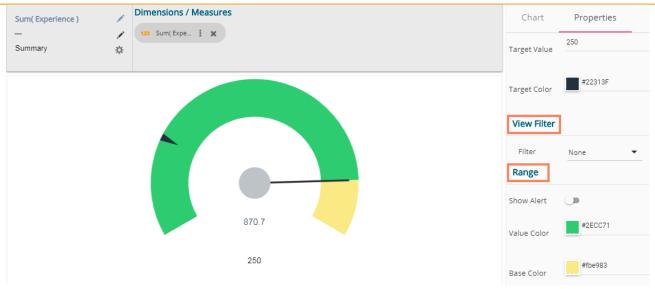
- i) General Settings
 - a. Minimum Value: Set a minimum value to be shown on the chart (It should be less than the maximum set value)
 - b. Maximum Value: Set a maximum value to be displayed on the chart (It should be more than the minimum set value)
 - c. Exclude from Global Filter: The view will be 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

Sum(MonthlySalary)	Dimensions / Measures	Chart	Properties
		General Sett	ings
		Label	Sum of Mon. Sal.
	17M Sum of Mon. Sal.	Label Color	#f57b00
		Label Font Size	18 🔻
		Value Color	#5200a3
		Value Font Size	22 🗸
		Exclude from Global Filter	
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.

Sum(MonthlySalary)	Dimensions / Measures	Chart	Properties
- /	123 Sum(Mon : *	Value Color	#a300a3
		Value Font Size	26 👻
	₹17M	Exclude from Global Filter	
	Sum of Mon. Sal.	View Filter	
		Filter	None
		Primary Valu	Je Axis
		Format Type	Million
		Currency Type	Rupees 🔻
		Precision	0

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)



BI Story 3.2: Design New	DESIGN	ACTIONS			← ▼ Ħ
Sample Data Store 2	Sum(experience)	Dimensions / Measures		Chart	Properties
Search Dimensions / Measures Q		123 Sum(expe 🗼 🗶			
Abc expband					
Abc id					
Abc candidate_id					
Abc isjoined			5K		
Abc expected_joining date			0		
123 experience				≡%	
123 previous_ctc					
123 offered_ctc				-2	
123 expperyear_ctc				• •	
ALL DATA STORE				B _R	

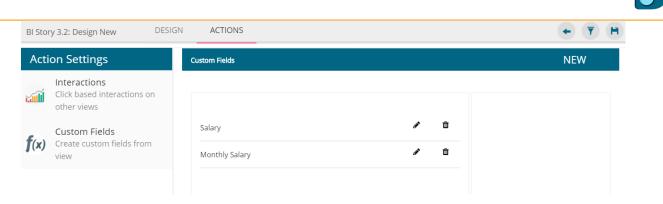
- iii) Navigate to the 'ACTIONS'
- Select the 'Custom Fields' option. Click 'NEW'. iv)
- V)
- vi) Provide a Title.
- vii) Set Value by using the value indicators.
- Click 'SAVE'. viii)

BI Story 3.2: Design New DESIG	N 3 ACTIONS	← ▼ ₱
Action Settings	Custom Fields	5 NEW
Click based interactions on other views		Title
Custom Fields f(x) Create custom fields from view		Salary
		27] ÷
		8 SAVE CANCEL

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

BI Stor	y 3.2: Design New DESIG	N ACTIONS		← ▼ Ħ
Acti	on Settings	Custom Fields		NEW
auli	Interactions Click based interactions on other views			
f (x)	Custom Fields Create custom fields from view	9 Salary	✓ ¹	

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

BI Story 3.2: Design New	DESIGN	ACTIONS			+ T	Ħ
Sample Data Store 2	Sum(experience)	1	Dimensions / Measures	Chart	Properties	
Search Dimensions / Measures Q			123 Sum(expe 1	Seconda	ry Value Properties	
Abc name						
Abc Gender				Secondary Value	Salary	•
Abc SOURCE				Font size	Monthly Salary	-
Abc Designation			5К	l		ŀ
Abc Team			560K	Format Typ	e Auto	•
Abc previous_organisation				Currency Ty	/pe	Ŧ
Abc Primary_Skills						
Abc joining_status				Precision	0	
Abc current_status						

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.



Chart	Properties
Rules	
When	Primary Value 🔹
IS	less than 🔹
	Secondary Value 🔹 🔻
Primary Color	#0000f5
Secondary Color	#d600d6
Trend Direction	Up 🔻
Trend Color	#00a300
REMOV	E
ADD	APPLY

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

BI Story 3.2: Design New	DESIGN	ACTIONS					+ T H
Sample Data Store 2	Sum(experience)	1	Dimensions / Measures			Chart	Properties
Search Dimensions / Measures ${f Q}$		1	123 Sum(expe 😧 🗶			Rules	
Abc name						When	Primary Value 🔹
Abc Gender						IS	less than
Abc SOURCE							
Abc Designation					5K		Secondary Value 🔻
Abc Team				560K	*	Primary Color	#0000f5
Abc previous_organisation						· · · · · · · · · · · · · · · · · · ·	
Abc Primary_Skills						Secondary	#d600d6
Abc joining_status						Color	_
Abc current_status						Trend Direction	Up 🔻
ALL DATA STORE							#00a300

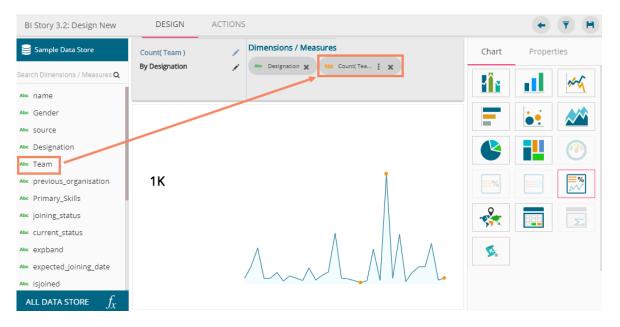
xiv) Users can set multiple '**Rules'** by configuring the required fields as described above; the KPI Tile Visualization will reflect the important changes as per the selected rule.



BI Story 3.2: Design New	DESIGN	ACTIONS			+ T H
Sample Data Store 2	Sum(experience)	1	Dimensions / Measures	Chart	Properties
Search Dimensions / Measures Q		/	za sumi expe : X	REMOVE	
Abc name				When	Primary Value
Abe Gender				IS	greater than
Abc SOURCE				5	greater than •
Abc Designation			5K		Secondary Value 🔹
Abe Team			ЗК ¥		#ff8000
Abc previous_organisation				Primary Color	_
Abc Primary_Skills				Secondary	#ffff00
Abe joining_status				Color	
Abe current_status				Trend Direction	Down
Abc expband					Down
Abc id				Trend Color	#ff0000
Abc candidate_id					
Abc isjoined				REMOVE	-
Abs expected joining date					
ALL DATA STORE				ADD	APPLY

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.



Count(Team)	Chart Properties
By Designation X Designation X 123 Count(Tea : X	
	General Settings
	Label Designation
	Label Color
1К	Label Font size 20
Designation	Exclude from Global Filter
	View Filter
	Filter Gender 💌
	Chart Properties

- 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

Count(Team) By Designation	Dimensions / Measures Anc Designation x 123 Count(Tea : x	Chart Chart Prope	Properties
		Line Color	#006488
		Fill Color	#86dff9
		Value Prope	rties
1K		Font size	22 •
Designation		Format Type	Auto 🔻
		Currency Type	None 🔻
		Precision	0
		Value	Aggregated 💌
		Value Color	#000000



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:

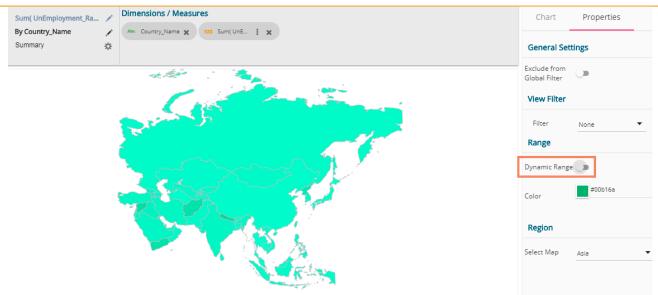
- i) Range
 - a. Dynamic Range: Enable or disable the dynamic range.
 - b. Min Color
 - c. Max Color
- ii) Region
 - a. Select Map: Select a region using the drop-down menu.

Sum(UnEmployment_Ra / Dimensions / Measures By Country_Name / Iza Sum(UnE : *	Chart	Properties
Summary A	General Set	tings
Salar and A	Exclude from Global Filter	
	View Filter	
	Filter	None 🔻
	Range	
	Dynamic Range	-
	Min Color	#f89406
	Max Color	#00b16a
	Region	
	Select Map	WORLD

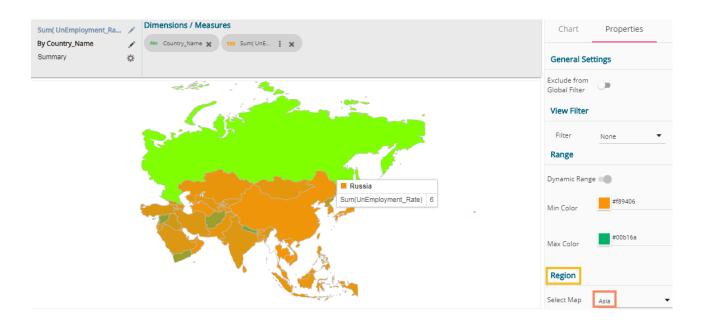
Note:

- 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

Sum(experience) By name	1	Dimensions / Meas	Gender 3	Abc Designation 🗶	Abc Team 🗶 123 Si	um(expe 🚺 🗙	Chart	Properties
Summary	\$	123 Sum(mon	X 123	Sum(usd X			General Set	
Name	Gender	Designation	Team	Sum(experience)	Sum(monthly_salary)	Sum(usd_billing)	Order	(◎) tī ti ÷
Abhay	Male	Senior Software Engineer	BU 4	15.20	300.00K	10.40K	Font Size Font Style	A A A B I U
Adarsh Srivastava	Male	Software Engineer	BU 4	10.50	250.00K	9.00K	Tone Style	$D I \underline{z}$
Ahsan	Male	QA Manager	BU 6	165.00	1.60M	44.00K	Font Color	#5200a3
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	Background Color	#99ffcc
Akshay Nimgaonkar	Male	Senior Software Engineer	BU 4	11.60	193.30K	8.80K	Exclude from Global Filter	
Alok	Male	QA Architect	BU 8	81.90	1.50M	34.20K	View Filter	
Amit Kumar Soni	Male	Senior Software Engineer	BU 11	28.00	597.30K	18.20K	Filter	None 🔻

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



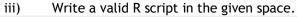
Sum(experience)	Dimensions / Measures	Chart Properties
	123 Sum(expe i X 123 Sum(usd i X 123 Count(Tea i X 123 Count(Sou i X	General Settings
Measures	Summary	Measure Measures
sum(experience)	4.70K	
sum(monthly_salary)	84.00M	Summary Summary Description
sum(usd_billing)	2.70M	Exclude from
count(Team)	12.00	Global Filter
count(Designation)	32.00	View Filter
count(source)	12.00	Filter None 🔻

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

Test Story: Design New	DESIGN				+	T H
Se Mpg	Untitled	R Script		Chart	Propert	ies
Search Dimensions / Measures Q				M	лI	~
Abc manufacturer						
Abc model						
Abc trans						
Abc drv						
Abc fl						
Abc class				≡ %		₩%
Abc NO						
123 displ				-2		-5
123 year				, ,		
ALL DATA STORE	[Sel	ect Dimension or Measure to Visualize Data	a]	S .		



Test Story: Design New	DESIGN		(₹) (₹)
Se mpg	Untitled	title='Bubble chart')	Chart Properties
Search Dimensions / Measures Q		g + geom_jitter(aes(col=manufacturer, size=hwy)) + geom_smooth(aes(col=manufacturer), method="lm", se=F)	
Abc manufacturer		K	
Abc model			
Abc trans			
Abc drv			
Abc f			
Abc class			≡%
Abc NO			
123 displ		لسنسلها	
123 year			
ALL DATA STORE	[S	elect Dimension or Measure to Visualize Data]	S.



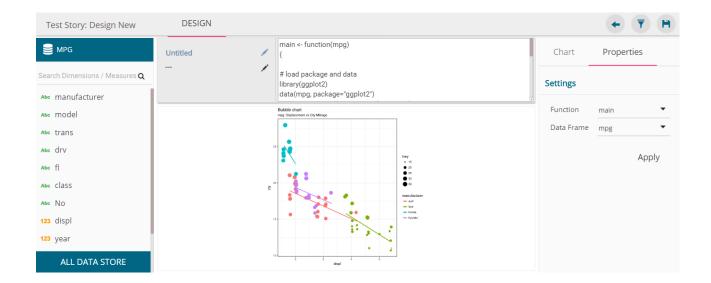
T H

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'

Э мрд	Untitled	main <- function(mpg) {	Chart	Properties
Search Dimensions / Measures Q		<pre># load package and data library(ggplot2) data(mpg, package="ggplot2")</pre>	Settings	
Abc manufacturer			x .	
Abc model			Function	main 🔻
Abe trans			Data Frame	mpg 👻
Abc drv				
Abc fl				Apply
Abc class				
Abc NO				
123 displ				
123 year	I Cala		Detail	
ALL DATA STORE	[Sele	ct Dimension or Measure to Visualize	e Data j	

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



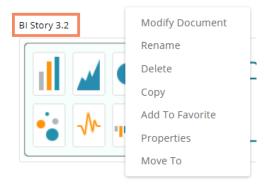
6. Options

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.'

Modify Story]	×
1 Title	BI Story 3.2	
2 Description	Description	1
	Close 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.'



Rename	>	× rd
1 New Name	BI Story 3.2	
	Close Save	y:
		-1

The story document name will be changed successfully. V)

✓ My Documents			Search × 🔳 🏢
			11 Order By: None
Destination Folder Business Stories	Published Dashboards	Sample Folder	BI Story Document

6.3. Deleting a Business Story i) Select a story document

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

Delete		×
Do you want to Delete selected File ?		
	Cancel	< e

The selected story document will be removed. vi)

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.
- Click 'Settings' 🌣 for options. ii)
- Select 'Copy.' iii)

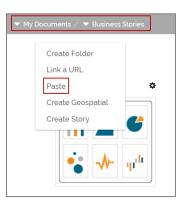


BI Story Document	¢
Modify Document	
Rename	
Delete	ĥ
Сору	
Add To Favorite	
Properties	
Move To	

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.'

ies	Paste			×
	Name	Copy of BI Story Document		
			Close 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.'

▼ Favorites	Copy of Sub-Folder1	
	Copy of Sub-Folder1	BI Story Document



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

▼ Favorites		
	Copy of Sub-Folder1	
	Copy of Sub-Folder1	BI Story Document

- 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.



	Properties		×
l	BI Story		_
l	Properties Share	e With Exclude User Copy To	ni
-	Created By:	nidhijoshi	- 1
	Kind:		
l	Where:	My Documents->Business Stories	
ł,	Created:	Fri Jul 14 2017 17:40:11 GMT+05:30 (India Standard Time)	
	Modified:	Fri Jul 14 2017 17:40:11 GMT+05:30 (India Standard Time)	
l	Version:	3.0.0	
l	Mobile View:		
l	Open Document Link:	http://182.75.180.61:8080/app/opendocument.html? docid=82214912&token=	_
l	Upload Image:	Browse Max 100kb	_
l	Description:		

- **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.'



ľ	Properties	×
l	BI Story	
	Properties Share With Exclude User Copy To	
Z	User Group	
	User List Selected User List	
	Priyanka123 dcdc Raz NewUserAD userMang12 usermang bib minal cappmlast release Ramoji fnlchkuser56546	
	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.'



ľ	Properties >	×
l	BI Story	
	Properties Share With Exclude User Copy To	n
2	User List Selected User List	
2	RanjitKrishnan Gunjan BizViz Admin ranjit.krishnan BI Team manirathinavelu Ajith	
	nidhijoshi UserTest EnterpriseUserTest	
l	admin adminn adminz8july ETL DEV User shyam	
	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.'



ľ	Properties		×	
l	BI Story			
	Properties Share With	Exclude User Copy To		na
2	User List	Selected User List		
-	Priyanka123 dcdc Raz NewUserAD userMang12 bib minal cappmlast release Ramoji finlchkuser56546 Dhiraj RegUser akumar	↓ usermang		
		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.

	fove To	×
L	My Documents	
Ŀ	Destination Folder	
	Business Stories	
	Published Dashboards	
	Sample Folder	
	Move	



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 **2** 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.