Administration Guide

Platform R-3.5

Contents

1. About this Guide

1.1. Document History

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

Product Version	Date (Release date)	Description
Big Data BizViz Platform 1.0	June 9th, 2015	First Release of the document
Big Data BizViz Platform 2.0	February 18th, 2016	Updated document
Big Data BizViz Platform 2.1	May 11th, 2016	Updated document
Big Data BizViz Platform 2.5	November 9th, 2016	Updated document
Big Data BizViz Platform 2.5.1	January 3rd, 2017	Updated document
Big Data BizViz Platform 2.5.3	March 16th, 2017	Updated document
Big Data BizViz Platform 3.0	August 31st, 2017	Updated document
Big Data BizViz Platform 3.0	October 31st, 2017	Modified document
Big Data BizViz Platform 3.2	February 2nd, 2018	Updated document
Big Data BizViz Platform 3.5	April 15th, 2018	Updated document

1.2. Overview

This guide covers:

- Introduction and steps to use the Big Data BizViz Platform
- Configuration details for the Big Data BizViz Platform and its Plugins
- Administrative Tasks and Features

1.3. Target Audience

This guide is aimed at system administrators who manage the Big Data BizViz Business Intelligence Platform.

2. Introduction

2.1. Introducing the Big Data BizViz Platform

Big Data BizViz offers a unique BI platform that can give users better knowledge and insight into their business to make informed decisions. The BDB Decision Platform has multiple Big Data connectors that makes it both exclusive and interesting tool. It allows its users to create web services based on a verity of database connections. The integrated dashboard designer can then utilize the generated web service. Users are enabled to provide descriptive, diagnostic, predictive, and prescriptive analytics in the cloud, on mobile devices, and on-premise.

Customers having multiple branches can efficiently manage data by creating a single space for each branch within this platform. They can also view the information collected from multiple branches via dashboards and BI Stories. They can use ETL and Predictive Analysis to prepare and organize their existing data to gain actionable insight into their business.

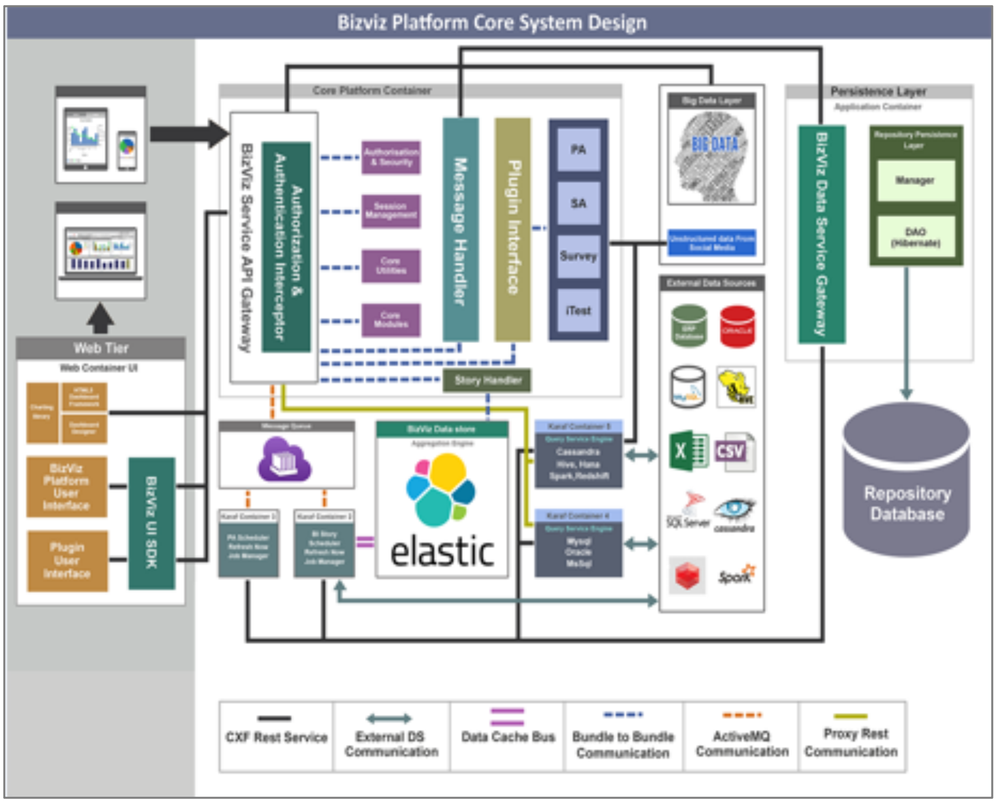
2.2. Prerequisites and Supported Devices

- A browser that supports HTML5

- Operating System: Windows 7
- Basic understanding of the BizViz Server

3. Architectural Overview

The Big Data BizViz Platform has a highly scalable, n-tier client-server architecture that serves users via mobile devices, web browsers, and desktop client software.

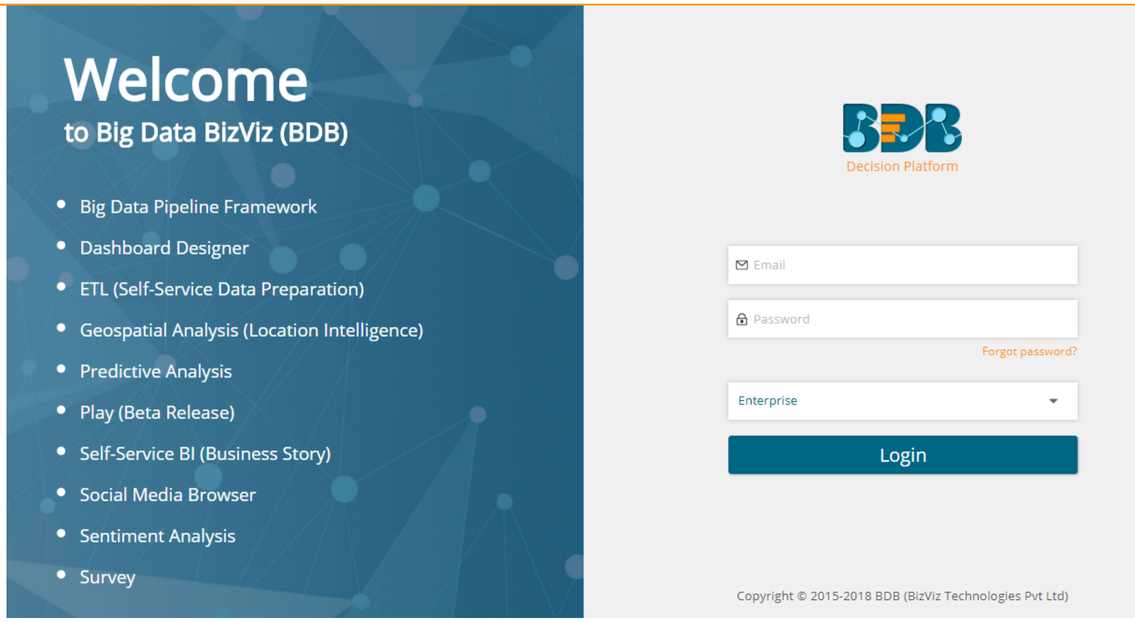


4. Getting Started with the BDB Platform

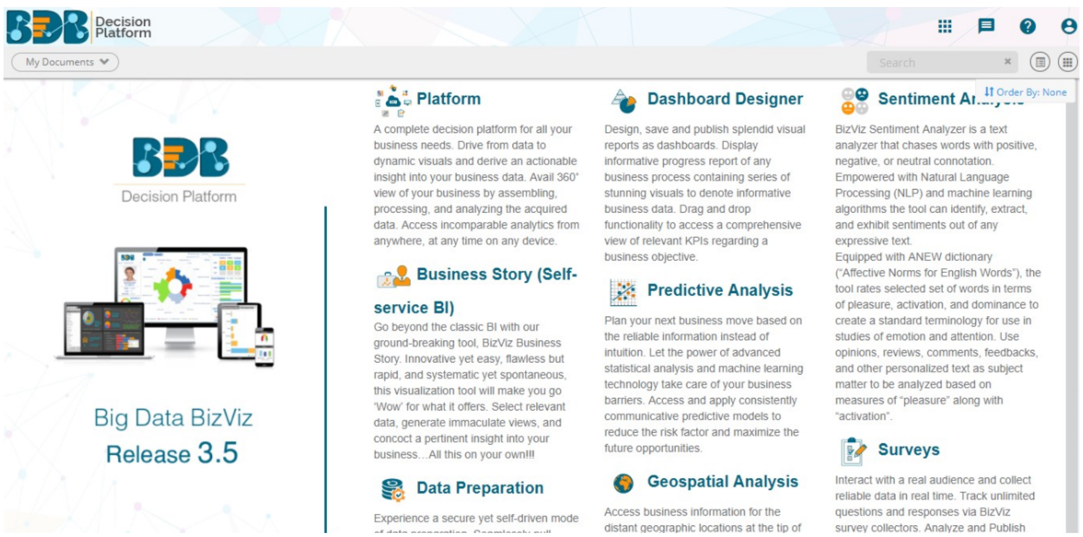
4.1. Accessing the BDB Platform

This section explains how to access the BizViz Platform and variety of plugins that it offers:

i) Open BDB Enterprise Platform Link: http://apps.bdbizviz.com/app/
ii) Enter your credentials to log in
iii) Click the ‘**Login**’ option



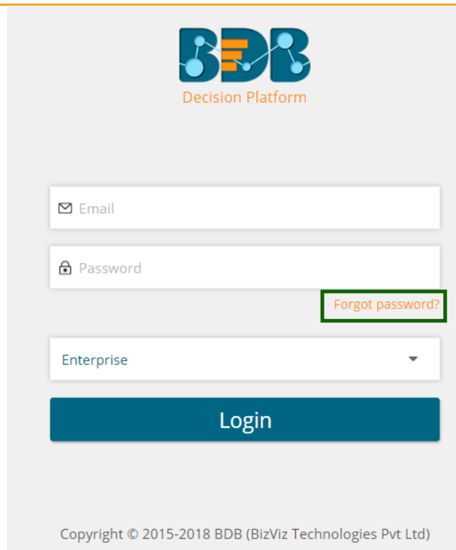
iv) Users will be redirected to the BDB Platform home page



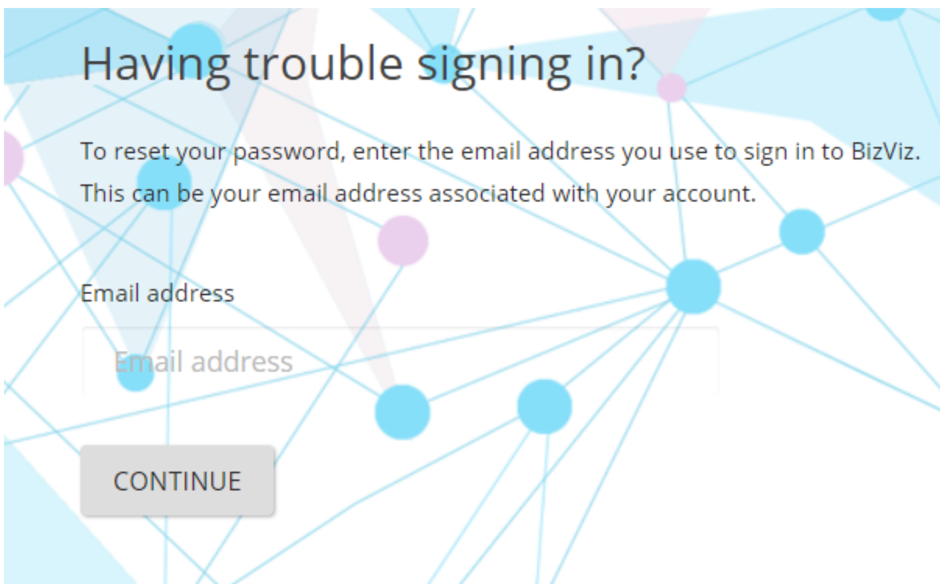
4.1.1. Forgot Password Option

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

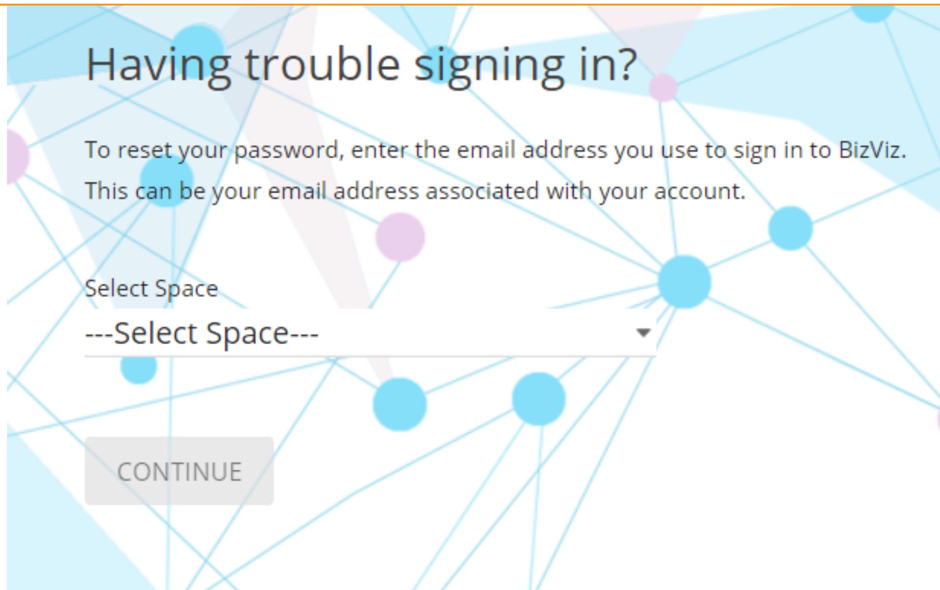
i) Navigate to the Login page
ii) Click '**Forgot Password?**' option



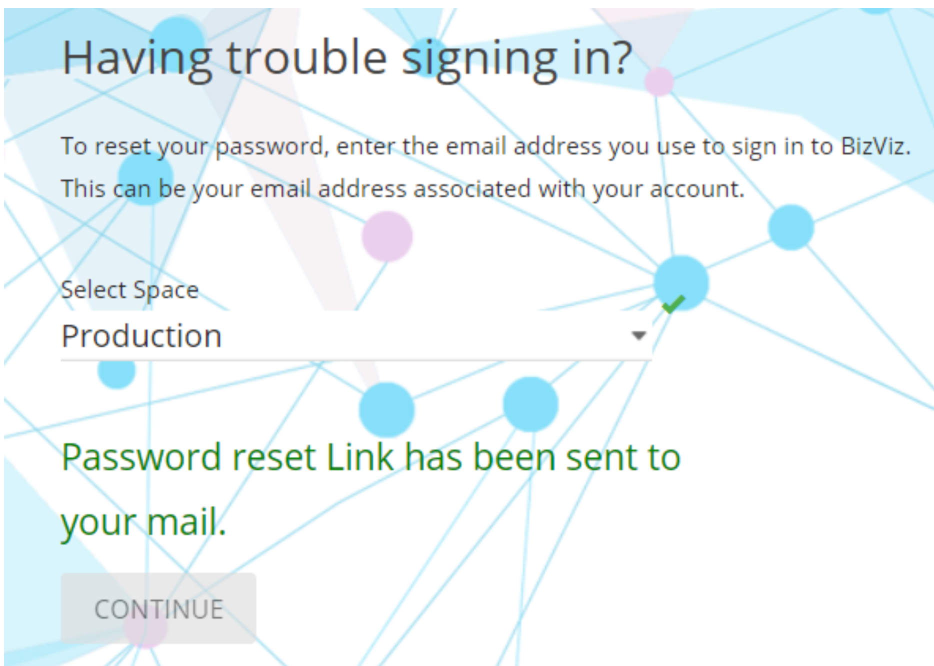
iii) Users will be redirected to a new window
iv) Provide the email id that is registered with BDB to send the reset password link
v) Click '**Continue**' option



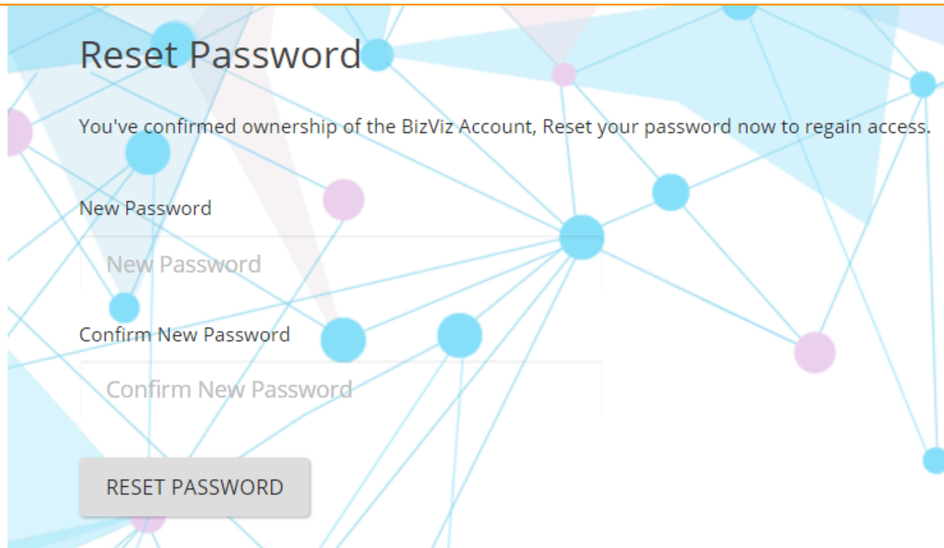
vi) Users will be redirected to select a space and click the '**Continue**' option



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



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



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

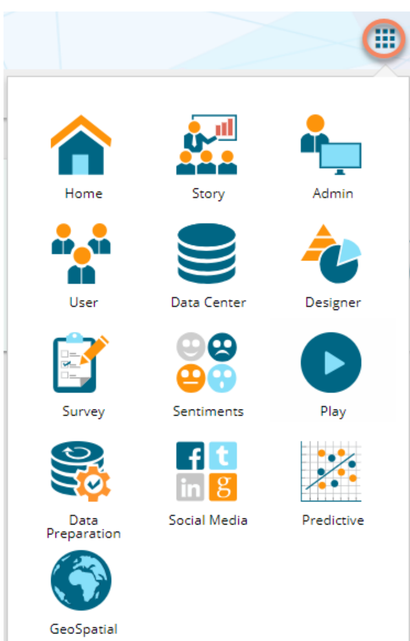
4.2. Platform Homepage

The BDB Platform Home Page redirects users to access various applications and features within the platform. It also displays information about a user and the documents accessible to the user.

4.2.1. Apps Menu

The Apps Menu button displays all the available applications.

i) Navigate to the Platform homepage
ii) Click the ‘**Apps**’ icon
iii) All the available plugin applications will be displayed



Note: Users can select and open various applications by using the specific App icon provided under the ‘**Apps**’ menu window.

4.2.2. Notification Option

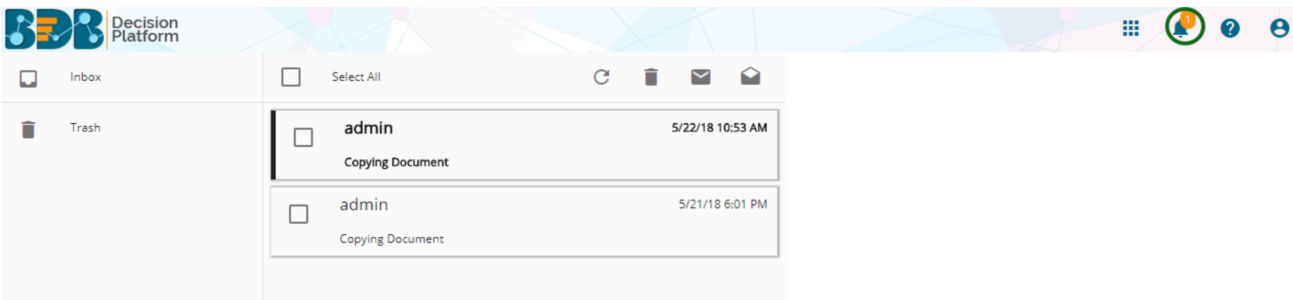
The Notification feature is a way to send and receive messages between people and from processes to people.
By default, Inbox and Trash folders are provided.

i) Navigate to the Platform home page

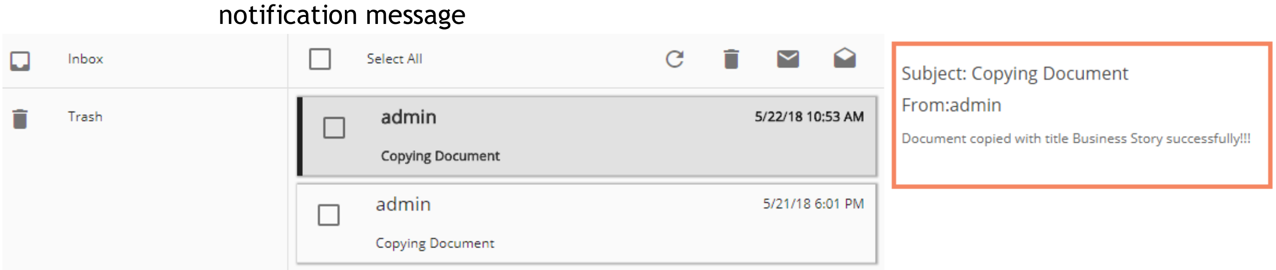
ii) Click the ‘**Notification**’ option

iii) Users will be redirected to the notification ‘**Inbox**’ page (by default)

(Unread Notifications are indicated using numbers on the Platform homepage will cover the Notification icon.)



iv) Click on a notification message from the ‘Inbox’ folder will display details of the selected notification message



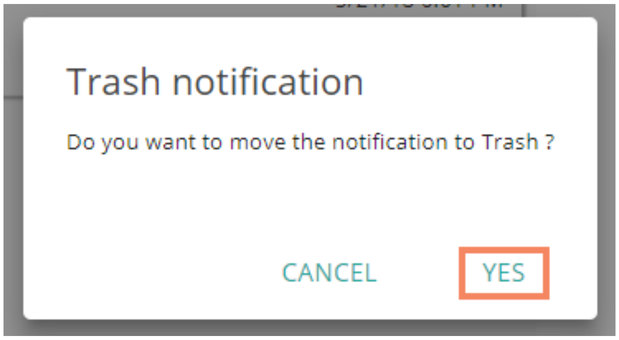
Icons provided on the inbox window:

Icons	Name	Task Assigned
	Trash	Displays messages in a list of all the deleted messages
	Refresh	Receives the latest messages
	Trash Message	Moves the selected messages into the Trash folder
	Unread	Marks messages status as ‘**unread**’
	Read	Marks messages status as ‘**read**’

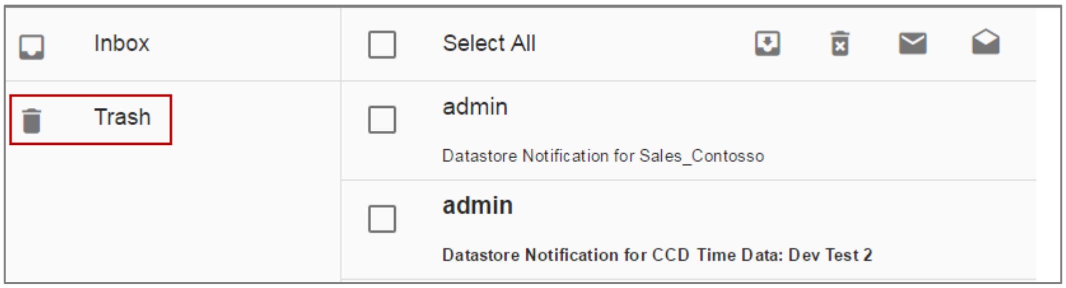
v) Click the '**Trash**' icon from the header panel of the notification inbox

vi) A message window will be displayed to confirm the action of moving the selected notification to Trash.

vii) Click '**YES**' to move the notification to Trash.



viii) Click to open the list of messages from the '**Trash**' folder



ix) Click on a message from the '**Trash**' folder will open the message details

Icons provided on the Trash-box window:

Icons	Name	Task Assigned
	Trash	Displays messages in a list of all the deleted messages
	Move to Inbox	Moves the selected messages to the inbox
	Delete Forever	Removes the selected messages permanently
	Unread	Marks messages status as '**unread**'
	Read	Marks messages status as '**read**'

Note: Alert messages will be displayed while performing the following actions:

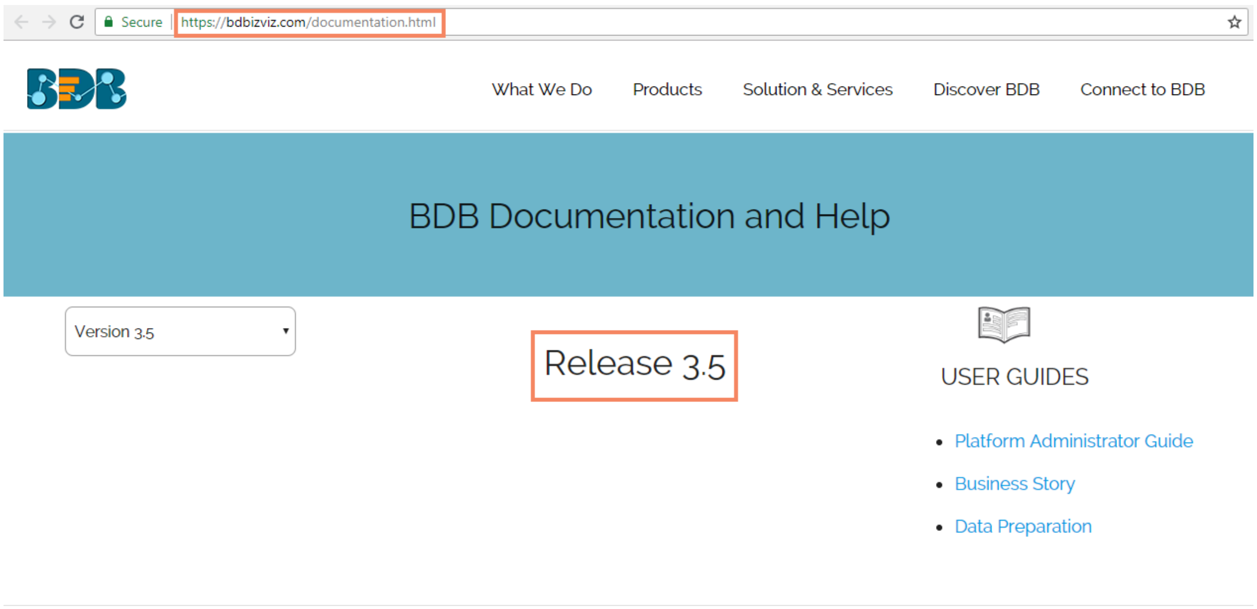
a. Moving messages from inbox to trash
b. Recovering them from trash to inbox
c. Marking messages status as '**read**' in the Inbox/Trash

d. Marking messages status as ‘**unread**’ Inbox/Trash

4.2.3. Help Menu

Users can access the help documents via this menu.

i) Navigate to the Platform home page
ii) Click the ‘**Help**’ icon from the header panel
iii) Users will be redirected to the ‘BDB Documentation and Help’ page of the BDB website



4.2.4. User Menu

Users will be directed to edit basic information, set preferences, change the password, set API token access, and mobile device by using the ‘**User Menu**’ option provided on the Platform home page.

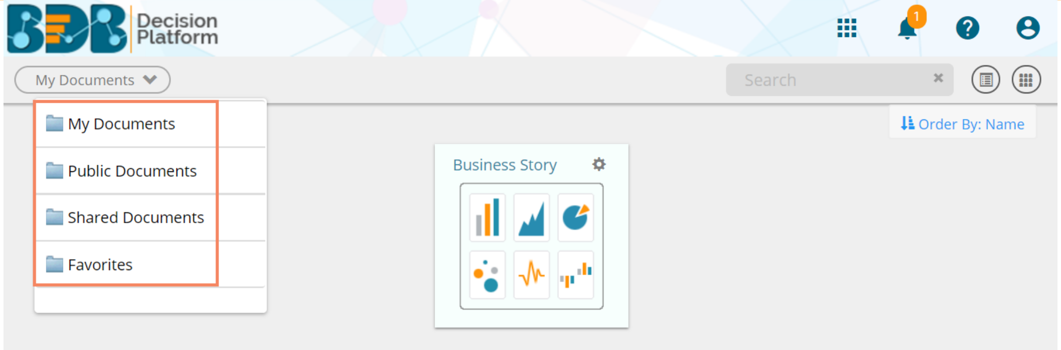
i) Navigate to the Platform home page
ii) Click the ‘**User Account**’ option
iii) Two options will be displayed:
   a. **My Account**: Displays account details of the logged in user
   b. **Sign Out**: Helps to sign out from the Platform

Note: ‘**My Account**’ and ‘**Sign Out**’ options are explained under topic no.9 and 11 of this document. Please refer the same to get more information on these options.

4.2.5. Available Documents

The Home page displays the following documents:

1. My Documents
2. Public Documents
3. Shared Documents
4. Favorites



- **My Documents**
  - '**My Documents**' lists all the documents created by the user or assigned to the user
  - The documents are displayed as thumbnails

- **Public Documents**
  - The '**Public Documents**' folder is available to all users
  - Users can view documents shared by others

- **Shared Documents**
  - The documents shared by users will be part of the '**Shared Documents**'
  - Users can not edit or delete the shared documents

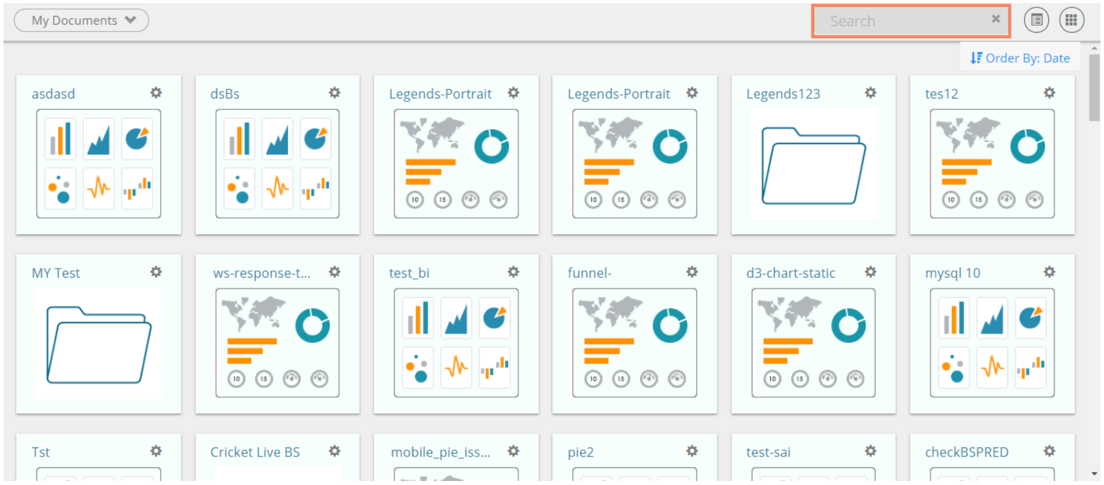
- **Favorites**
  - The documents marked as a favorite by a user are saved under '**Favorites.**'
  - The documents in frequent use by the users are a part of Favorites
  - Users can remove a document from '**Favorites**' (if desired)

Note: '**My Documents**' will open by default while opening the BDB Platform homepage.

4.2.6. Navigation Bar

Users can search for a specific document by typing the title of the document in the Navigation bar.

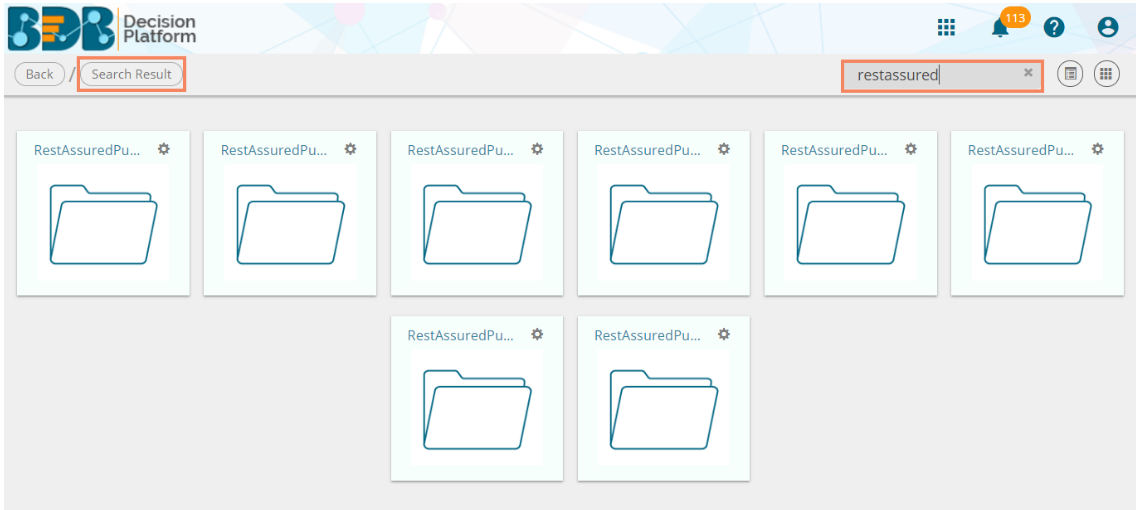
i) Navigate to the platform homepage.



ii) Type the title of the document in the '**Search**' space.
iii) User 'ENTER' key.

iv) The searched document will be displayed as 'Search Result.'

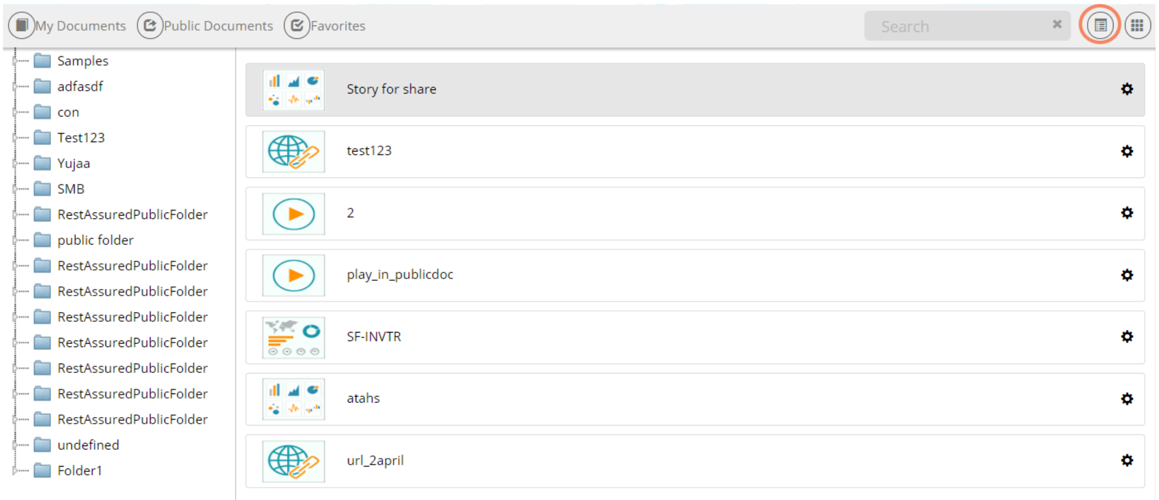
E.g. The following image displays all the documents containing the word **"RestAssured"** in the title:



4.2.7. Displaying and Ordering Documents

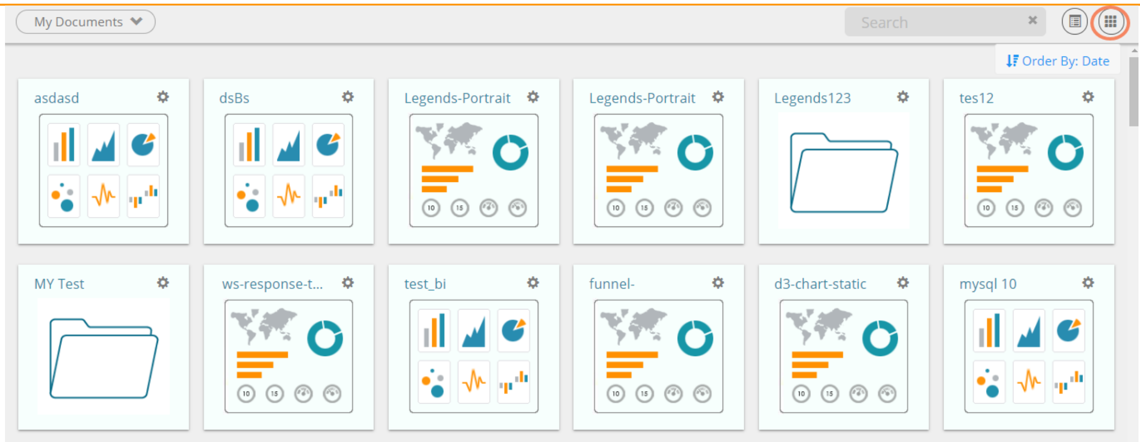
The following features are provided to arrange and display various platform documents:

- **List Panel:** Click '**List**' icon to display all the documents in the tree structure.



Note: The '**List View**' does not display documents stored in the '**Shared Documents**' folder.

- **Grid Panel:** Click '**Grid**' icon to display all the documents in a grid view (it is the default view to display platform documents).

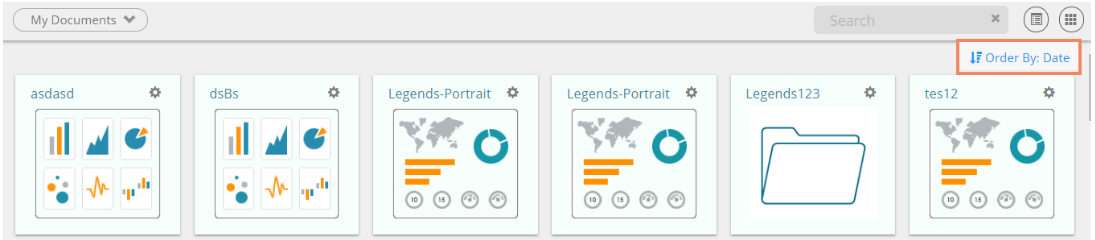


- **Document Ordering:** This feature allows users to sort documents by selecting a specific order on the platform homepage.

The following options are provided for the 'Order By' feature:

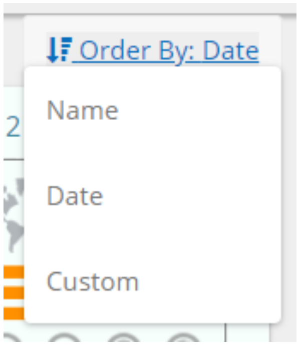
1. **Alphabetical/Name (Ascending and Descending)**
2. **Date (Ascending and Descending)**
3. **Custom**

i) Click '**Order By**' option on the platform homepage



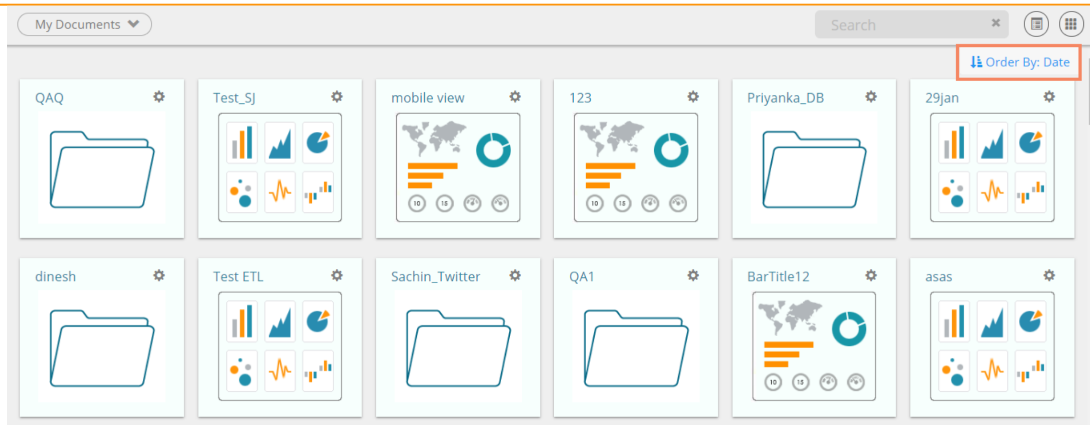
ii) A context menu opens with the following sorting options:

a. Name: Users can sort documents by their name in ascending or descending order
b. Date: Users can sort documents by date by using this option
c. Custom: Users can manually drag and change the order of documents by selecting this Option



iii) Select an option from the context menu

iv) The platform documents will be sorted as per the selected order, E.g., The following image shows documents categorized by date



Note:

a. Platform homepage will display the saved documents as **'My Documents'** by default.
b. A **'Search Bar'** has been provided on the Platform homepage to search the specific folders and files.
c. Documents will be sorted in ascending order by default; users need to click on the 'Name' option again to sort the documents in the descending order.

5. Administration

The entire BizViz Platform can be managed through this module. It controls all the general and user-specific configuration settings for various plugin applications provided in the platform.

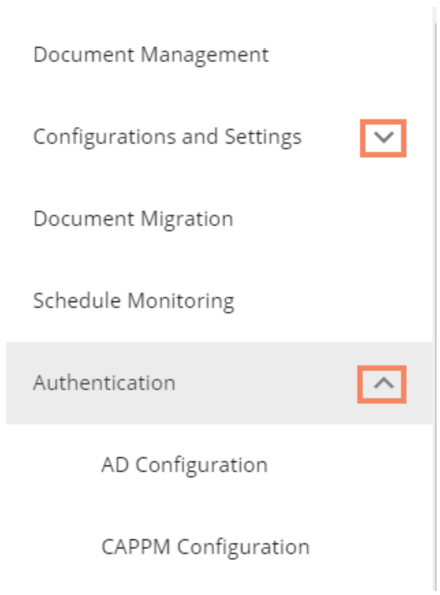
5.1. Accessing the Administration Module

i) Navigate to the Platform home page
ii) Click the **'Apps'** menu icon
iii) A menu containing all the plugins will be displayed
iv) Select and click the **'Admin'** plugin

v) Users will be directed to the '**Administration**' page

vi) Various administration options will be displayed on the left side of the page

vii) Click the drop-down sign provided next to the concerned admin option to display the sub-categories for the same. By clicking the drop-down sign, it will be changed into the upward sign as displayed in the below given image:



5.2. Administration Options

Configuration settings for the various platform plugins are covered under this section.

5.2.1. Document Management

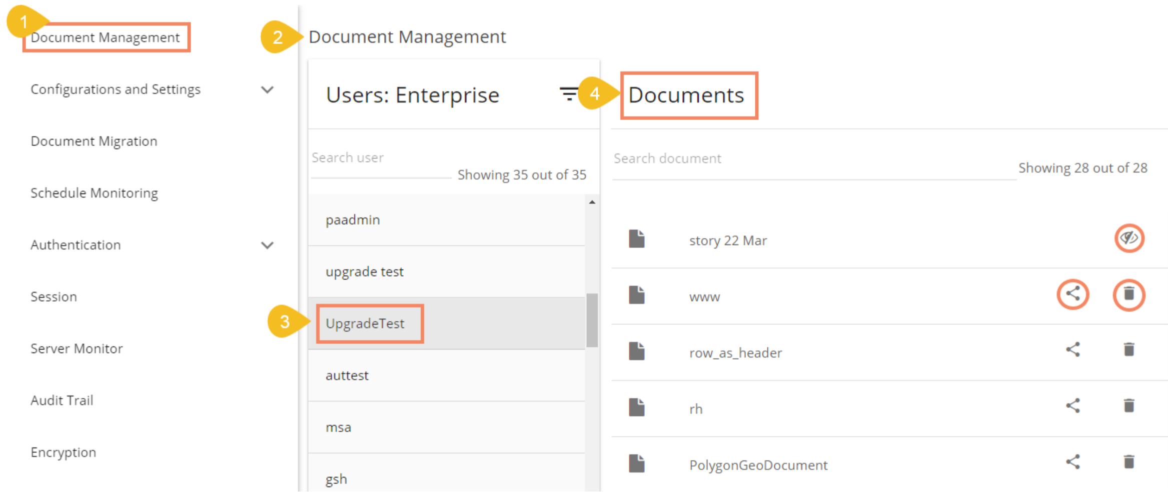
This feature allows an administrator to view all the documents created by a specific user. The user specific documents can be shared or deleted by the administrator via this module. The Document Management tile will be displayed in the Administration module.

i) Click '**Document Management**' option from the Administration Page

ii) Users will be directed to the ‘**Document Management**’ window

iii) Select a user from the ‘**Users**’ list

iv) A list of documents created by that user will be displayed



Icon	Name	Description
	Share Document/ Exclude User	Redirects the user to share the selected document using ‘**Share With**’ option provided under Properties (When a document is not shared)
	Delete Document	Removes the document from the list
	Exclude from This Document	Excludes the user from the right to access the document (in case if a document is shared with user/s)

Note:

a. The administrator must exclude users from a shared document before deleting the document.

b. Share/Exclude options can be applied only to the files, the folders available under the ‘**Document Management**’ module cannot be shared/excluded.

5.2.2. Configurations and Settings

This section covers configuration details for various platform plugins.

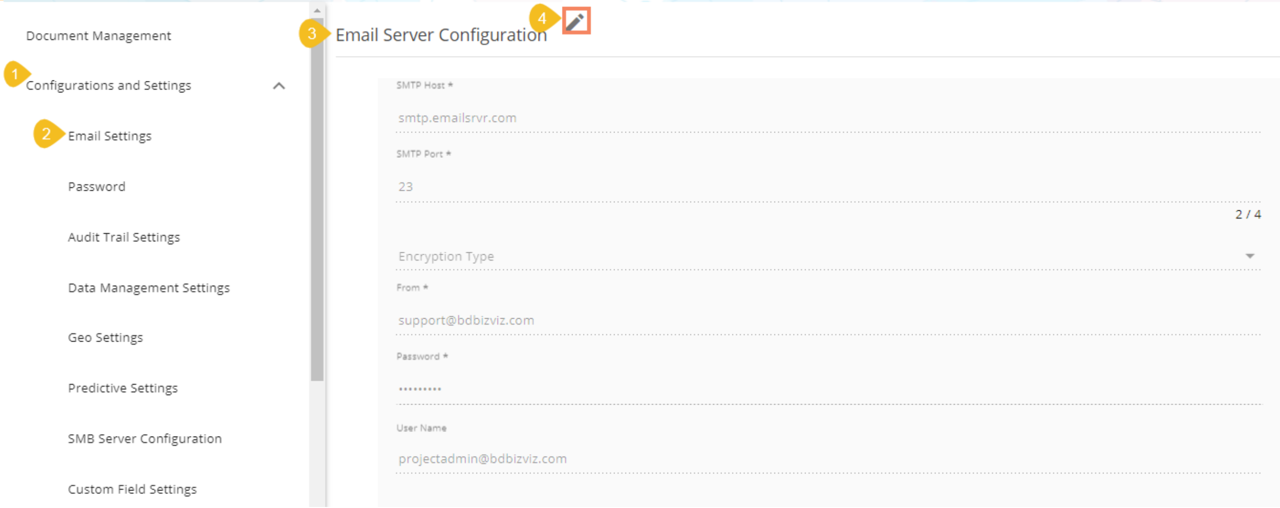
5.2.2.1. Email Settings

i) Click ‘**Configuration and Settings**’ from the Admin options list

ii) Click ‘**Email Settings**’ from the list of configuration options available inside the ‘Configuration and Settings’ option

iii) The ‘**Email Server Configuration**’ window will be displayed

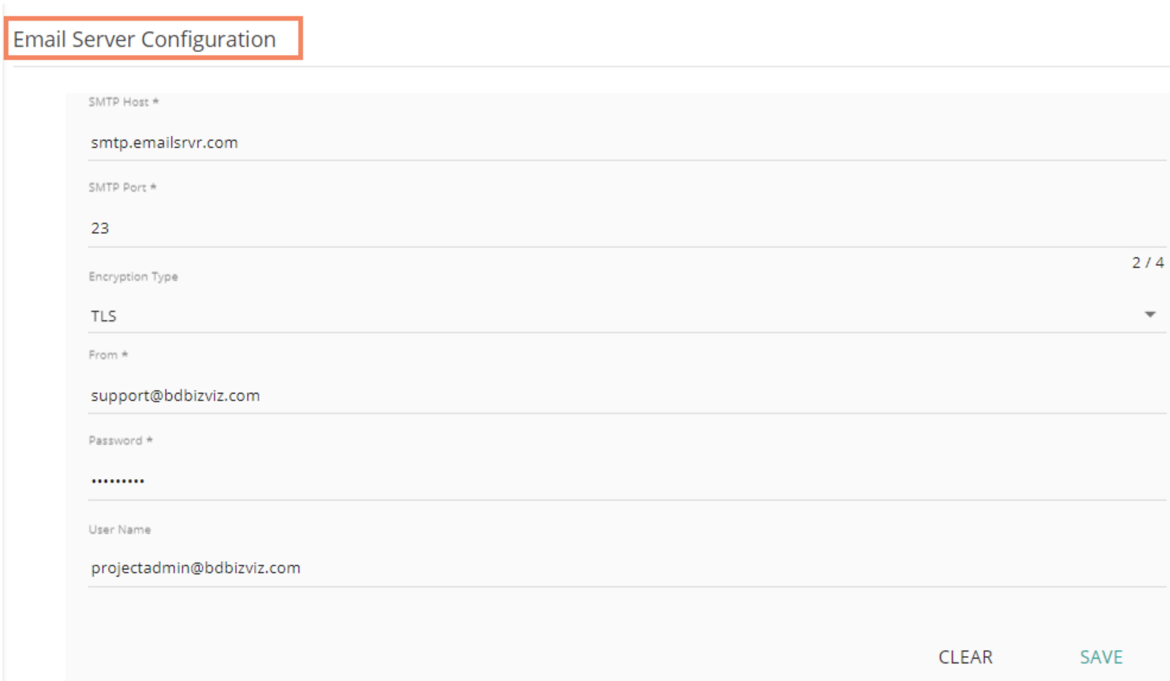
iv) Click the ‘**Edit Configuration**’ option to modify the email settings details



v) By clicking the '**Edit Configuration**' option users will be able to fill in the following information:
- **SMTP Host**: SMTP host address
- **SMTP Port**: Port number of SMTP
- **Encryption Type**: Select an encryption type from the drop-down menu
- **From**: Enter authenticated credentials of the sender
- **Password:** Provide the password
- **User Name**: Name that will be displayed to the receivers

vi) Click '**SAVE**' to save the configuration details

vii) Click '**CLEAR**' to erase the entered configuration details

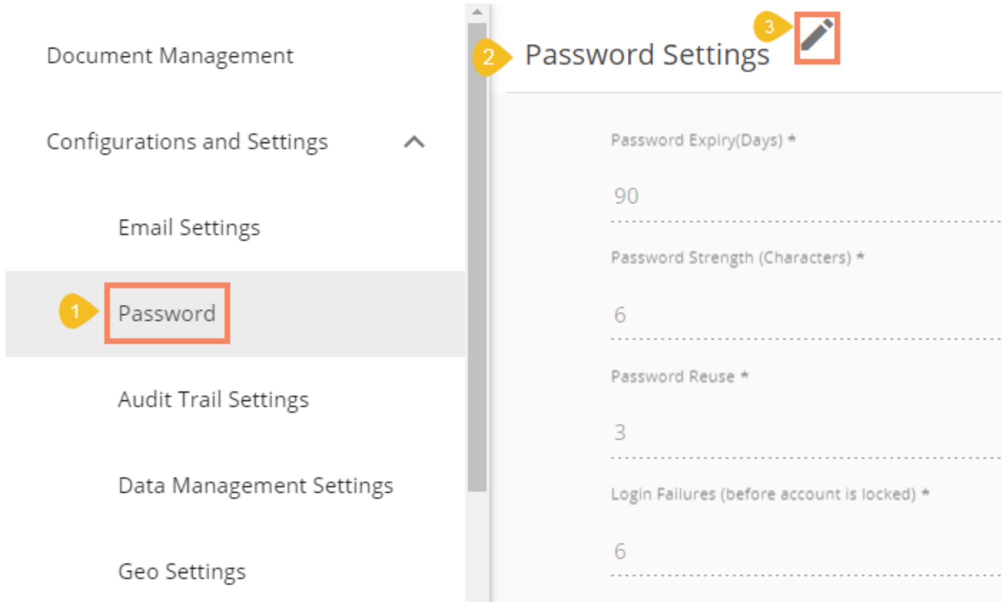


5.2.2.2. Password

a. Click '**Password**' from the '**Configuration and Settings**' sub-menu

b. The ‘**Password Settings**’ page will be displayed

c. Click the ‘**Edit Configuration**’ option



d. By clicking the ‘**Edit Configuration**’ option users will be able to fill in the following information:
   - **Password Expiry:** Set password validity (in days)
   - **Password Strength:** Set password length (6 to 16)
   - **Password Reuse:** Set a limit to restrict the user from using an old password (last 3 passwords cannot be reused)
   - **Login Failures (No. of User Login Failure):** Set the number of chances provided to the user for logging in with wrong passwords (Maximum login chances provided to the user are 3. The user account will be blocked, if a user enters the wrong password more than 3 times.)

e. Click ‘**SAVE**’ to save the settings

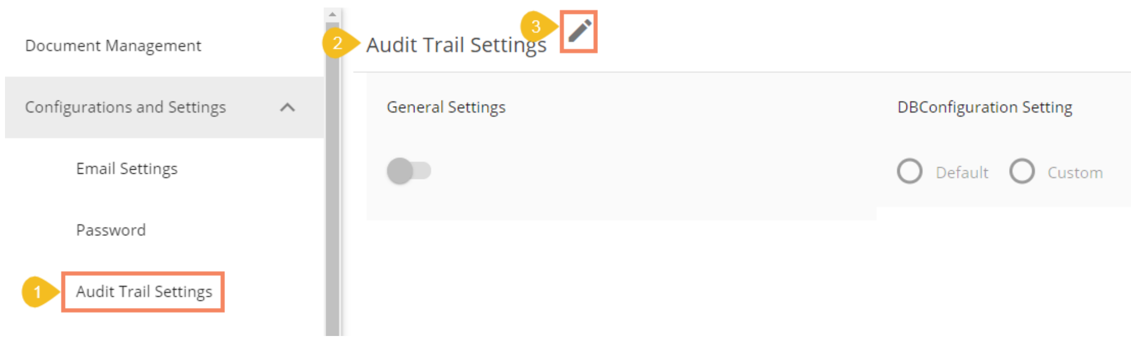
f. Click ‘**CLEAR**’ to erase the entered configuration details

Note:

a. The administrator will block any user who fails to enter the correct password for 3 times.
b. A user can login with the same password only when the administrator enables the user again.
(The password must be a combination of alphabetical letters, numerical figure, and a special character. **E.g.,** Admin1@)

5.2.2.3. Audit Trail Settings

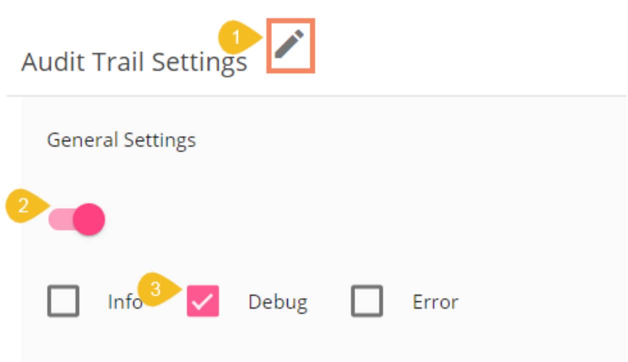
Audit Trail enables the administrator to keep a record of significant events on servers and applications. It provides information regarding what is being accessed, how it is being obtained or changed and, who is performing these operations. Users can configure the Audit Trail Settings by clicking the '**Edit**' option.



This section contains two options:

- **General Settings**
  This option is provided to enable or disable Audit Trail settings. Users can access this option from the list of '**Configurations and Settings**' provided under admin options.

  a. Enable '**General Settings**' settings
  b. Select any one option out of the following:
     i. **Info**: It captures information about all the events
     ii. **Debug**: It enables the admin to debug the errors
     iii. **Error**: It helps admin to identify the errors so that they can be fixed



  c. Click '**SAVE**'

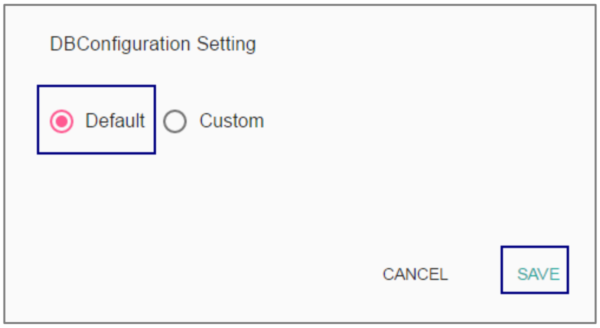
Note: There is a single '**SAVE**' button provided for both the Audit Trail options.

- **DB Configuration Settings**

  This section is provided to configure Database/ BizViz Repo Database settings.

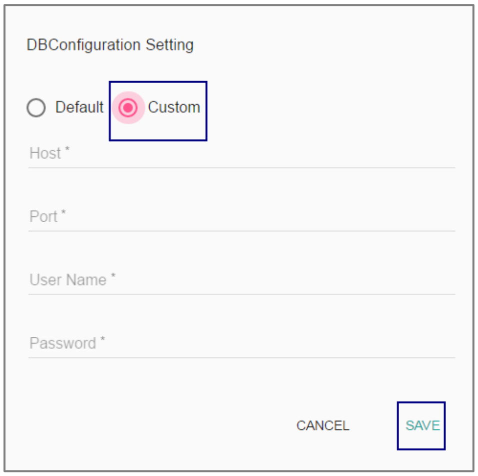
  There are 2 ways to configure database settings:

  a. **Default**
     i. Select '**Default**'
     ii. Click '**SAVE**'



     iii. The metadata will be stored in the default database (MySQL Enterprise 5.6)

  b. **Custom**
     i. Select '**Custom**'
     ii. Fill in the following information:
        - Host
        - Port
        - User Name
        - Password
     iii. Click '**SAVE**'



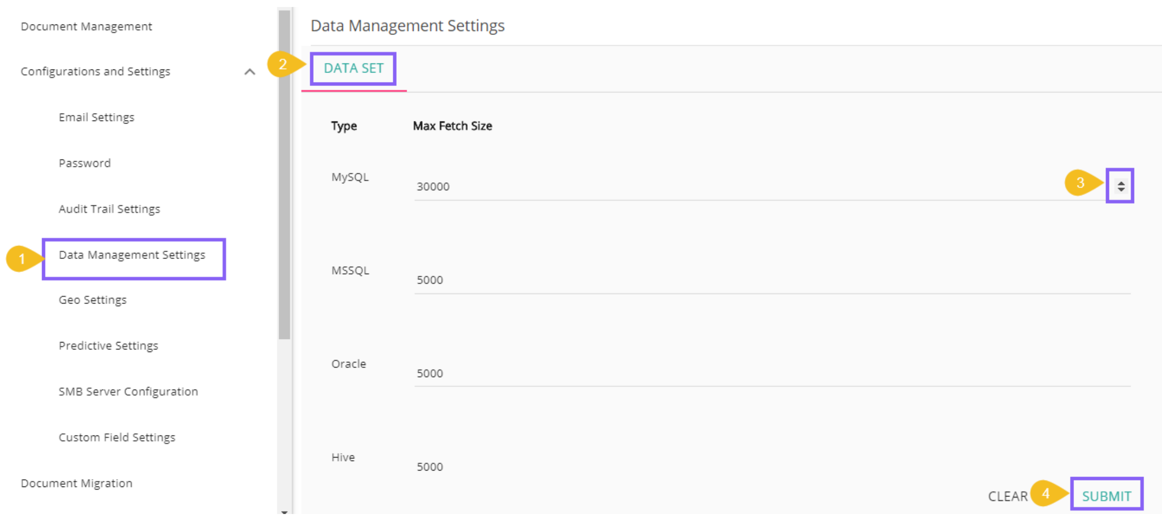
iv. The metadata will be stored in the configured database

Note: Click **'CANCEL'** to undo the audit trail settings**.**

5.2.2.4. Data Management Settings

The '**Data Management Settings**' helps users set the Maximum Fetch Size of the Data Connectors used for Data Sets.

a. Select '**Data Management Settings**' from the list of admin options provided under '**Configuration and Settings**'
b. The Data Management Settings for Data Set will be displayed on the right side of the screen
c. Set/Re-set maximum fetch size of the data connectors used for Data Sets manually. Alternatively, use the increase and decrease option
d. Click '**SUBMIT**' to save the selections



Note: Click '**CLEAR**' to undo the selected values.

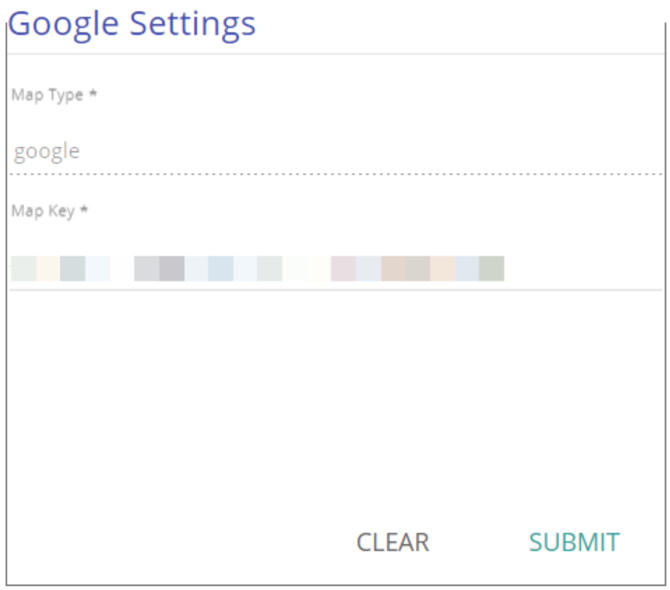
5.2.2.5. Geo Settings

This section explains steps to configure the Geospatial plugin. Two types of Map settings are provided here:

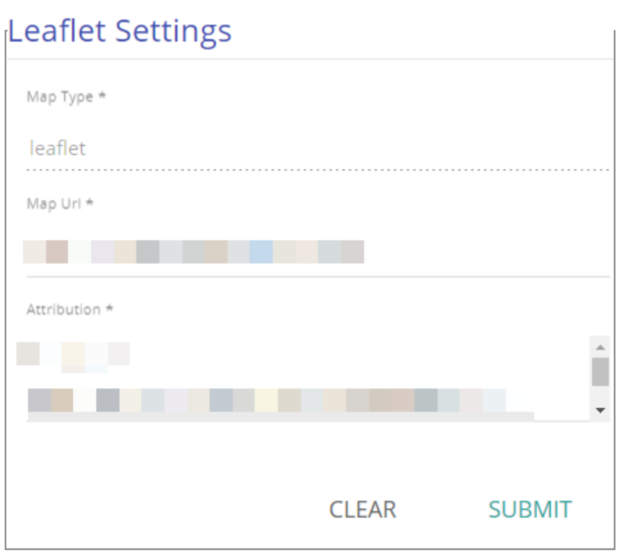
i) Google Settings
ii) Leaflet Settings

- **Google Settings**

  a. Fill in the following information:
     i. **Map Type**: It will be preselected.
     ii. **Map Key**: Enter the map key that has been provided by Google (To be purchased from Google).
     iii. Click '**SUBMIT**'



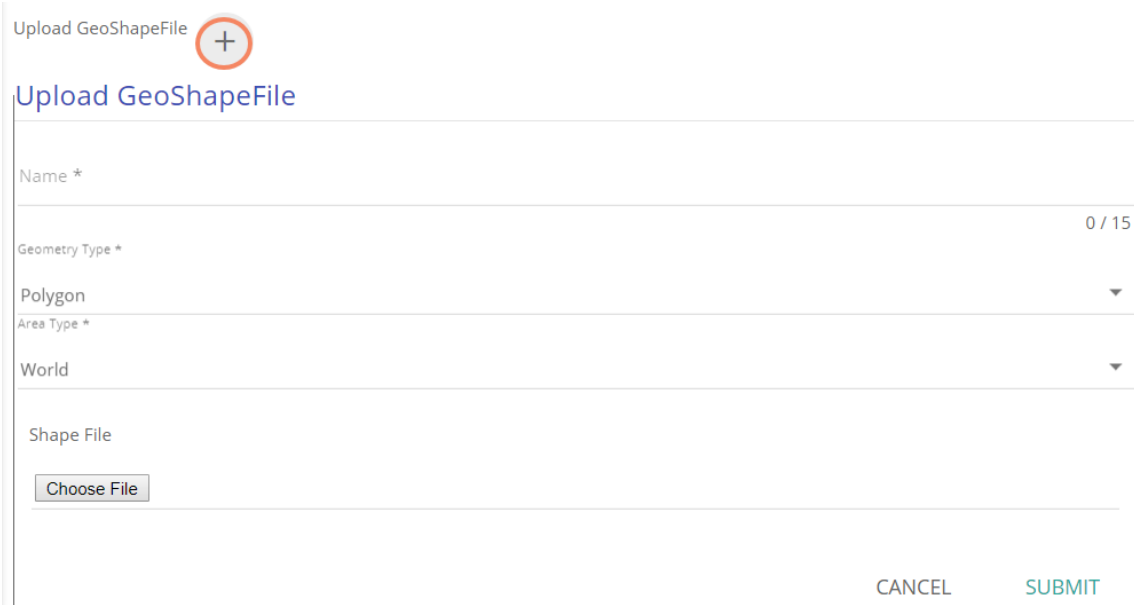
- **Leaflet Settings**
  a. Fill in the following information:
     i. **Map Type:** It will be preselected
     ii. **Map Url:** URL of the selected map (provided by the open-source vendors)
     iii. **Attribution:** Configuration parameters for the map (provided by the open-source vendor)
     iv. Click '**SUBMIT**'



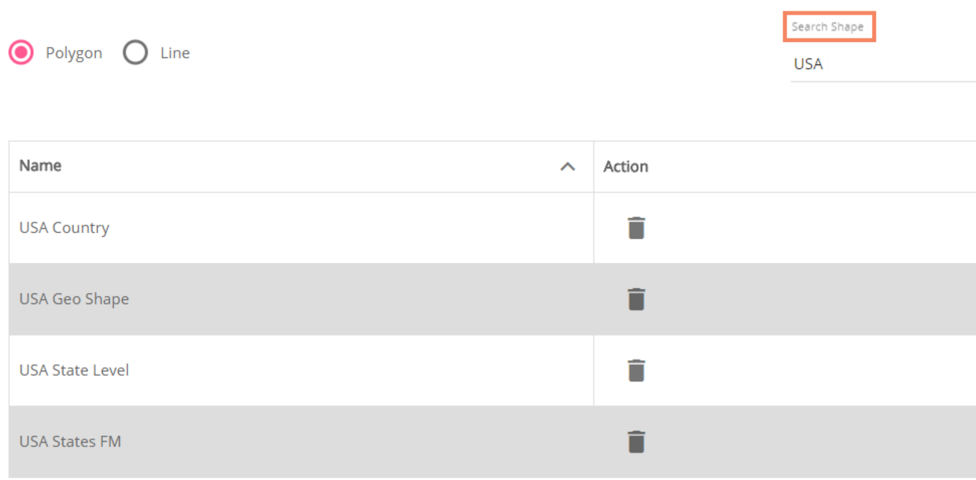
- **Uploading a Geo Shape File**
  a. Click '**Add**' + button provided next to the '**Upload a Geoshape File**' option
  b. **Upload Geo Shape File**' fields will be displayed below
  c. Enter the following information:
     i. **Name**: Title of the map
     ii. **Geometry Type**: Select anyone Geometry type from the drop-down menu (out of '**Polygon**' or '**Line**')

iii. **Area Type**: Select an area type using the drop-down menu
iv. **Shape File**: Browse a shapefile from the system and upload (Only ‘**json** ’and ‘**js**’ formats are supported)

d. Click ‘**SUBMIT**’



e. A message will pop-up to assure that the file has been uploaded
f. All the uploaded Geo Shapefiles will be displayed in the list format
g. Select a Geometry Type using the check-box
   i. Polygon
   ii. Line
h. Use ‘**Search Shape**’ space to search a Geo Shapefile



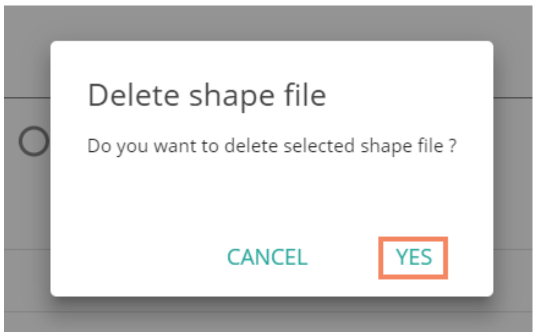
- **Deleting a Geo Shape File**

a. Select an uploaded Geo Shapefile from the list (as displayed at the bottom of the window)

b. Click the ‘**Delete**’ icon  provided next to a Geo Shape File

Name	Action
Country_May	
India Country	
India State	
India_30May	

c. A new window will pop-up to confirm the deletion
d. Select '**YES**'

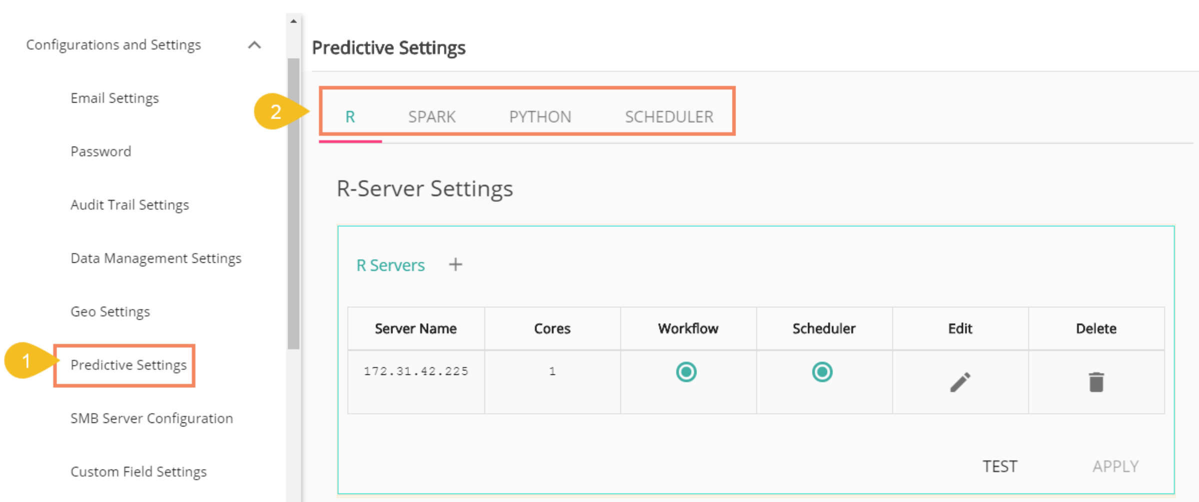


e. The selected Geo Shapefile will be removed from the list

5.2.2.6. Predictive Settings

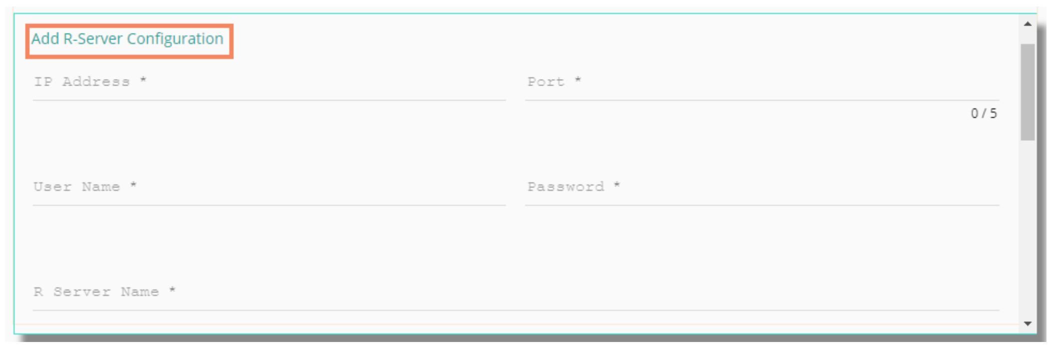
This section explains R-Server Configuration and Predictive Spark App Settings details for the Predictive Analysis plugin of the BizViz Platform.

a. Click the '**Predictive Settings**' option from the list of '**Configurations and Settings**' admin options
b. Various Predictive Settings will be displayed horizontally on the right side of the screen as displayed below:

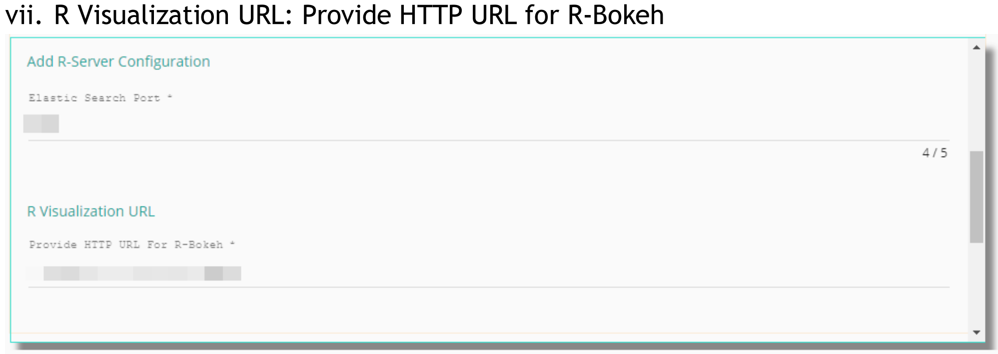


- **Steps to Create a New R-Server**

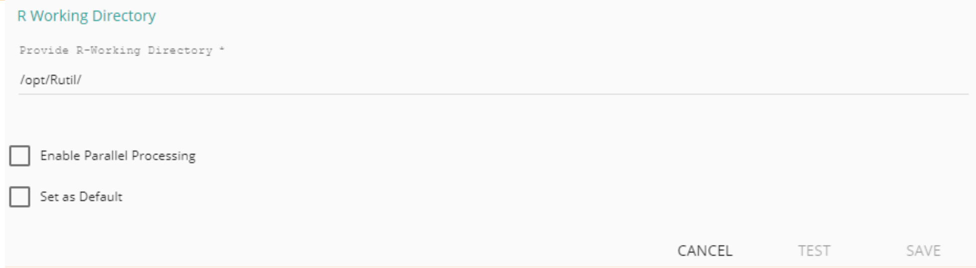
a. Navigate to the '**Predictive Settings**' admin option
b. Click the R tab
c. Users will be redirected to the R Server Settings page
d. Click '**Add**' + icon given for the R server
e. Users will be redirected to a scrollable '**Add R-Server Configuration**' window
f. Provide the following information to configure a new R server:
   i. IP Address: IP address of the R-server
   ii. Port: R-Server's port number
   iii. User Name: Enter a username to log in to the R- server
   iv. Password: Enter the password for the above username
   v. R Server Name: Provide the R- Server address



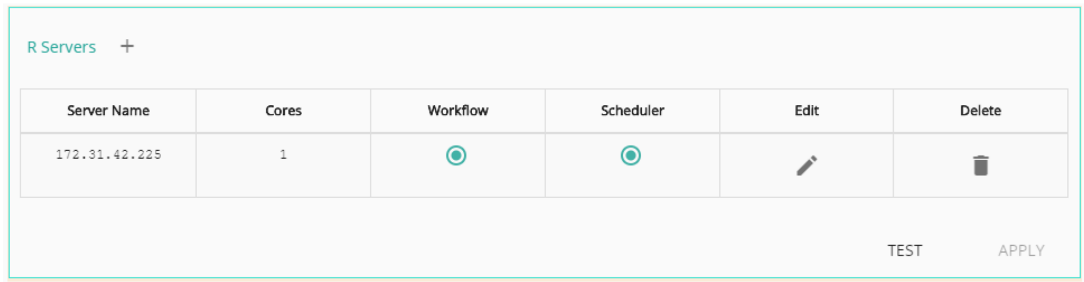
   vi. Elastic Search Port: Provide elastic search port number
   vii. R Visualization URL: Provide HTTP URL for R-Bokeh



   viii. R Working Directory: Provide the relevant link to access R-Working Directory
   ix. Enable Parallel Processing- Select this option by using a check mark in the box
   x. Set as Default: Select this option by using a check mark in the box
g. Click '**TEST**' to verify the R-Server connection
h. A message will pop-up to assure about the connection
i. Click '**SAVE**' to save the R-server configuration details once the R-server configuration is verified

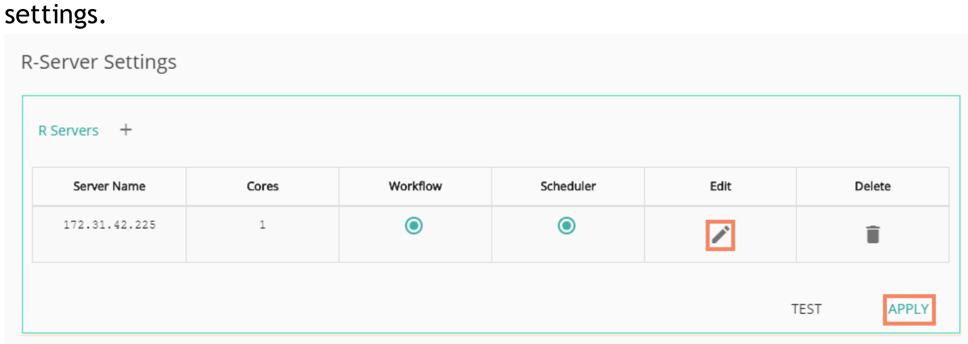


j. A message will pop-up to ensure that a new R-Server has been created
k. The newly created R-Server will be added to the R-Server list displayed under '**R-Servers**' window



Note:

a. Users can click '**Edit**' icon from the R Servers window to modify the R Server settings.
b. Users can click '**APPLY**' from the R Servers window to update the R Server settings.



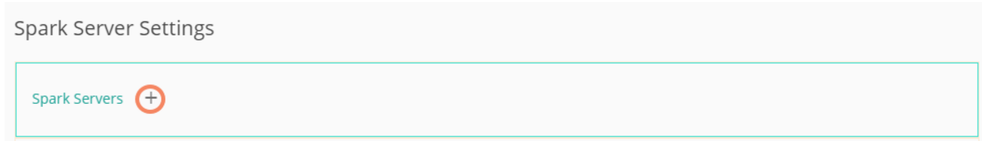
a. The Administrator can configure multiple R-Server, but the process will execute on a single server at a time.
b. Click '**CLEAR**' to erase the information from the R-Server configuration fields.
c. The admin needs to provide a working directory while configuring the R server and users should be given read and write permission to that directory.

- **Spark Server Settings**

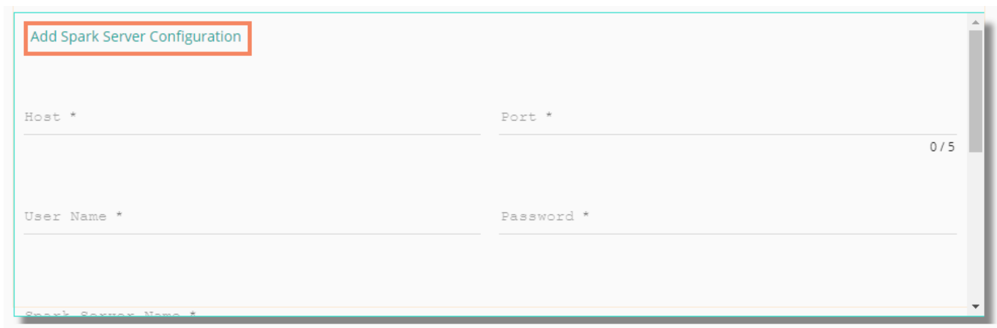
  Users can configure a new Spark Server or edit the existing server via the Spark Server Settings.

  a. Navigate to the '**Predictive Settings**' admin option
  b. Select '**Spark**' tab
  c. Users will be redirected to the Spark Server Settings page

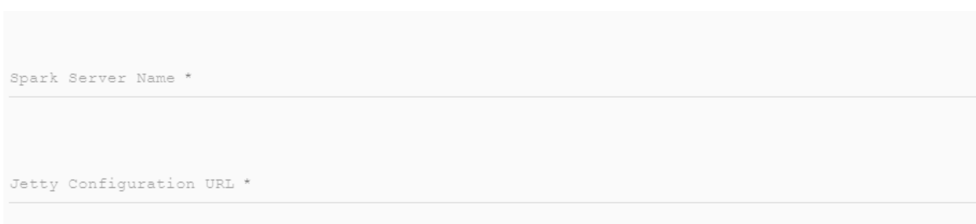
d. Click '**Add**' + icon to add a new Spark server confirmation



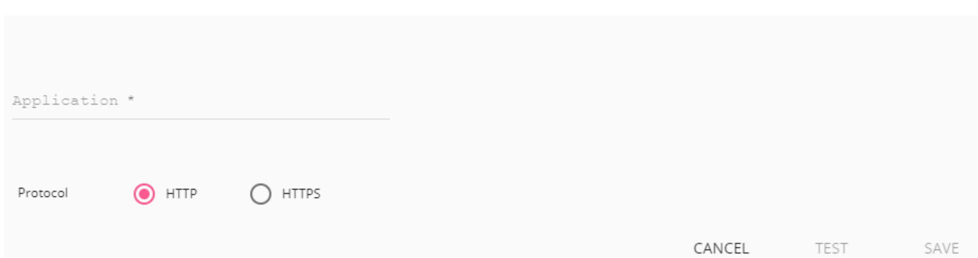
e. Users will be redirected to the '**Add Spark Server Configuration**' window
f. Provide the following information:
   i. Host: Host address of the Spark server
   ii. Port: Spark server's port number
   iii. User Name: Enter a username to log in to the Spark server
   iv. Password: Enter the password for the above username



   v. Spark Server Name: Provide Spark Server Address
   vi. Jetty Confirmation URL: Provide Jetty confirmation URL link



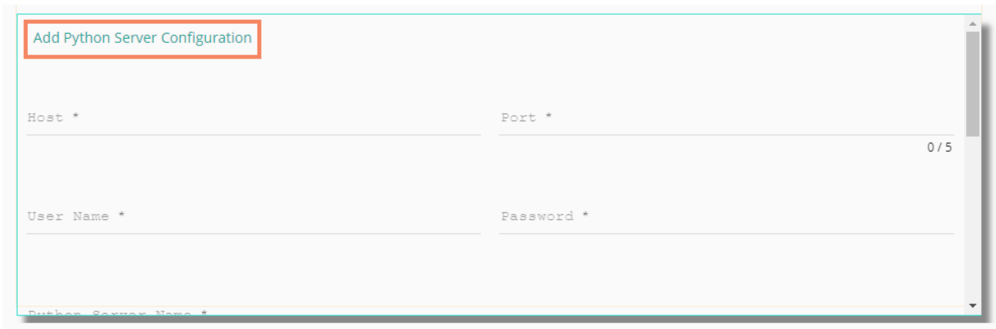
   vii. Application: Provide the application name
   viii. Protocol: Select a protocol option by using the radio option
   ix. Click '**TEST**' to verify the connection
   x. A message will pop-up to assure about the connection
   xi. Click '**SAVE**'



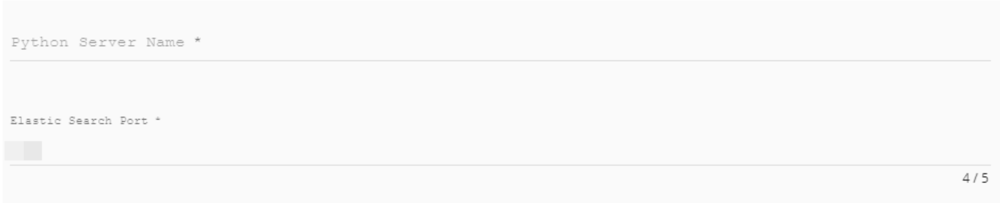
xii. A new Spark Server will be created and added to the '**Spark Server Settings**' window.

- **Python Server**
  Users can configure the Predictive Python Application settings via the '**Python Server Configuration**' fields.
  a. Navigate to the '**Predictive Settings**' admin option
  b. Select '**Python**' tab
  c. Users will be redirected to the Python Server Settings page
  d. Click '**Add**' + icon to add a new Spark server confirmation

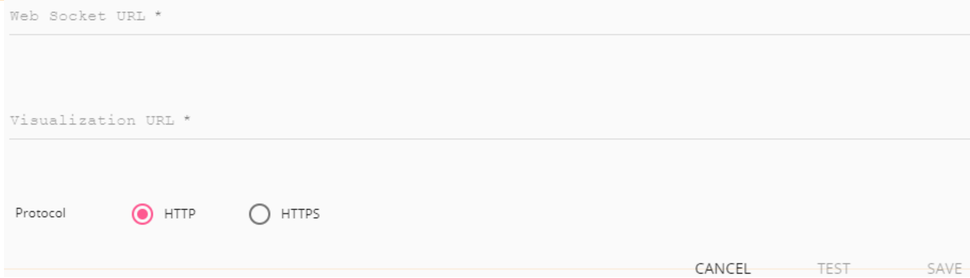
  e. Users will be redirected to the '**Add Python Server Configuration**' window
  f. Provide the following information:
     i. Host: Host address of the Spark server
     ii. Port: Spark server's port number
     iii. User Name: Enter a username to log in to the Spark server
     iv. Password: Enter the password for the above username



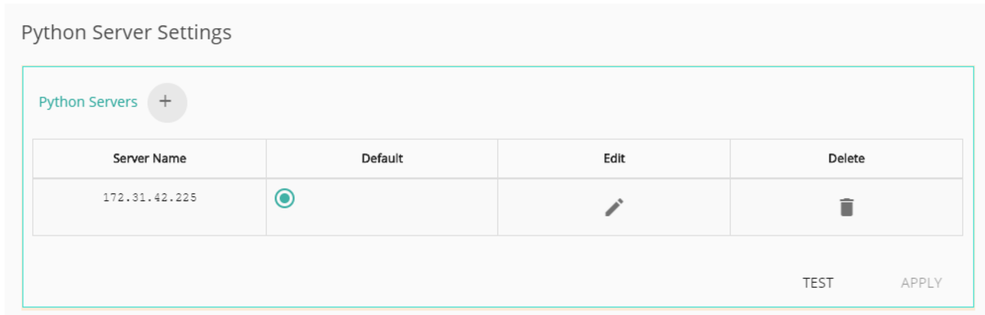
     v. Python Server Name: Provide Python Server Address
     vi. Elastic Search Port: Provide the elastic search port number



     vii. Web Socket URL: Provide the web socket URL link
     viii. Visualization URL: Provide the Visualization URL link
     ix. Protocol: Select a protocol option by using the radio option
     x. Click '**TEST**' to verify the connection
     xi. A message will pop-up to assure about the connection
     xii. Click '**SAVE**'



xiii. A new Python Server will be configured and added under the '**Python Servers**' window.

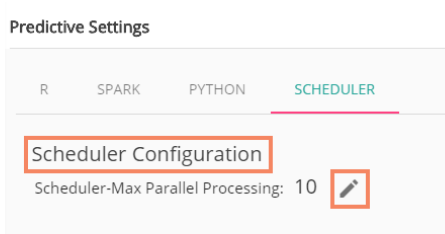


Note:

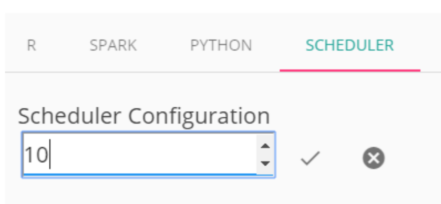
a. Click '**Edit**' icon to modify an existing python server configuration
b. Click '**CLEAR**' to erase the Python App Configuration details.

- **Steps to Schedule Maximum Parallel Process**

a. Navigate to the '**Predictive Settings**' page
b. Click the '**SCHEDULER**' tab
c. Users will be redirected to the 'Scheduler Configuration' option
d. Click the '**Edit**' icon provided to modify the '**Scheduler-Max Parallel Processing**' option



e. Set/Reset a number to indicate the maximum scheduled parallel processes.

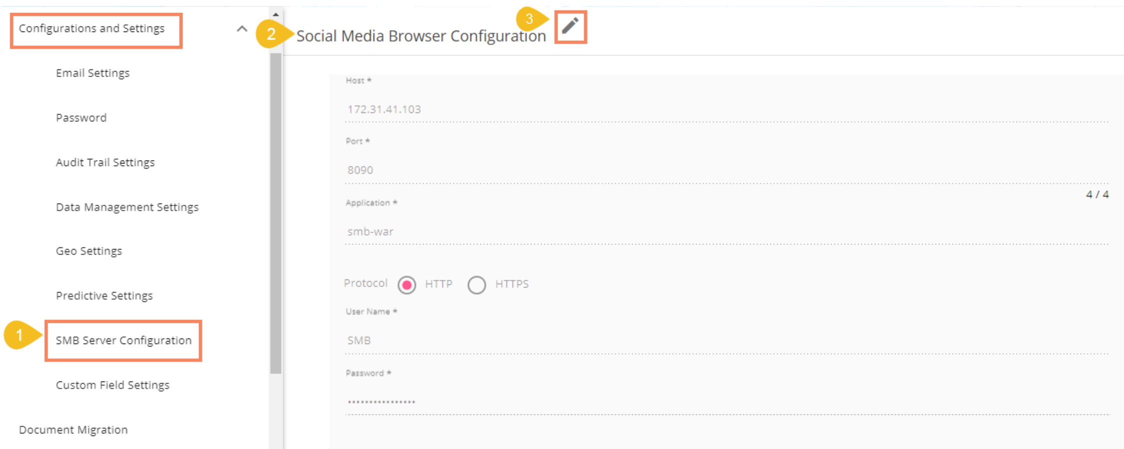


f. Click the ‘**Check Mark**’ to apply the selection

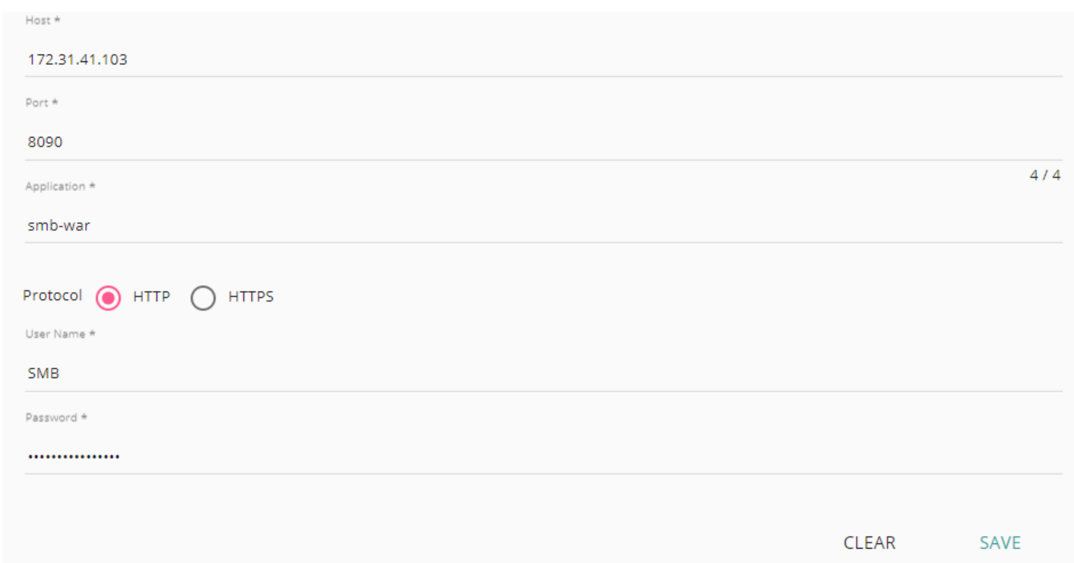
5.2.2.7. SMB Server Configuration

This section covers Social Media Browser configuration details.

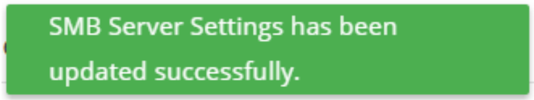
a. Click ‘**SMB Server Configuration**’ from the ‘**Configuration and Settings**’ list.
b. The ‘**Social Media Browser Configuration**’ fields will be displayed.
c. Click the ‘**Edit**’ icon



d. Users will be redirected to fill in the following information to configure the Social Media Browser settings:
   i. Host
   ii. Port
   iii. Application
   iv. Protocol
   v. User Name
   vi. Password
e. Click the ‘**SAVE**’ option



f. A message will pop-up to assure that the SMB server settings have been updated successfully.

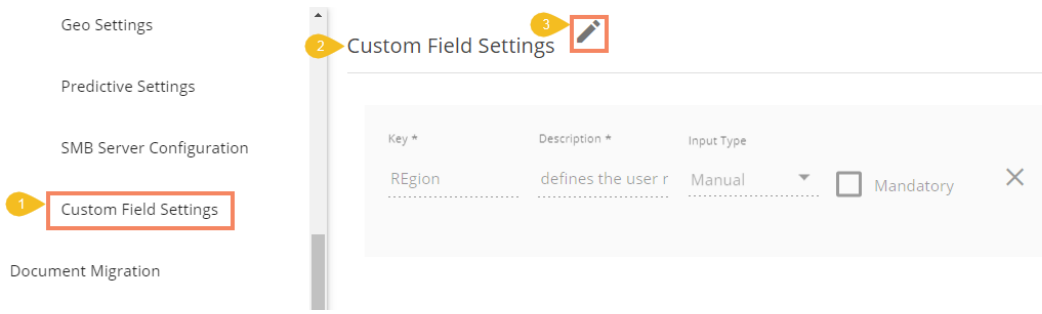


Note: Click ‘**CLEAR**’ to erase the existing SMB Server Configuration details.

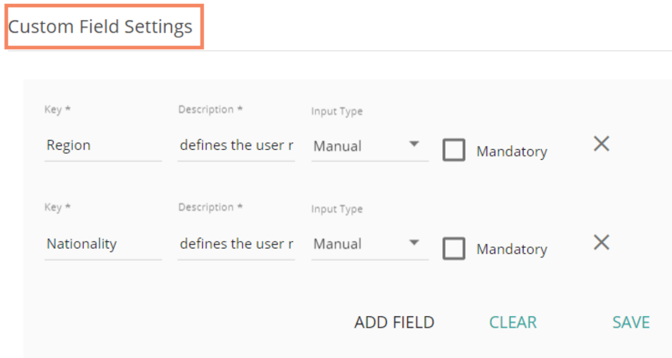
5.2.2.8. Custom Field Settings

This section configures the custom fields settings that can later be added to user groups and assigned to the users of those groups.

a. Click ‘**Custom Field Settings**’ from the ‘**Configuration and Settings**’ list
b. Users will be directed to the Custom Field Settings window
c. Click the ‘**Edit**’ icon



d. Users will be redirected to the ‘**Custom Field Settings**’ to modify the settings
e. Click ‘**ADD FIELD**’ to add a new custom field
f. Provide the following information for each custom field:
   i. Key: Provide the key value of the custom field
   ii. Description: Describe the inserted key
   iii. Input Type: Select an input option from the drop-down menu
      1. Manual: By selecting this option, users need to fill the field manually
      2. User Lookup: By selecting this option, users need to choose from a drop-down menu
   iv. Mandatory: Use checkmark in the given box to make the inserted custom field mandatory
g. Click ‘**SAVE**’ to save the inserted custom fields



Note:

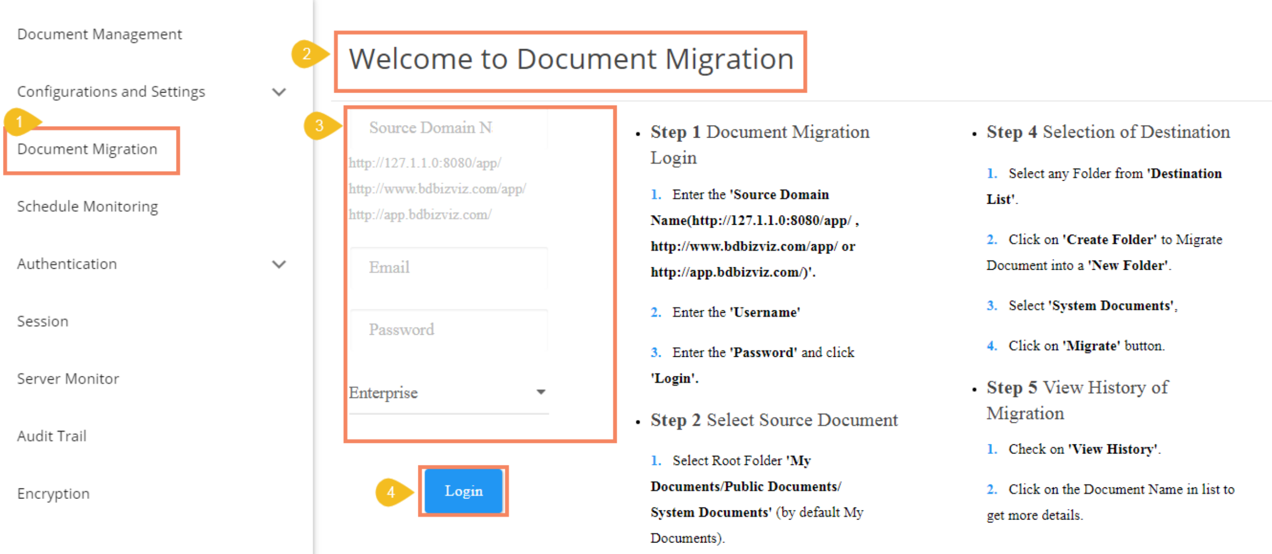
g. Click ‘**ADD FIELD**’ to add a new custom field.
h. Click ‘**CLEAR**’ to erase the entered custom field details.
i. Click the ‘**Remove Field**’ icon to remove a custom field.

5.2.3. Document Migration

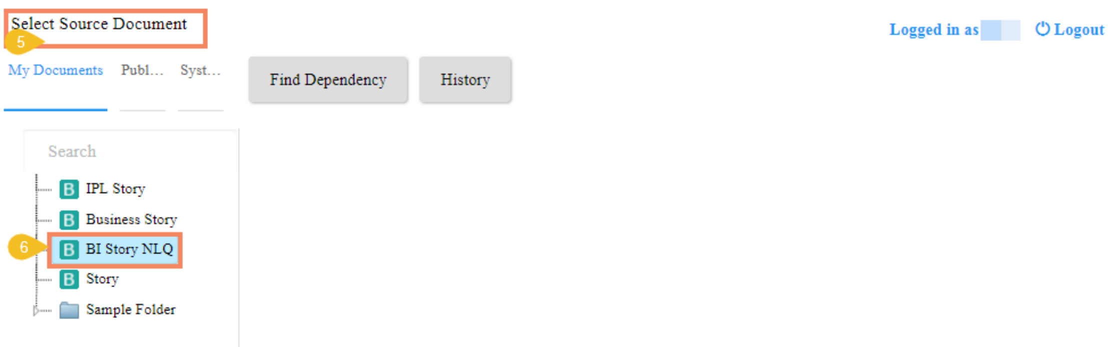
Users can migrate a business story or dashboard using this option. This section explains step by step process for document migration.

1. Document Migration Login

i) Select ‘**Document Migration**’ from the list of admin options
ii) Users will be redirected to the Document Migration landing page
iii) Fill in the following information:
   a. **Source Domain Name:** Enter address of the destination server
   b. **Email:** Enter the email address of the account from where the document is to be shared
   c. **Password:** Enter the password for the account
   d. **Domain:** Select the desired domain for the selected BDB platform account from the drop-down menu
      i. Enterprise
      ii. Windows AD
      iii. CAPPM
      iv. Mobile
iv) Click ‘**Login**’

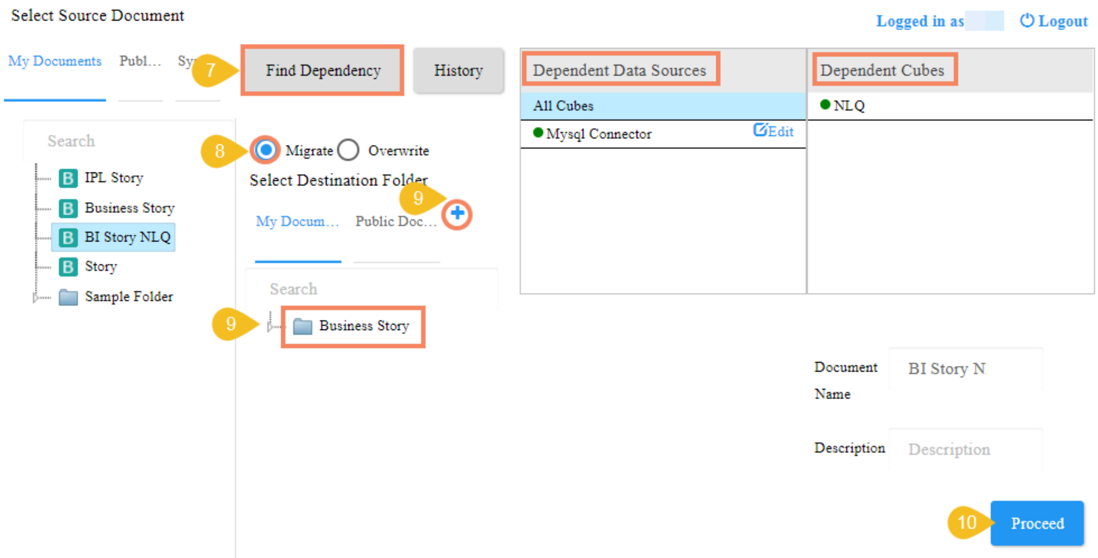


2. **Select Source Document**
   i) By clicking on '**Login**,' users will be redirected to the '**Select Source Document**' page.
   ii) Users can select a source document/file from the list of the available files (source documents) under the Logged-in user account



Note: '**My Documents**' opens by default with the list of source documents. Users can select a document

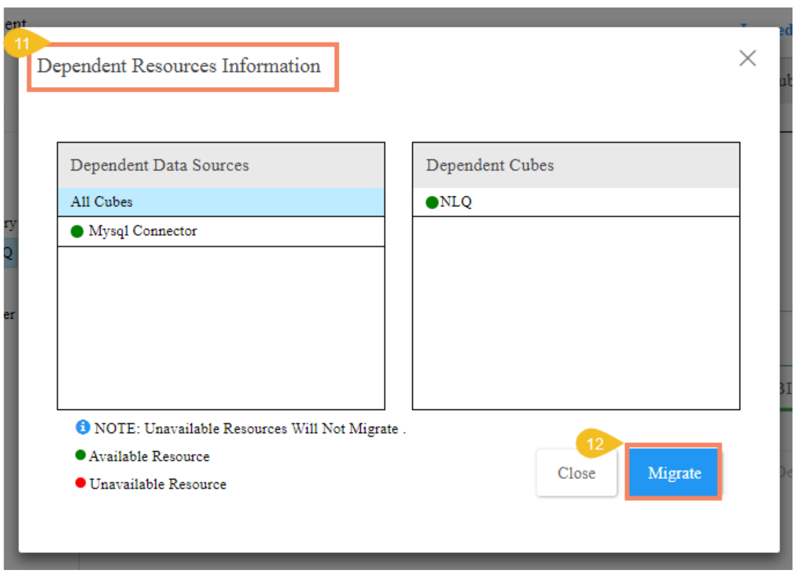
3. **Steps to Migrate**
   i) Select a file from the list of source documents
   ii) Click '**Find Dependency**'
   iii) Select an option by using the radio button
      a. Migrate
      b. Overwrite
   iv) Dependent Data Sources and Cubes/Data Services will be displayed
   v) Click the '**Add**' option + to create a new folder in the destination account
      OR
      Select an existing folder as a destination folder
   vi) Click '**Proceed**'



vii) The selected source document name will be displayed in the green color

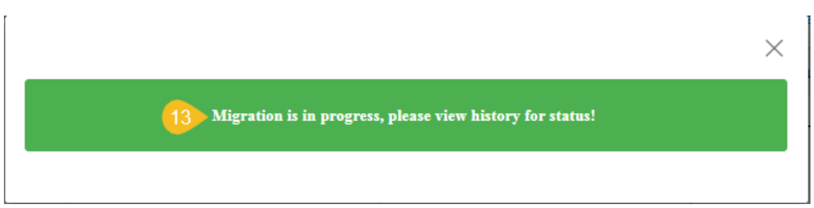
viii) A new window will pop-up displaying information about the dependent resources

ix) Click ‘**Migrate**’ option



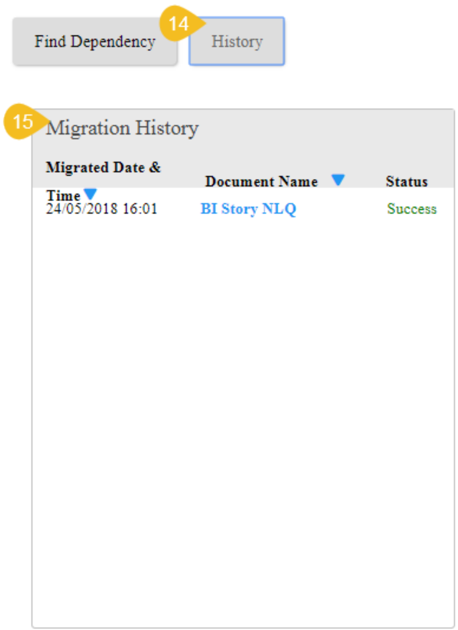
4. View Migration History

i) On clicking the ‘**Migration**’ option, a new message pops-up redirecting the user to view the migration status

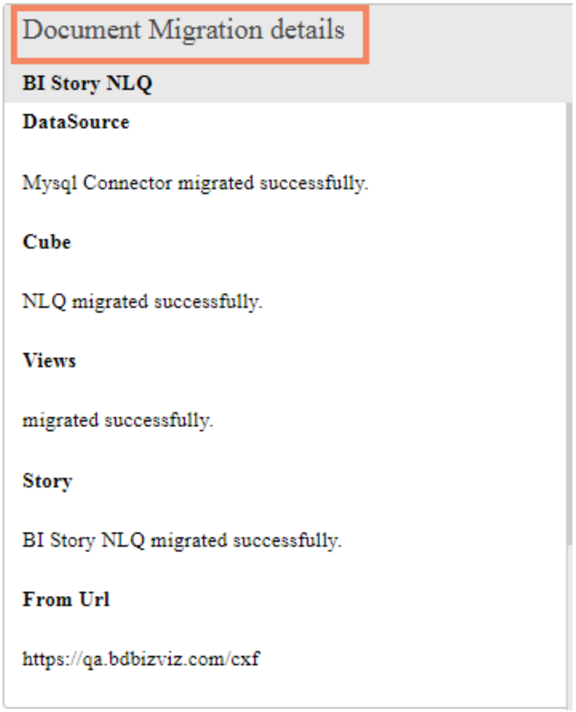


ii) Click the ‘**History**’ option on the Select Source Document page

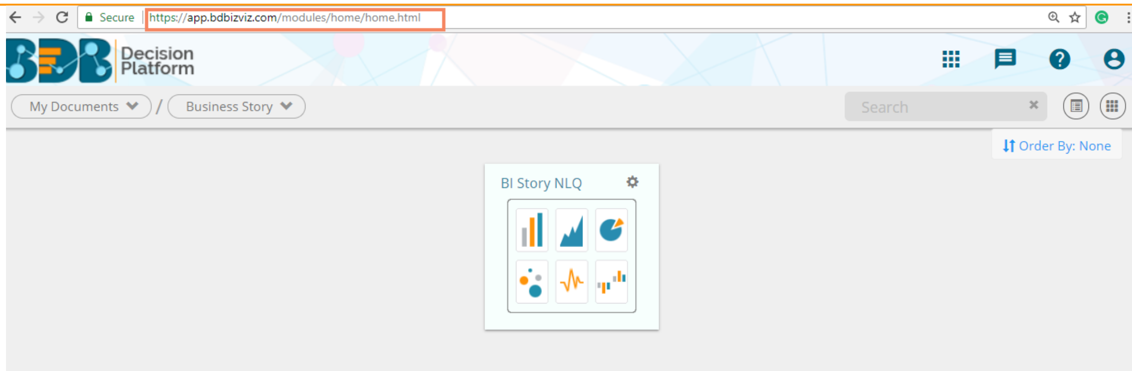
iii) Users will be redirected to a pop-up window displaying the migration history



iv) Click on the 'Document Name' from the Migration History window to display the document migration details.

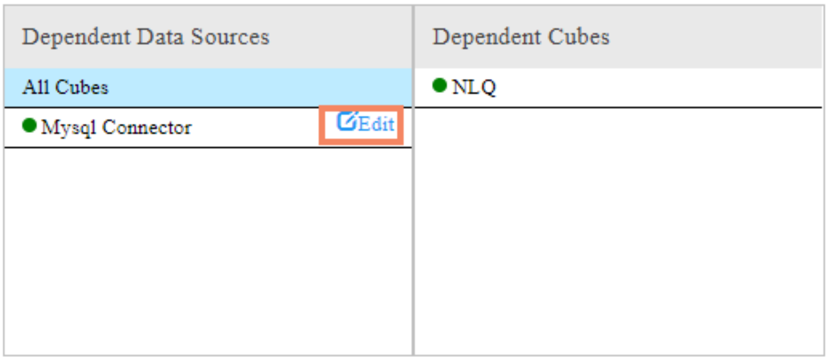


v) The selected document will be migrated to the destination folder.

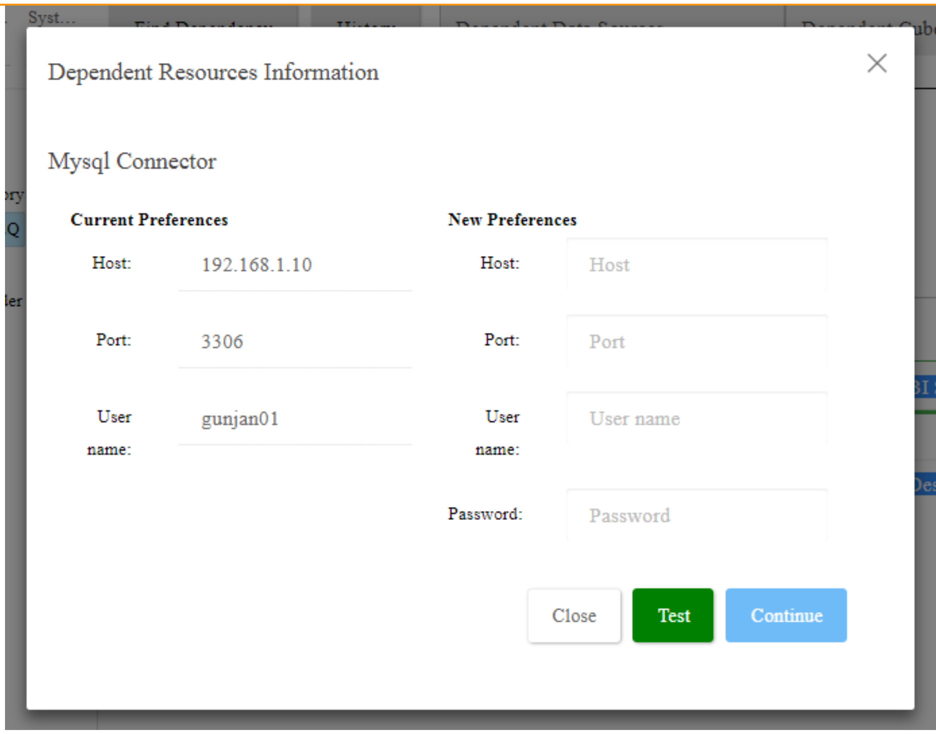


Note:

a. This feature does not support folder migration.
b. Flat files as source document will display an error message, “**Dependency not found.**” while clicking the ‘**Find Dependency**’ option.
c. If a deleted data connector/dataset/data store is used as a source document, then it will display an error while finding the dependency.
d. Users can edit the Dependent Data Source information by using the ‘**Edit**’ option provided on the Select Source Document page.



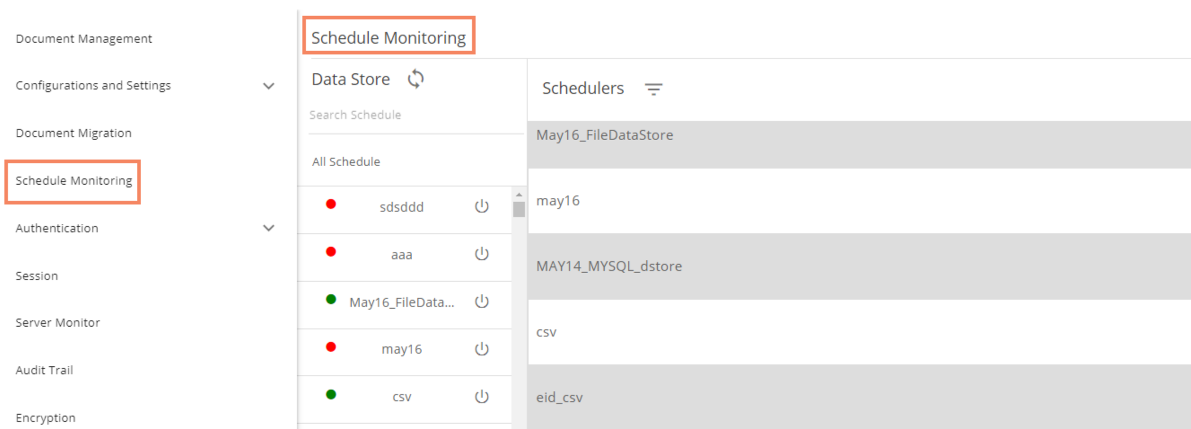
Users will be redirected to a new window displaying the dependent resources information. Users can configure the New Preferences providing the required information.



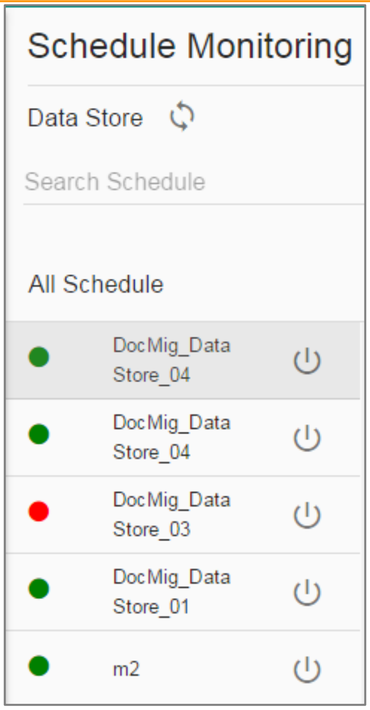
5.2.4. Schedule Monitoring Settings

This option helps the administrator to monitor the scheduled data stores.

i) Click ‘**Schedule Monitoring**’ option from the list of admin options
ii) The ‘**Schedule Monitoring**’ window will be displayed



iii) Search and select a scheduled data store from the ‘**All Schedule**’ list (Use the ‘**Search Schedule**’ space to search for a scheduled data store)

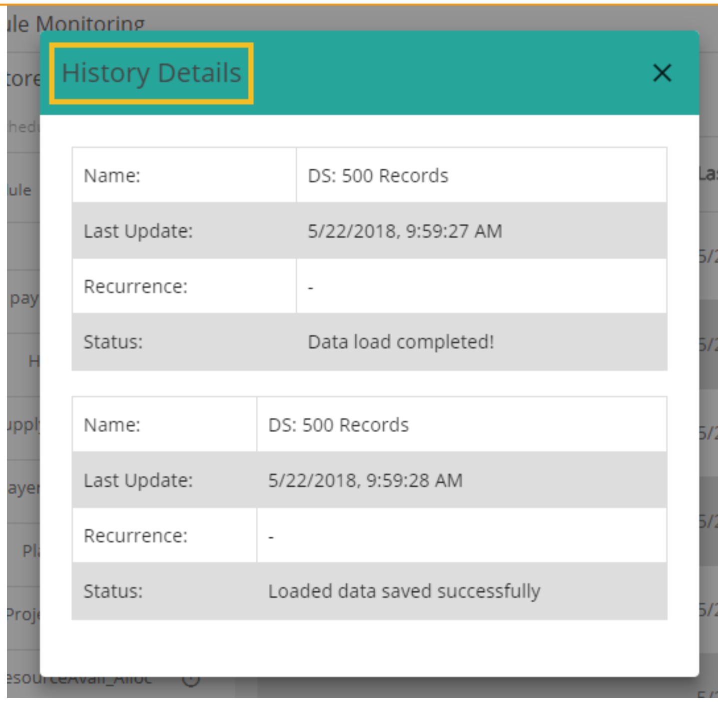


iv) Scheduler details are displayed on the right side of the screen

Scheduler Name	Last Updated Date	Recurrence	Status	
DS: 500 Records	5/22/2018, 9:59:14 AM	-	Refresh success	
DS: 500 Records Copy	5/22/2018, 9:58:21 AM	-	Refresh failed	
DS: 500 Records Copy	5/22/2018, 9:57:18 AM	-	Refresh failed	
Oracle_may14	5/21/2018, 2:28:24 PM	-	Refresh failed	
Oracle_may14	5/21/2018, 11:58:01 AM	-	Refresh failed	

Note:

a. Click the '**Start/Stop**' button to start/stop the scheduler.
b. Click the '**Refresh**' icon to refresh the data store(s).
c. Click the '**Information**' icon to display the '**History Details**' of the selected schedule.



d. Use ‘**Filter**’ option to display filtered details for the selected scheduled job.

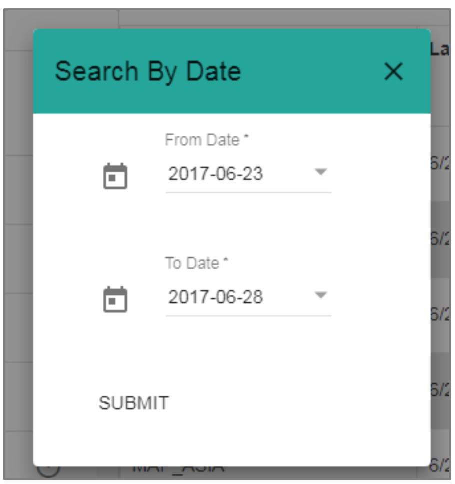
i) Click the ‘**Filter**’ option

ii) A window will pop-up

iii) Fill the required information:

1. From Date
2. To Date

iv) Click ‘**SUBMIT**’ option



v) The filtered data will be displayed

Schedulers

Scheduler Name	Last Updated Date	Recurrence	Status	
Map_Canada	6/27/2017, 5:34:44 PM	-	Refresh success	
TEST_MAP	6/27/2017, 5:21:39 PM	-	Refresh success	
MAP_ASIA	6/27/2017, 5:16:05 PM	-	Refresh success	
New Store	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
VIVEK_STORE_9_1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
May25Mysql	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
treemap1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	

5.2.5. Authentication

The administrator can configure windows AD or CA Clarity accounts by applying the below given settings:

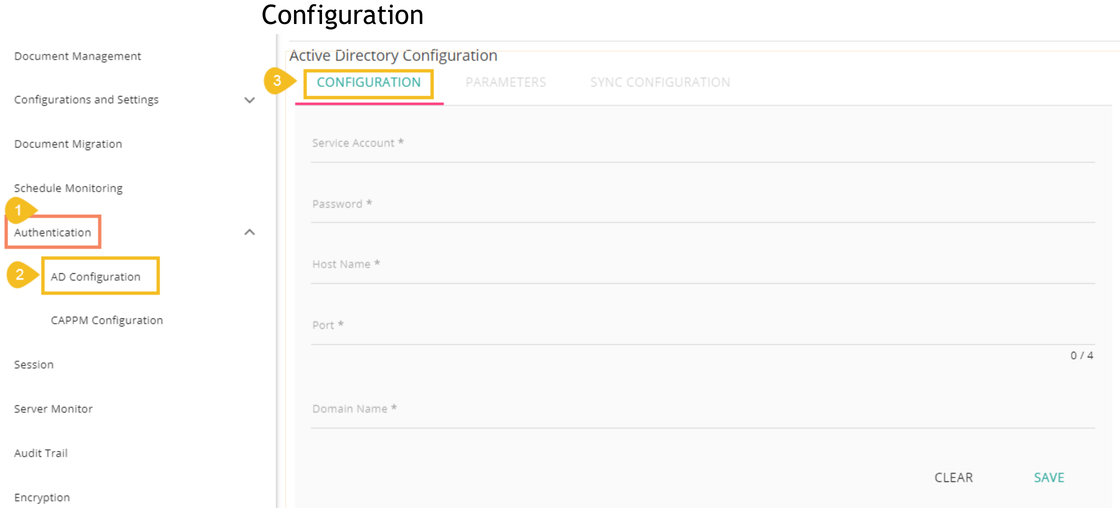
5.2.5.1. Active Directory Configuration

a. **Configuration**

i) Click '**Authentication**' option from the list of admin options

ii) Click '**AD Configuration**' authentication option

iii) Users will be redirected to the '**CONFIGURATION**' page of the Active Directory Configuration



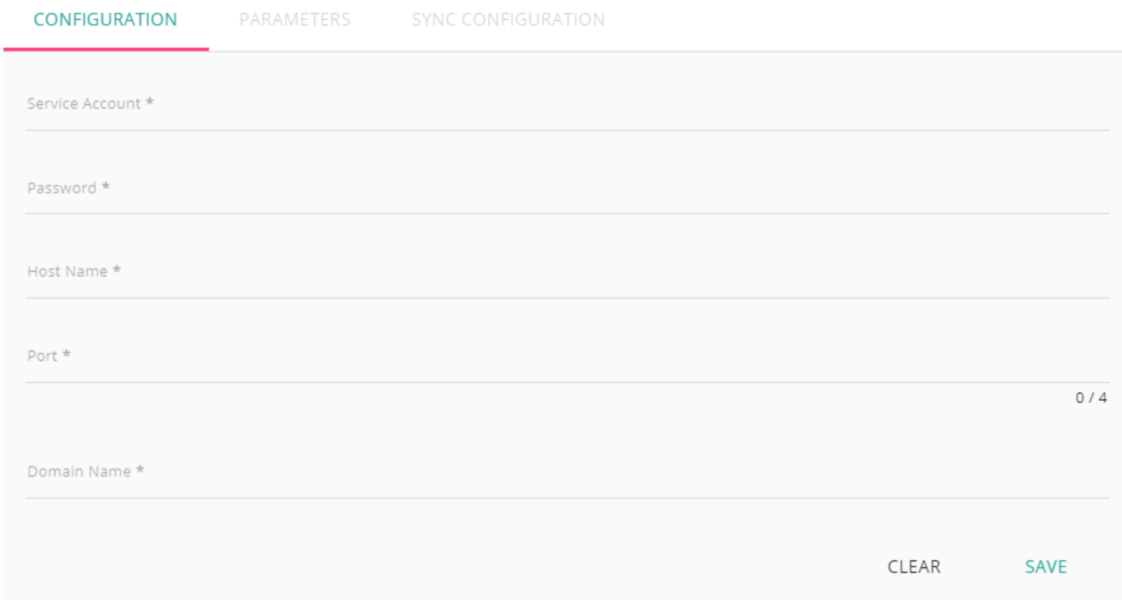
iv) Fill in the following information:

- **Service Account:** Name of the Windows AD service account
- **Password:** Secure authentication credential
- **Host Name:** IP address of the Windows AD server

- **Port:** Port number of Windows AD
- **Domain Name:** Enter the Domain Name

v) Click **'SAVE'**

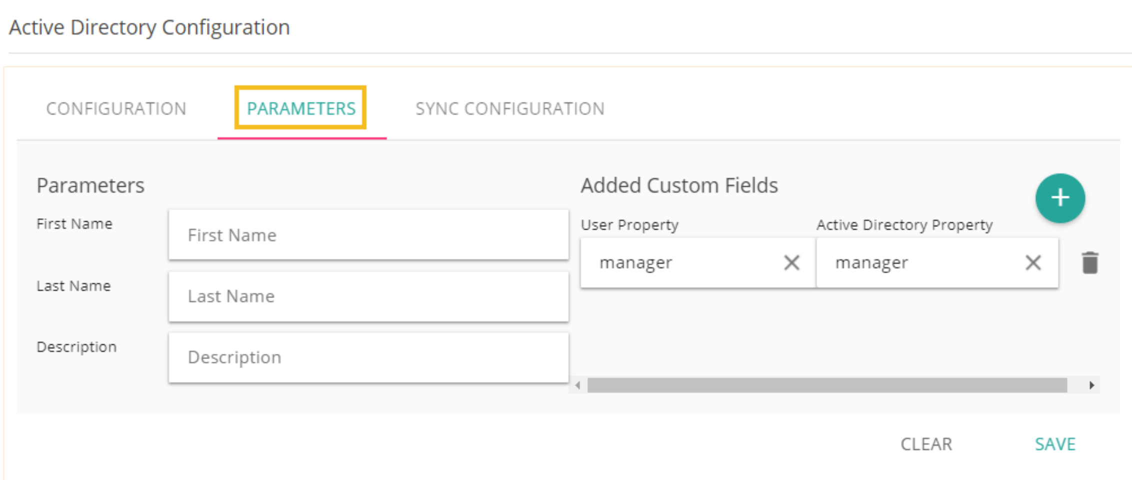
vi) A message will pop-up to confirm that the configuration details are saved.



b. **Parameters**

i) Set the user parameters by using this tab.

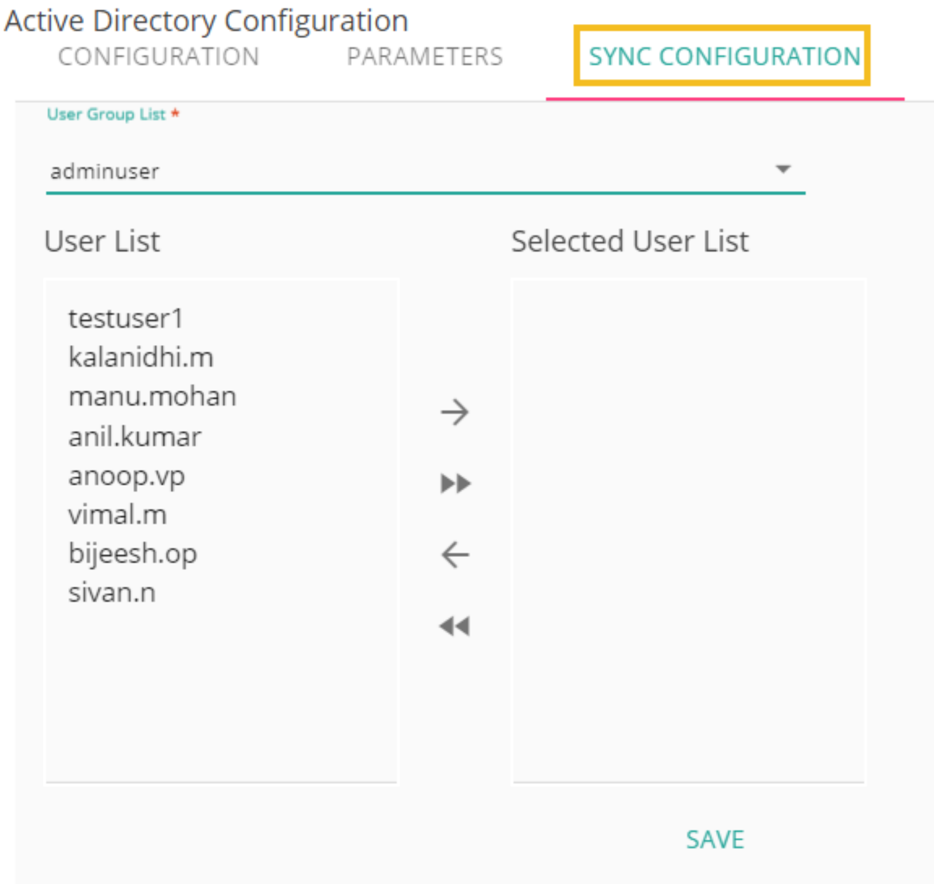
i. First Name: Provide the first name of the user
ii. Last Name: Provide the last name of the user
iii. Description: Add description
iv. Add a new custom field by clicking the **'Add'** icon
v. Configure the following properties to add a Custom Field
    1. User Property: Select an option from the available context menu
    2. Active Directory Property: Select an option from the available context menu



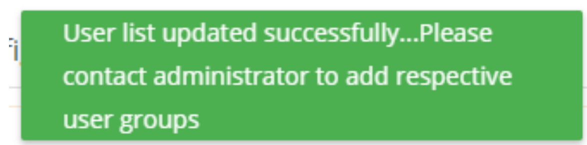
c. **Sync Configuration**

i) Once you get confirmation that AD details are saved select the **'SYNC CONFIGURATION'** tab

ii)	Select a user group using the ‘**User Group List**’ drop-down menu
iii)	Select and move users from ‘**User List**’ to the ‘**Selected User List.’**
iv)	Click ‘**Save**’



v)	A pop-up message will appear to confirm that the user list has been updated

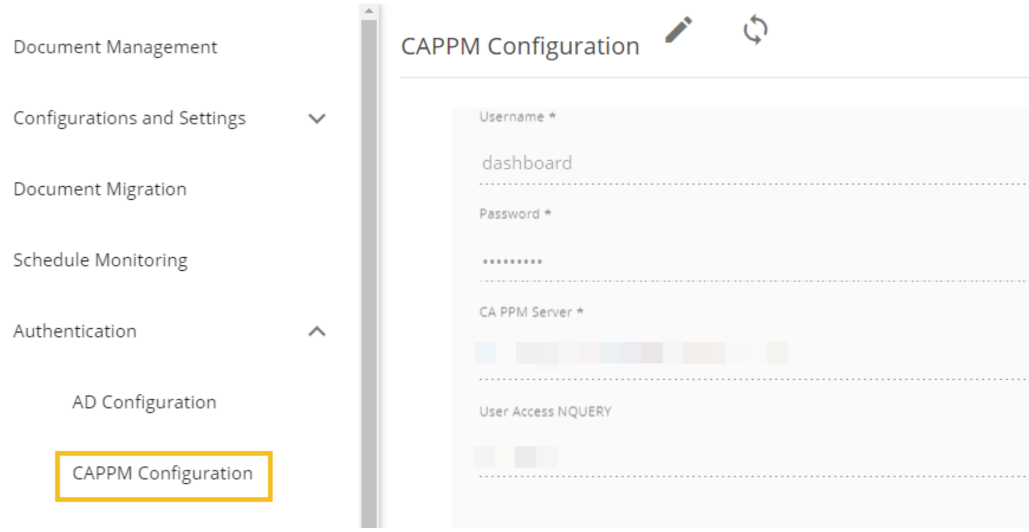


5.2.5.2. CAPPM Configuration

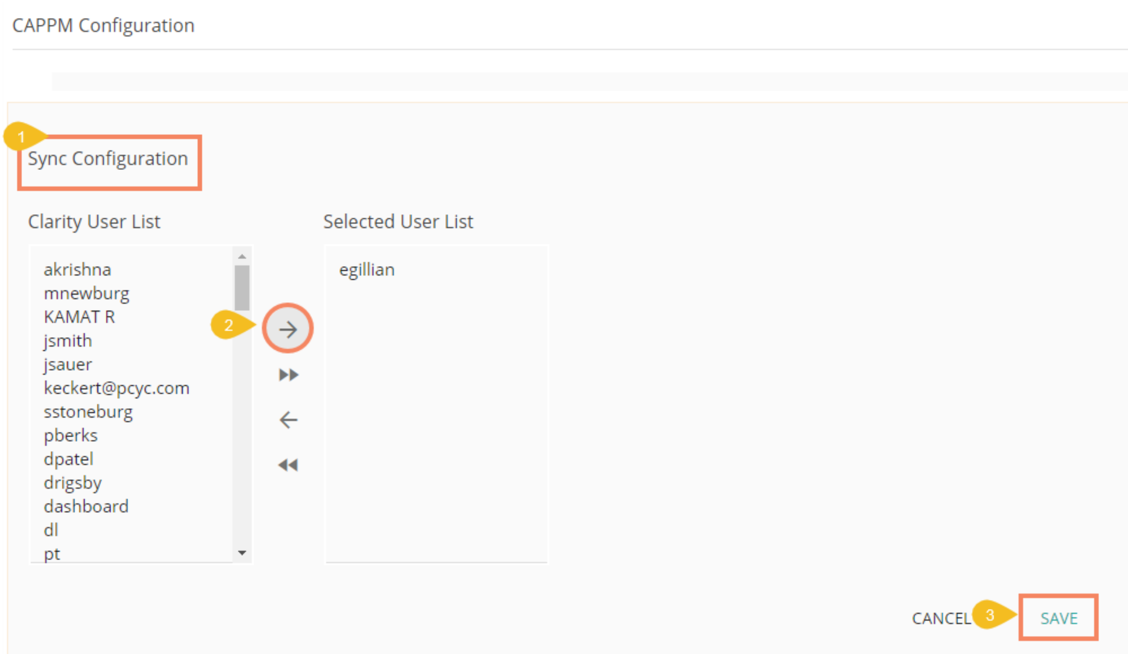
This section explains how to configure Clarity.

a. Select the ‘**CAPPM Configuration**’ using the ‘**Authentication**’ Admin option
b. Click the ‘**Edit**’ icon provided on the ‘**CAPPM Configuration**’ window
c. Fill in the required information:
   i. **Username**
   ii. **Password**
   iii. **CA PPM Server:** URL details of the Clarity server (E.g., http://dashboards.xyz.com)
   iv. **User Access NQUERY:** Name of the Query that will fetch a list of the Clarity users

d. Click the ‘**Save**’ option



e. Once you get confirmation that CAPPM configuration details are saved, click the ‘**Synchronize**’ option
f. Select a user group using the ‘**User Group List**’ drop-down menu
g. Select and move users from ‘**User List**’ to the ‘**Selected User List**’
h. Click the ‘**Save**’ option

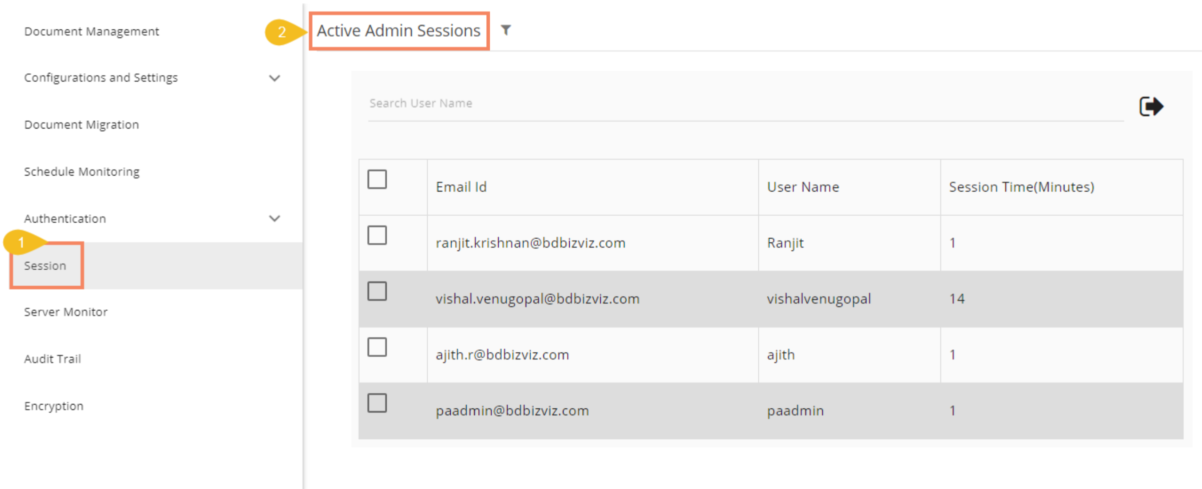


i. A message will pop-up to confirm that the user’s list has been updated.

5.2.6. Sessions

The ‘**Sessions**’ is an administrative module to display active platform users.

i) Click ‘**Sessions**’ from the list of Admin options
ii) Users will be redirected to the ‘**Active Admin Sessions**’ page
iii)

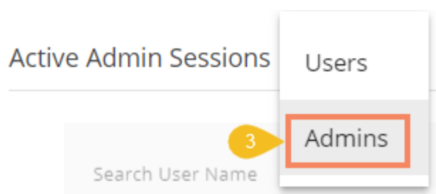


iv) Click the ‘**Filter**’ icon

a. A new window pops-up providing two filter options:

- Users
- Admins

b. Select any one filter option to launch the list of all the active sessions.



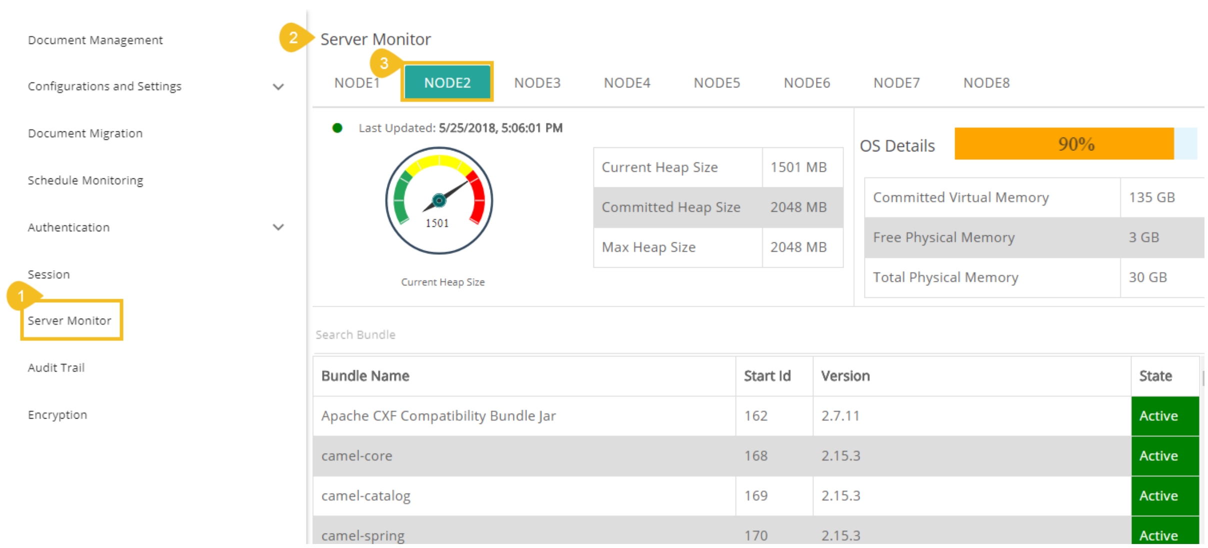
v) Select a session from the list by check marking the box
vi) Click ‘**Kill Session**’ to kill the selected session

Note: Users to whom the '**Kill Session**' option has been used will be forced to log out their sessions without any notification. The users need to log in again on the platform.

5.2.7. Server Monitor

Server monitor reviews and analyzes a server for availability, operations, performance, security and other operations-related processes. The server administrators perform server monitoring to ensure that the server is performing as expected.

i) Click '**Server Monitor**' from the list of Admin options
ii) The '**Server Monitor**' page will be displayed with Nodes ranging from 1 to 8
iii) Select a node to display the node-specific server details

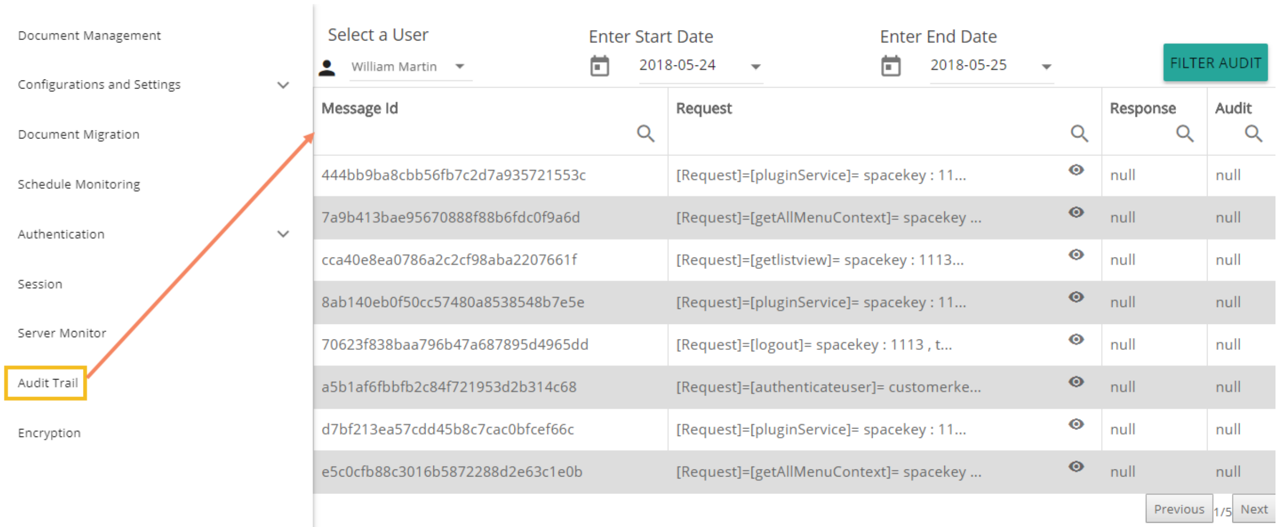


5.2.8. Audit Trail

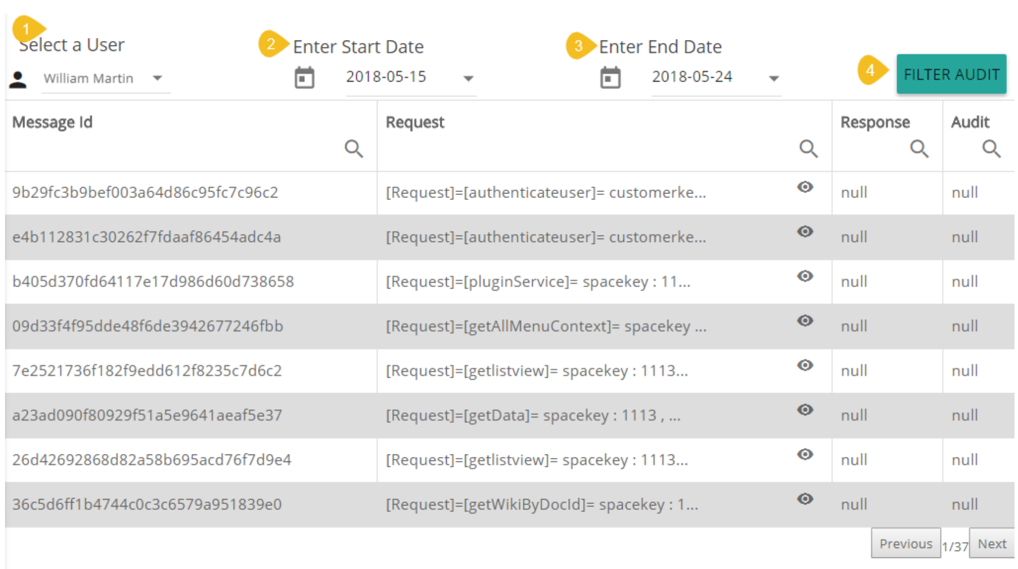
The Audit trail (or Audit Log) module generates a sequential record of request and response between destination and source server.

i) Click the '**Audit Trail**' option from the list of admin options

ii) Users will be directed to a page displaying audit log details



- **Filter Audit:** Users can filter the audit log details by using the following steps:
  i) Select a User: Select a user from the drop-down list
  ii) Enter a Start Date: Select a Start Date from the drop-down list
  iii) Enter an End Date: Select an End Date from the drop-down list
  iv) Click the '**FILTER AUDIT**' option
  v) The filtered records of the audit log will be displayed in the list

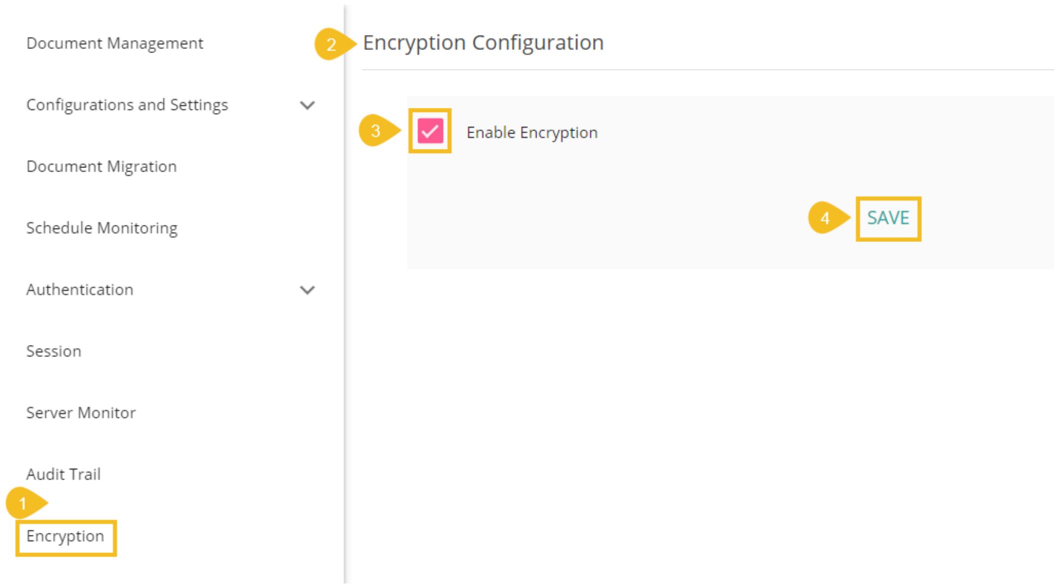


5.2.9. Encryption

Encryption is the process of encoding a message or information in such a way that only authorized users can access it. The primary purpose of this technology is to protect the privacy of digital data stored on computer systems or transmitted via the Internet or other computer networks.

The Encryption module provided under the list of admin options allows users to enable or disable encryption.

i) Click the ‘**Encryption**’ option from the list of admin options
ii) Users will be directed to the ‘**Encryption Configuration**’ page
iii) Enable Encryption by a checkmark in the box
iv) Click the ‘**SAVE**’ option

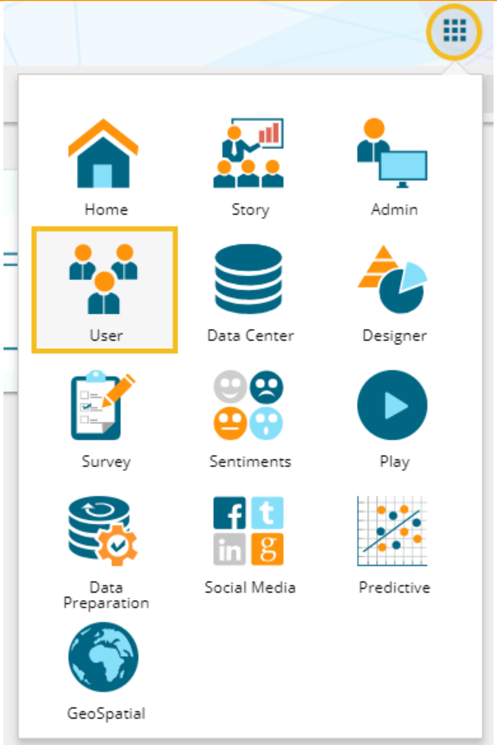


6. User Management

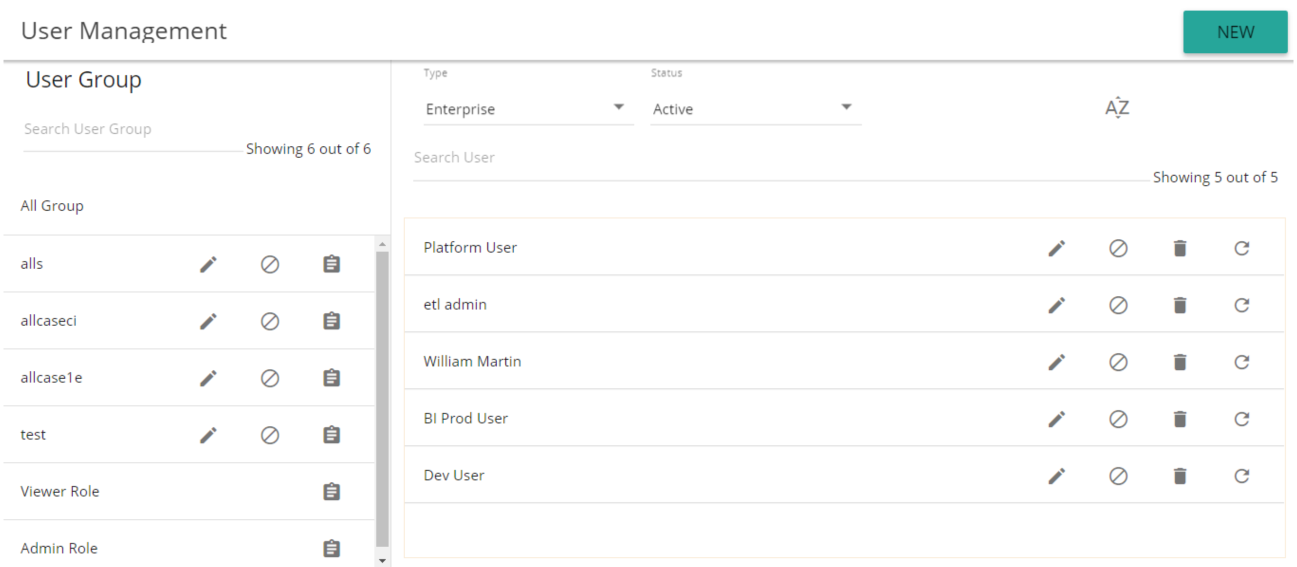
This section describes how to create a user or user group in BDB Platform. A newly formed user must be added to a user group to access the various platform application.

6.1. Accessing the User Management Page

i) Select the ‘**User**’ plugin from the Apps menu



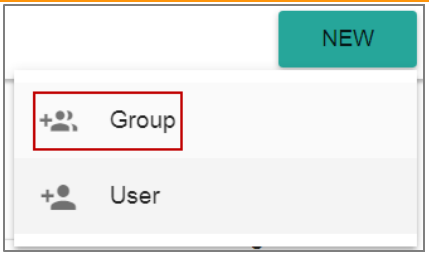
ii) Users will be redirected to the User Management page



Note: The admin can search for a specific user or group by using the '**Search**' boxes

6.2. Creating a New User Group

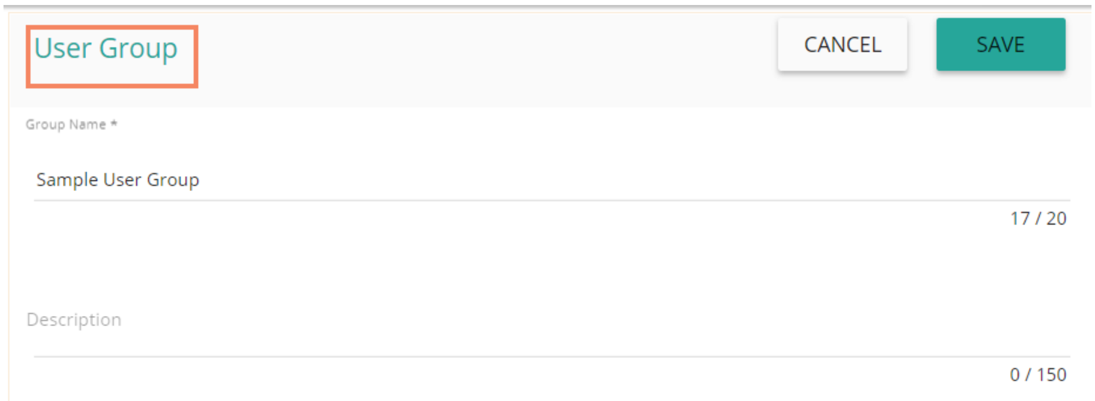
i) Click the '**NEW**' option
ii) A context menu opens
iii) Select '**Group**' option from the context menu



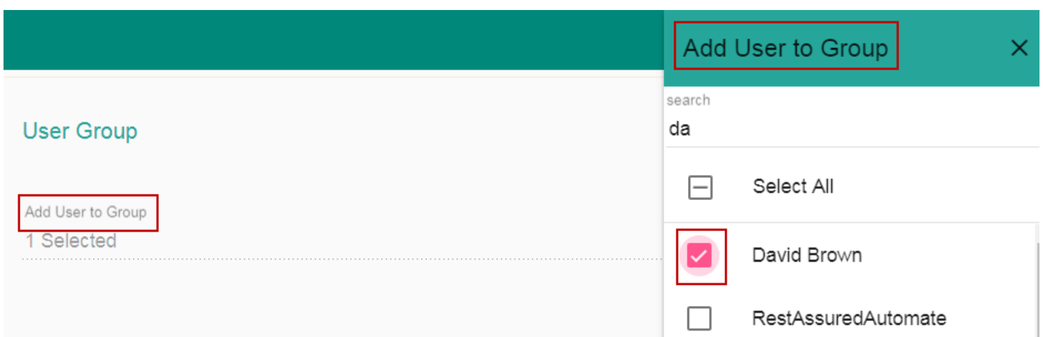
iv) Provide the following information for a new User Group:

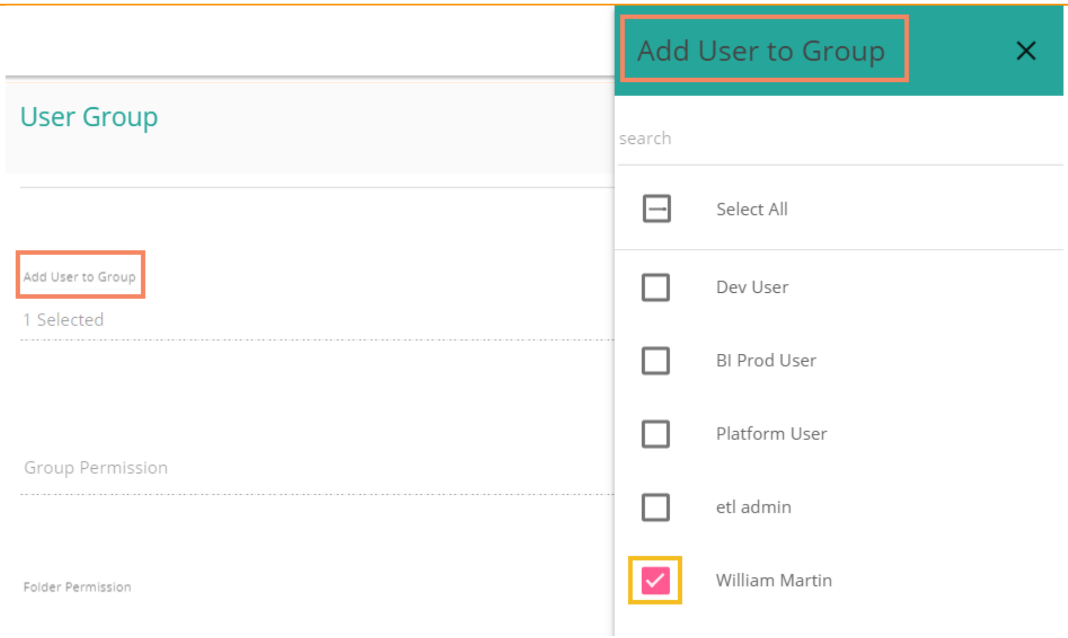
a. **Group Name:** Enter a name for the user group (The group name should not exceed 20 words)

b. **Description:** Describe the user group (optional) (The description should not exceed 150 words)

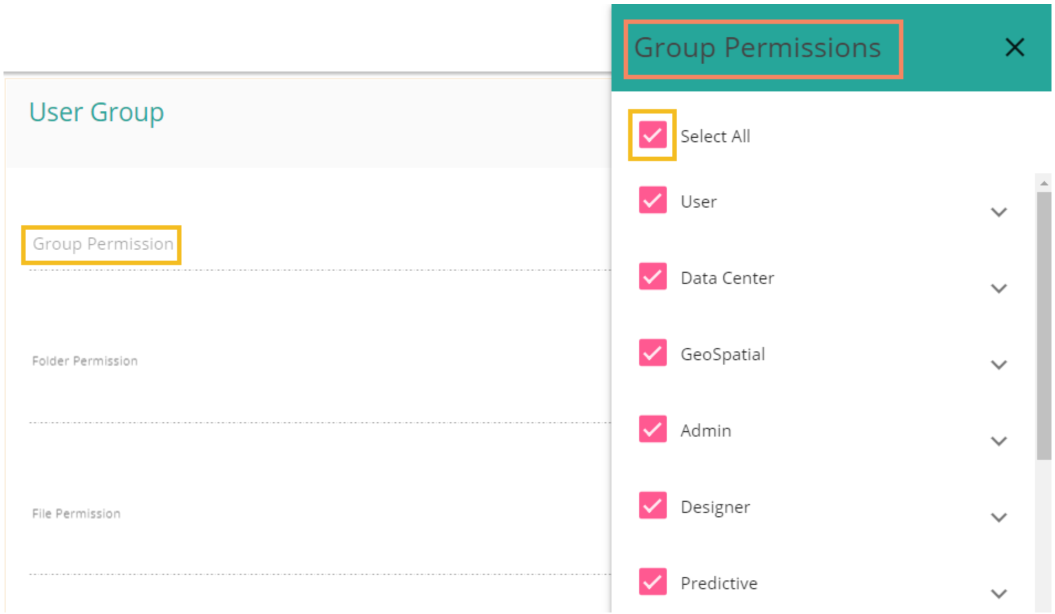


c. **Add User to Group**: Click the **'Add'** button  and select User(s) by using a checkmark in the box from the displayed list of users.

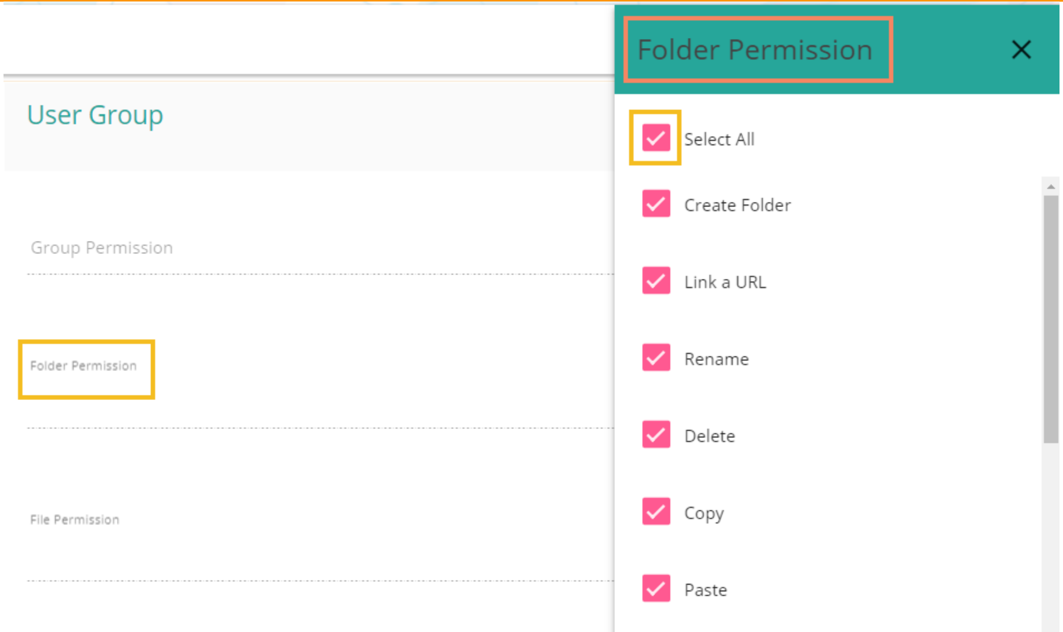


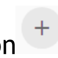


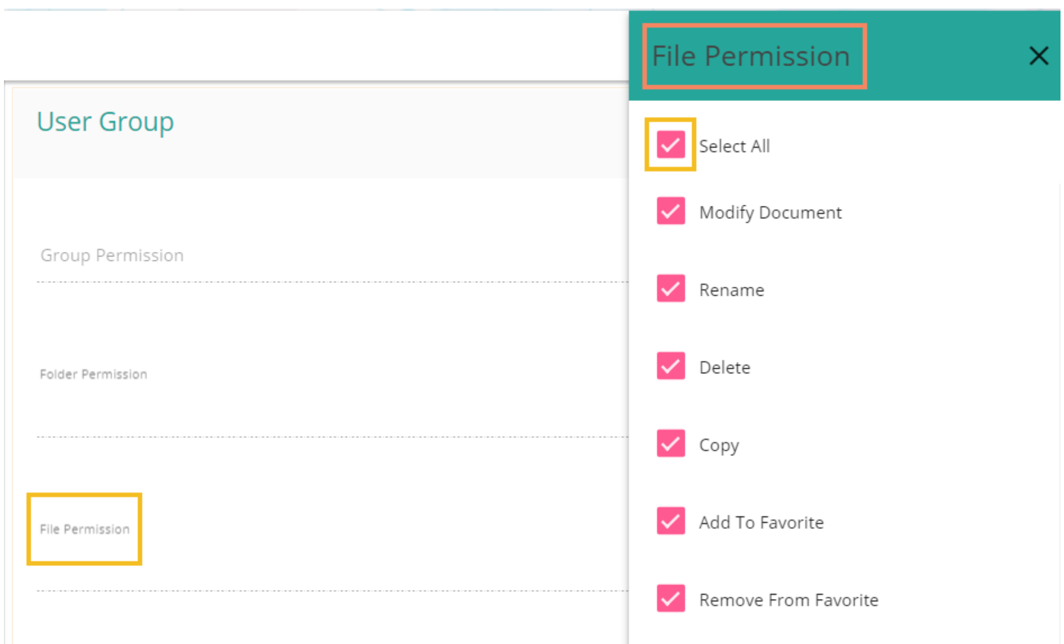
d. **Group Permission**: Click the '**Add**' button provided next to the Group Permission option. Assign various plugin/app rights to the User Group via the '**Group Permissions**' menu list (It is Mandatory).



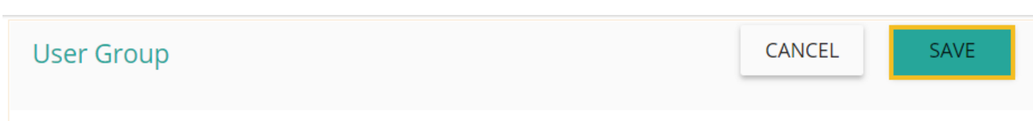
e. **Folder Permission**: Click the '**Add**' button provided next to the Folder Permission option. Assign various folder permissions to the User Group via the '**Folder Permission**' menu list.



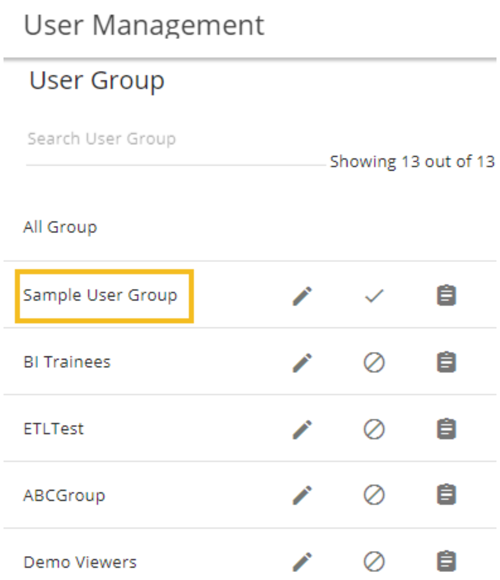
f. **File Permissions**: Click the '**Add**' button  provided next to the File Permission option. Assign various file permissions to the User Group via the '**File Permission**' pop-up window.



v) Click the '**SAVE**' option provided for the User Group



vi) The newly created group will be listed under the '**All Group**' list (as shown below):



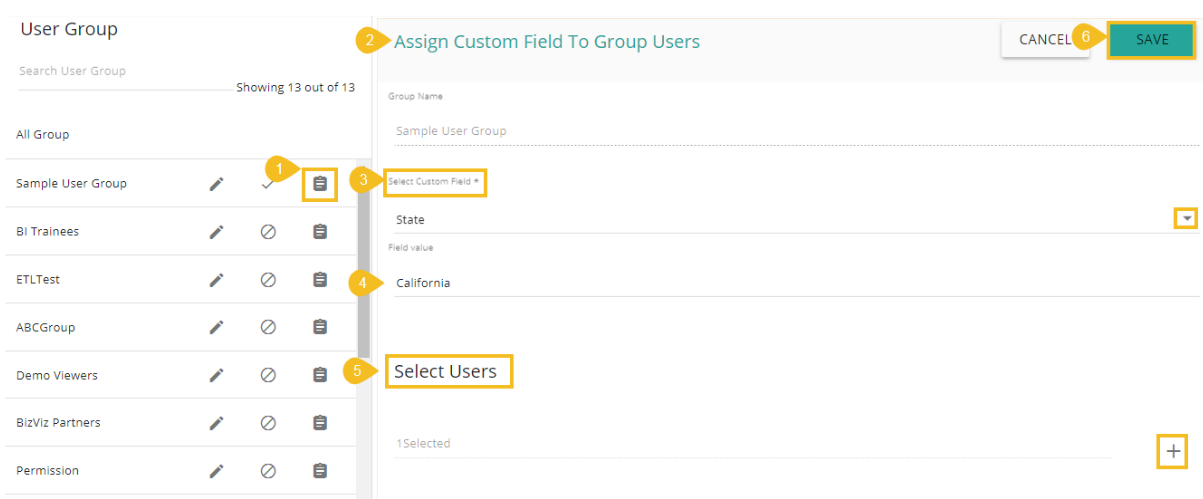
Note: Users can apply the following actions on a created user group.

Option	Name	Description
	Edit	To edit details for the selected user group
	Activate Group	To activate the selected user group
	Block Group	To block the selected user group
	Assign Custom Fields	To assign the group-specific custom fields.

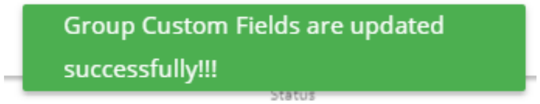
6.2.1. Assigning Group Custom Fields

This feature is provided to assign values to the custom fields.

i) Click '**Assign Custom Field**' option provided next to a user group
ii) Users will be redirected to the '**Assign Custom Field to Group Users**' page
iii) Select a Custom Field using the drop-down menu
iv) A new field will be displayed to assign the '**Field Value**' for the selected custom field
v) Select users using the '**Add**' icon to assign the custom field to the selected users
vi) Click '**SAVE**'



vii) A message will pop-up to assure that the group custom fields are updated successfully



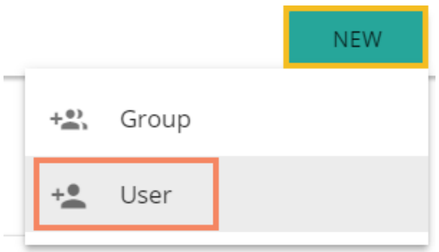
Note: The ‘**Edit**’ and ‘**Block**’ icons will not be provided for the default user groups – Admin Role and Viewer Role.

6.3. Creating a New User

i) Click ‘**NEW**’

ii) A context menu opens

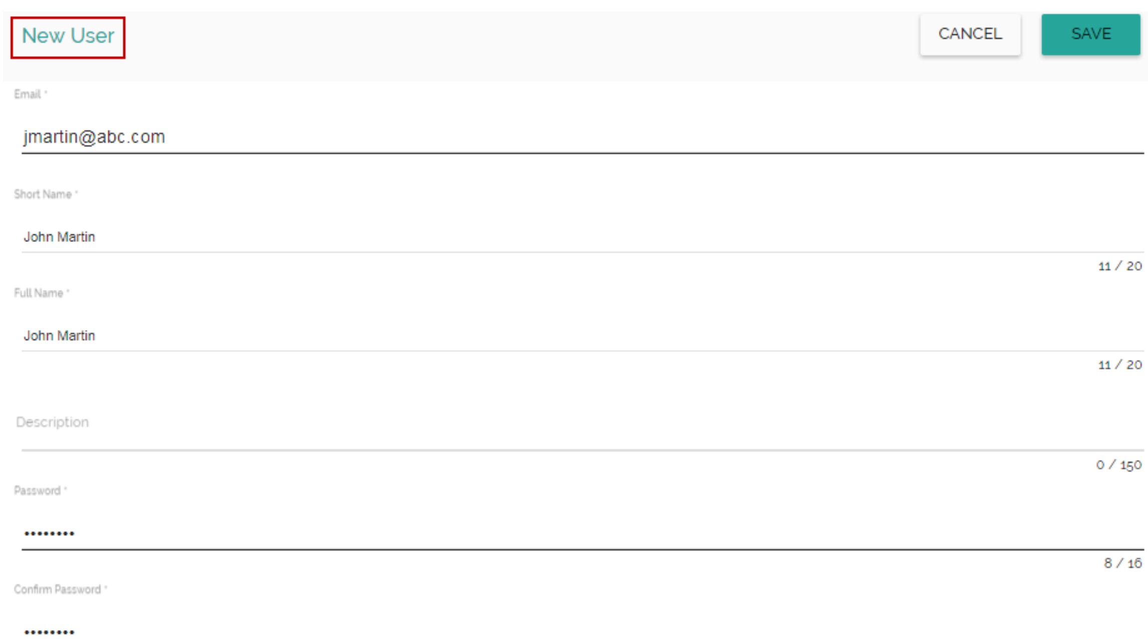
iii) Select the ‘**User**’ option from the context menu



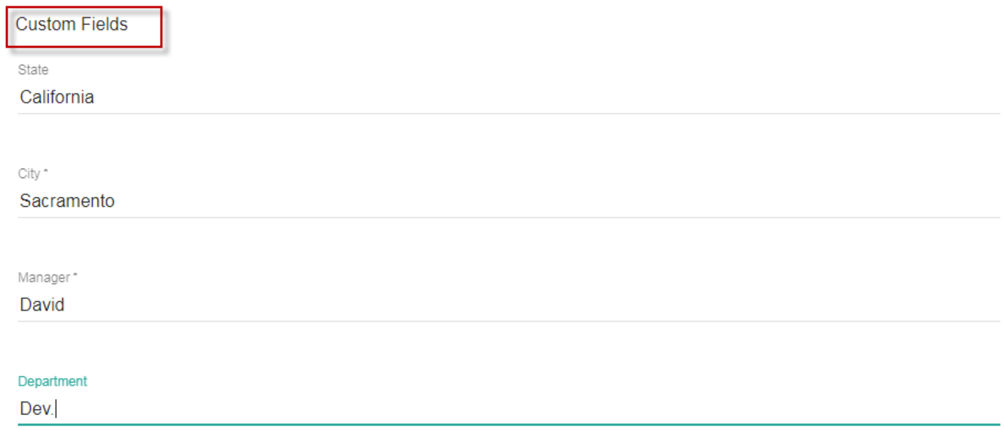
iv) Users will be directed to the ‘**New User**’ form

v) Fill in the following information to create a new User:

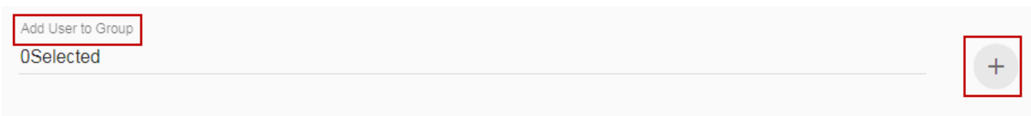
a. **Email:** Email address
b. **Short Name:** Short name of the user
c. **Full Name:** Full name of the User
d. **Description:** Describe the user (optional)
e. **Password:** Password to be assigned to the new user
f. **Confirm Password:** Confirm the above password



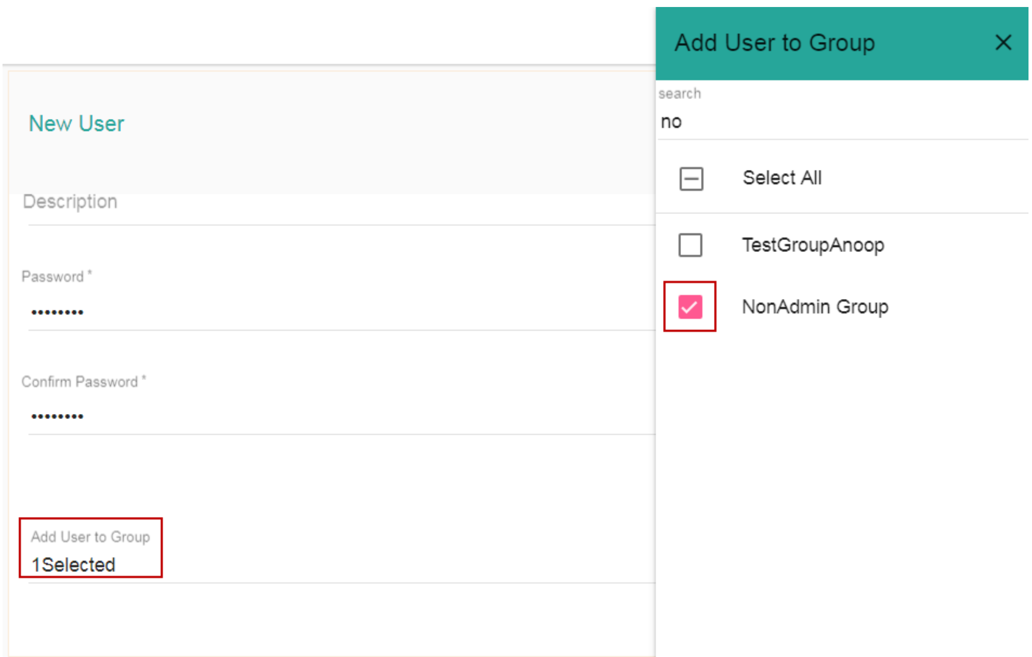
vi) Preconfigured custom fields will be displayed in this form. Users need to provide the required details using the custom fields if marked as mandatory (The user will get group specific custom fields)



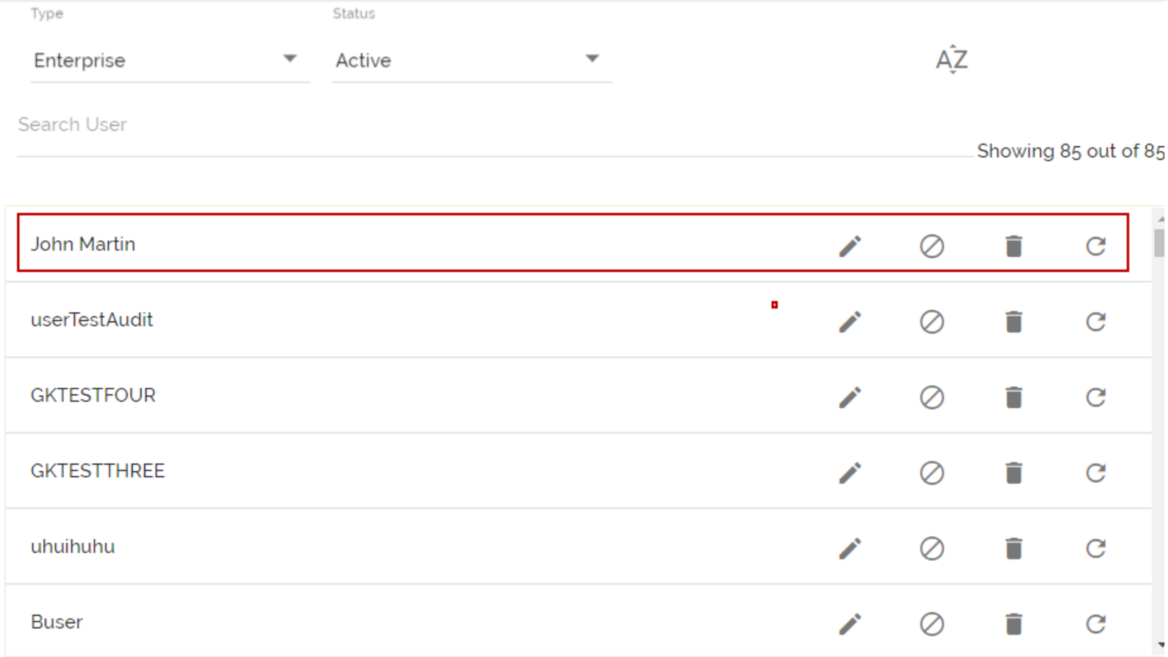
vii) Click the ‘**Add**’ option provided next to the ‘**Add User to Group**’ field



viii) A new window will open with the existing user groups list.
ix) Select the user groups from the window to add the new user.
x) Click the ‘**SAVE**’ option



xi) Users will be directed to the existing user list
xii) The newly created user will be added to the user list



Options	Name	Description
	Edit	Update/Edit the user specific details for a selected user
	Block	Block the selected user
	Remove	Remove the selected user from the user list
	Reset Password	A Reset password will be sent to the registered user email

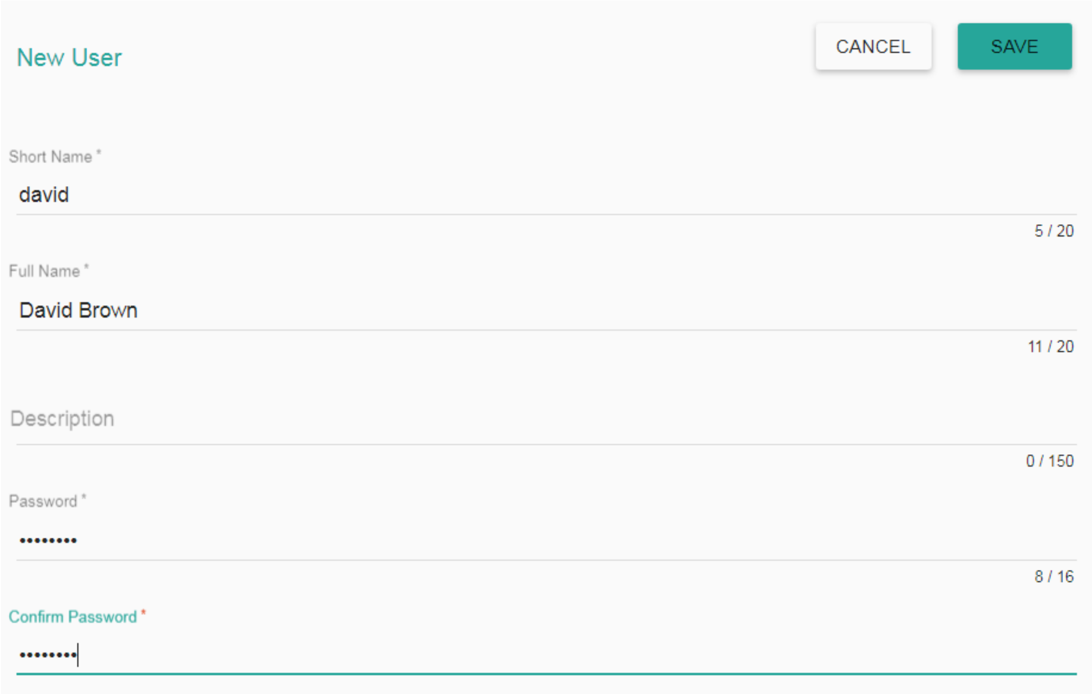
Note:

a. All the user specific details other than email id can be updated/edited by the Update User option
b. If the new user is added to the Admin Group, the new user becomes admin
c. A user can be added to the multiple groups

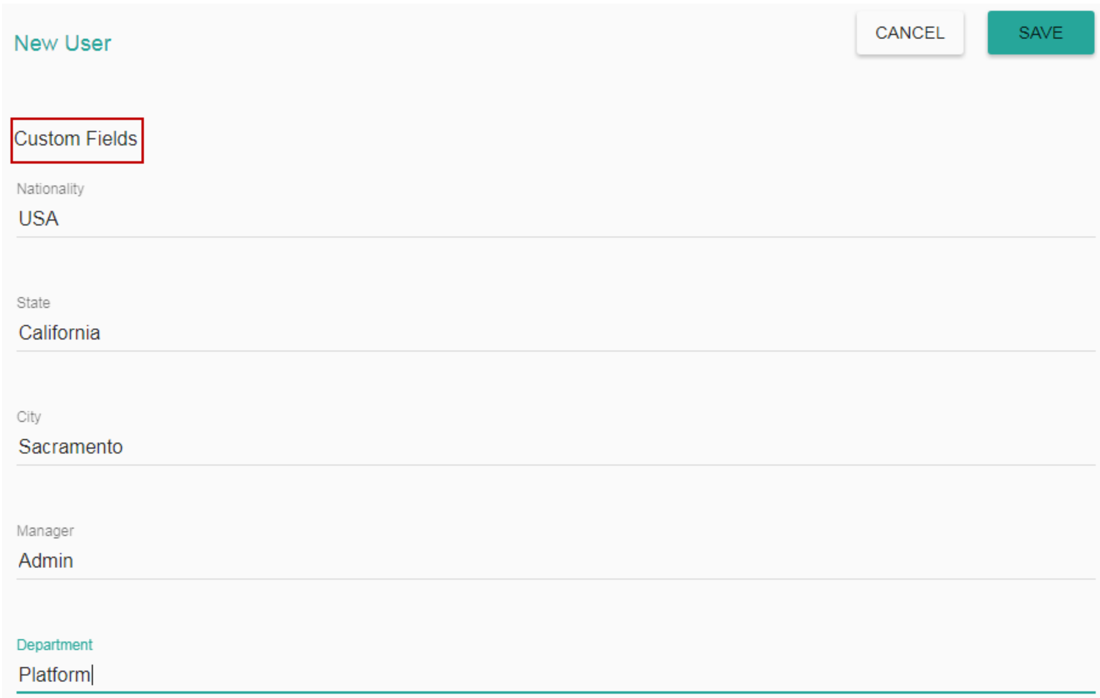
6.3.1. Default User Role

All the new users created via the User Management Module are added to a default role (the viewer role). The default user role restricts all new users from accessing any of the Platform plugins until they are attached to some user group.

i) Select '**User**' option from the '**New**' context menu
ii) The '**New User**' form will open
iii) Provide the required information to create a new user

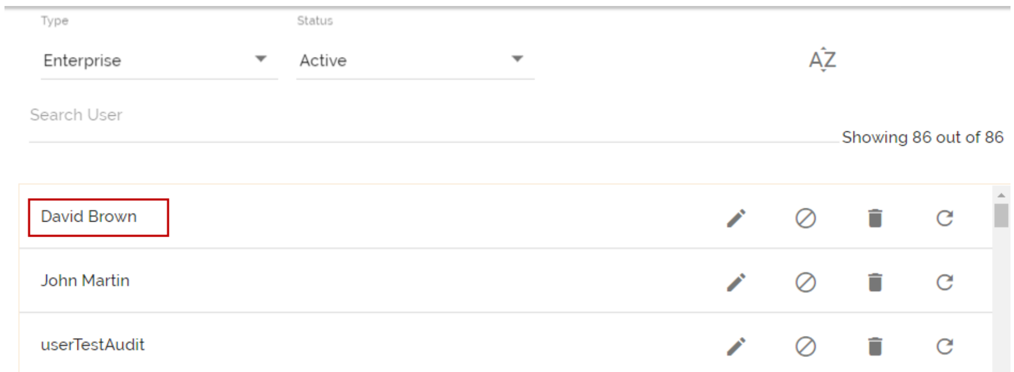


iv) Provide the '**Custom Fields**' details for the new user (If marked as mandatory)

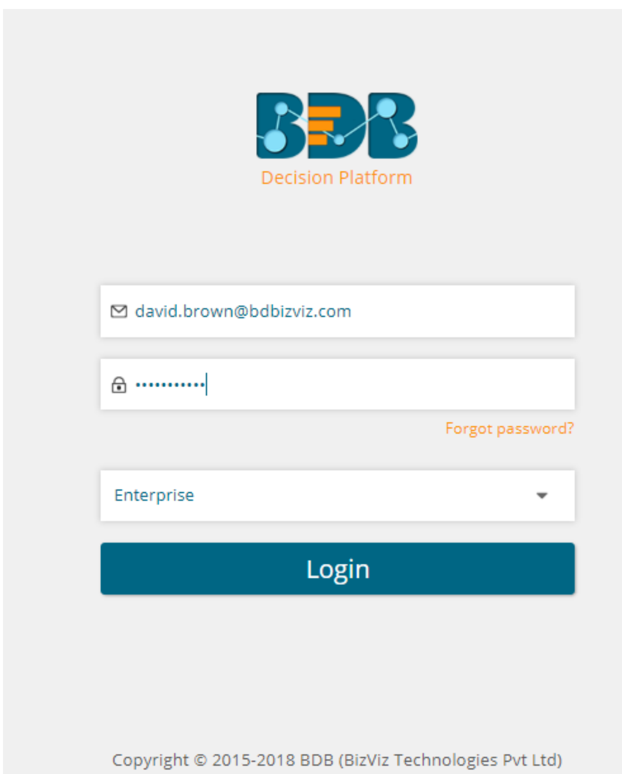


v) Do not add the user to any group

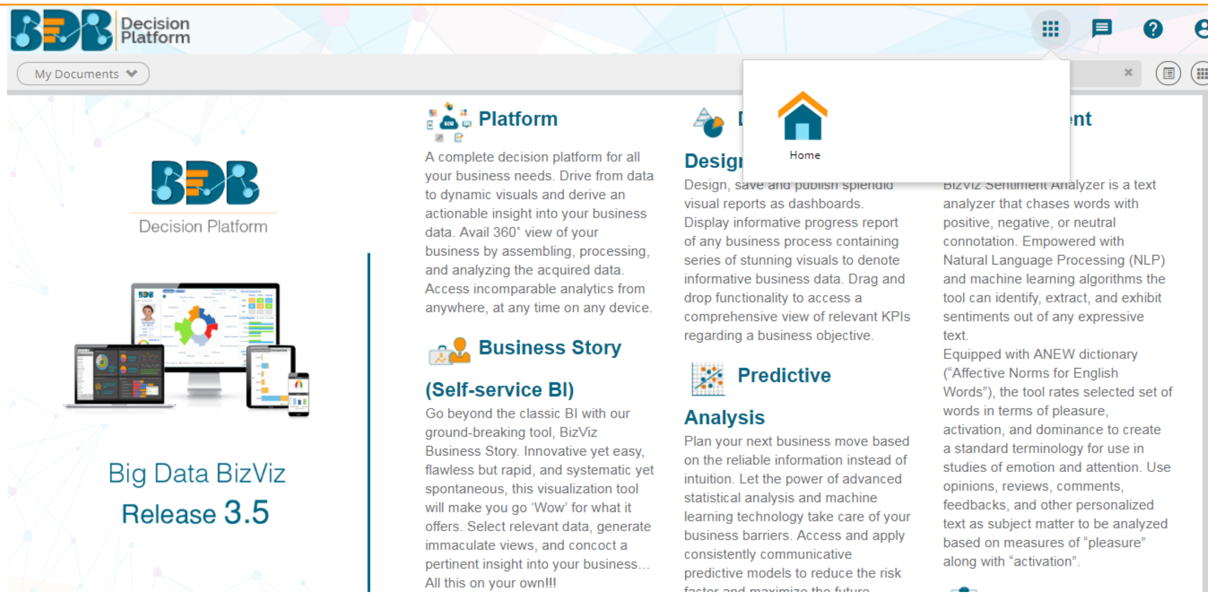
vi) The user will be created and added to the list of users (By default the newly created user will be added to the Viewer Role User Group)



vii) Navigate to the 'Login' page of BDB platform and use new user's credentials to access the platform



viii) The new user can access the platform homepage, but not the platform plugins



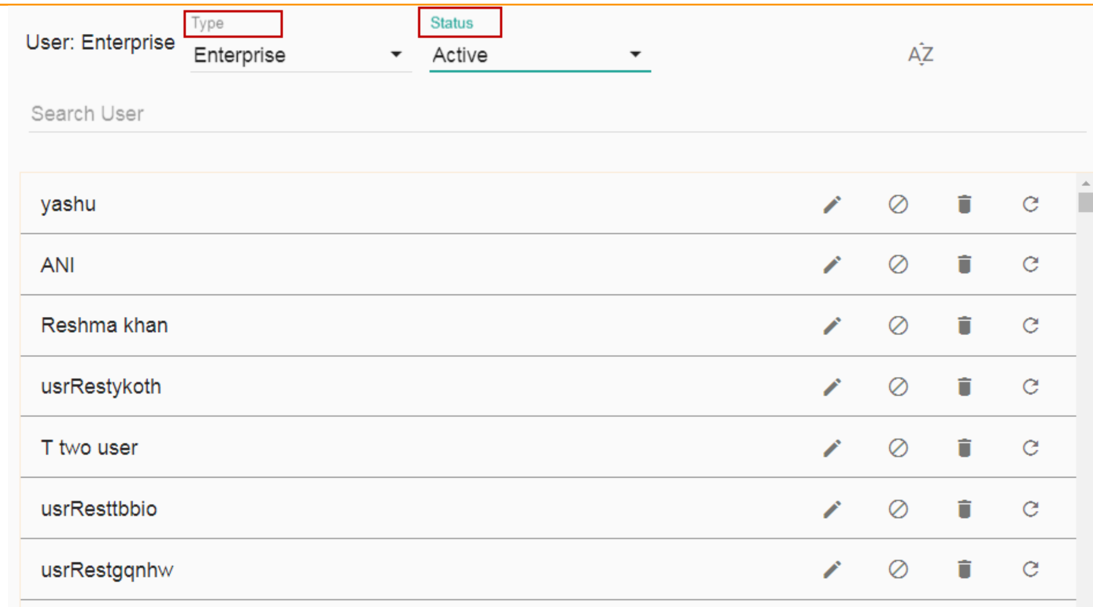
Note: The BizViz Platform provides some category of users (as explained below):

1. **Viewer Role**: Any user created under the BizViz Platform will be assigned this role by default.
2. **Admin Role**: Any user can be added to this role by using the **'Add User to Group'** window. Users added the Admin Role would have to be permitted to access all the plugins.
3. **Ordinary User Role**: If a user is added to any group other than Admin Role, the user will be assigned the group-specific permissions.

6.4. User Status

This feature helps the administrator to identify the various status of system users and enable an expired user account.

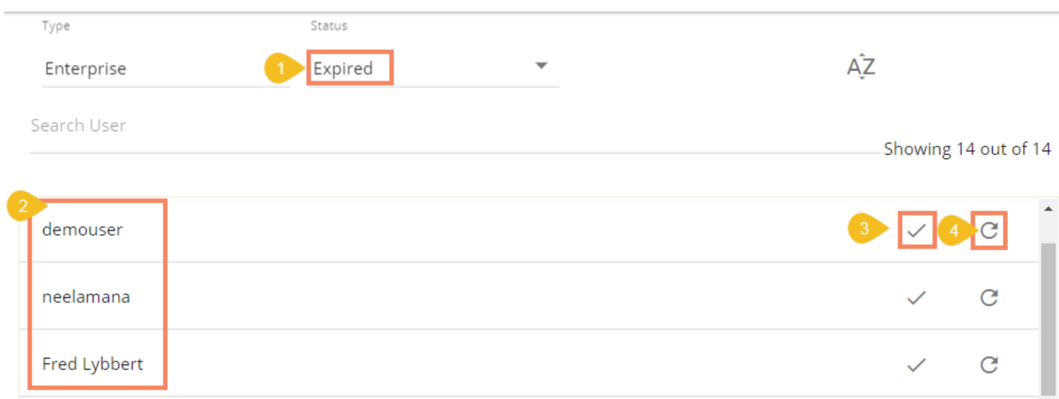
i) Navigate to the User Management page
ii) Users will be directed to the two drop-down menus.
   a. **Type**: It contains the following authentication types as drop-down options
      i. Enterprise
      ii. Window AD
      iii. CA PPM
   b. **Status**: It includes the following user status as drop-down options
      i. Active
      ii. Blocked
      iii. Expired
      iv. Deleted



Note: Users can select any combination of the filter values mentioned above to display filtered/customized lists of users.

6.4.1. Activating an Expired User Account

i) Select '**Expire**' as the status option
ii) A list of all expired user accounts/ groups will be displayed
iii) Click '**Activate**' to activate a specific user/user group
iv) Click the '**Reset Password**' option to set a new password for an activated user



Note: By clicking '**Activate**,' an expired user account can be activated. The user can use the old password. However, when the '**Reset Password**' option has been used, the user will be activated with a new password (In this case, the user will be redirected to set a new password).

7. Data Center

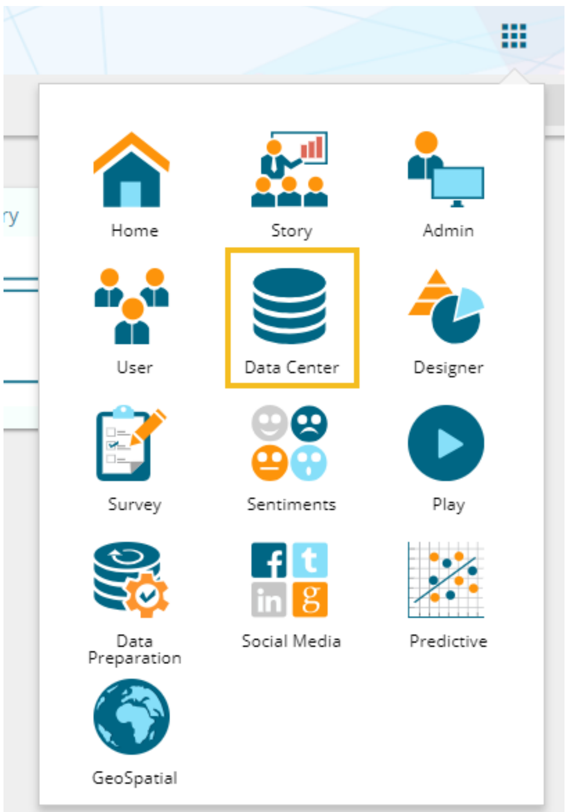
This section explains how to connect with multiple databases to create data service and elastic search-based data store. It also describes steps to create data store metadata.

7.1. Data Connector

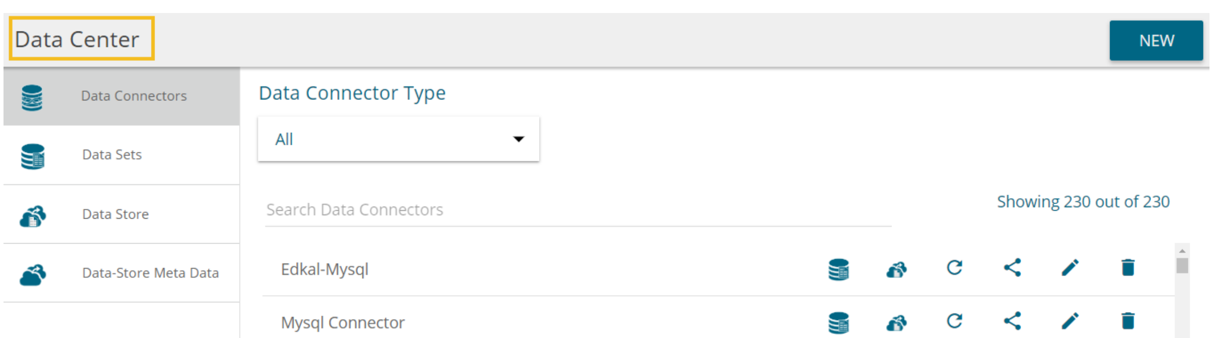
BDB Decision Platform offers a wide choice of data connectors ranging from RDBMS, Big Data and File types to various API connectors to fetch data from any media.

7.1.1. Creating a Data Connector

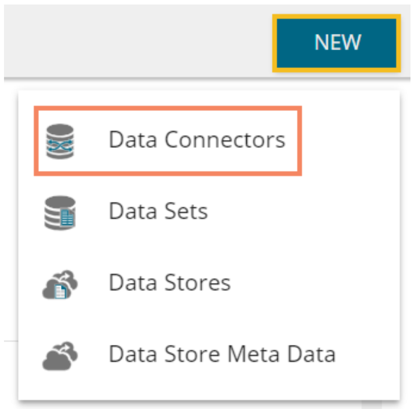
i) Click the '**Data Center**' option  from the apps menu



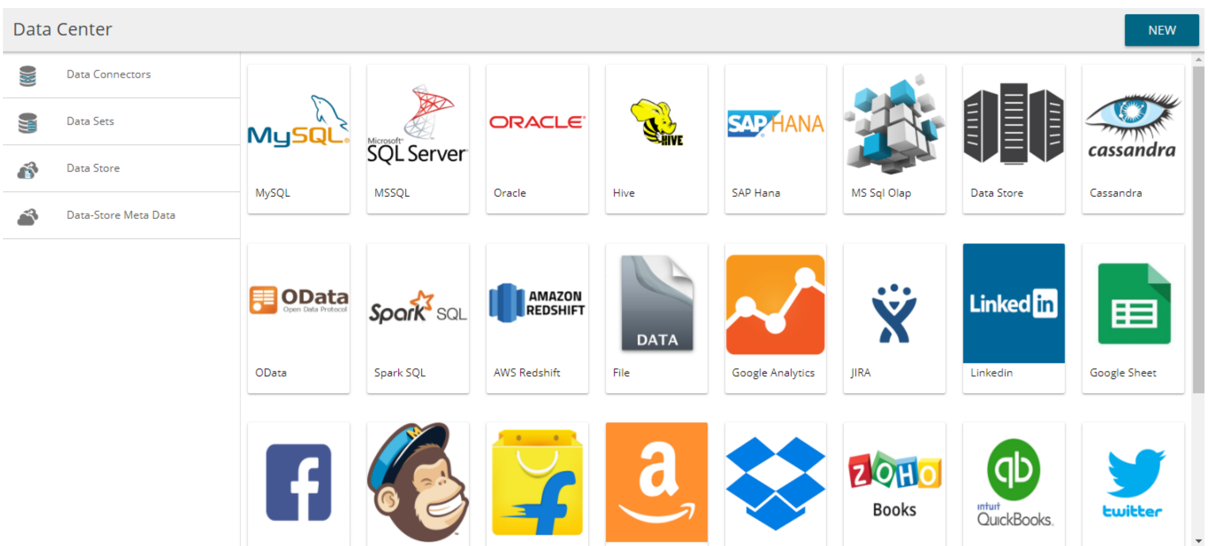
ii) Users will be directed to the Data Center page



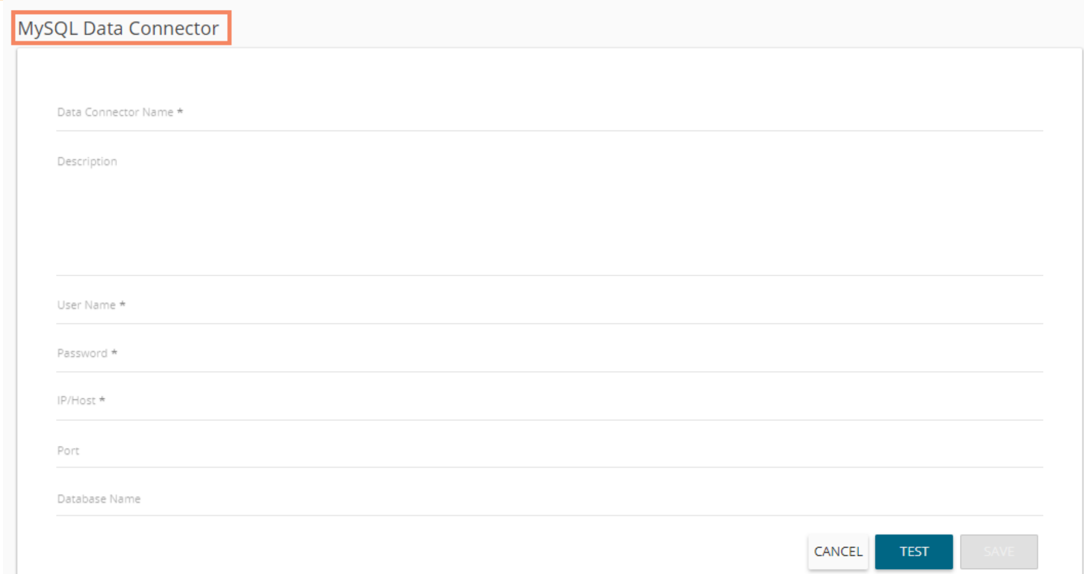
iii) Click the ‘**NEW**’ option
iv) A context menu opens
v) Select ‘**Data Connectors**’ from the context menu



vi) Users will be redirected to a new page to select a connector type

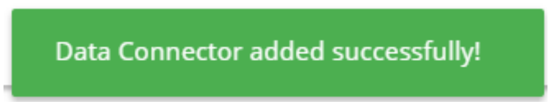


vii) By selecting a connector type, users will be directed to configure that connector
viii) Users need to fill in the required details for the selected data connector
ix) Verify the data connection by clicking the ‘**TEST**’ option
E.g. The following image displays details to be filled to create a MySQL Data Connector

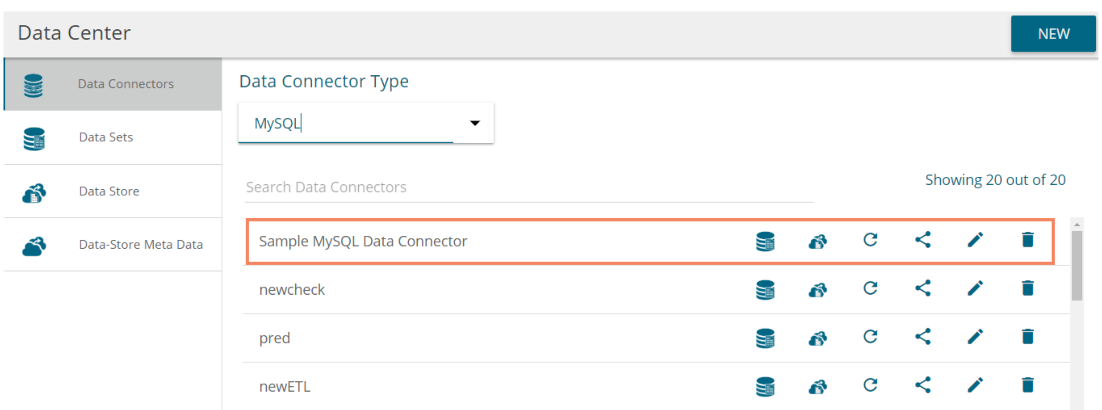


x) Once the connection is tested successfully, click the '**SAVE**' option

xi) A Success message will pop-up as below:

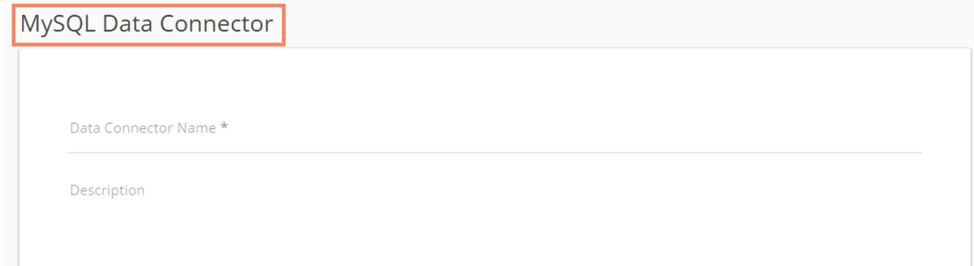


xii) The newly created data connector will be saved under the data connector list
E.g. The Data Connector Name given for the following MySQL Data Connector is Sample MySQL Data Connector.

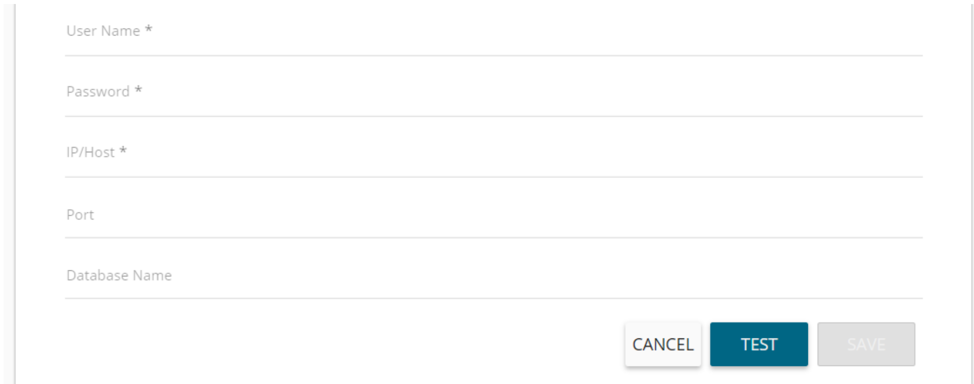


Users need to fill in the required information in the connector specific forms as described below to create that connector.

1. **MySQL Data Connector**
   i) **Data Connector Name:** A user defined name to identify the data source
   ii) **Description:** Connection Details

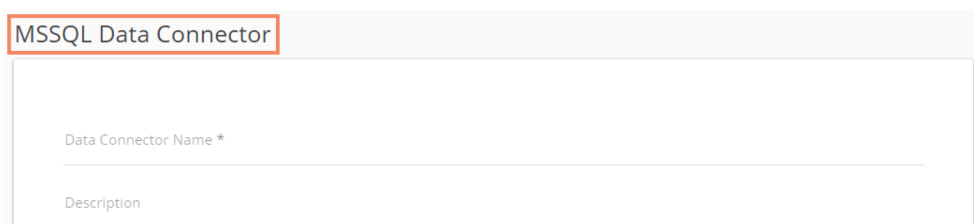


iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where data will be stored

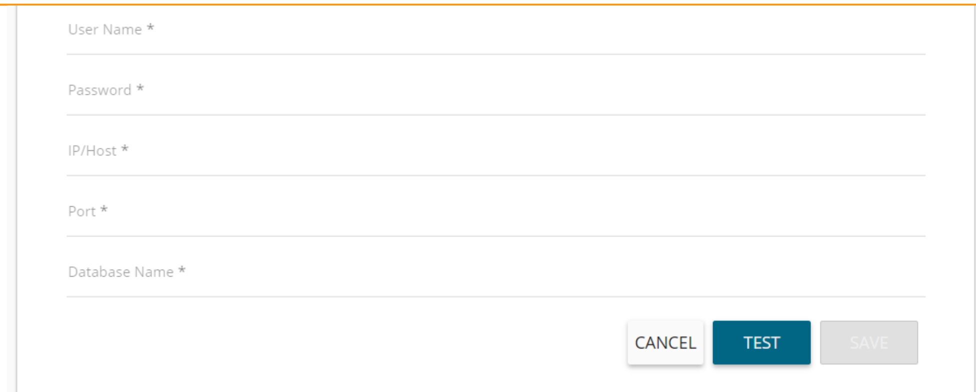


2. MSSQL Data Connector

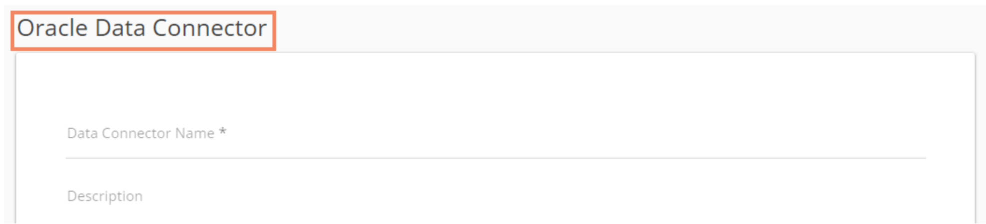
i) **Data Connector Name**: A user defined name to identify the data source
ii) **Description**: Connection Details



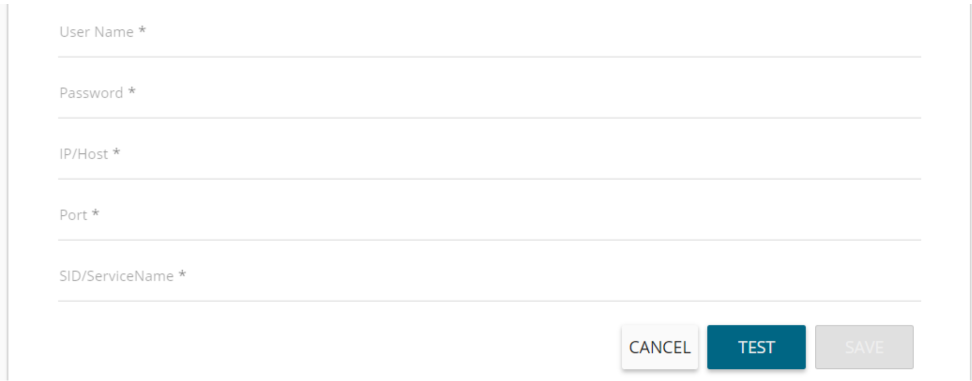
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password**: Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where data will be store



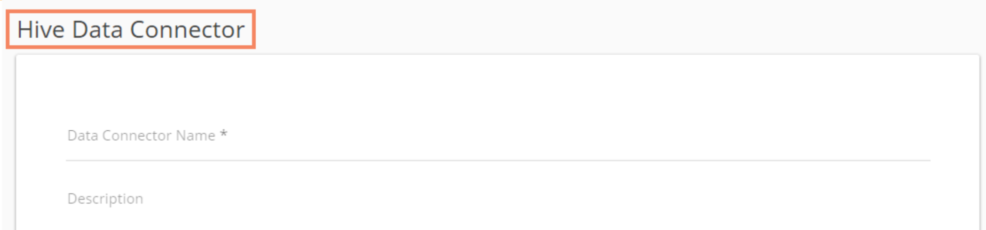
3. **Oracle Data Connector**
   i) **Data Connector Name:** A user defined name to identify the data source
   ii) **Description:** Connection Details



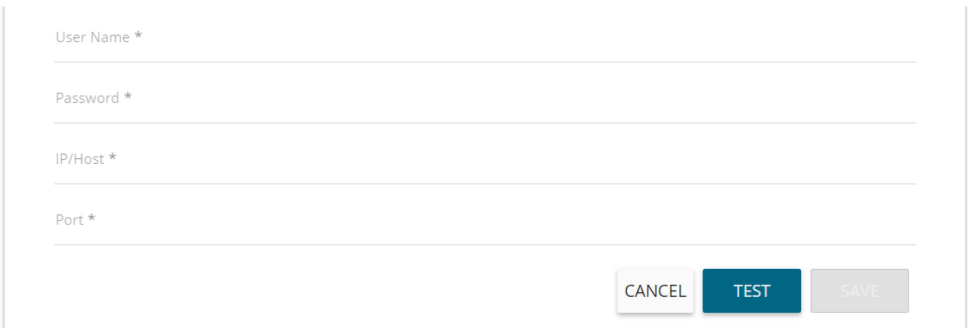
   iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
   iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
   v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
   vi) **Port**: The server port number
   vii) **SID Service Name:** Unique alias used for the database (when connecting)



4. **Hive Data Connector**
   i) **Data Connector Name:** A user defined name to identify the data source
   ii) **Description:** Connection Details

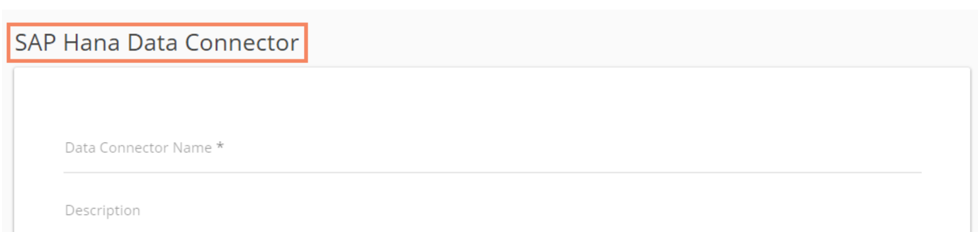


iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number

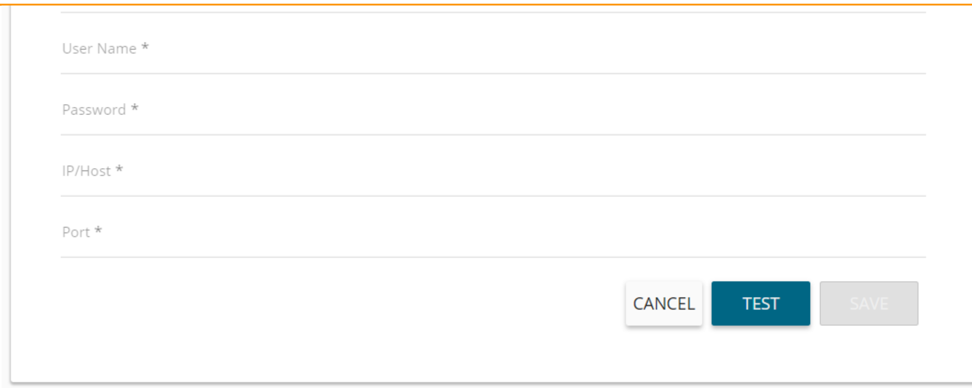


5. SAP Hana Data Connector

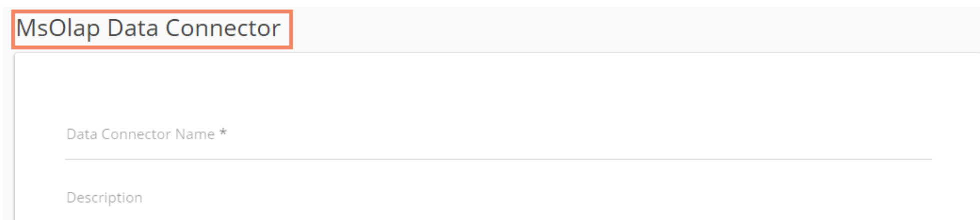
i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description**: Connection Details



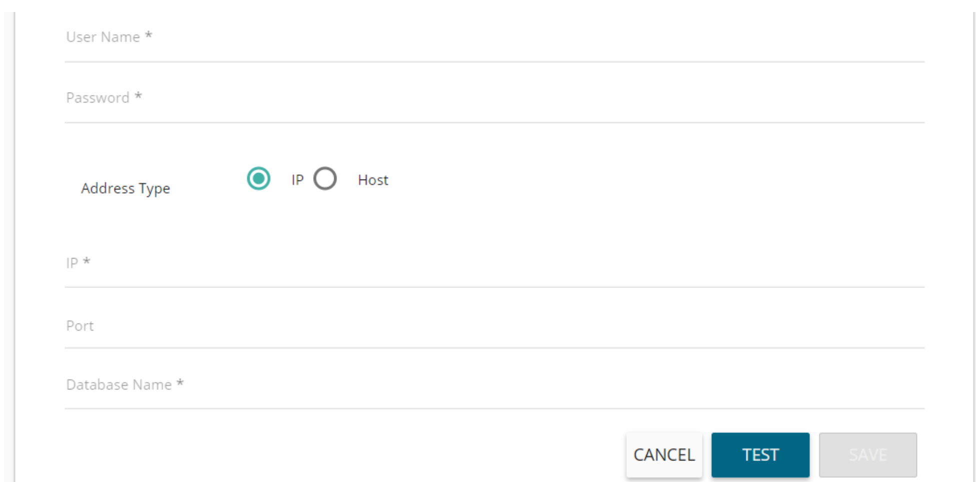
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number



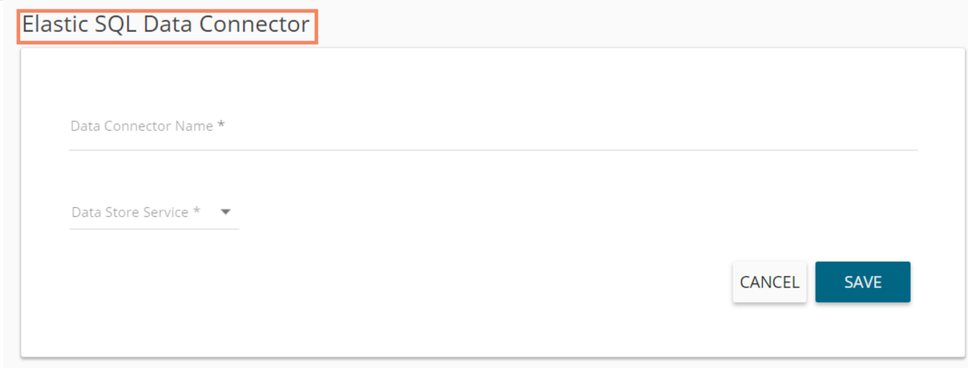
6. **MSSQL Olap Data Connector**
   i) **Data Connector Name:** A user defined name to identify the data source
   ii) **Description:** Connection Details



   iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
   iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
   v) **Address Type (IP/Host):** As per the selected Address Type a field will be displayed below. Users need to enter database server details (from where the user wants to fetch data).
   vi) **Port:** The server port number
   vii) **Database Name:** Name of the database where data will be stored



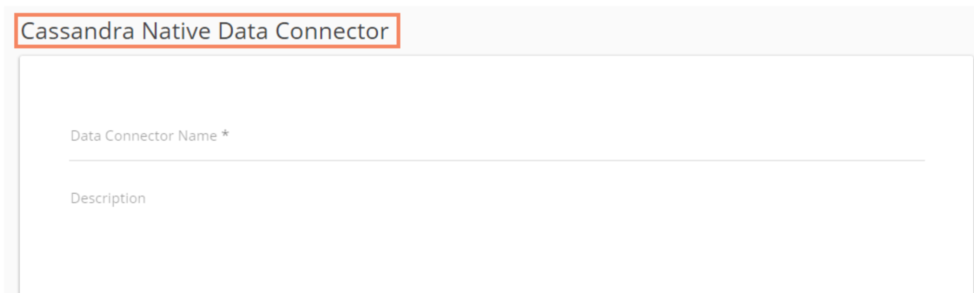
7. **Data Store - Elastic SQL Data Connector**
   i) **Data Connector Name:** A user defined name to identify the data source
   ii) **Data Store Service:** Select a data store service from the drop-down list



8. Cassandra Native Data Connector

i) **Data Connector Name:** A user defined name to identify the data source

ii) **Description:** Connection Details



iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)

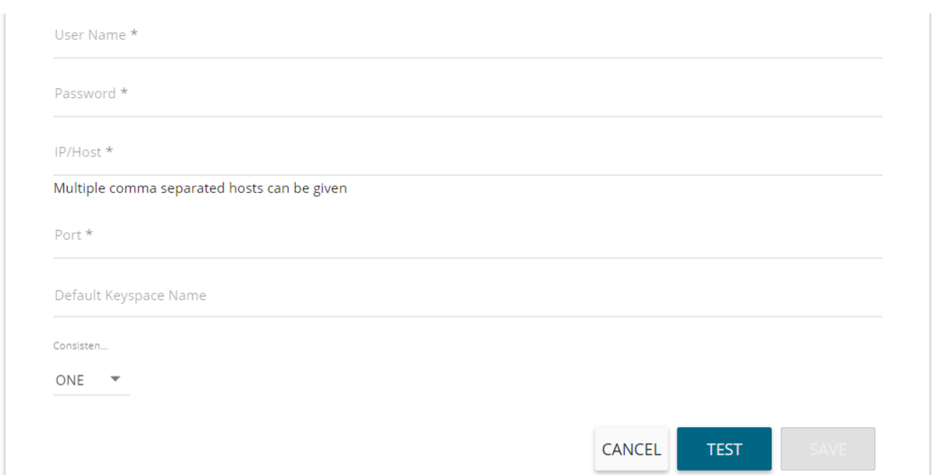
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)

v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)

vi) **Port:** The server port number

vii) **Default Key-Space Name:** Enter the default keyspace name

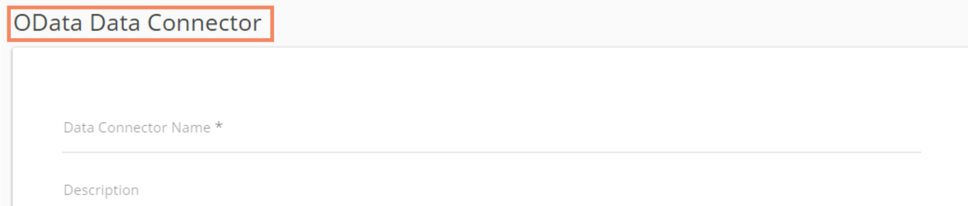
viii) **Consistency:** Select a consistency option from the drop-down list (One/Two/Three/Quorum)



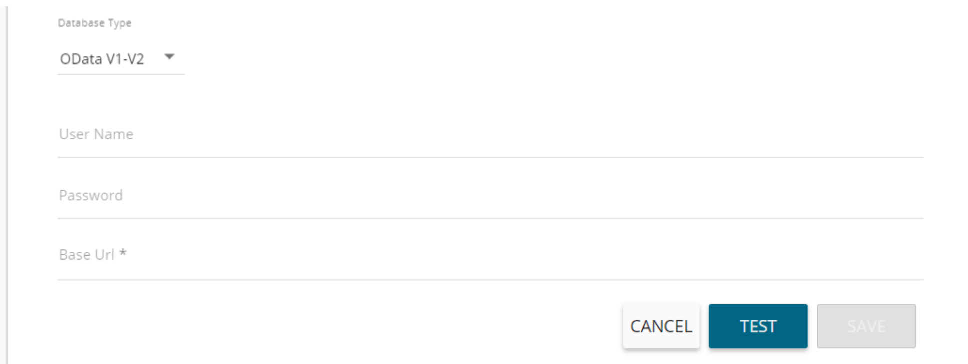
9. O Data Connector

i) **Data Connector Name:** A user defined name to identify the data source

ii) **Description:** Connection Details

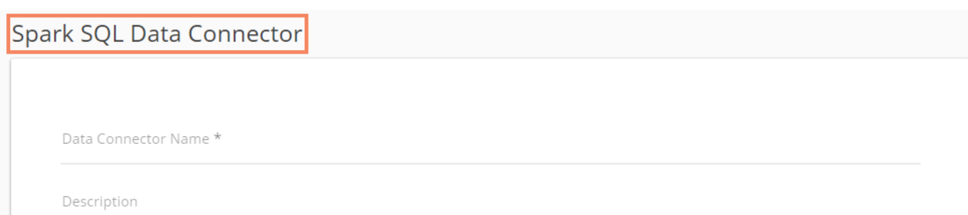


iii) **Database Type:** Database type using the drop-down menu in which the data will be stored (OData V1-V2/OData V3-V4)
iv) **User Name:** Enter a User Name (It should be the same as given in the connection server)
v) **Password:** Enter the Password (It should be the same as provided in the connection server)
vi) **Base Url:** Enter Service Root URL or Base URL



10. Spark SQL Data Connector

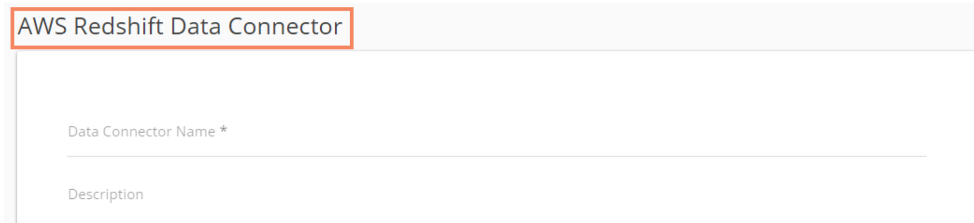
i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection Details



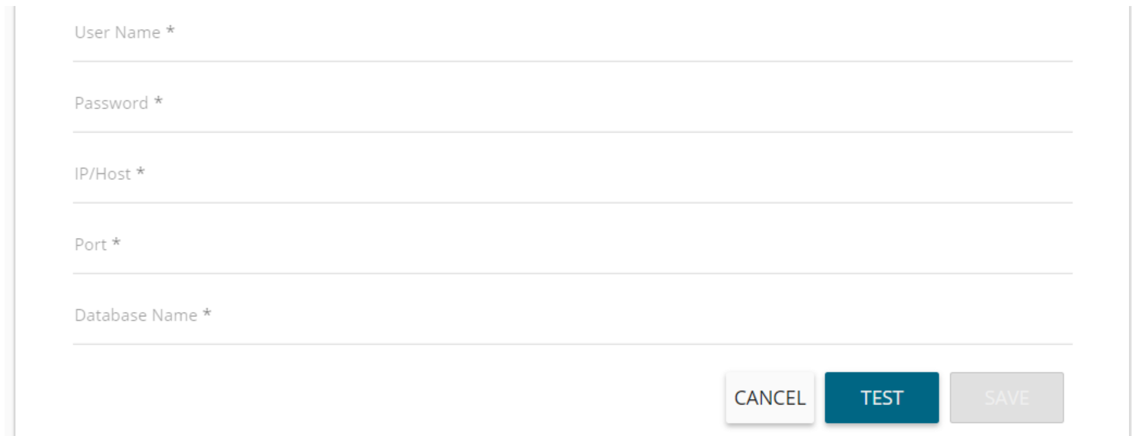
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number

11. **AWS Redshift**

i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection Details

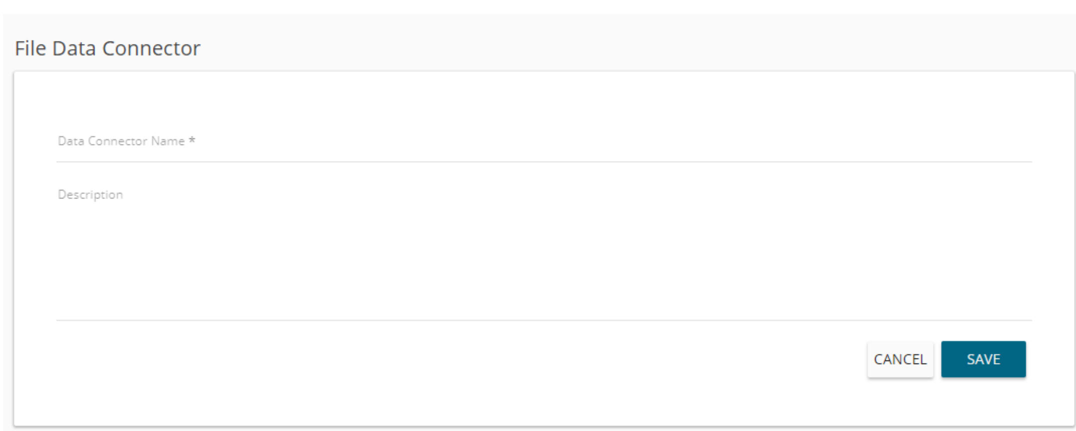


iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where data will be stored

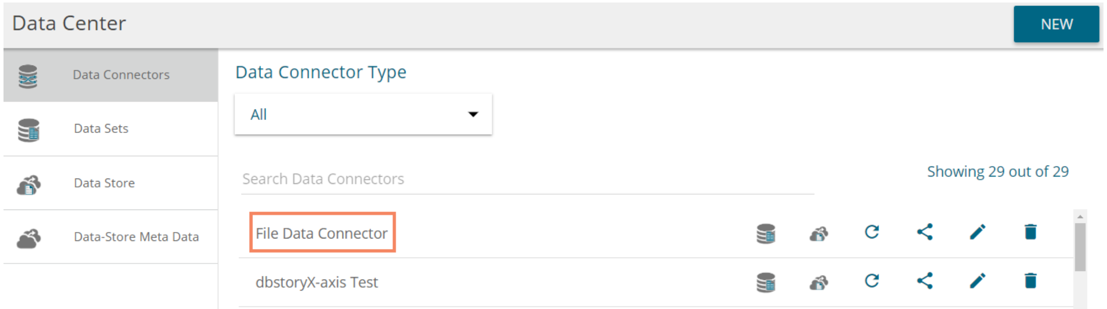


12. **File**

i) **Data Connector Name:** A user defined name to identify the data source
ii) **Description:** Connection details (optional)
iii) Click the **'SAVE'** option



iv) The newly created file connector will be added to the data connector list.

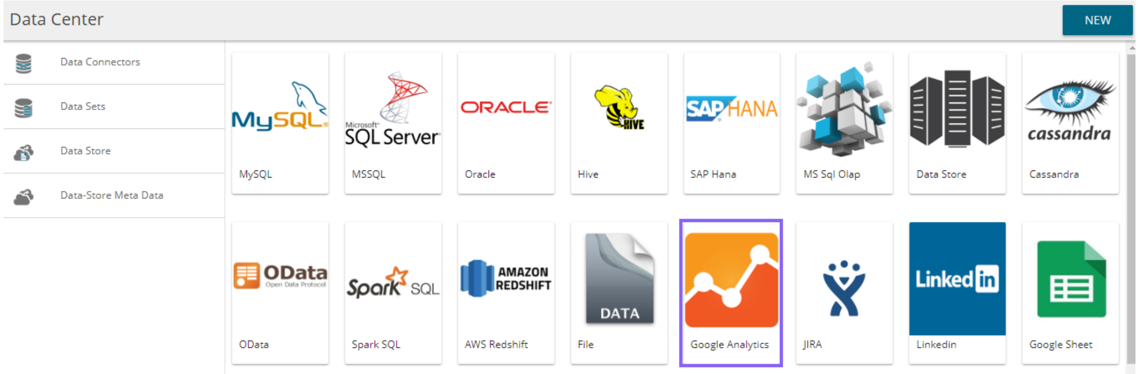


Note: Users need to select a file from the system while creating a datastore based on the file connector.

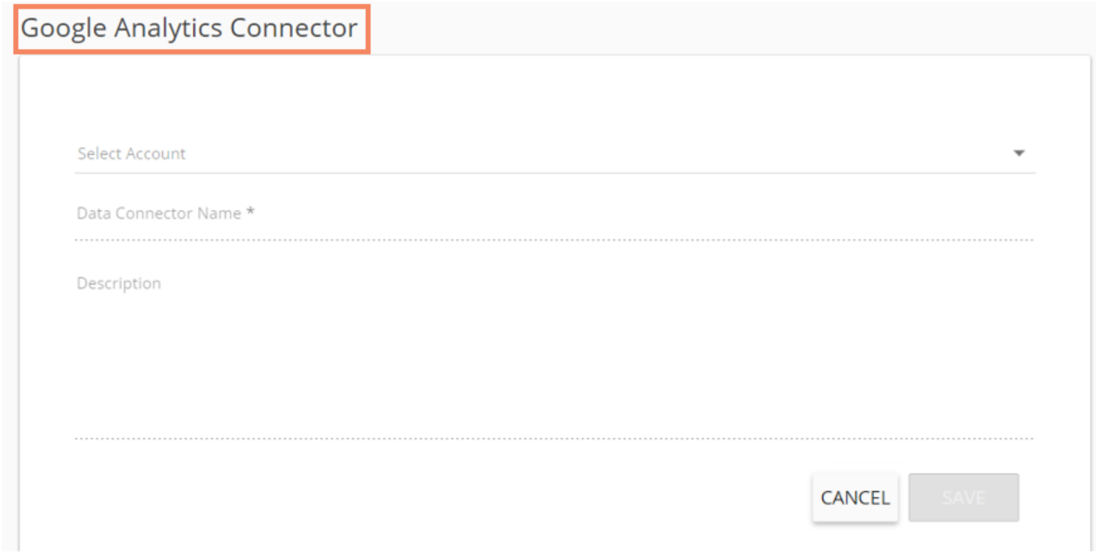
13. Google Analytics Connector

i) Navigate to the Data Connector page by using the 'NEW' context menu.

ii) Click '**Google Analytics**' connector



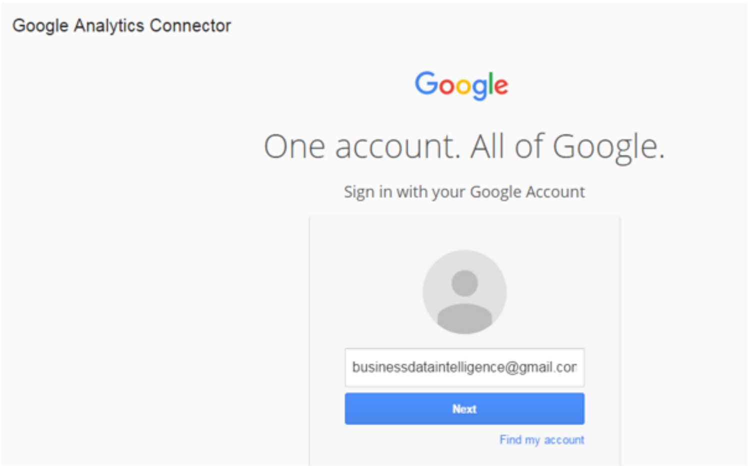
iii) Users will be directed to the Google Analytics Connector form



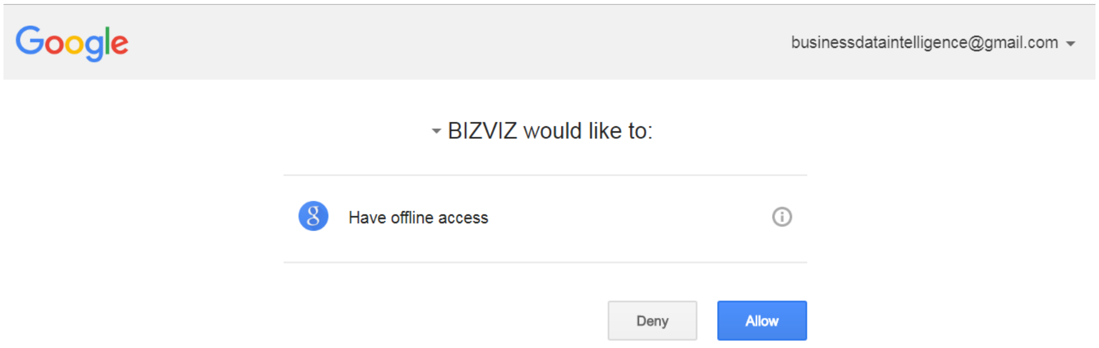
iv) Select Account: Either select a Google account from the list or choose 'Add New Account' option to add a new Google account

v) Adding a new google account will redirect users to follow the below given steps:

a. After selecting a google account, users need to login to the same

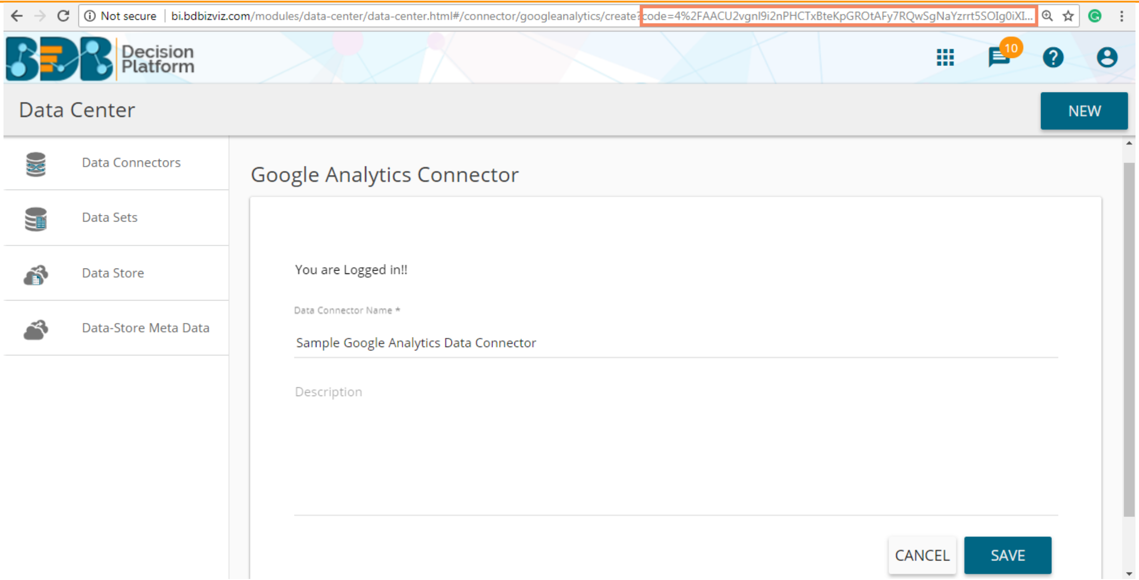


b. Give access to the analytics data by clicking the 'Allow' option



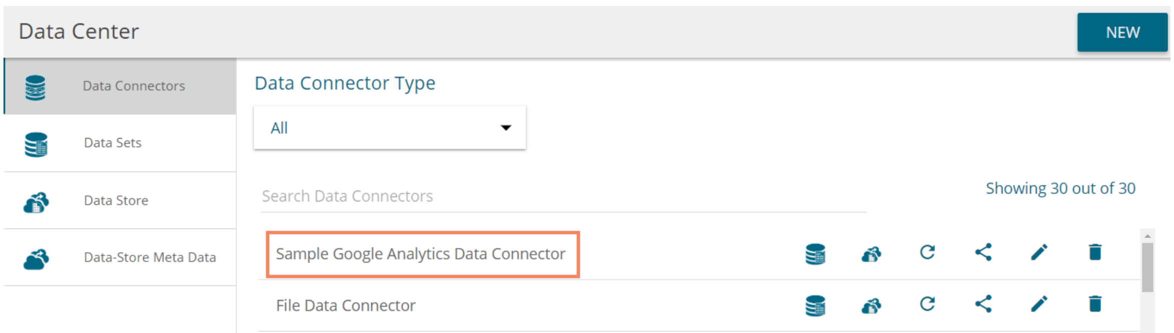
c. After getting the access permission, users will be redirected to the data connector form with an authorization code in the URL.

i. Click '**CHANGE ACCOUNT**' option, if wish to change the selected account
ii. **Data Connector Name:** Enter a user-defined name to identify the data connector
iii. **Description:** Describe the data connector (optional)
iv. Click '**SAVE**'



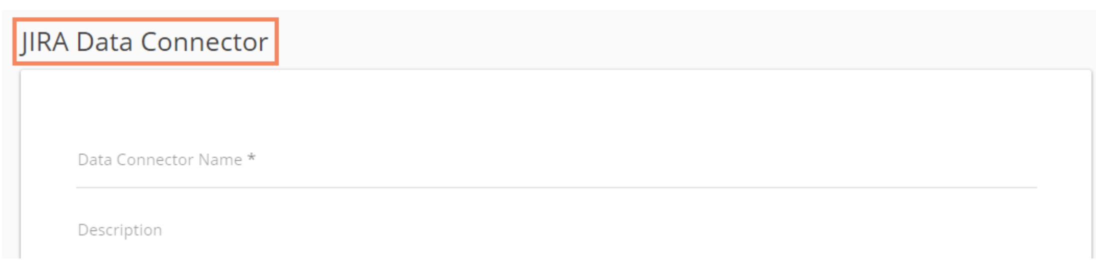
Note: Users can '**CANCEL**' the connector if wished to do so from the current page.

vi) The new Google Analytics Data Connector will be created and added to the existing data connectors list

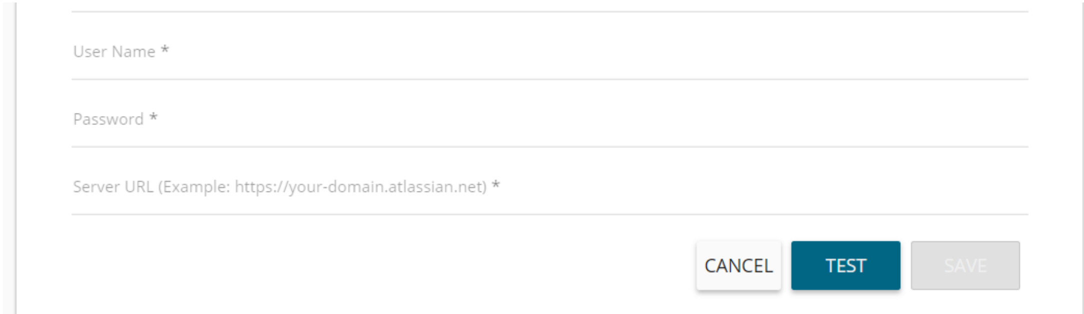


14. JIRA

i) **Data Connector Name:** A user-defined name to identify the data connector
ii) **Description:** Describe the data connector

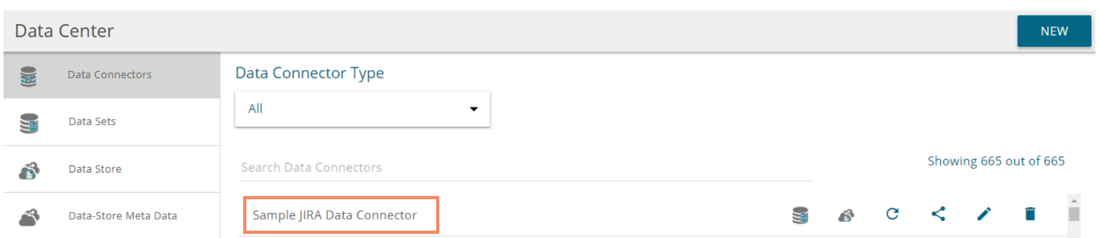


iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the password (It should be the same as provided in the connection server)
v) **Server URL:** Enter the server URL link
vi) Click '**TEST**' to verify the connection



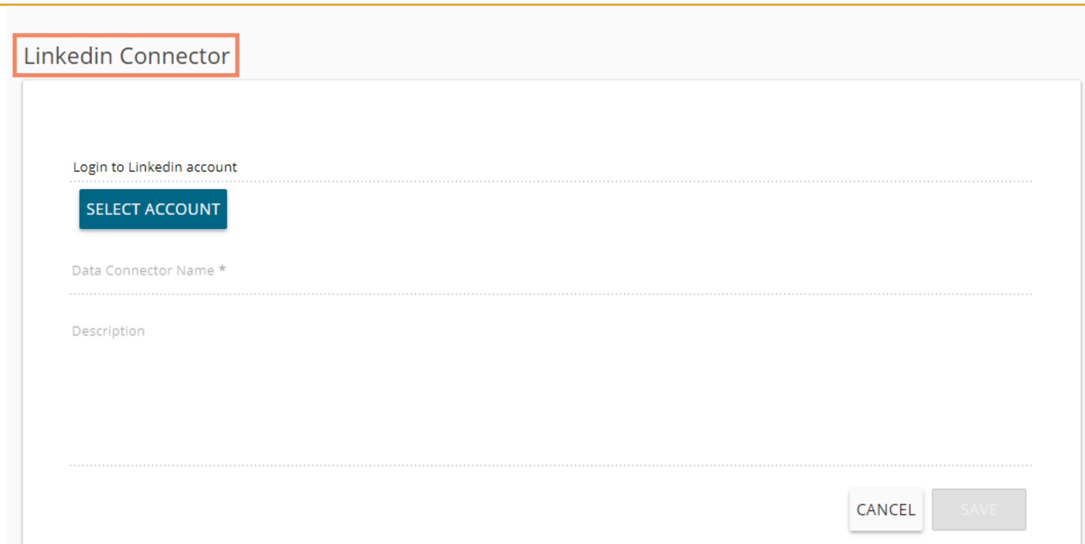
vii) Click **'SAVE'** after the connector is successfully verified

viii) The new JIRA Data Connector will be saved and added to the Data Connector list



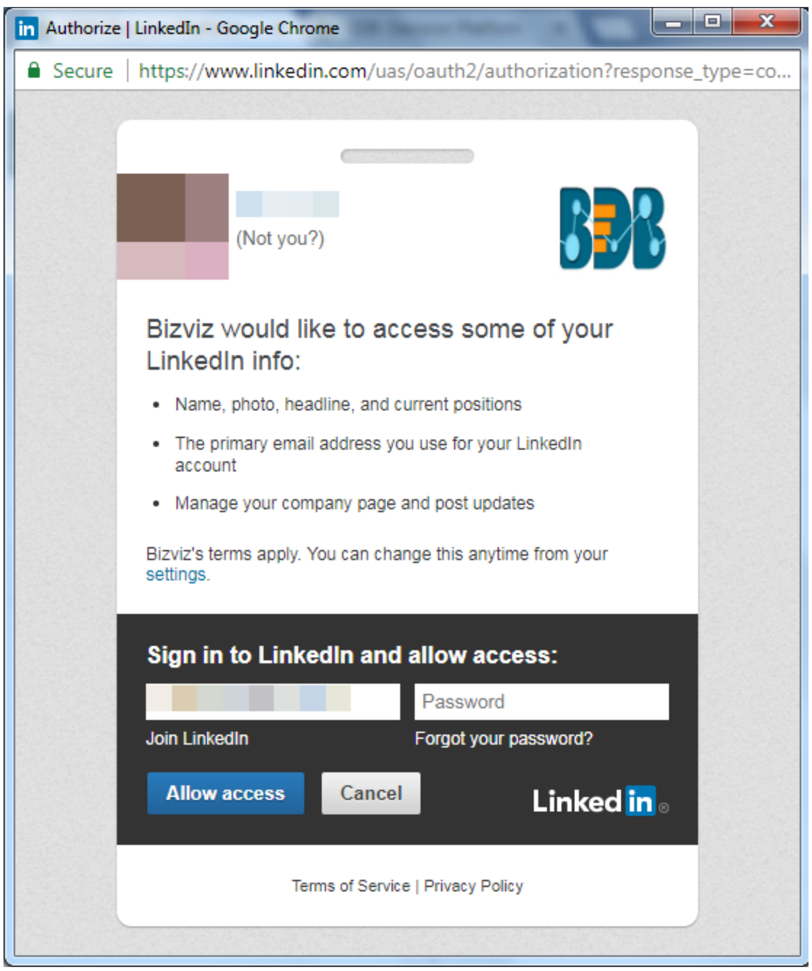
15. LinkedIn

i) Select **'LinkedIn'** connector from the Data Connector page
ii) The user will be redirected to select a LinkedIn account
iii) Click **'SELECT ACCOUNT'** option



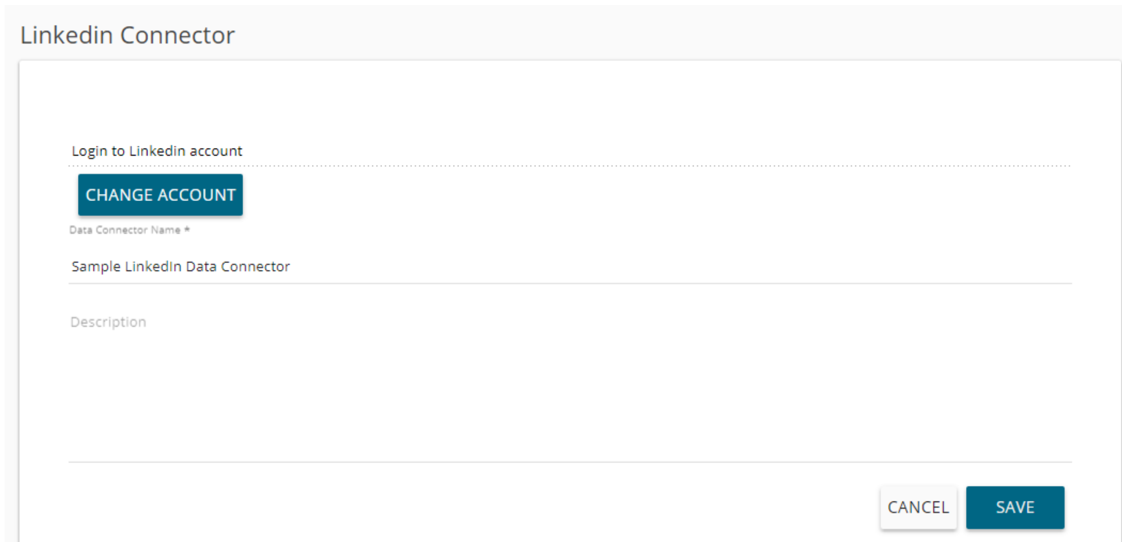
iv) The user will be redirected to a new window

1. Log in to a valid LinkedIn account
2. Click '**Allow access**' option to provide permission to BDB for accessing data from the selected LinkedIn account

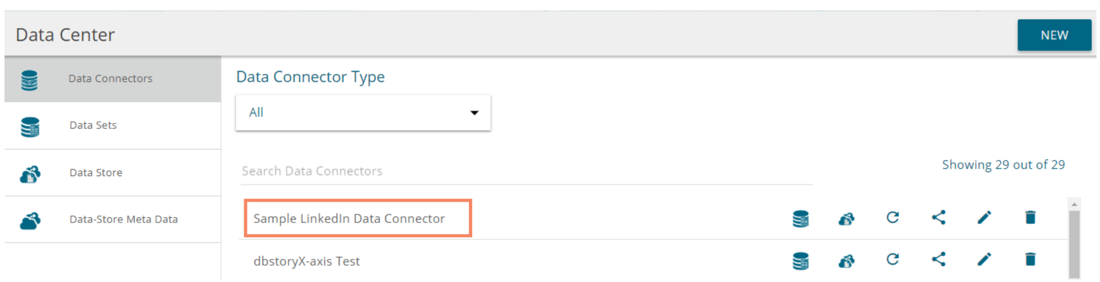


v) Users will be redirected to the LinkedIn Connector page

vi) Click ‘**CHANGE ACCOUNT**’ if you wish to change the selected account
   1. Define the name of the connector (E.g., In this case, it is defined as ‘**Sample LinkedIn Data Connector**.’
   2. Click ‘**SAVE**’ option

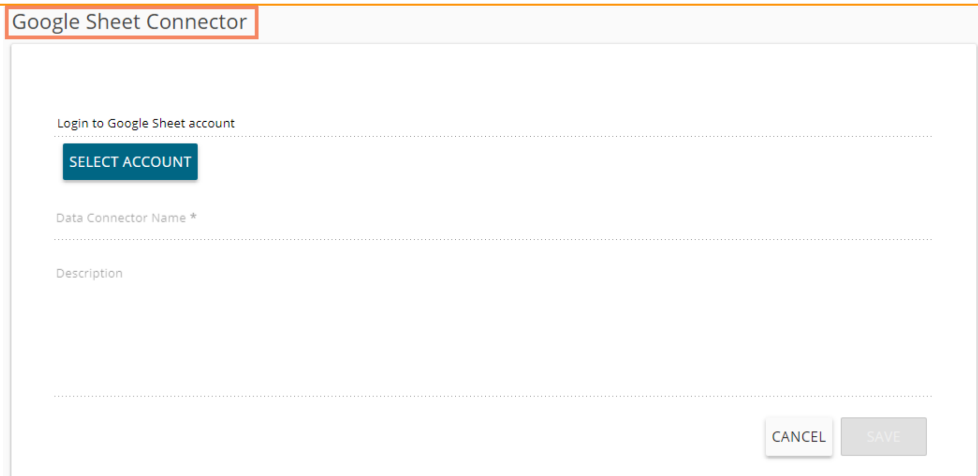


   3. Users will be notified by a message that a new LinkedIn connector has been successfully created. The newly formed data connector will be added to the list of data connectors

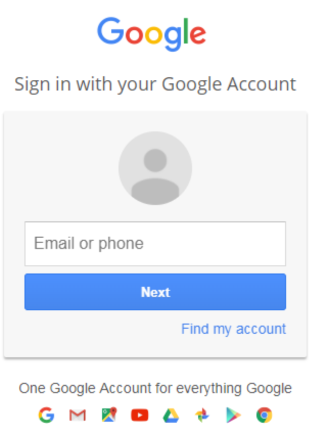


16. Google Sheet

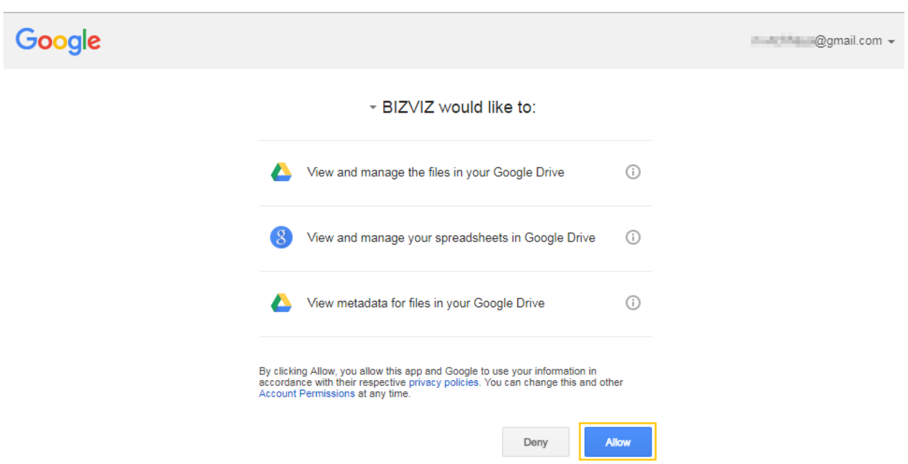
i) Select ‘**Google Sheet**’ connector from the Data Connector page
ii) Users will be redirected to the Google Sheet Connector page
iii) Click ‘**SELECT ACCOUNT**’ to login to a Google Sheet



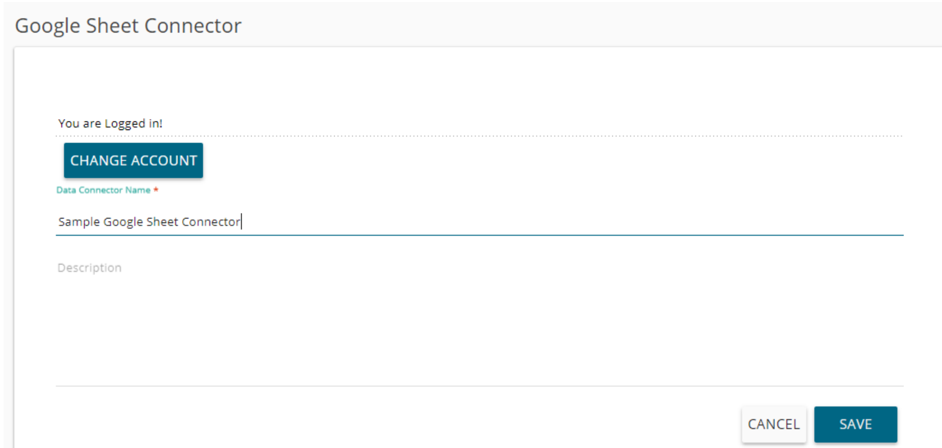
iv) Enter the credentials of your Google Account



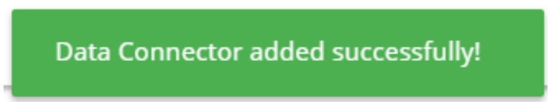
v) Users will be redirected to share their information with BizViz
vi) Click ‘**Allow**’ to share the same



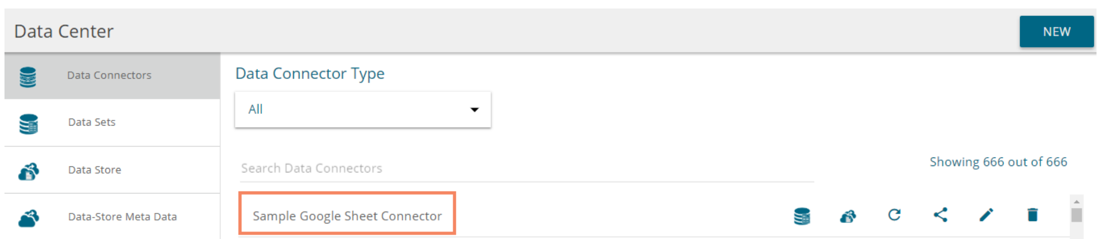
vii) Users will be redirected to the Google Sheet Connector page
  i. The ‘**SELECT ACCOUNT**’ button will change into the ‘**CHANGE ACCOUNT**’ option
  ii. Provide a name for the Data Connector
viii) Click the ‘**SAVE**’ option



ix) A success message will pop-up as below

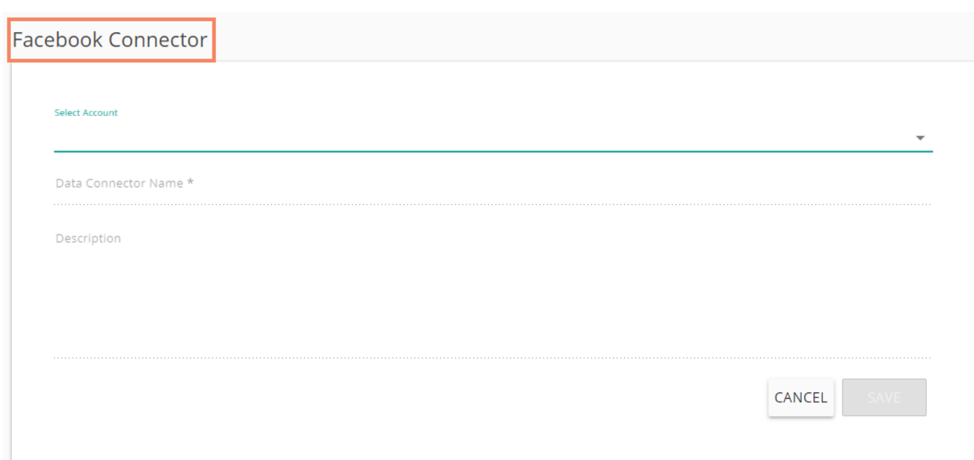


x) The newly created Google Sheet Data Connector will be added to the list of connectors

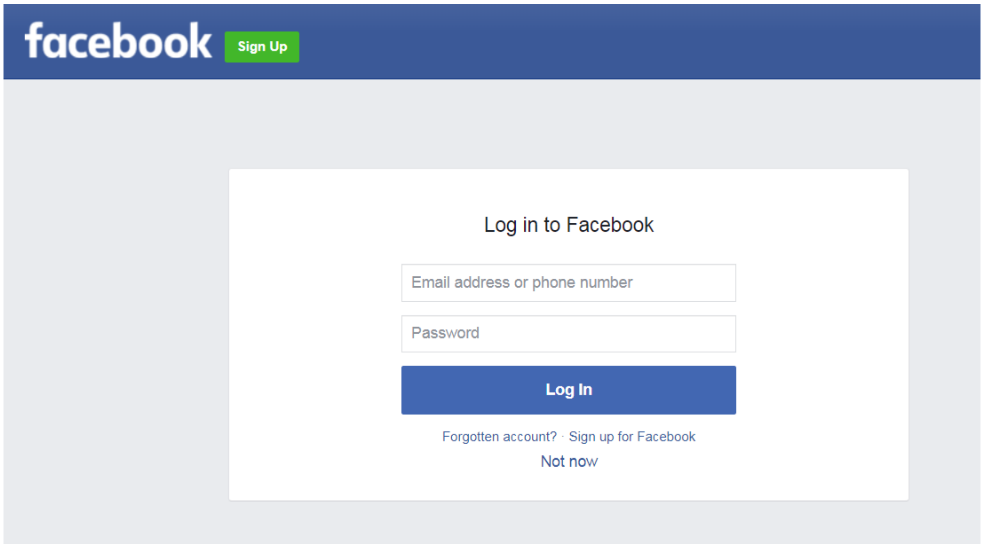


17. Facebook

i) Select '**Facebook**' connector from the Data Connector page
ii) Users will be redirected to the Facebook Connector page
iii) Select an account using the **'Select Account'** drop-down menu

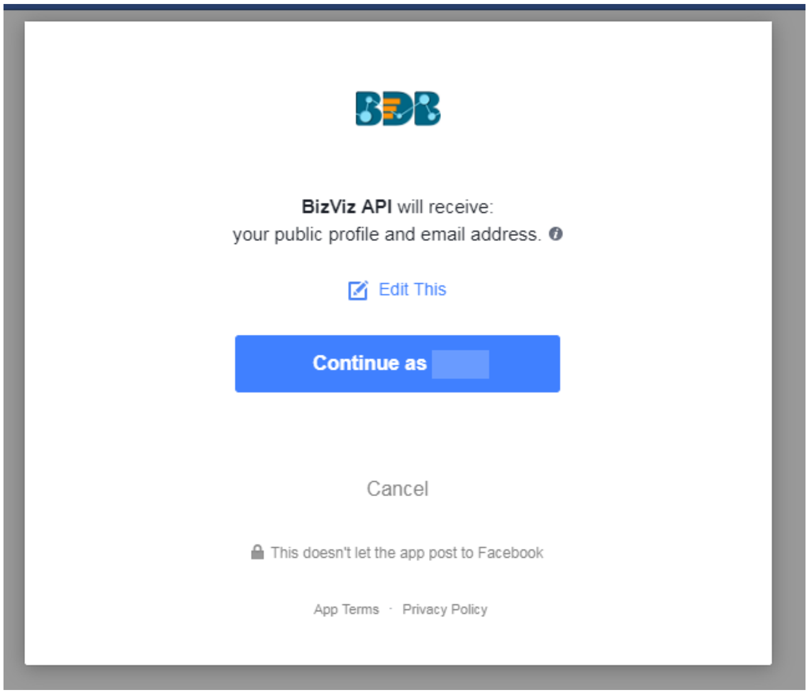


iv) Users will be redirected to enter the credentials for a Facebook account for login

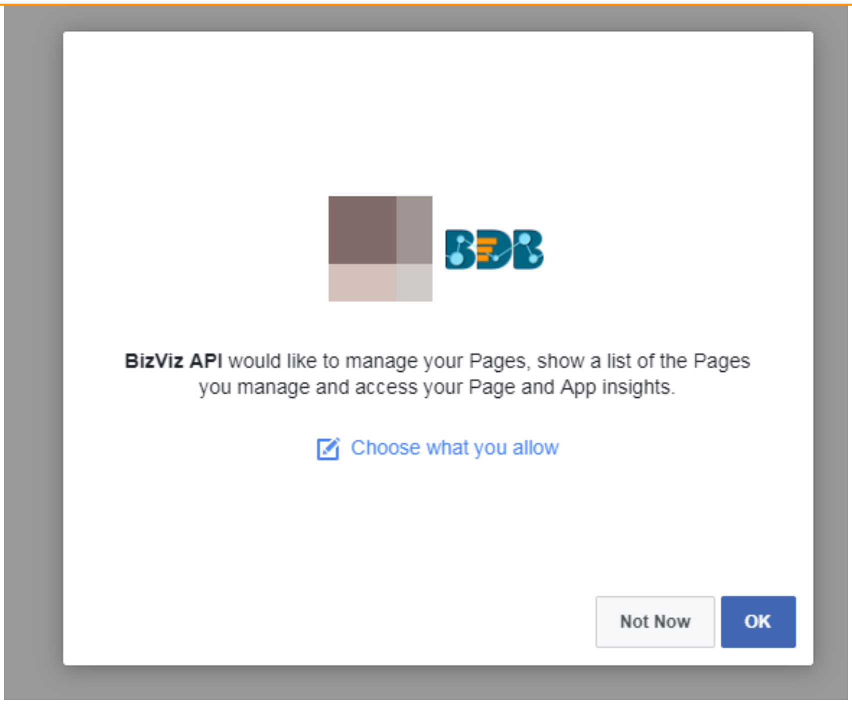


v) A new page will be opened allowing BizViz to access the information from the logged in Facebook account

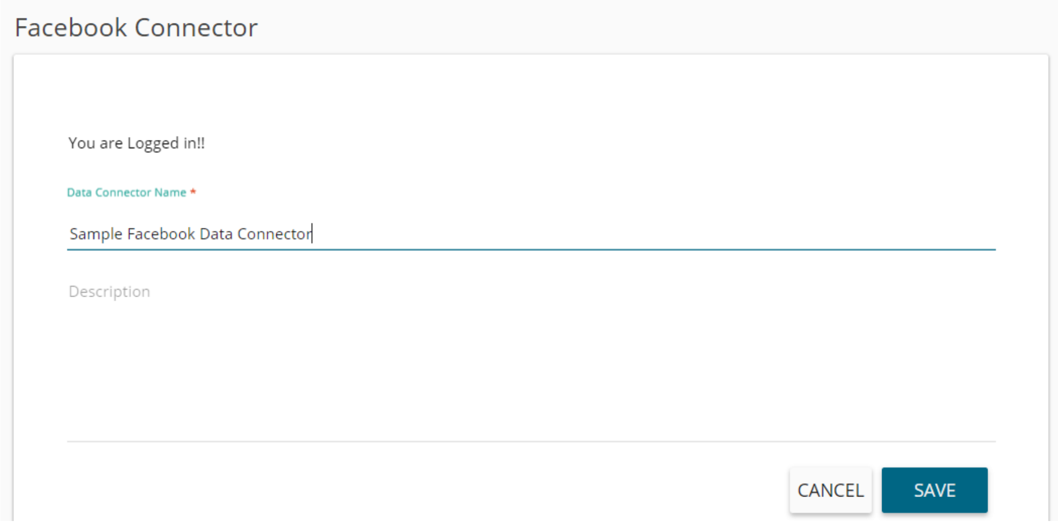
vi) Click the Continue as 'The profile owner's name' if you wish to map the same account, or use 'Edit' option to edit the information.



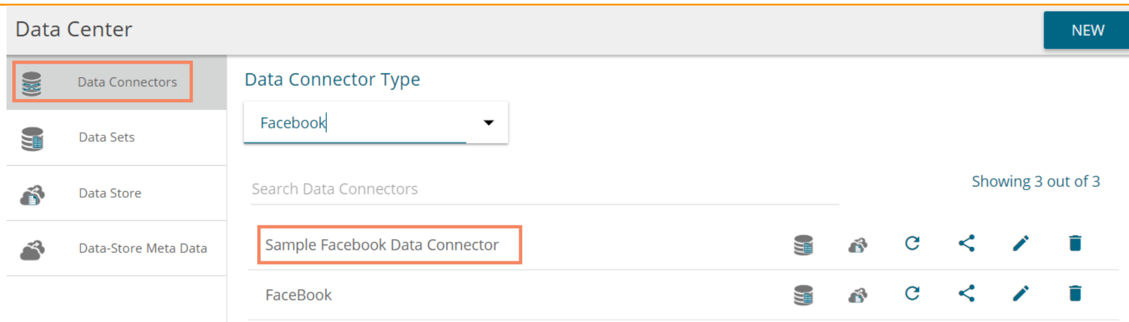
vii) Select the '**OK**' option to allow the selected options from Facebook account



viii) By selecting the continuation option, users are notified as logged in to the selected account redirected to the Facebook Connector page
ix) Provide a title for the data Connector
x) Click the ‘**SAVE**’ option

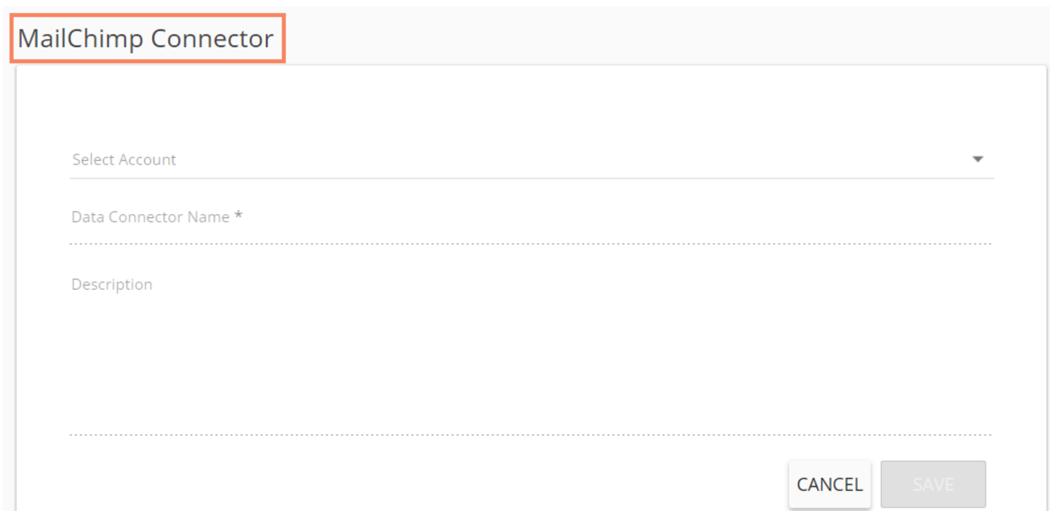


xi) The newly created Facebook Connector will be added to the data connector list

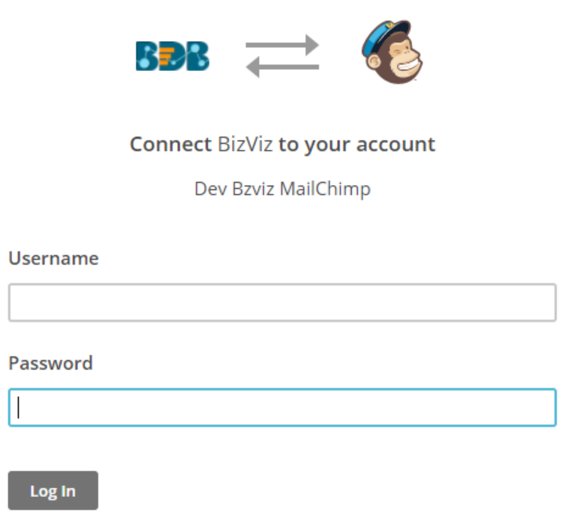


18. MailChimp

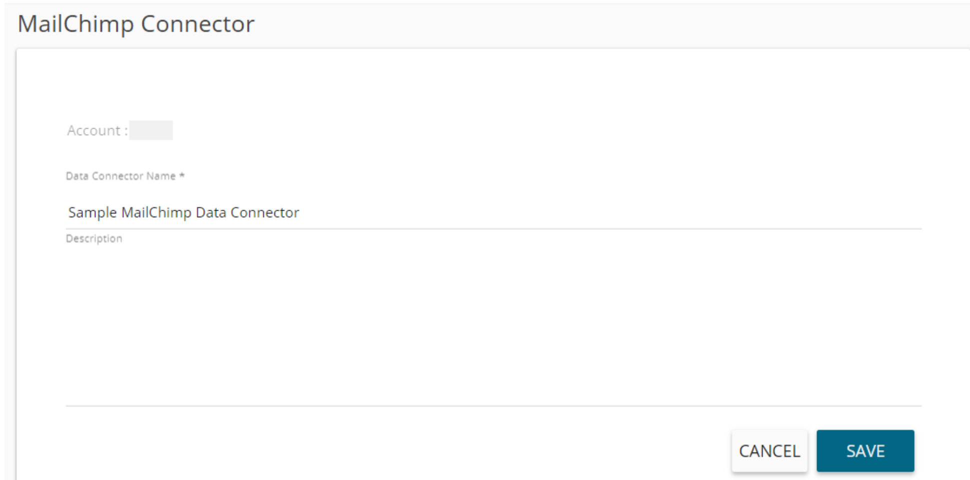
i) Select '**MailChimp**' connector from the Data Connector page
ii) Users will be redirected to the MailChimp Connector page
iii) Click '**SELECT ACCOUNT**' option



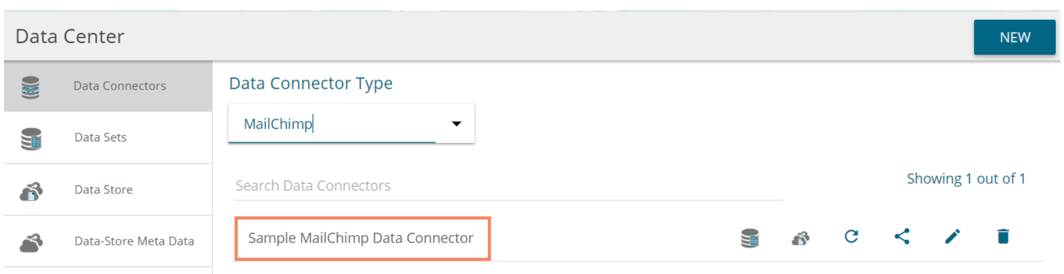
iv) Users will be redirected to enter the credentials for a MailChimp account for login
v) By entering the correct credentials, the users will be redirected to the MailChimp Connector page



vi) After selecting an account user will be redirected to the MailChimp Data Connector displaying the selected account.
vii) Provide a title for the data Connector
viii) Click the ‘**SAVE**’ option

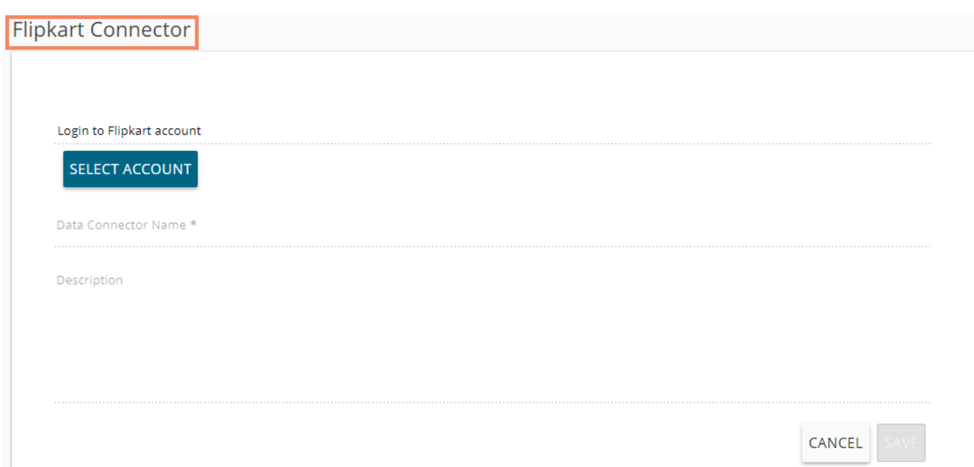


ix) The newly created MailChimp Data Connector will be added to the data connector list



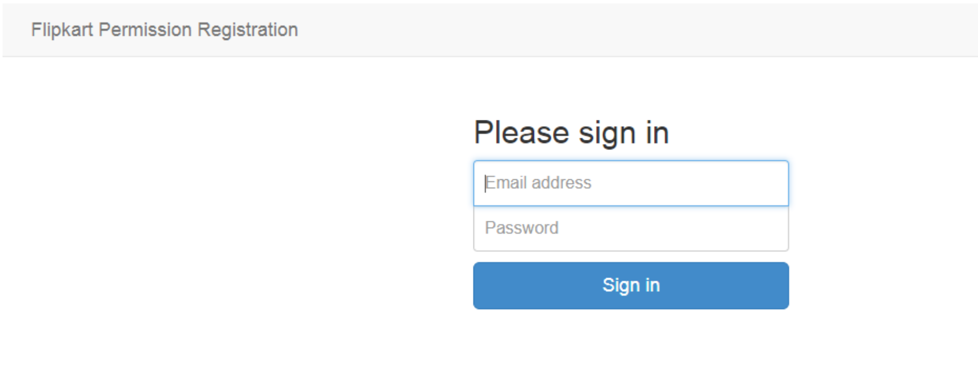
19. Flipkart

i) Select ‘**Flipkart**’ connector from the Data Connector page
ii) Users will be redirected to the Flipkart Connector page
iii) Click ‘**SELECT ACCOUNT**’ option



iv) Users will be redirected to enter the credentials for a Flipkart Permission Registration account for login

v) By entering the correct credentials, the users will be redirected to the Flipkart Connector page

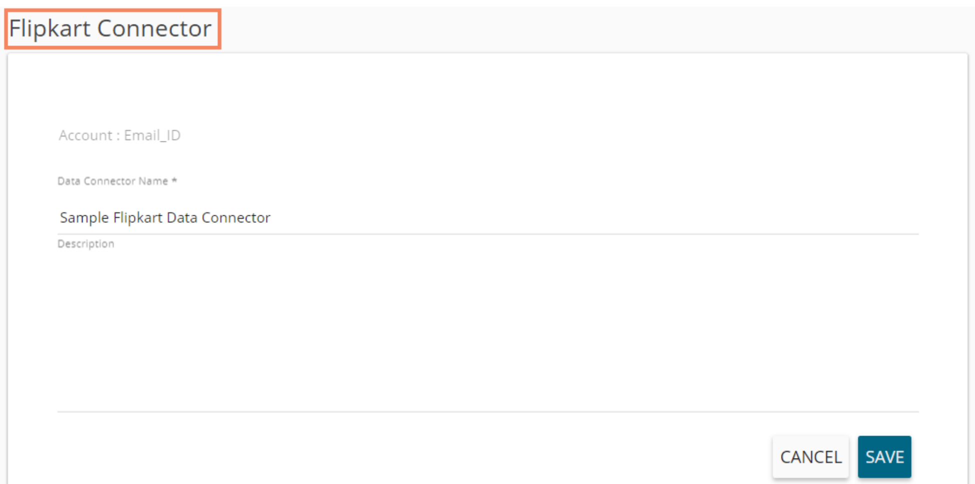


vi) The '**SELECT ACCOUNT**' button changes into the '**CHANGE ACCOUNT**' option

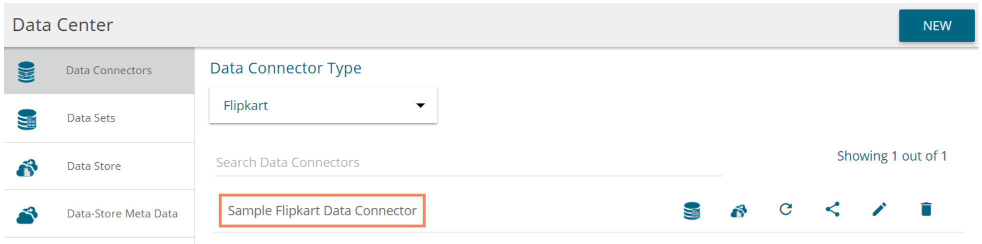
vii) Provide a title for the data Connector

viii) Click the '**SAVE**' option

ix)



x) The newly created Flipkart Connector will be added to the data connector list



20. Amazon

i) Select '**Amazon Marketplace**' connector from the Data Connector page

ii) Users will be redirected to the Amazon Marketplace Connector page

iii) Select a link using the drop-down menu

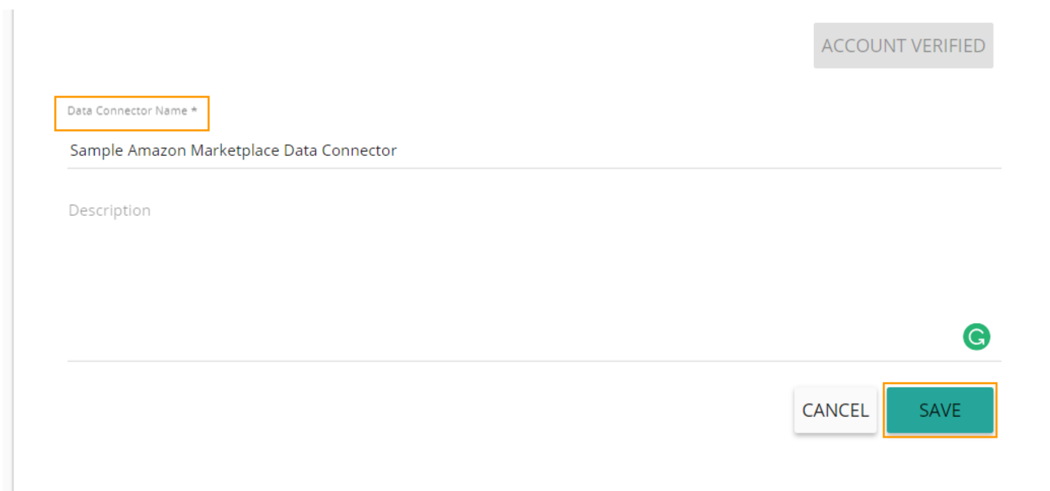
iv) Provide the following information:

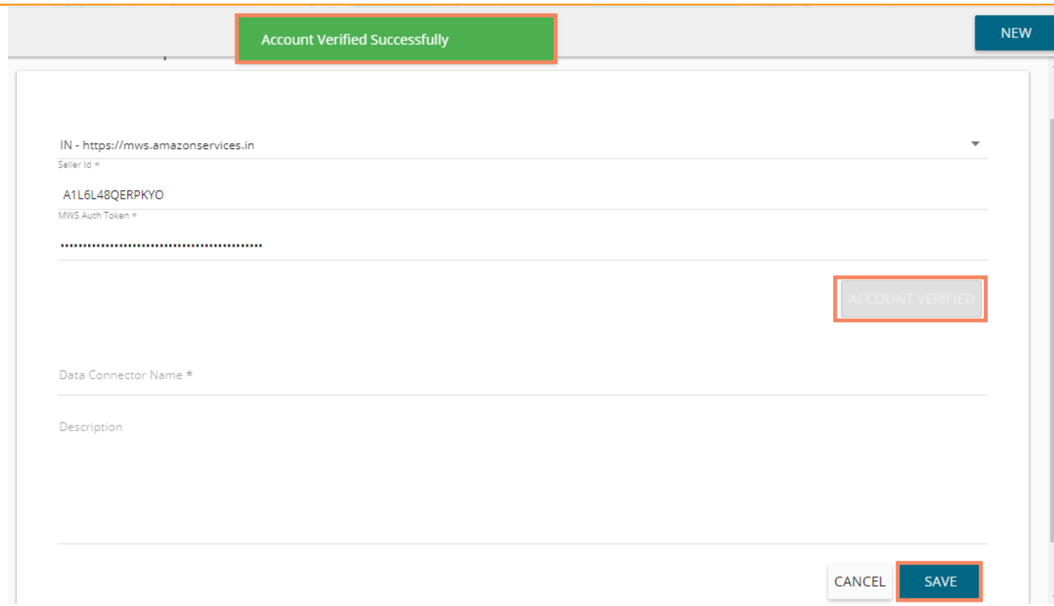
a. Server id

b. MWS Auth Token
c. Click ‘**VERIFY ACCOUNT**’ option

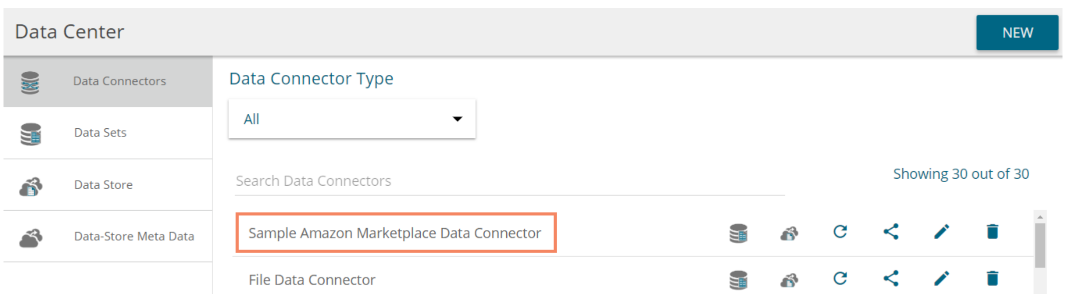
v) A Pop-up message will appear to confirm that the account has been successfully verified

vi) Users will be redirected to the Amazon Marketplace connector page with the ‘**ACCOUNT VERIFIED**’ notification
vii) Provide a title for the data Connector
viii) Click the ‘**SAVE**’ option



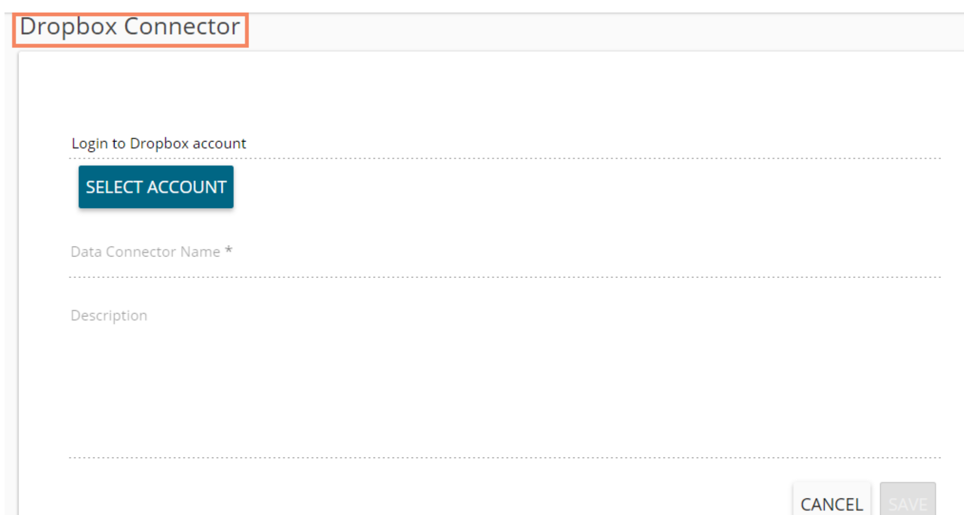


ix) The newly created Amazon Marketplace Connector will be added to the data connector list

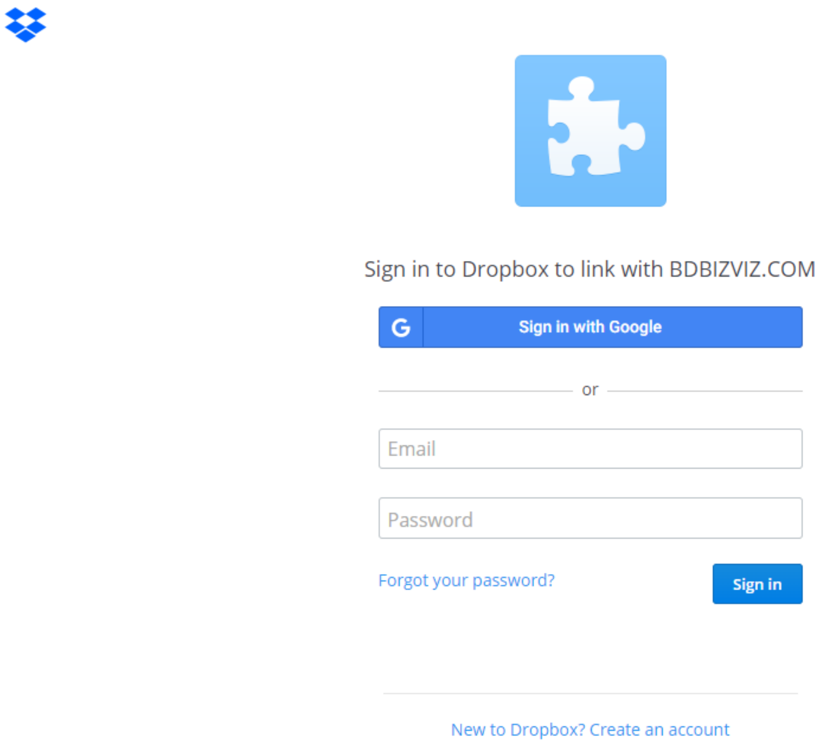


21. Dropbox

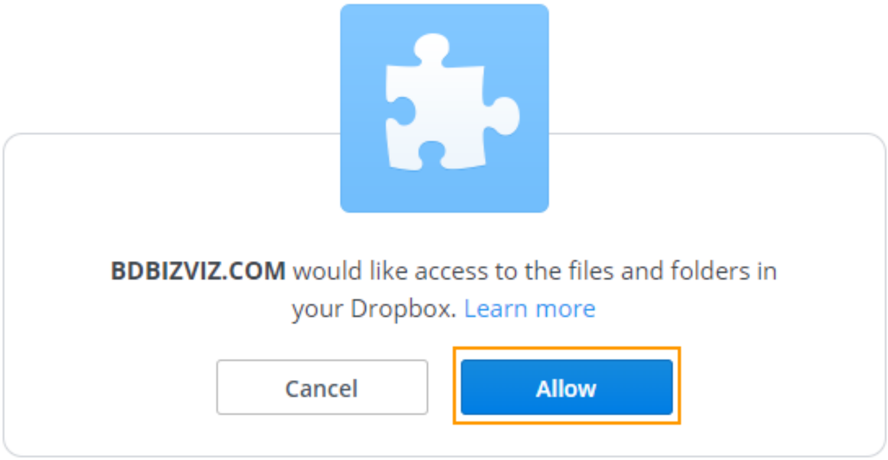
i) Select '**Dropbox**' connector from the Data Connector page
ii) Users will be redirected to the Dropbox Connector page
iii) Click '**SELECT ACCOUNT**' for login to a Dropbox account



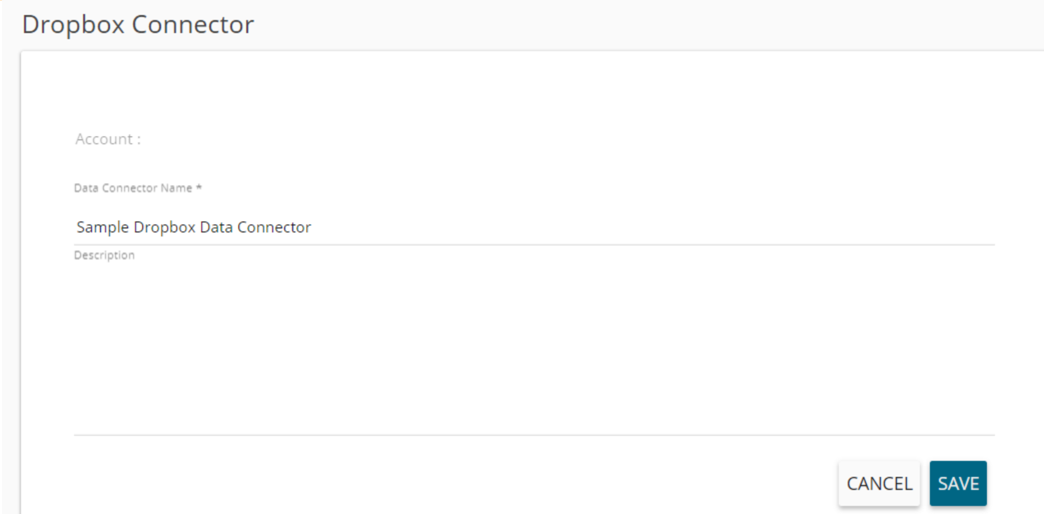
iv) Users will be redirected to the '**Sign in**' page of the Dropbox
v) Enter the credentials to Sign in



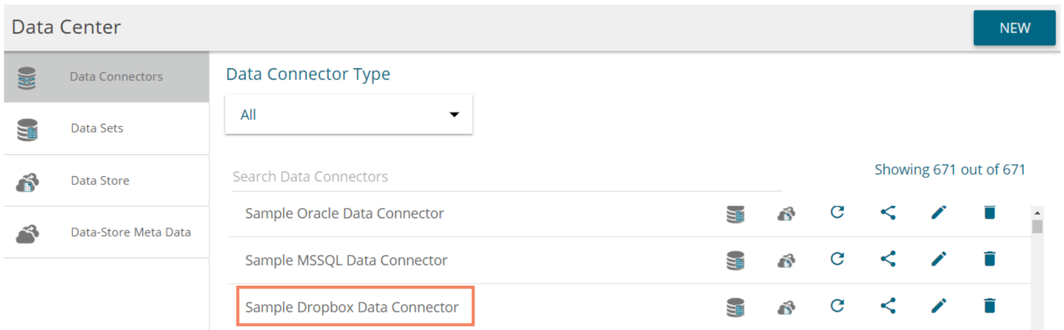
vi) A message will pop-up to allow Dropbox account access to BDB
vii) Click '**Allow**' to provide access to the selected Dropbox account



viii) Users will be redirected to the Dropbox connector page
   a. The selected Dropbox account will be mentioned on the page.
   b. Enter a Data Connector Name
   c. Click the '**SAVE**' option

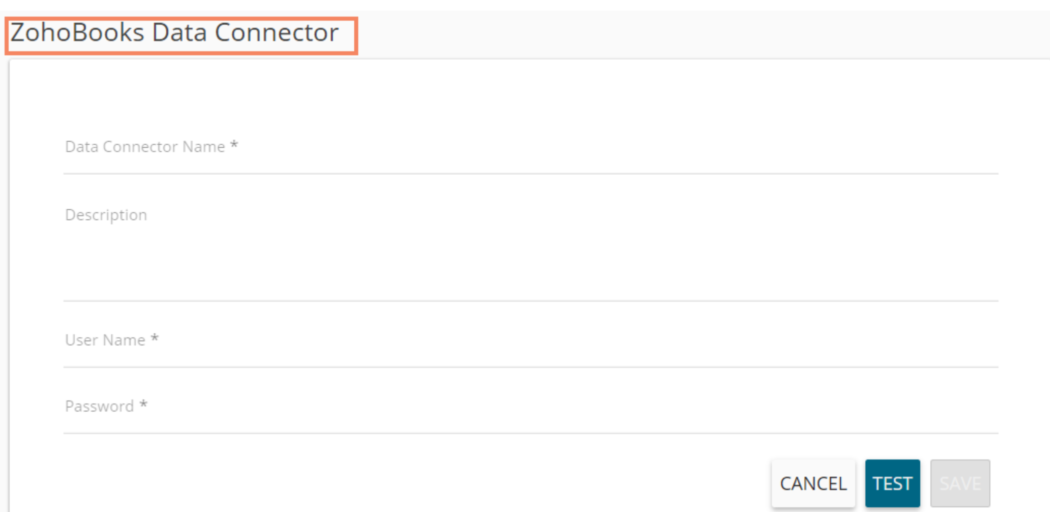


ix) The newly created Dropbox Connector will be added to the Data Connectors list

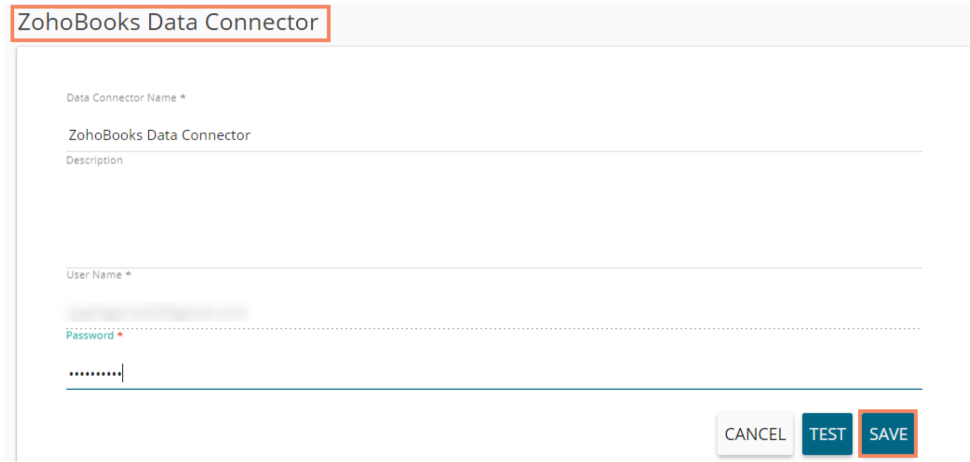


22. ZOHO Books

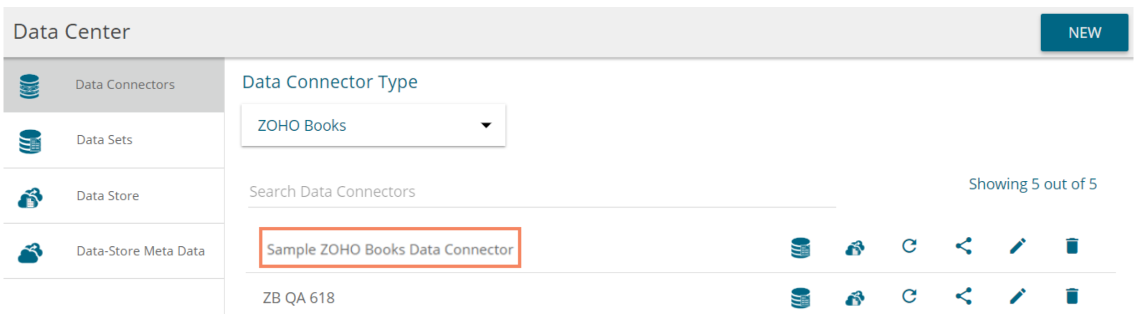
i) Select '**ZOHO Books**' connector from the Data Connector page
ii) Users will be redirected to the ZOHO Books Data Connector page
   a. Provide User Name
   b. Give a valid Password for the account
   c. Click the '**TEST**' option



d. Click ‘**SAVE**’ after the data connection gets verified

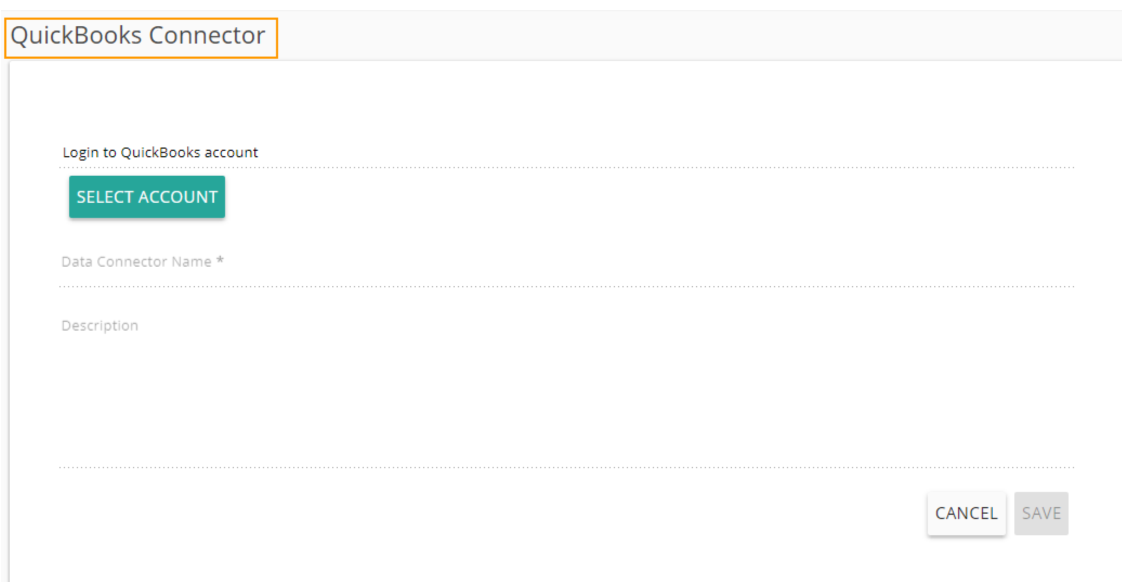


iii) The newly created ZOHO Books Connector will be added to the Data Connectors list

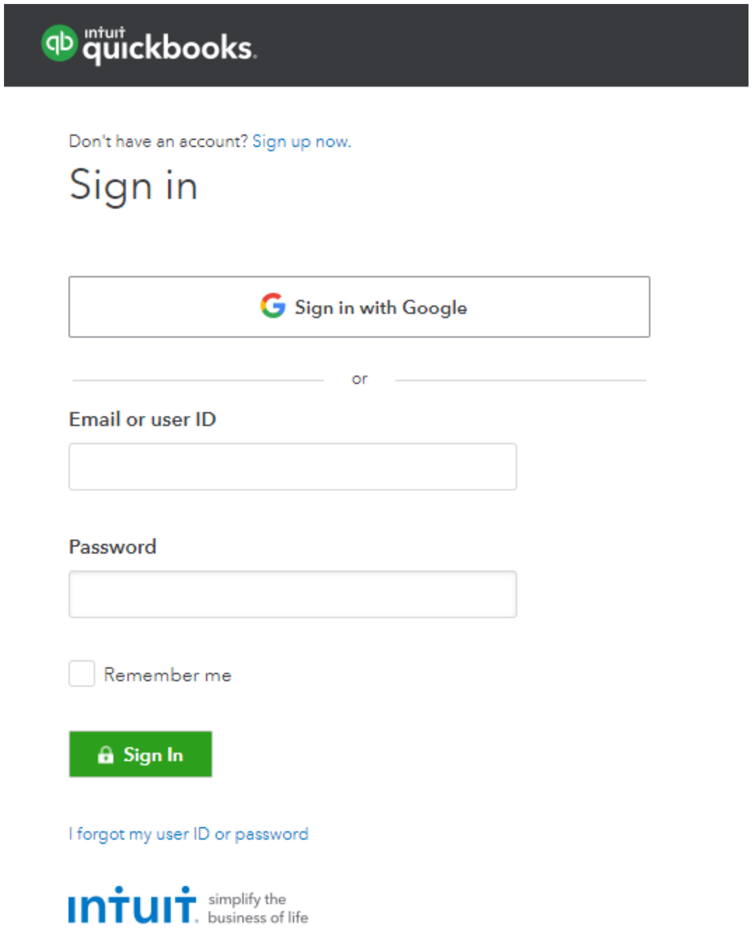


23. QuickBooks

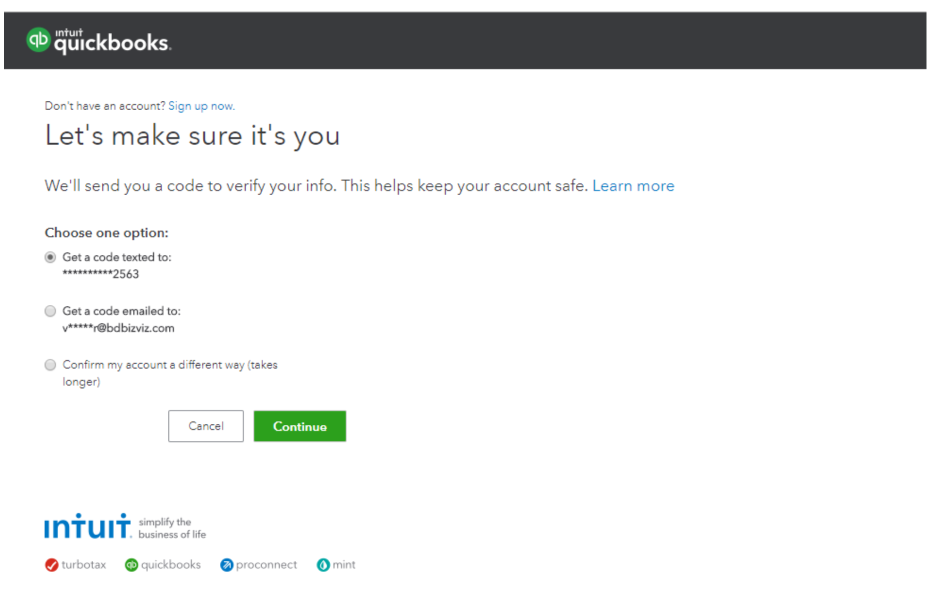
i) Select ‘**QuickBooks’** connector from the Data Connector page
ii) Users will be redirected to the QuickBooks Connector page
iii) Click ‘**SELECT ACCOUNT**’ for login to a QuickBooks account



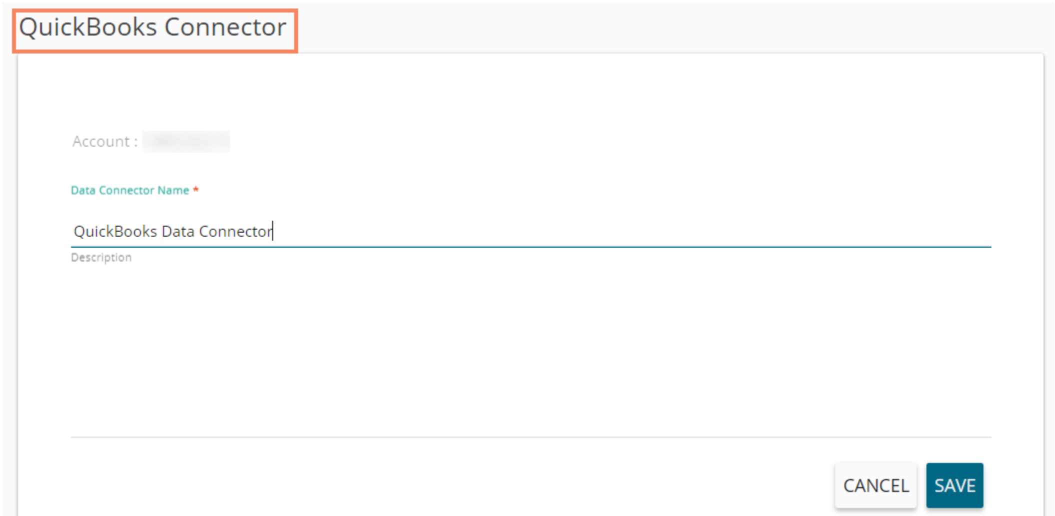
iv) Users will be redirected to the '**Sign in**' page of the QuickBooks
v) Enter the credentials to Sign in



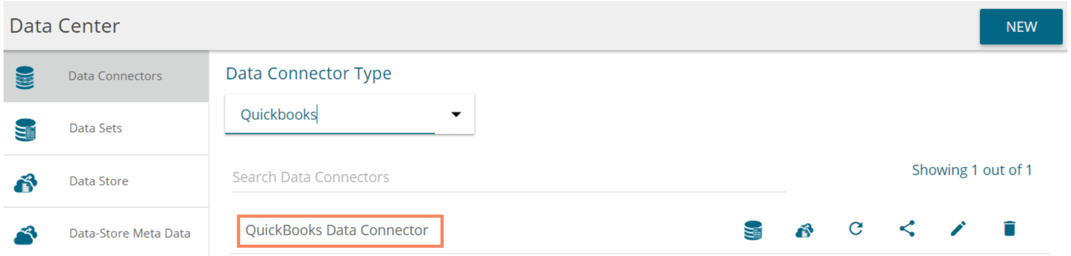
vi) Users will receive a code to assure the authenticity if the selected account. The verification code will be sent through email and mobile



vii) Users will be redirected to the QuickBooks connector page after verification has been done
   a. The account number of the selected account will be displayed on this page
   b. Enter a Data Connector Name
   c. Click the '**SAVE**' option

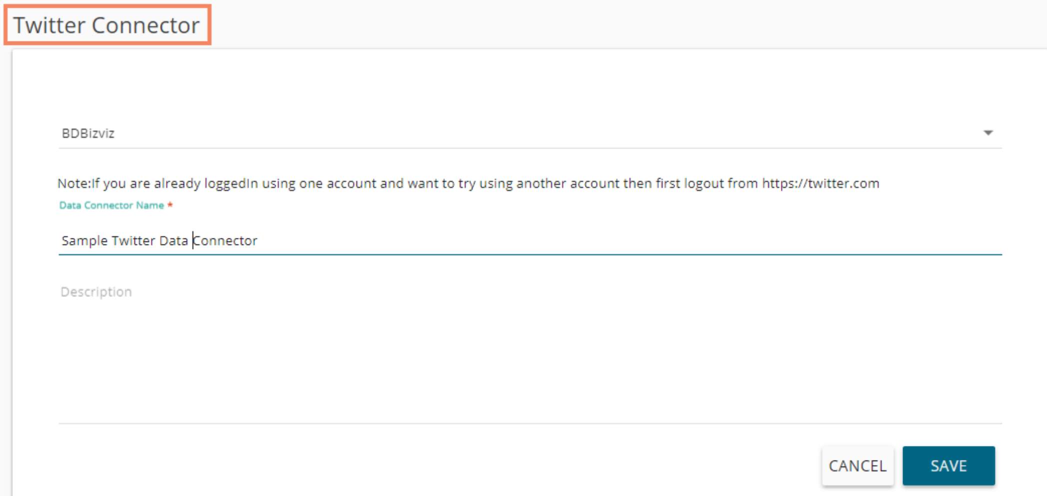


viii) The newly created QuickBooks Connector will be added to the Data Connectors list

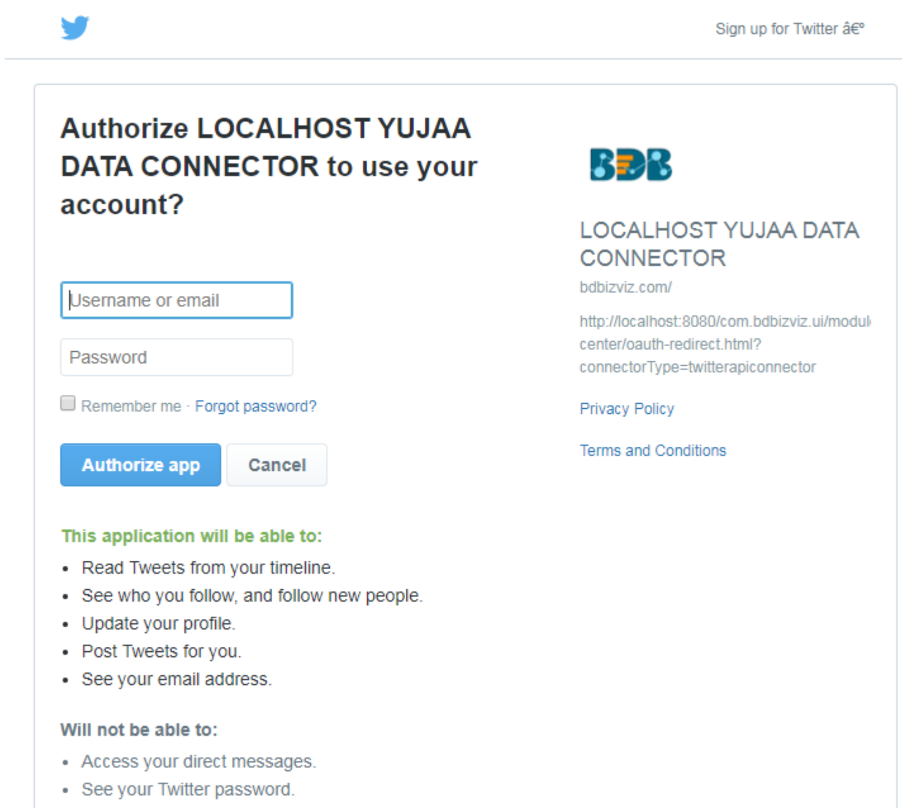


24. Twitter

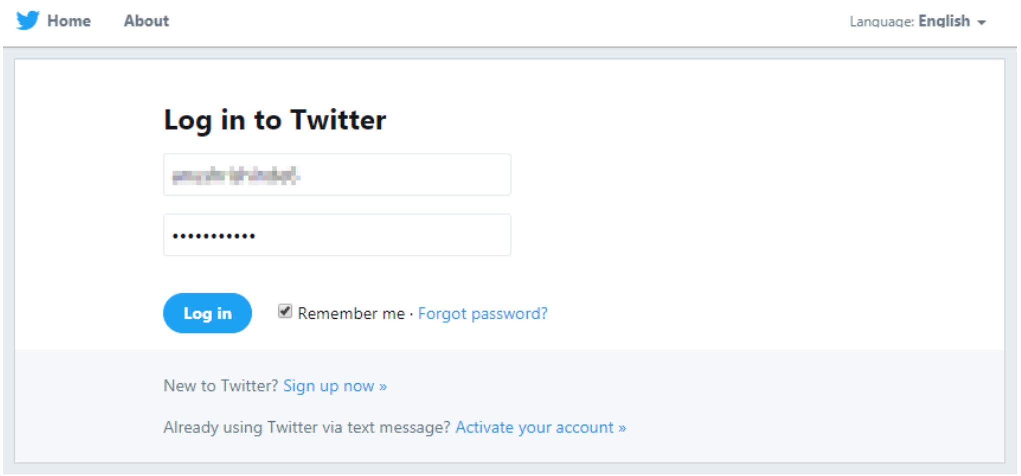
i) Select '**Twitter**' connector type icon from the Data Connector page
ii) Users will be redirected to the Twitter Connector page
iii) Either select a Twitter account listed in the drop-down menu or add a new Twitter account



iv) If users wish to add a new account, they will be redirected to the authorization page allowing BizViz to access the Twitter account
v) Enter the credentials to Sign in
vi) Users will receive a code to assure the authenticity of the selected account (The verification code will be sent through email and mobile)



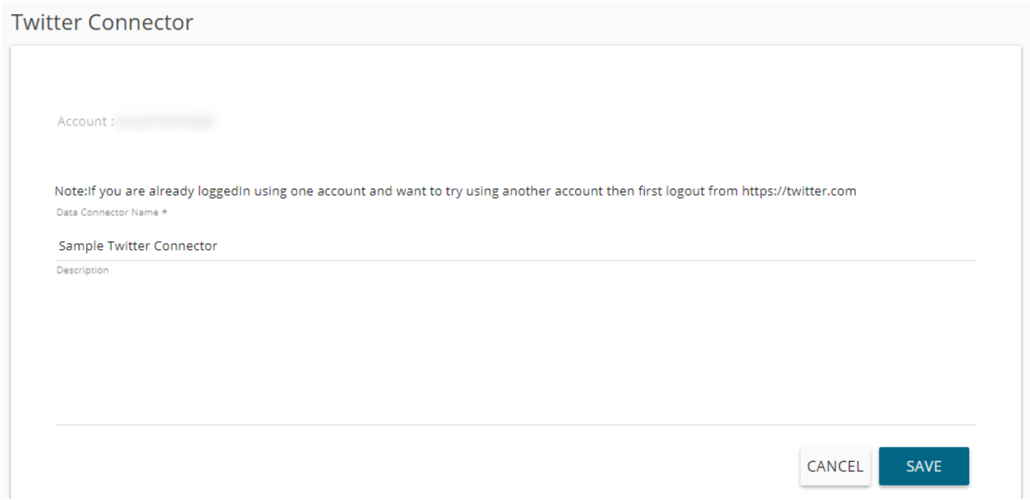
vii) Users will be redirected to the Twitter Login page



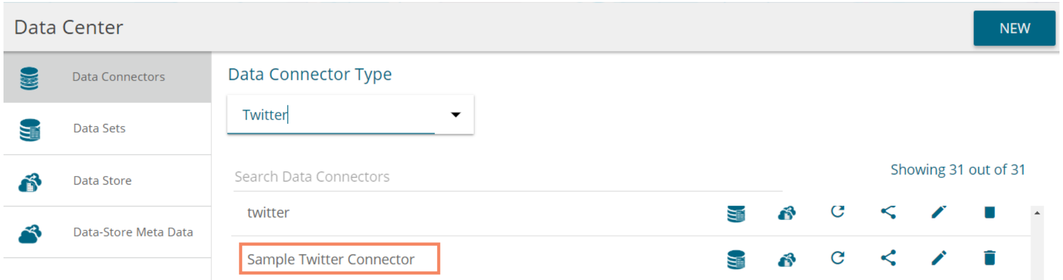
viii) Users will be redirected to the Twitter Connector page

a. Enter a Data Connector Name

b. Click the '**SAVE**' option



ix) The newly created Twitter Connector will be added to the Data Connectors list

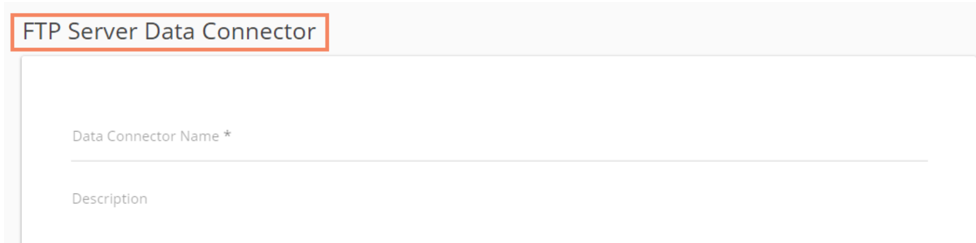


25. FTP Server

i) Select '**FTP Server**' connector type icon from the Data Connector page

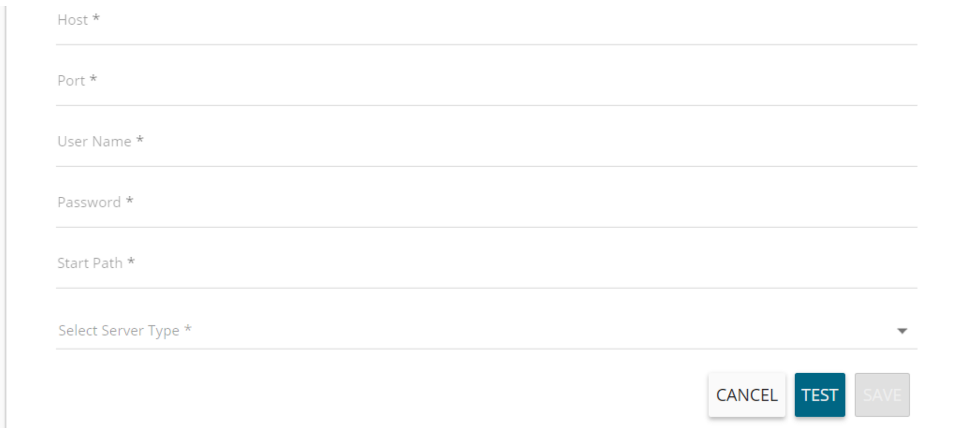
ii) Fill in the following information:

1. Data Connector Name: A user defined name to identify the data source
2. Description: Describe the connector details

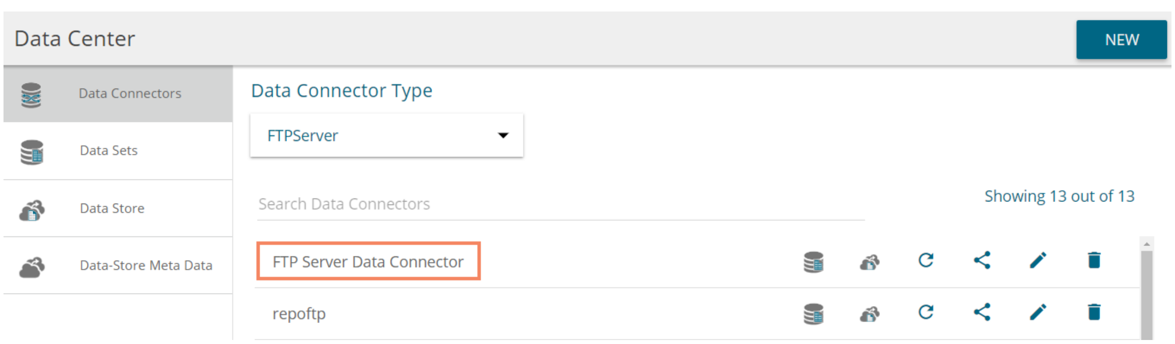


3. Host: Enter database server details (from where the user wants to fetch data)
4. Port: The server port number
5. User Name: Enter a User Name (It should be the same as given in the connection server)
6. Password: Enter the Password (It should be the same as provided in the connection server)
7. Start Path: Give a defined path to start

iii) Verify the data connection by clicking the '**Test**' option



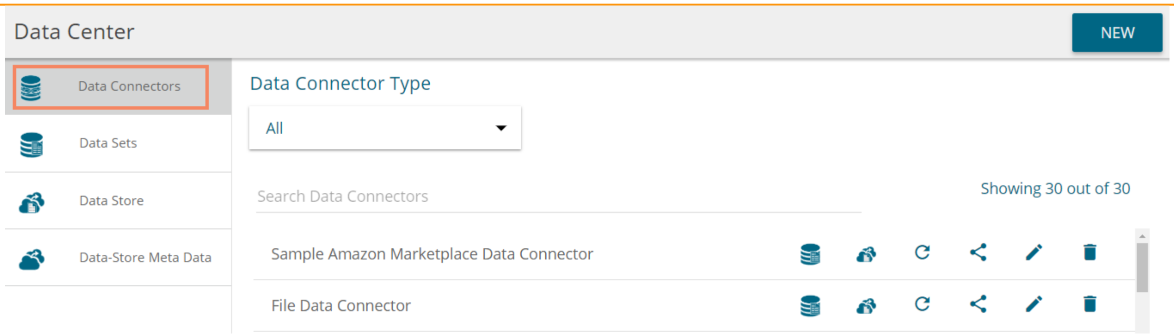
iv) Once the connection is tested successfully, click the '**SAVE**' option
v) The newly created FTP data connector will be added to the Data Connectors list



7.1.2. Data Connector List

All the created data connectors will be listed on the Data Center page.

- The list appears by default while selecting the '**Data Center**' option from the apps list
- Users can also get the list of data connectors by clicking on the '**Data Connectors**' option provided at the top left side of the page



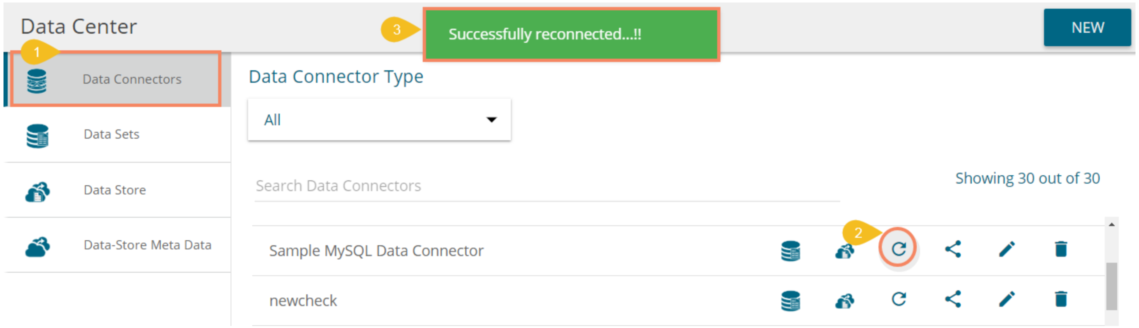
Option	Name	Task
	New Data Set	Redirect user to create a new Data Set
	New Data Store	Redirect user to create a new Data Store
	Reconnect	Reconnect with the server
	Share	Share connector with the selected user(s) or group(s)
	Edit	Edit the connector fields
	Remove	Remove a connector from the list

7.1.3. Reconnecting a Data Connector

i) Navigate to the Data Connector list

ii) Select a Data Connector and click the '**Reconnect**' icon provided in the connector list

iii) A message will pop-up to assure the action

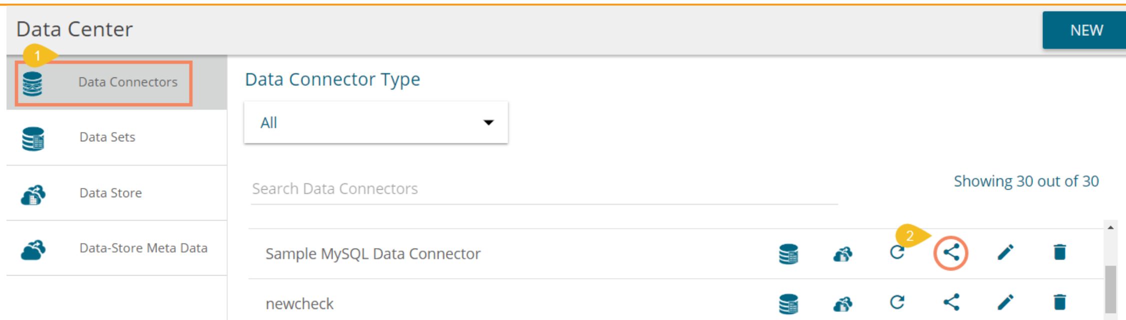


iv) The selected data connector will be reconnected

7.1.4. Sharing a Data Connector

i) Navigate to the Data Connector list

ii) Select a Data Connector and click the '**Share**' icon

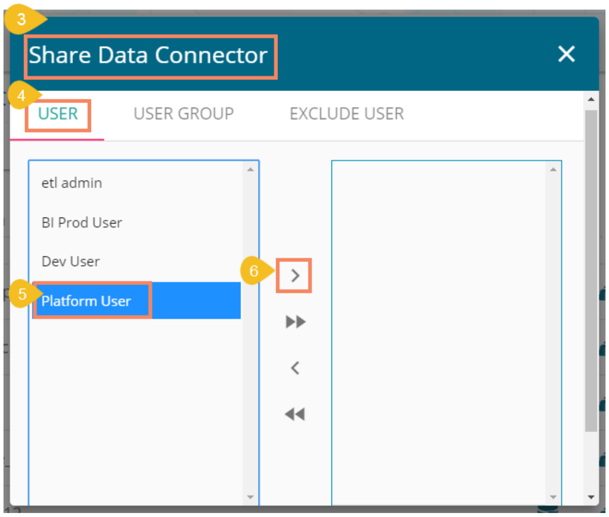


iii) Users will be directed to the 'Share Data Connector' window

iv) Select an option out of the given choices: User and User Group/ Exclude User ('Exclude User' option can be chosen, if the document is already shared with a user/user group and you wish to exclude them from the privilege)

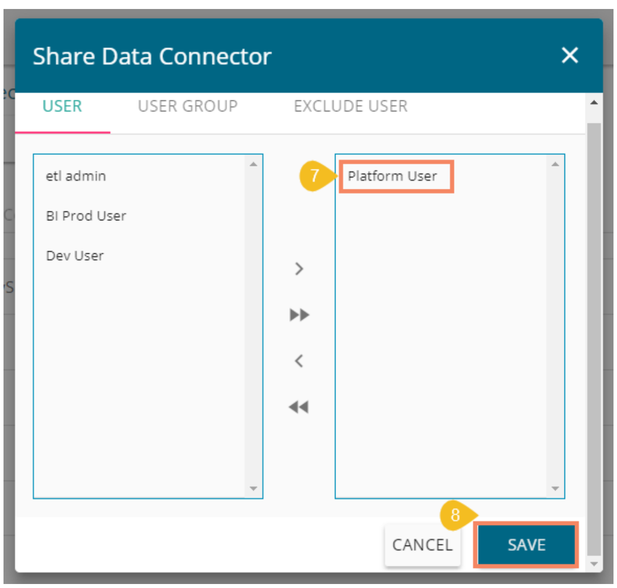
v) Select a user or user group using the displayed list of users/user groups

vi) Click the arrow to move the selected User(s)/User Group(s)

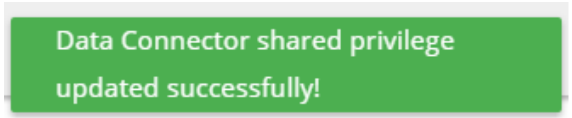


vii) The selected user(s)/user group(s) will be moved to the box given on the right

viii) Click '**SAVE**'



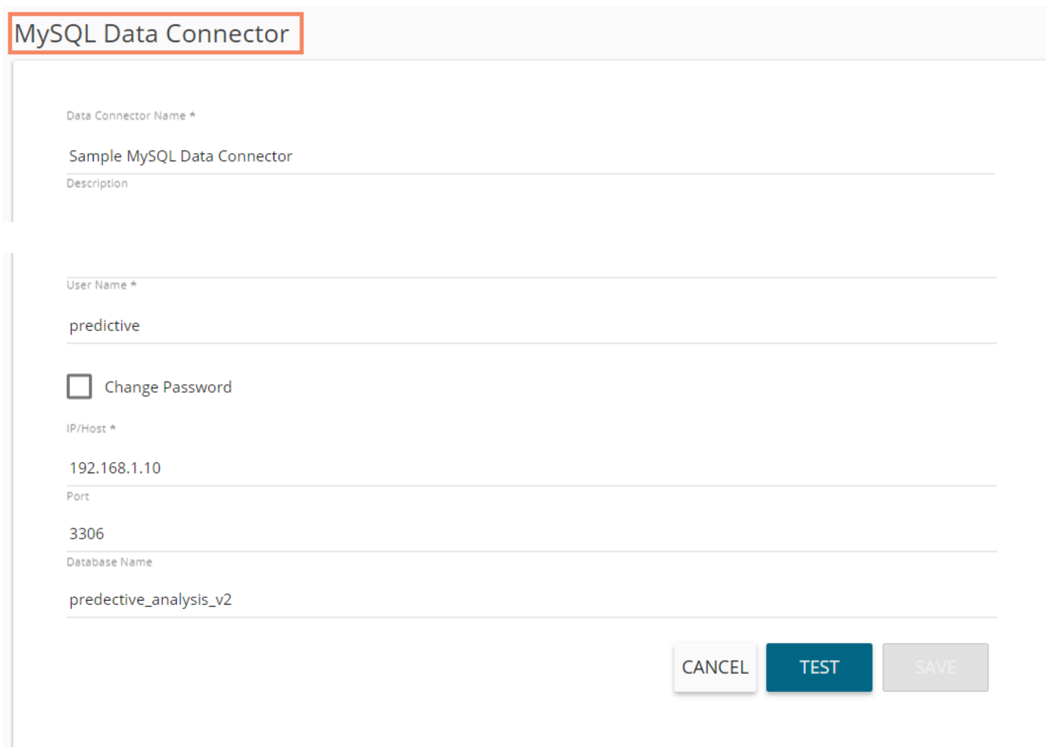
ix) A message will pop-up to communicate the same (as displayed below)



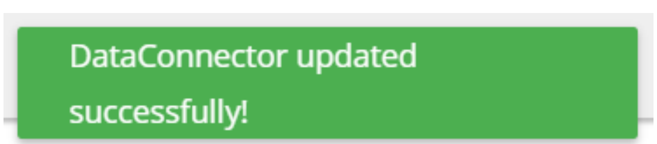
By completing the steps mentioned above, a data connector can be successfully shared with the selected user/user group. The selected users can be excluded from their privileges as well.

7.1.5. Editing a Data Connector

i) Navigate to the Data Connector list
ii) Select a Data Connector and click the ‘**Edit**’ icon
iii) Users will be directed to a new page
iv) Edit or modify the required details
v) Click ‘**TEST**’ to verify the connector



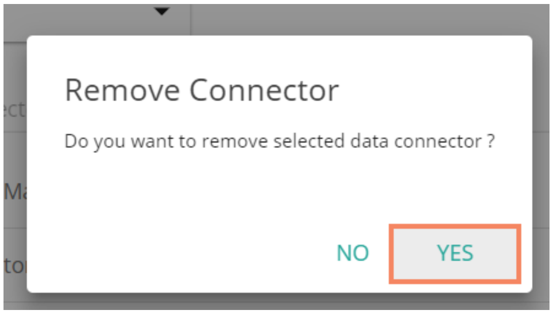
vi) Click ‘**SAVE**’ to save the edited details
vii) A success message will pop-up stating that the data connector has been updated successfully



viii) The updated details will be saved for the selected data connector

7.1.6. Removing a Data Connector

i) Navigate to the Data Connector list
ii) Select a Data Connector and click the ‘**Remove**’ icon
iii) A message will pop-up to confirm the deletion
iv) Click the ‘**YES**’ option



v) The selected data connector will be removed from the ‘**Data Connectors**’ List

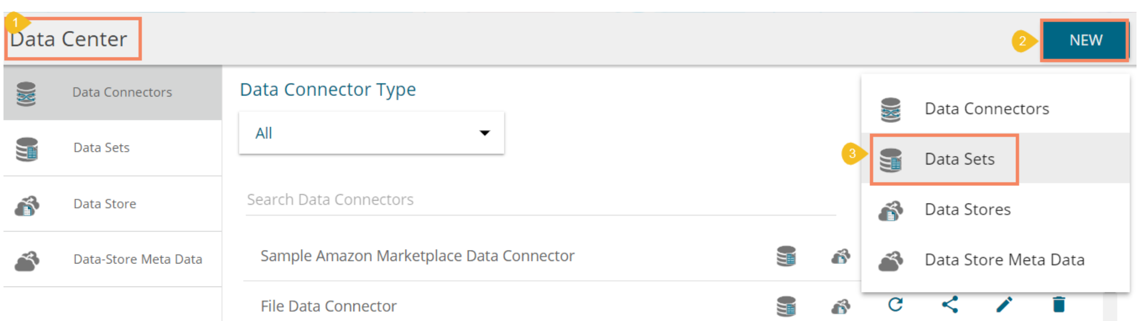
7.2. Data Set

This section includes steps to create a new Data Set based on an RDBMS/Big Data, API, and FTP Data Connectors. The description aims at explaining steps of sample data sets based on the all above mention categories which can be followed to create data sets falling under the similar categories.

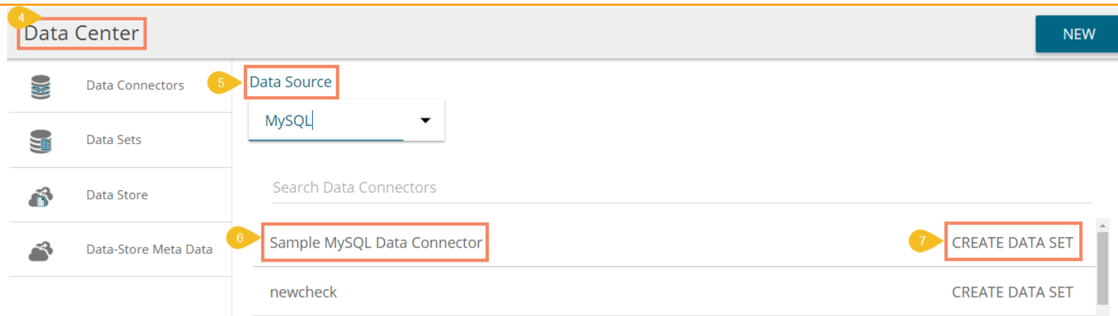
7.2.1. Creating a New Data Set using RDBMS or Big Data Connector

This section explains the steps to create a new Data Set

i) Navigate to the Data Center landing page
ii) Click the ‘**NEW**’ option
iii) Select ‘**Data Sets**’ from the context menu

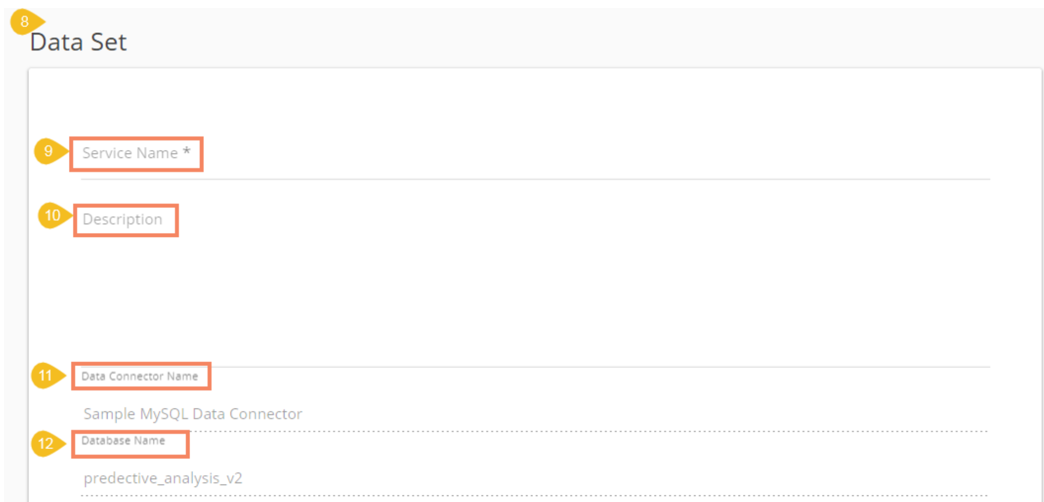


iv) Users will be directed to a new page
v) Select a Connector Type from the ‘**Data Source**’ filter
vi) Select a data connector from the ‘**Data Connectors**’ list
vii) Click the ‘**CREATE DATA SET**’ option provided next to the selected data connector

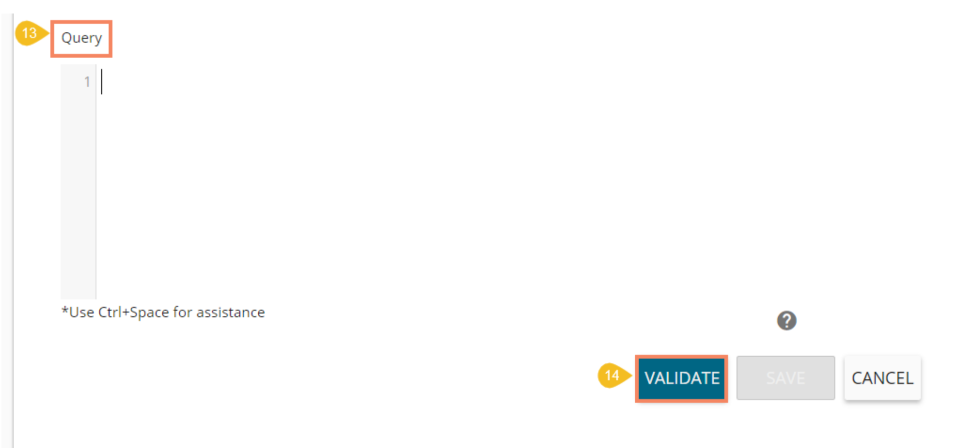


viii) Users will be redirected to the '**Data Set**' page for filling the required details

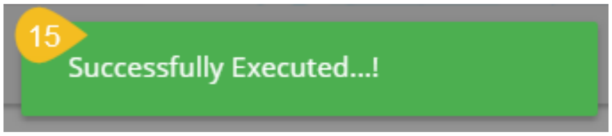
a. **Service Name:** Enter any user-defined name for the new data set
b. **Description**: Brief description of the Data Set (It is an optional field)
c. **Data Connector Name:** This field will be pre-defined based on the selected data connector
d. **Data Base Name**: This field will be pre-defined based on the data connector chosen earlier



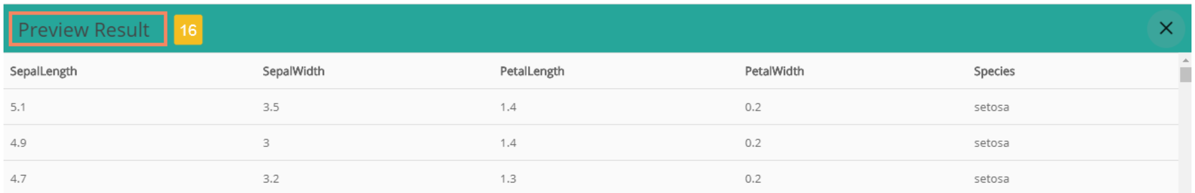
e. **Query:** Write a valid query service in the given space (Use '**Ctrl+Space**' for assistance in writing a query)
f. Click '**VALIDATE**' to execute the new Data Set



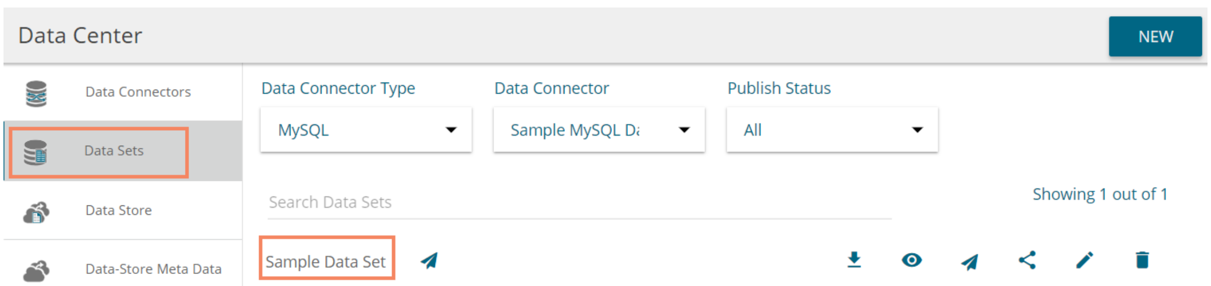
ix) The following message will pop-up at the successful execution



x) The '**Preview Result**' will be displayed at the bottom of the page



xi) After getting the data preview, click the '**SAVE**' option
xii) A new Data Set will be created and added to the '**Data Sets**' List



Note: The '**Publish**' icon beside a Data Set name suggests that the data set has been published.

Option	Name	Task
	Download	To download the Data Set
	View Link	To display the Data Set link
	Publish	To publish a Data Set
	Share Data Service	To shares a data set to/for the selected user(s) or group(s) or Exclude the selected users
	Edit	To edit the Data Set fields
	Remove	To remove the selected data set from the list

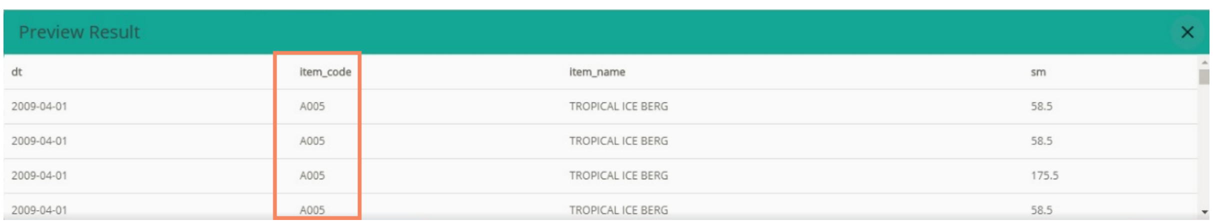
7.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

Users can insert dynamic filter condition via the query service to an RDBMS Data Set.

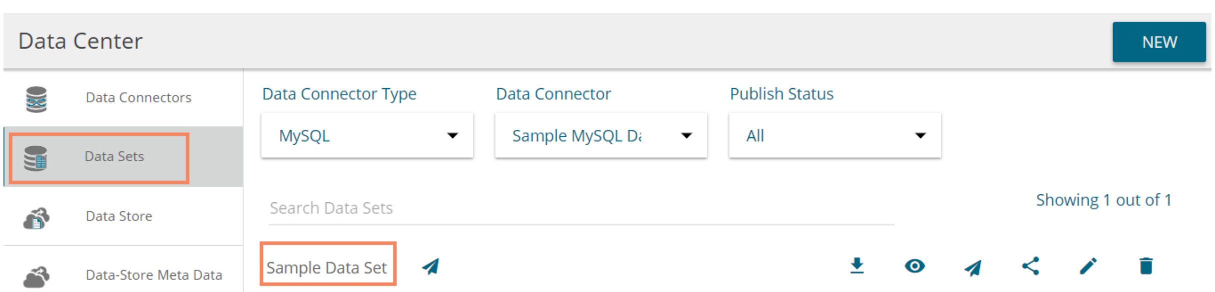
i) Navigate to the Data Set form for any RDBMS connector
ii) Enter filter condition to the '**Query**' section as highlighted in the below image
iii) Click the '**VALIDATE**' option

iv) A window will pop-up asking for the filter value
v) Enter a filter value
vi) Click the '**CONTINUE**' option

vii) The data preview of the filter data will be displayed at the bottom of the page



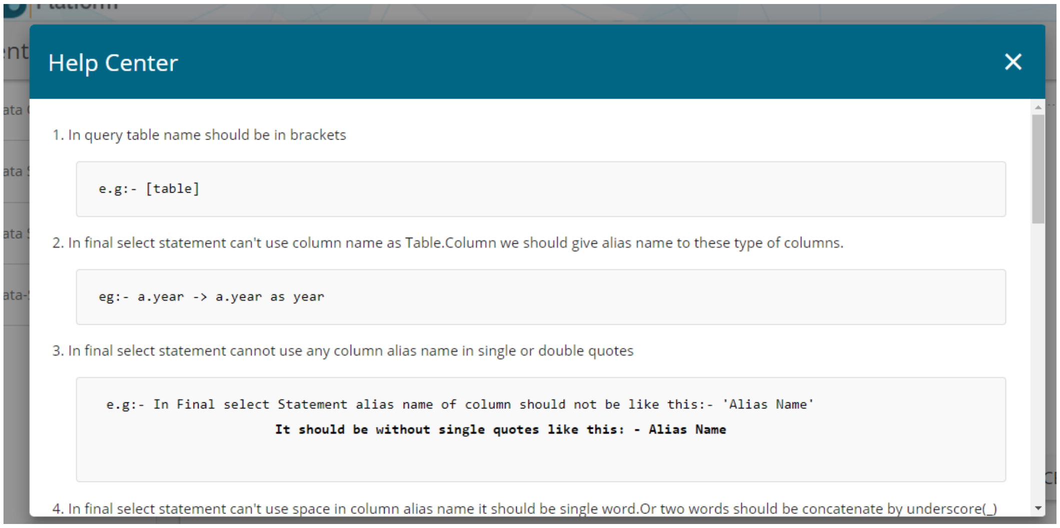
viii) Click the '**SAVE**' option on the Data Set form to save the Data Set



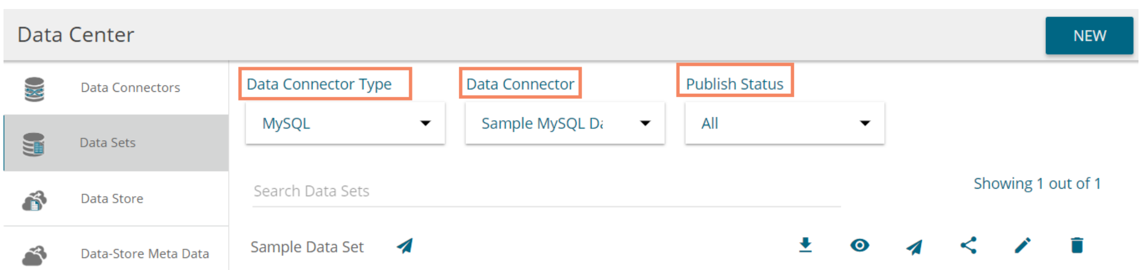
Note:

a. Use ‘**Ctrl+Space**’ to get assistance while writing a query.

b. Click the ‘**Help Center**’ icon from the Data Set form to get rules regarding the formation of a query. The query formation rules will be displayed in a new pop-up screen.



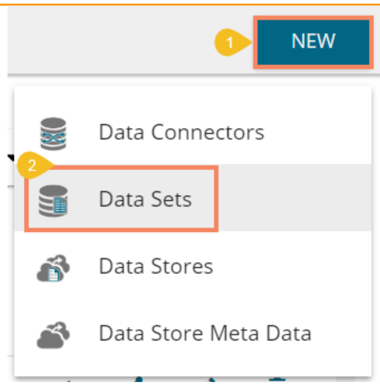
c. Users can filter the Data Set list by Data Connector Type, Data Connector, and Publish Status. These filters are provided on the top of the Data Set List page.



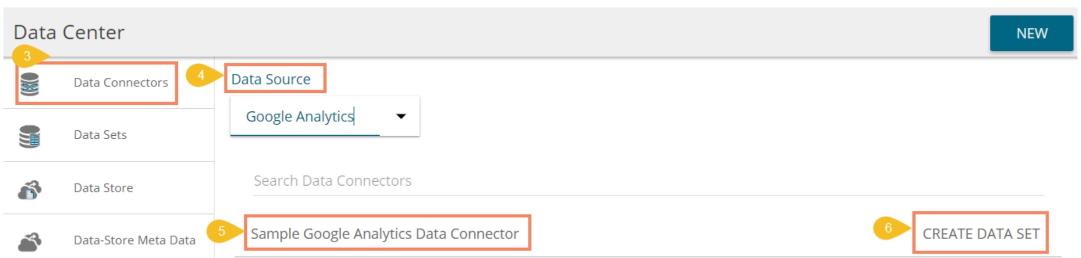
7.2.2. Creating a New Data Set Using API Connectors

i) Click ‘**NEW**’ menu from the Data Center page.

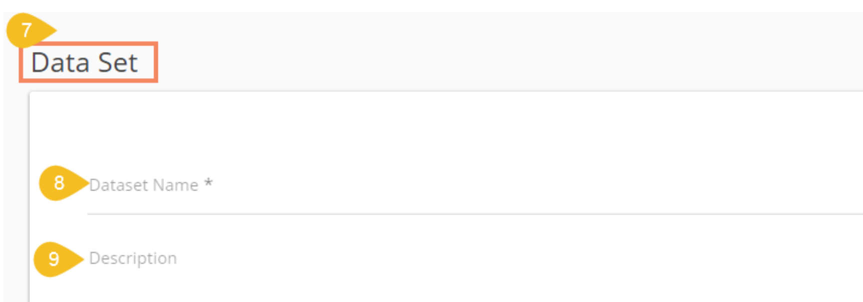
ii) Select the ‘**Data Set**’ option from the context menu



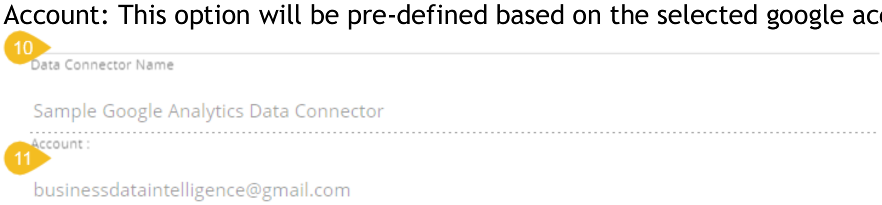
iii) Users will be redirected to the page containing all the data connectors
iv) Use the ‘**Data Source**’ filter to search for a specific API Data Connector (E.g., the below image displays ‘**Google Analytics**’ as the data source filter)
v) Select a data connector from the displayed list (E.g., in this case; a google analytics data connector is selected)
vi) Click the ‘**CREATE DATA SET**’ option



vii) Users will be redirected to a new Data Set form for Google Analytics Data Set
viii) Fill in the following information:
a. Service Name: Enter any user-defined name for the new dataset
b. Description: Brief description of the Data Set (It is an optional field)



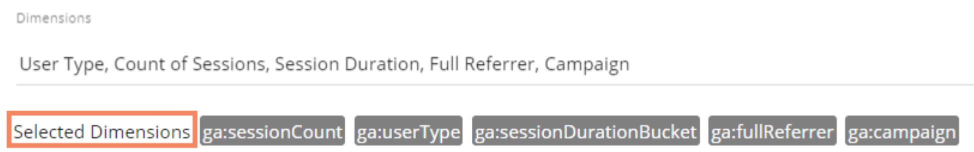
c. Data Connector Name: This option will be pre-defined
d. Account: This option will be pre-defined based on the selected google account



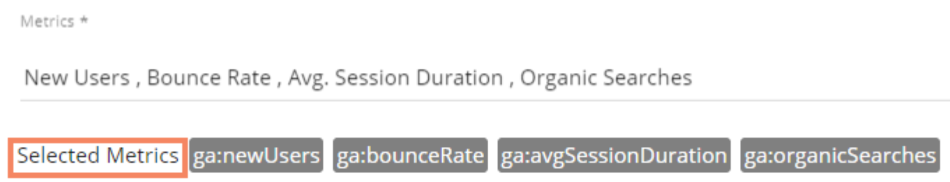
e. Users can select specific data using the below given drop-down lists:
i. Select Web Property: Select the required web property using the drop-down menu

ii. Select View: Select the required view using the drop-down menu

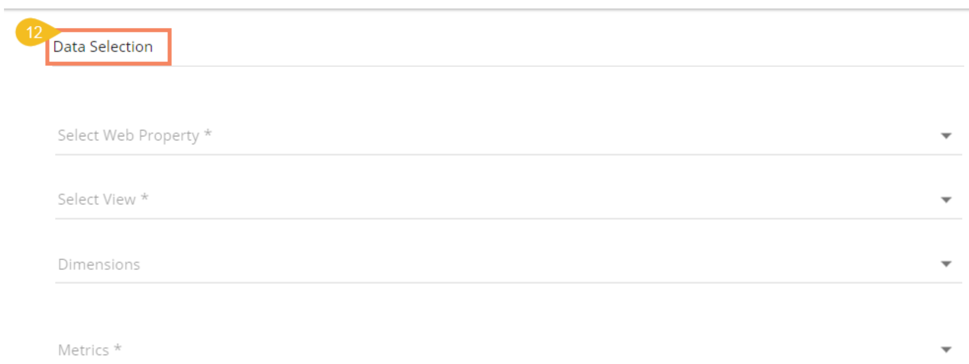
iii. Dimensions: Select the required dimensions using the drop-down menu (The selected dimensions will be displayed below with ‘ga’ suffix)



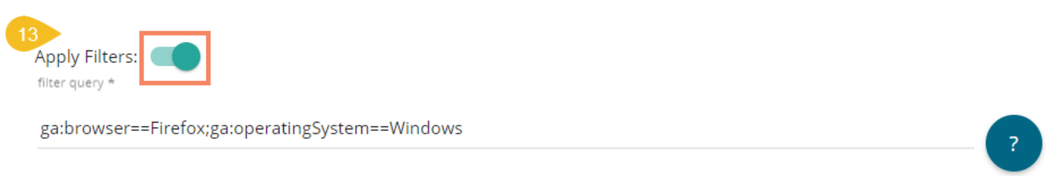
iv. Metrics: Select the required metrics using the drop-down menu (The selected metrics will be displayed below with ‘ga’ suffix)



Note: **Select Web Property**, **Select View**, and **Metrics** are the mandatory fields to create a Google Data Set.

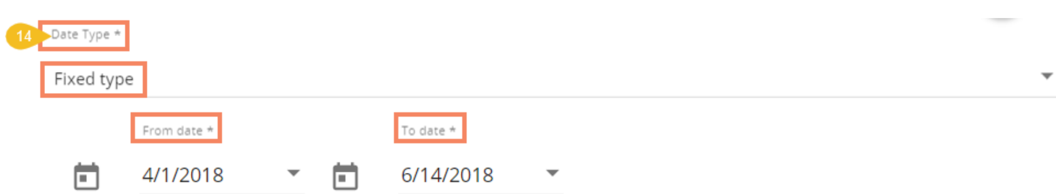


f. Apply Filter: Enable the filter option. The filter query will be displayed below



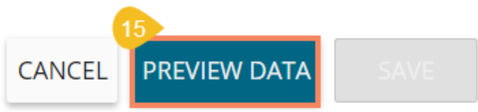
g. Date Type: Select a Date Type using the given options- ‘**Fixed Type**’ and ‘**Dynamic Type**’

i. Fixed Type: Define a time range by specifying dates using the ‘**From date**’ and ‘**To date**’ options

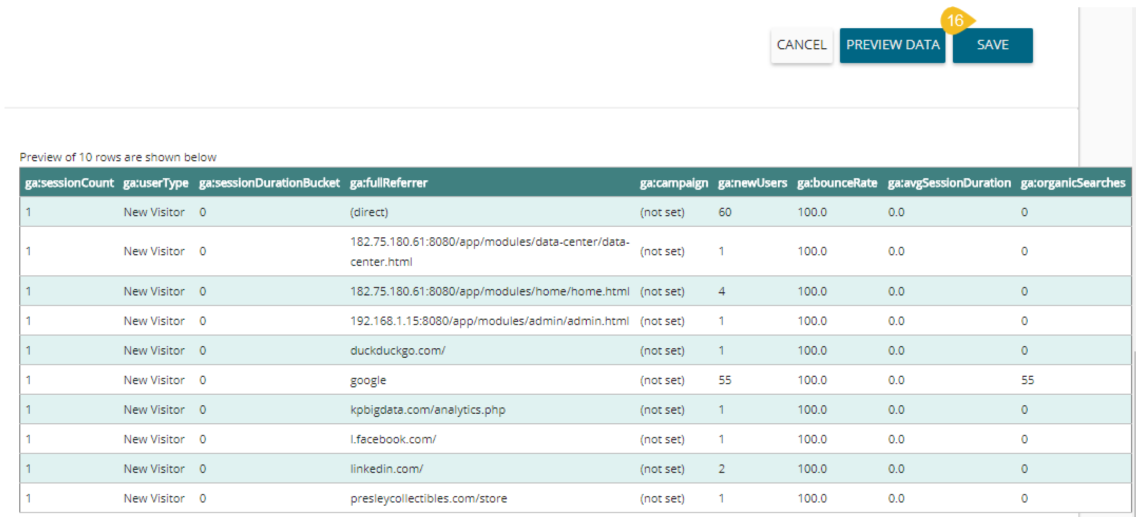


ii. Dynamic Type: Select an option from the drop-down menu to define the time range

h. Click the ‘**PREVIEW DATA**’ option

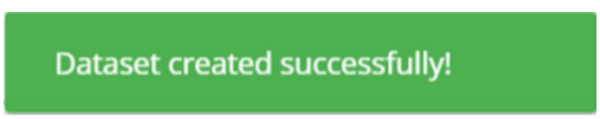


ix) After getting the data preview in the tabular format, click the ‘**SAVE**’ option

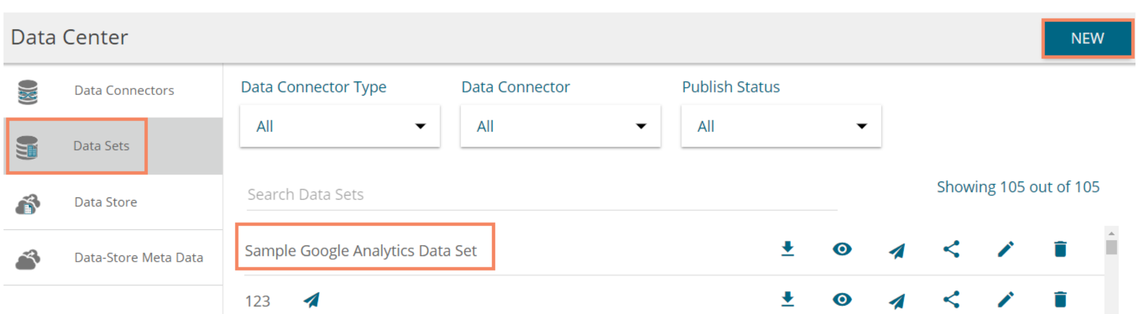


ga:sessionCount	ga:userType	ga:sessionDurationBucket	ga:fullReferrer	ga:campaign	ga:newUsers	ga:bounceRate	ga:avgSessionDuration	ga:organicSearches
1	New Visitor	0	(direct)	(not set)	60	100.0	0.0	0
1	New Visitor	0	182.75.180.61:8080/app/modules/data-center/data-center.html	(not set)	1	100.0	0.0	0
1	New Visitor	0	182.75.180.61:8080/app/modules/home/home.html	(not set)	4	100.0	0.0	0
1	New Visitor	0	192.168.1.15:8080/app/modules/admin/admin.html	(not set)	1	100.0	0.0	0
1	New Visitor	0	duckduckgo.com/	(not set)	1	100.0	0.0	0
1	New Visitor	0	google	(not set)	55	100.0	0.0	55
1	New Visitor	0	kpbigdata.com/analytics.php	(not set)	1	100.0	0.0	0
1	New Visitor	0	l.facebook.com/	(not set)	1	100.0	0.0	0
1	New Visitor	0	linkedin.com/	(not set)	2	100.0	0.0	0
1	New Visitor	0	presleycollectibles.com/store	(not set)	1	100.0	0.0	0

x) A success Message will appear to assure the creation of a new Data Set.

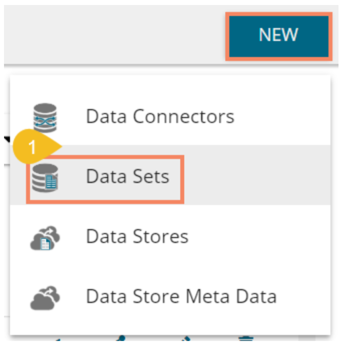


xi) The newly created Google Analytics dataset will be added to the ‘**Data Sets**’ list



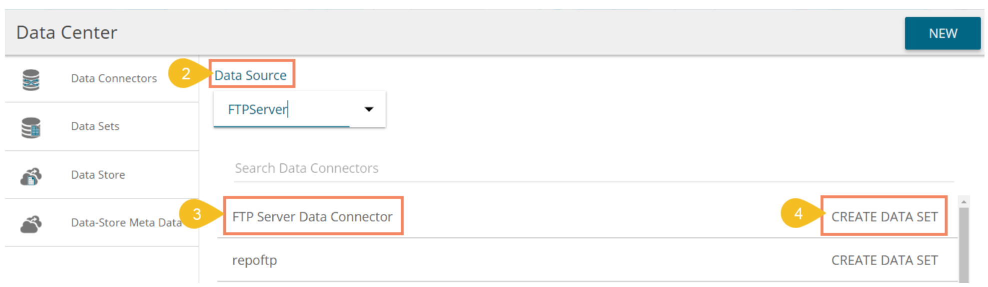
7.2.3. Creating a New FTP Data Set

i) Select ‘**Data Sets**’ from the ‘**NEW**’ context menu



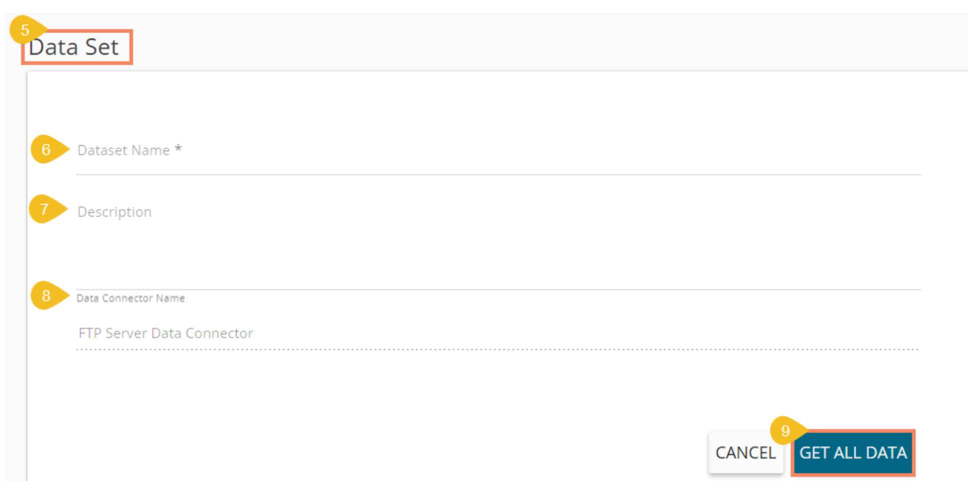
ii) Users will be redirected to the list of Data Connectors

a. Select an FTP Server using the data source filter
b. Select an FTP Data Connector from the list
c. Click the ‘**CREATE DATA SET**’ option



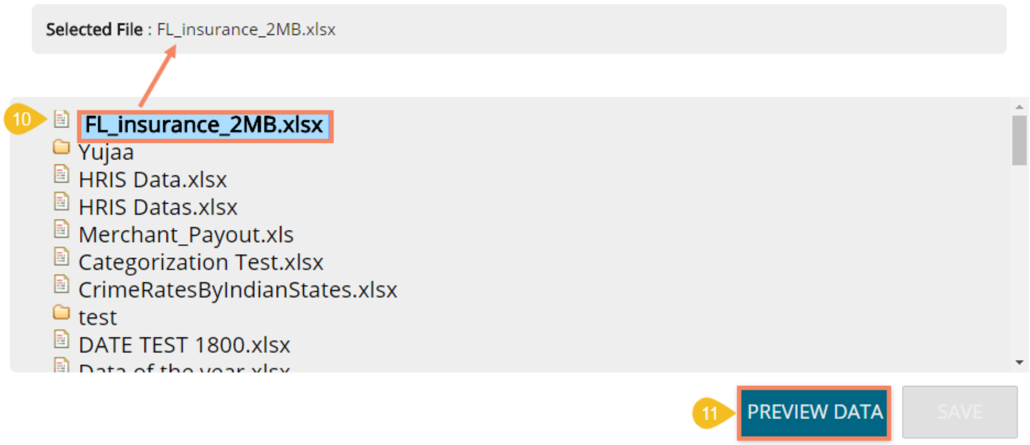
iii) Users will be redirected to the FTP Data Set form

a. Provide Data Set Name
b. Provide Description of the Data Set (Optional)
c. Data Connector name will be pre-selected
d. Click ‘**GET ALL DATA**’ option

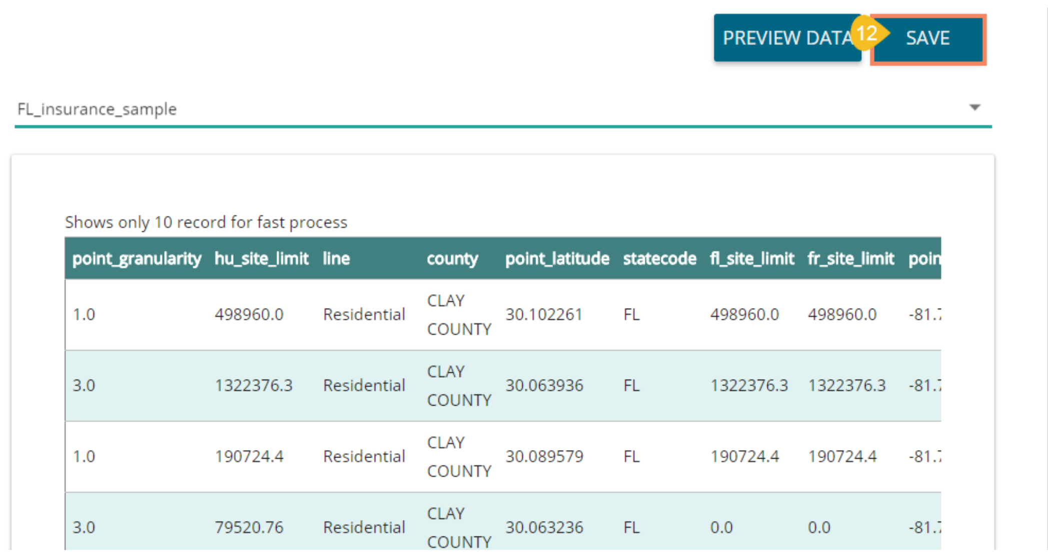


iv) Users will be redirected to select a file from the displayed list. Use double click on a file to select it.

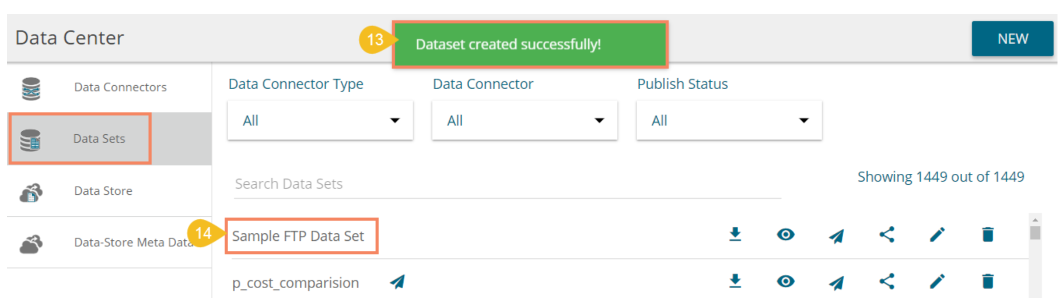
v) After selecting a specific file, click ‘**PREVIEW DATA**’ option



vi) Click ‘**SAVE**’ option after getting the data preview



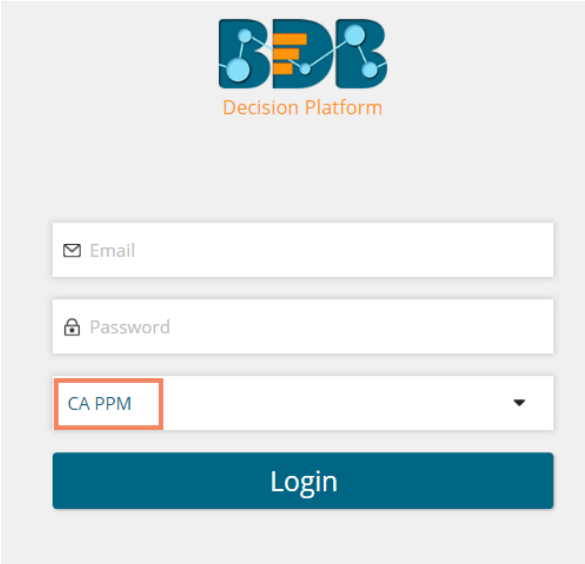
vii) A success message will appear to assure the creation of a new dataset
viii) The newly created FTP Data Set will be added to the Data Sets list



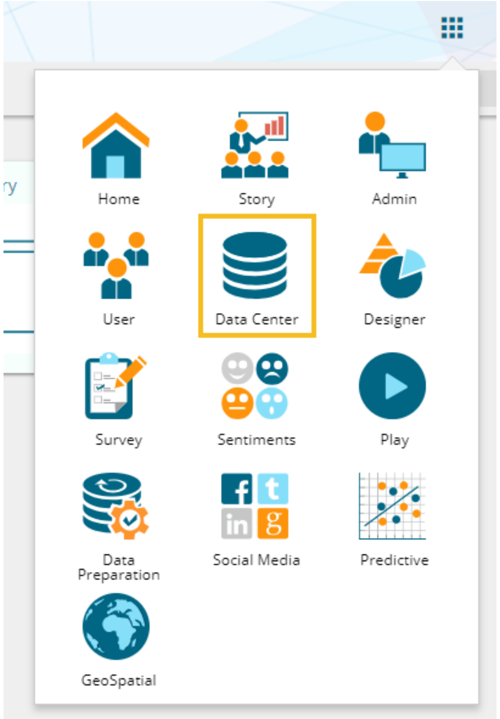
7.2.4. Creating a CA PPM Data Set

The CA Connector is accessible only for the CA PPM users.

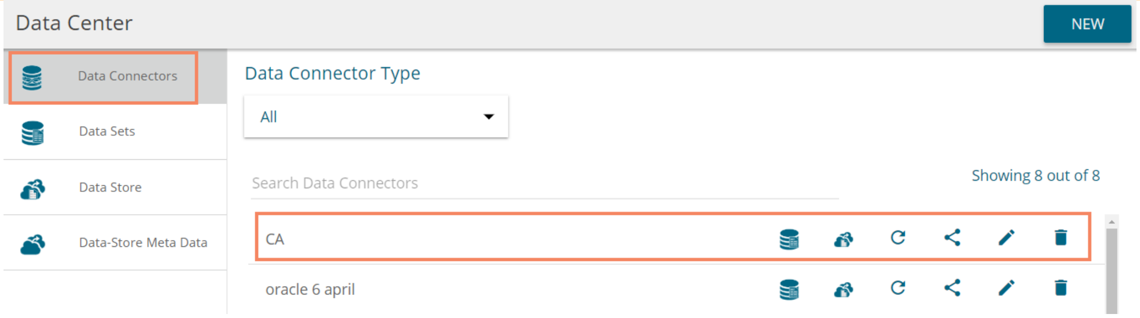
i) Login to the platform using the CA PPM authentication option



ii) Select Data Center from the Apps menu



iii) Users will be redirected to the Data Connector list
iv) The '**CA**' default connector will be provided in the data connector list



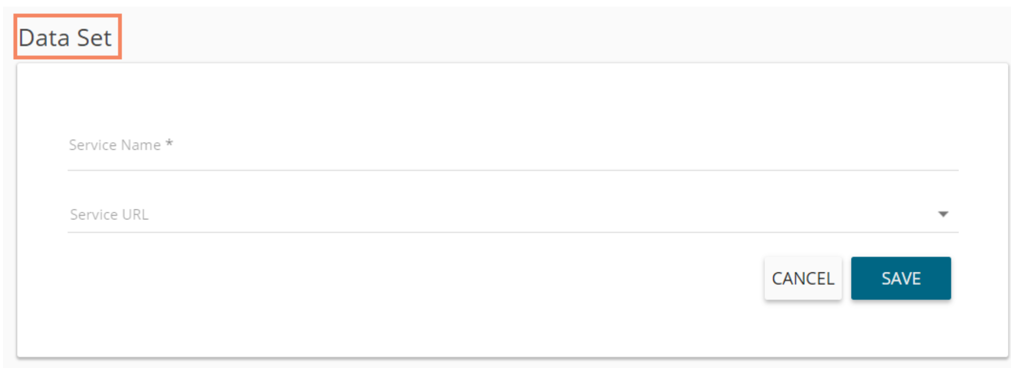
v) Click ‘**Create New Data Set**’ option

vi) Users will be redirected to the Data Set form

vii) Configure the following information to create a CA PPM Data Set

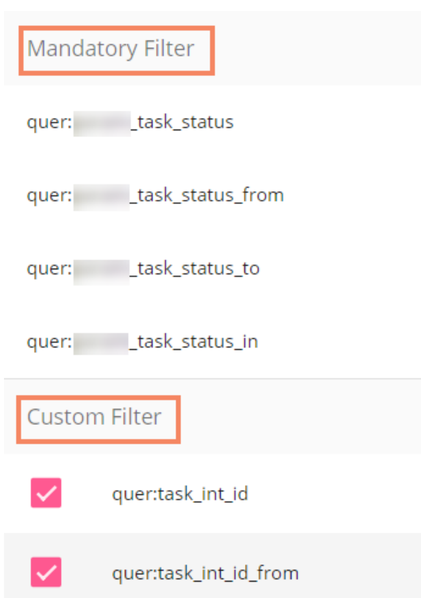
   a. Service Name: A user-defined name given to the data set

   b. Service URL: Select a service URL from the drop-down menu



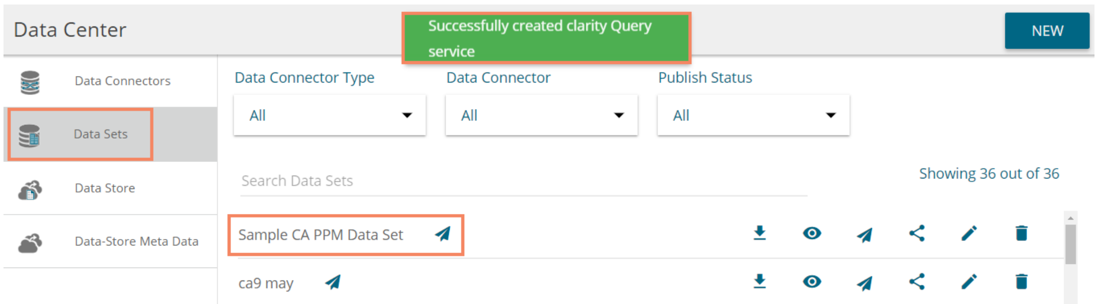
   c. Mandatory Filter: The list of the selected mandatory filter will be displayed based on the service URL

   d. Custom Filter: Select ‘**Custom Filter**’ options from the drop-down menu



   e. Click the ‘**SAVE**’ option

viii) A success message will appear to assure that a new data set has been created
ix) The newly created data set will be added to the data set list



Note:

a. Users can not access any other option (NEW DATA STORE, Reconnect, Share, Edit, Delete) except '**New Data Set**' while using the CA default data connector.
b. By clicking '**NEW**' option from the Data Set form, users will be sent back to the Data Connector List, and they need to click again the '**CREATE DATA SET**' option to access a Data Set form.

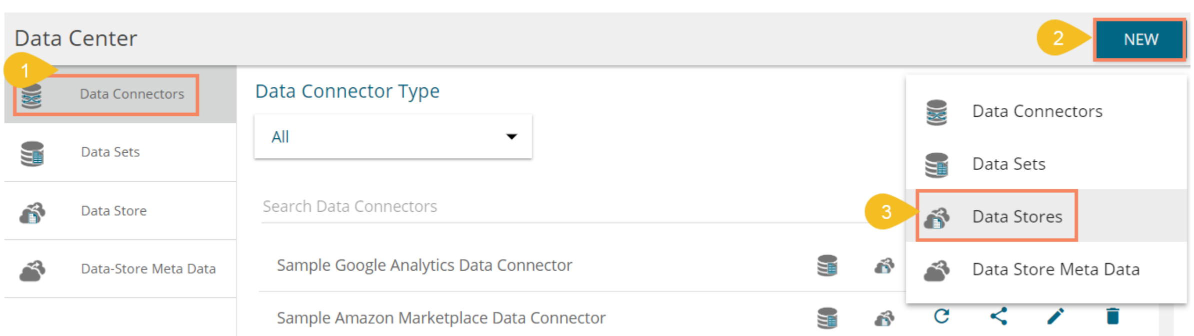
7.3. Data Store

This section describes steps to store data in a specific format that can be used to create interactive visual reports.

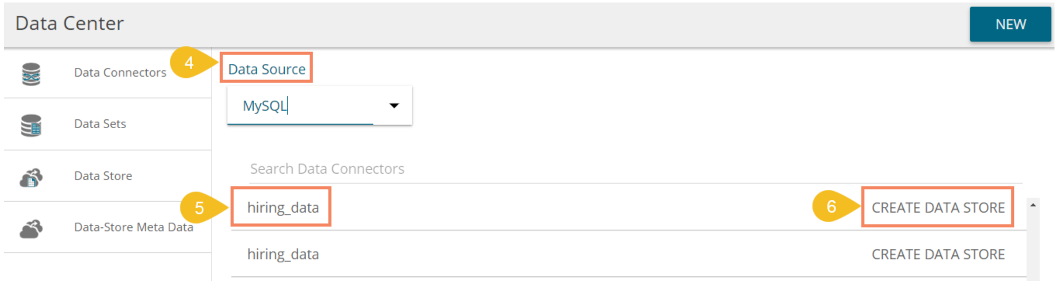
7.3.1. Creating a New Data Store

This section explains steps to create a new data store

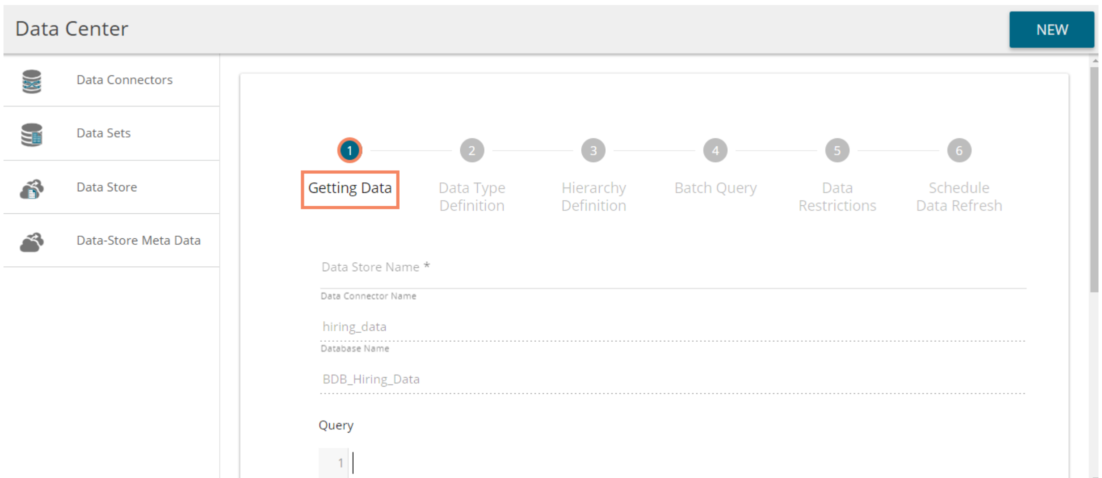
i) Navigate to the Data Center page
ii) Click '**NEW**'
iii) Select '**Data Stores**' from the context menu



iv) Users will be directed to the following page:
   a. Select a Connector Type from the '**Data Source**' filter
   b. Select a data connector from the Data Connector list
   c. Click the '**CREATE DATA STORE**' option provided next to the selected data connector



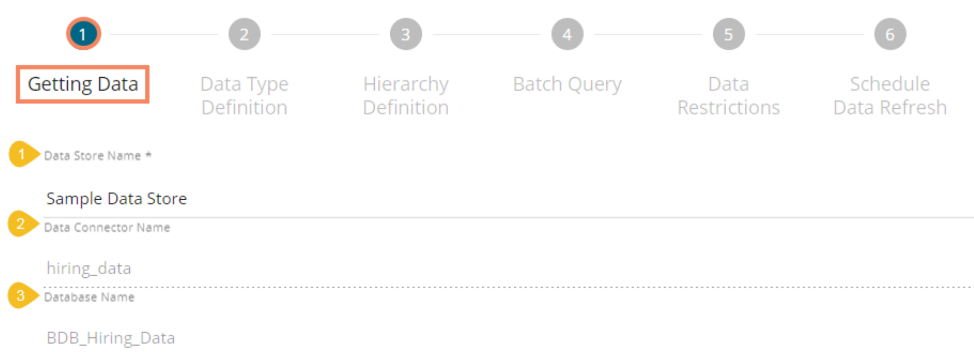
v) Users will be directed to get data for creating a Data Store



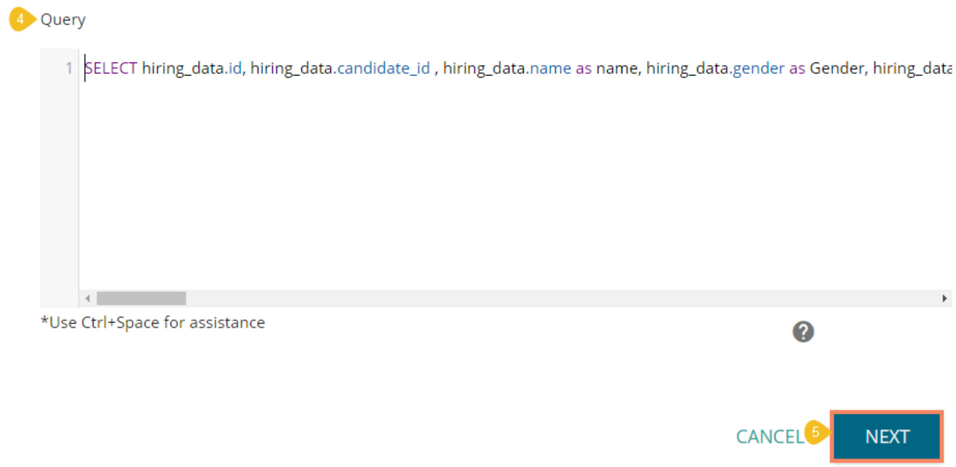
7.3.1.1. Getting Data

This section displays a form to create a new data store. Users need to provide the following information:

i) **Data Store Name:** Enter a name for the data store
ii) **Data Connector Name:** It will be preselected (Name of the selected data connector will be displayed in this field)
iii) **Database Name:** It will be preselected based on the selected data connector



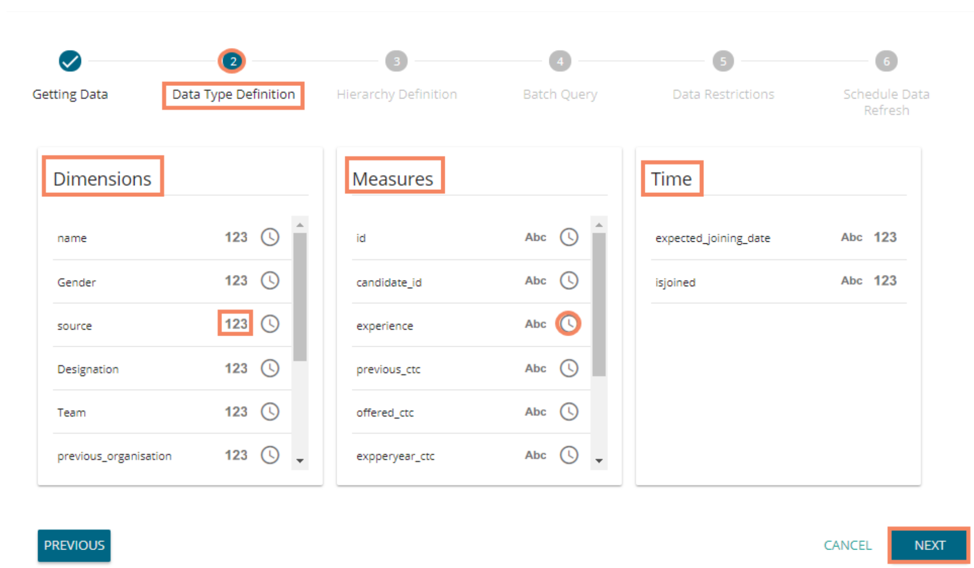
iv) **Query:** Write the query service in the given space (Use ‘**Ctrl+Space**’ for assistance in writing a query)
v) Click ‘**NEXT**’ to proceed to the next tab



7.3.1.2. Data Type Definition

This tab allows users to define the data type using the selected data store. They can interchange the Dimensions, Measures, and Time fields by selecting the respected icons provided for these fields.

i) Define the required Dimensions, Measures, and Time by interchanging the categories
ii) Click '**NEXT**' to proceed to the next tab



Note:

a. Users can change the categories of a dimension, measure, and time values by clicking the following options:

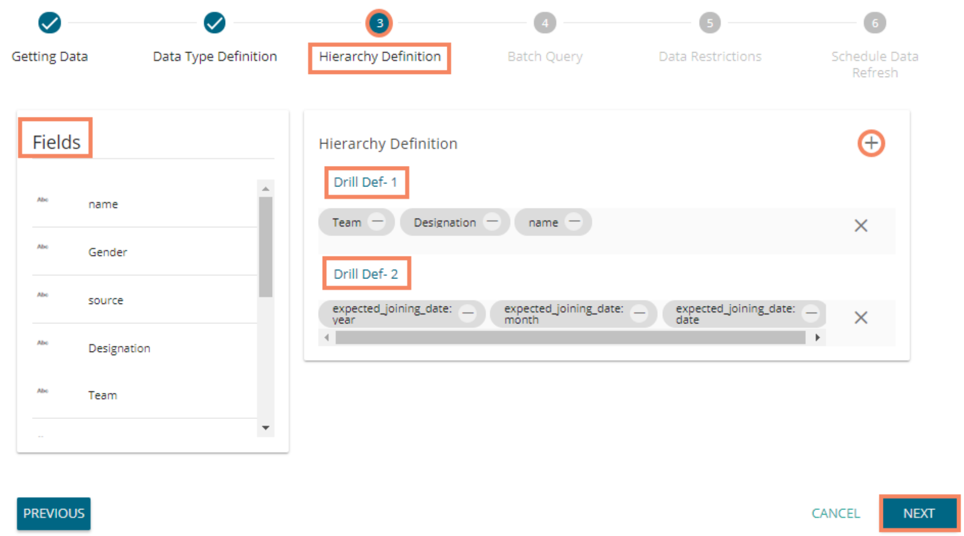
Options	Description
Abc	Move to Dimensions
123	Move to Measures
	Move to Time

b. Click the ‘**PREVIOUS**’ option to go back to the previous tab.

7.3.1.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

i) Click the ‘**Add**’ option + provided in the Hierarchy Definition window
ii) A new ‘**Drill Def**’ box will be added
iii) Drag and drop the dimensions or time options to define a hierarchy
iv) Click ‘**NEXT**’ to proceed to the next tab



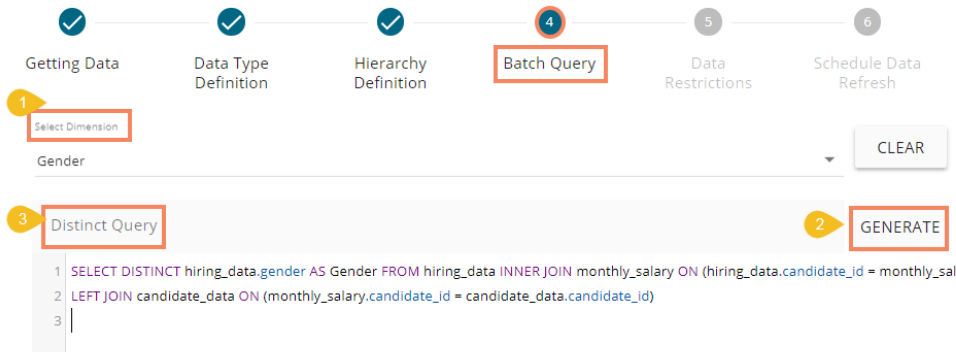
Note:

a. Click the ‘**PREVIOUS**’ option to go back to the previous tab.
b. Click the ‘**Remove**’ option — (in the Drill Def box) to remove the defined hierarchy using the selected option.
c. The ‘**Date Drill**’ functionality is available for the Time dimensions. By default, the Time dimensions will be split into Year>Month>Date hierarchy.
Users can define the date drill by dragging once a time dimension into a ‘**Drill Def**’ box.
E.g., Hierarchy for the ‘**Opening**’ time dimension has been defined as shown below:

7.3.1.4. Batch Query

Split the data fetching process into different batches by generating a batch query.

i) Select a Dimension using the drop-down menu
ii) Click the ‘**Generate**’ option
iii) Based on the selected dimension a distinct query will be generated (in the below-given box)
Users can edit the distinct query as per their requirement



iv) Click '**Generate**' option provided for the '**Batch Query**' option

v) The original query will be generated with the distinct query specifications to fetch data

vi) Click '**NEXT**' to proceed to the next tab

7.3.1.5. Data Restriction

Configure the '**Data Restrictions**' settings to restrict a user-level view of the data store.

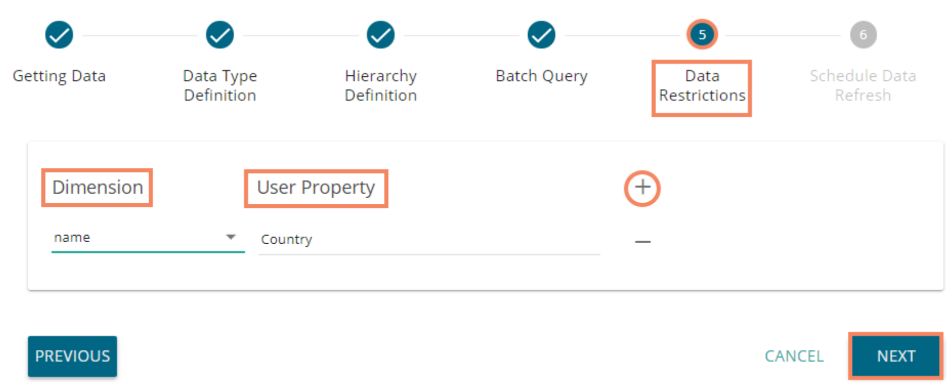
i) Click '**Add**' ✚ to add a new box for inserting the data restriction parameter

ii) Fill in the following information:

   a. **Dimension**: Select a dimension using the drop-down menu

   b. **User Property**: Enter user/group specific custom field

iii) Click '**NEXT**' to proceed to the next tab

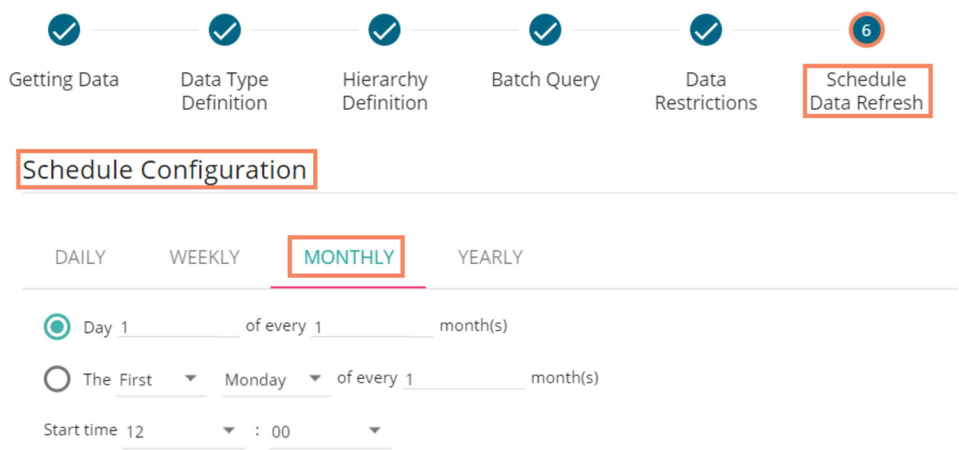


Note: The Administrator can restrict access to data for a specific user by configuring the User Property via the '**Data Restriction**' tab. **E.g.,** If for a user/user group '**Country**' custom field is provided value '**India,**' and the administrator passes '**Country**' as User Property while creating a data store. Users for whom '**India**' was selected as the value for the '**Country**' custom field will be able to access data regarding India only.

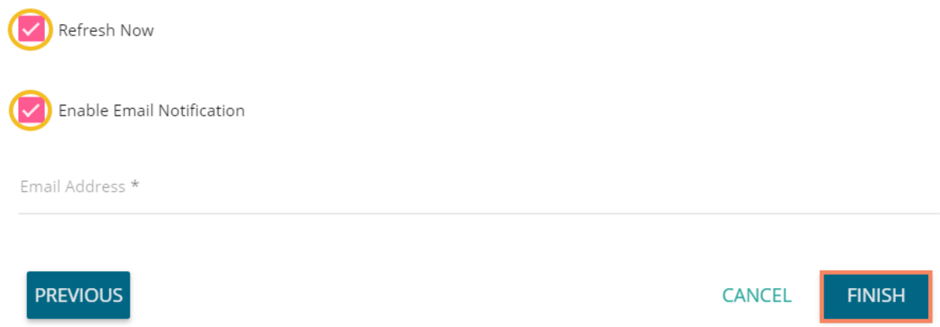
7.3.1.6. Schedule Data Refresh

Users can schedule a data refresh interval via the 'Schedule Data Refresh' tab.

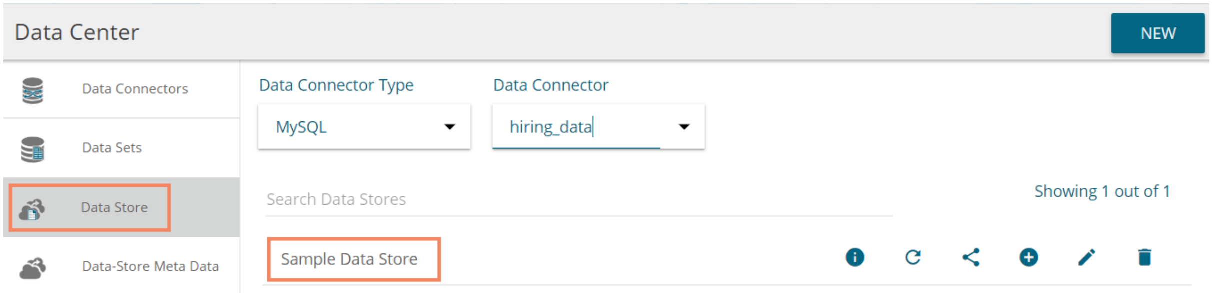
i) The following options are provided to refresh the data:
   a. Daily
   b. Weekly
   c. Monthly
   d. Yearly
ii) Select any one option from the above-given list to set the data refresh interval



iii) Select the '**Refresh Now**' option by enabling the box to refresh the data store immediately after it has been created
iv) Enable Email Notification by enabling the option
v) Provide the Email Address on which you want the notification email to be sent
vi) Click '**FINISH**'



vii) A message will pop-up to confirm that the data store configuration has been saved
viii) Users will be redirected to the Data Store List
ix) A new data store will be created and added to the displayed list

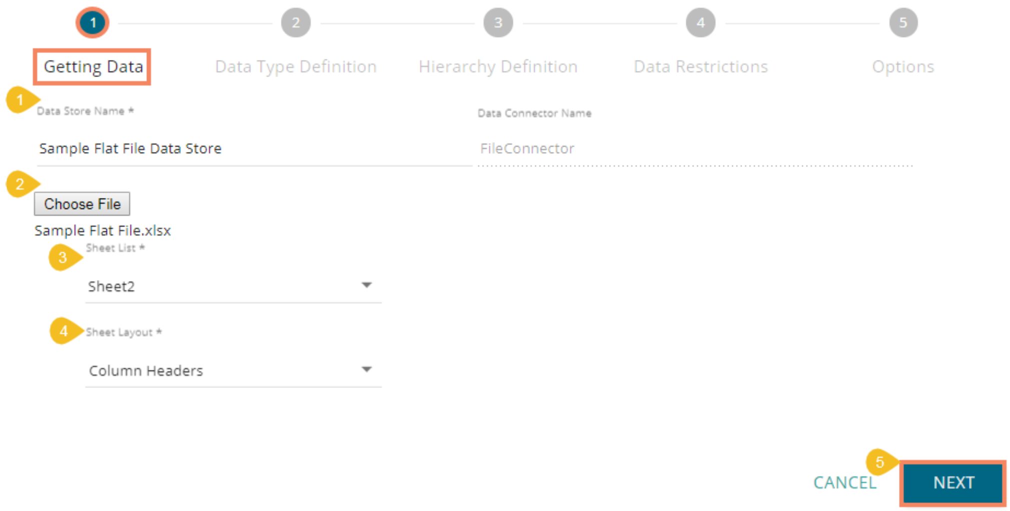


Option	Name	Task
	Latest Scheduler Status	Displays the latest scheduler status via a pop-up window
	Refresh Data	Refreshes data for a datastore
	Share Data Store	Shares a datastore to/for the selected user(s) or group(s)
	Add Synonyms to Data Store	Adds more synonyms to a datastore
	Edit	Edit the datastore fields
	Remove	Remove a data store from the list

7.3.2. Creating a New Data Store Using a Flat File Data Connector

Step 1- Getting Data

i) Fill in the following information:
   a. **Data Store Name**: Enter a data store name
   b. **Data Connector Name**: It will be preselected (Name of the selected data connector will be displayed in this field)
ii) Click '**Choose File**' to browse a file from the system
iii) The following information must be configured, if the file carries more sheets:
   a. Sheet List
   b. Sheet Layout
iv) Click '**NEXT**' to proceed to the next tab

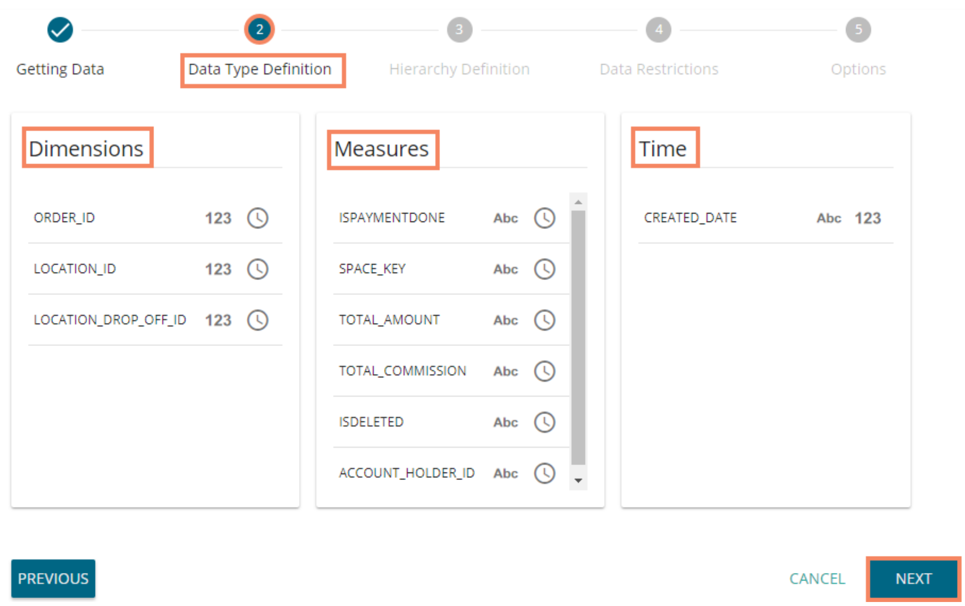


Note: Users can choose an Excel or CSV file as a file data connector.

Step 2- Data Type Definition

i) Users can define data by interchanging available Dimensions, Measures, and Time fields from the selected data store

ii) Click '**NEXT**' to proceed to the next tab



Step 3- Hierarchy Definition

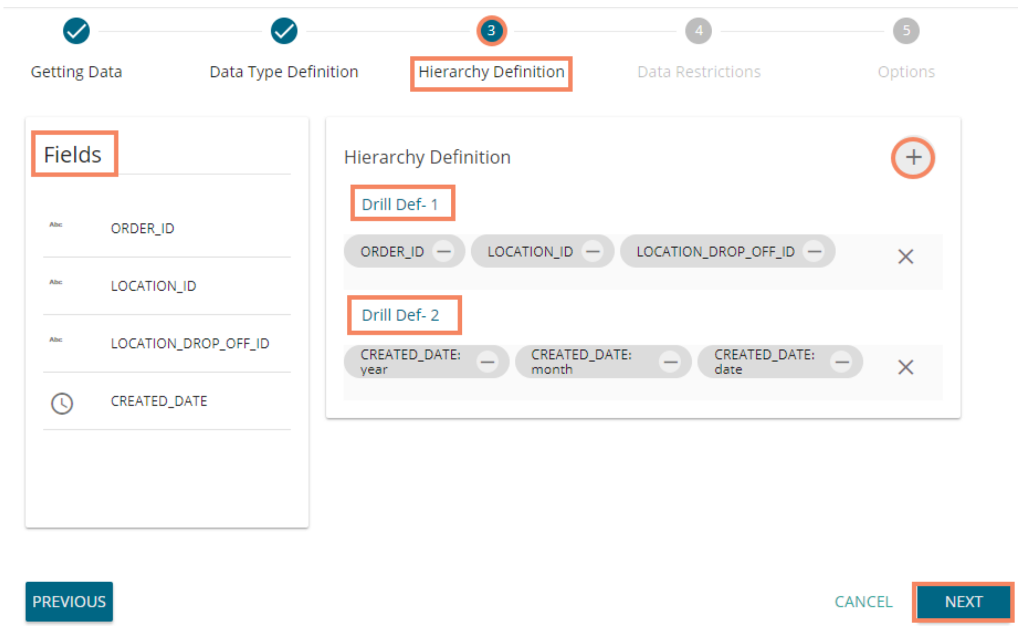
Define hierarchy using multiple dimensions or dropping the selecting time fields in the Drill Definition box.

i) Click the '**Add**' option + provided in the Hierarchy Definition window

ii) A new '**Drill Def**' box will be added

iii) Drag and drop the dimensions or time options to define a hierarchy

iv) Click '**Next**' to proceed to the next tab

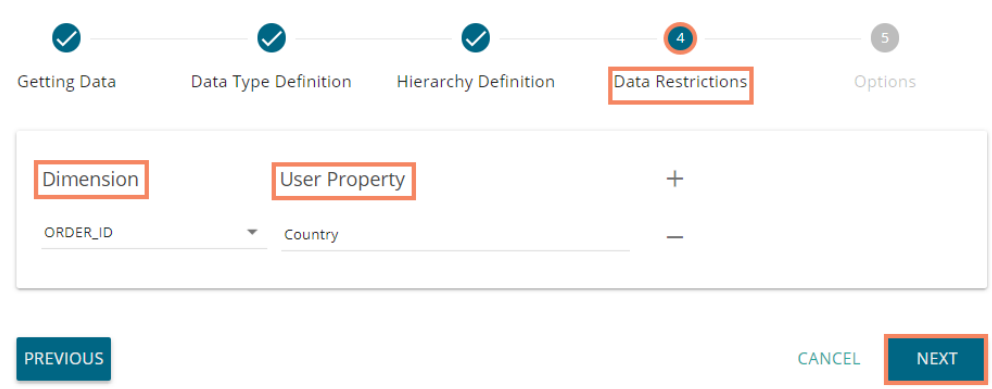


Step 4- Data Restriction

The Administrator can restrict access to data for a specific user by configuring the User Property via the '**Data Restriction**' tab.

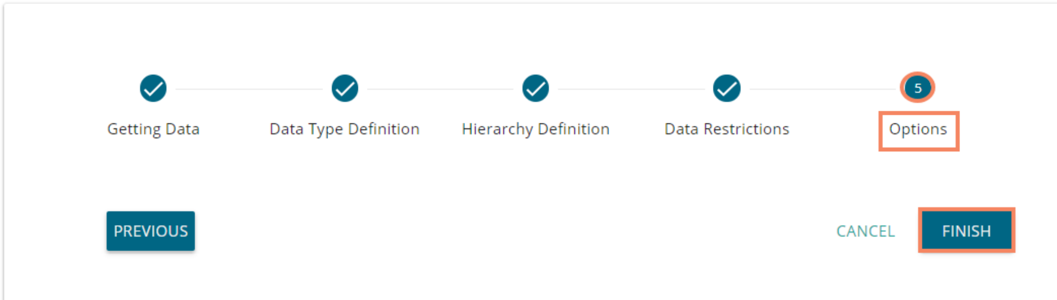
E.g., If for a user/user group '**Country**' custom field value is '**USA**' and the administrator passes '**Country**' as User Property while creating a data store. Users for whom '**USA**' was selected as value for the '**Country**' custom field will be able to access data related only to the USA from the data store.

i) Click '**Add**' icon + to add a new box for inserting the data restriction parameter
ii) Fill in the following information:
   a. **Dimension:** Select a dimension using the drop-down menu
   b. **User Property:** Enter user property value (It should be the same as the selected dimension)
iii) Click '**NEXT**' to proceed to the next tab

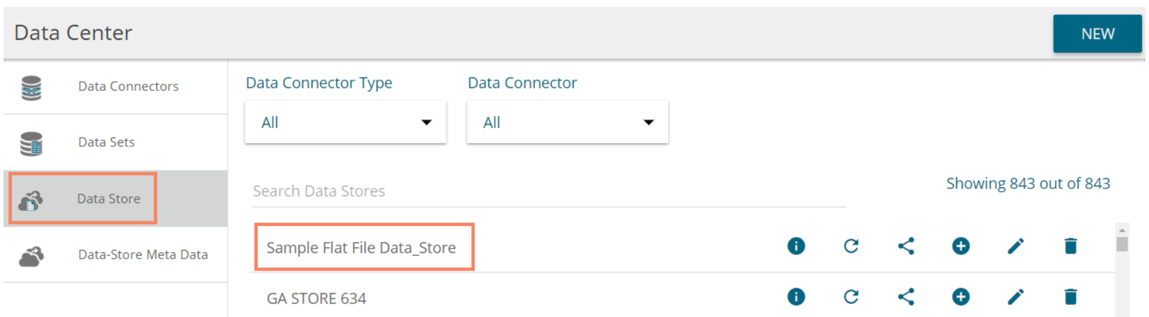


Step 5 - Options

i) Click ‘**FINISH**’ option to complete the Data Store creation process

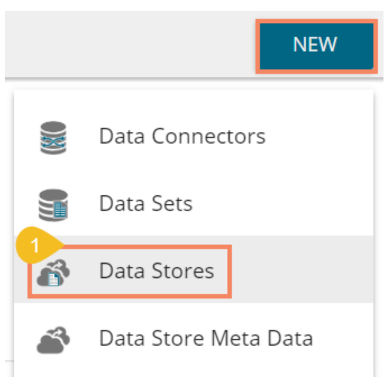


ii) The newly created data store will be added to the Data Store list

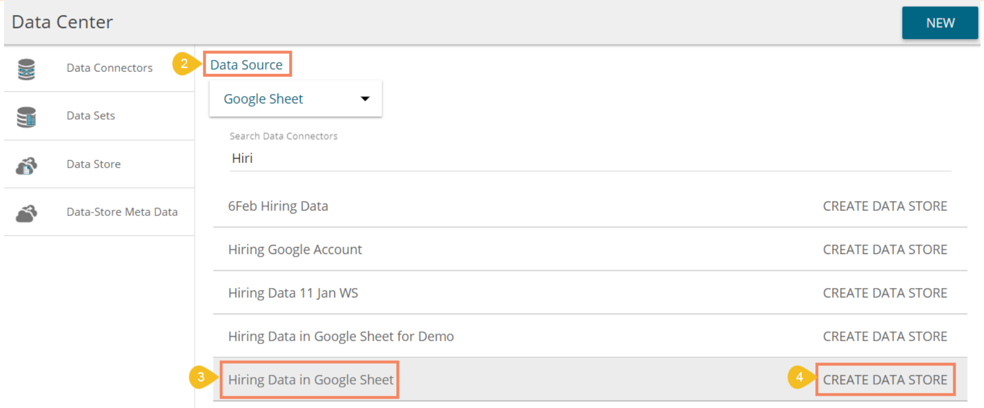


7.3.3. Creating a New Data Store Using an API Data Connector

i) Select ‘**Data Store**’ from the ‘**NEW**’ context menu

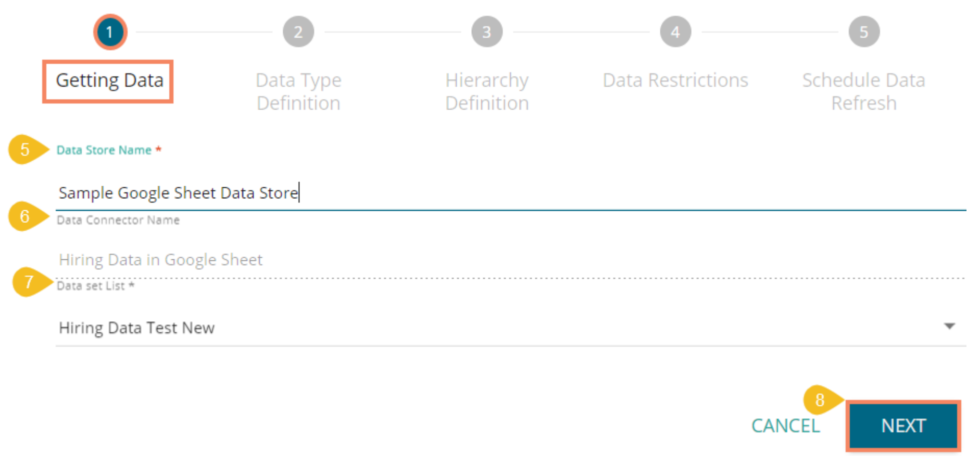


ii) Choose an API connector type from the filter panel
iii) Select a data connector from the displayed list
iv) Click ‘**CREATE DATA STORE**’ option



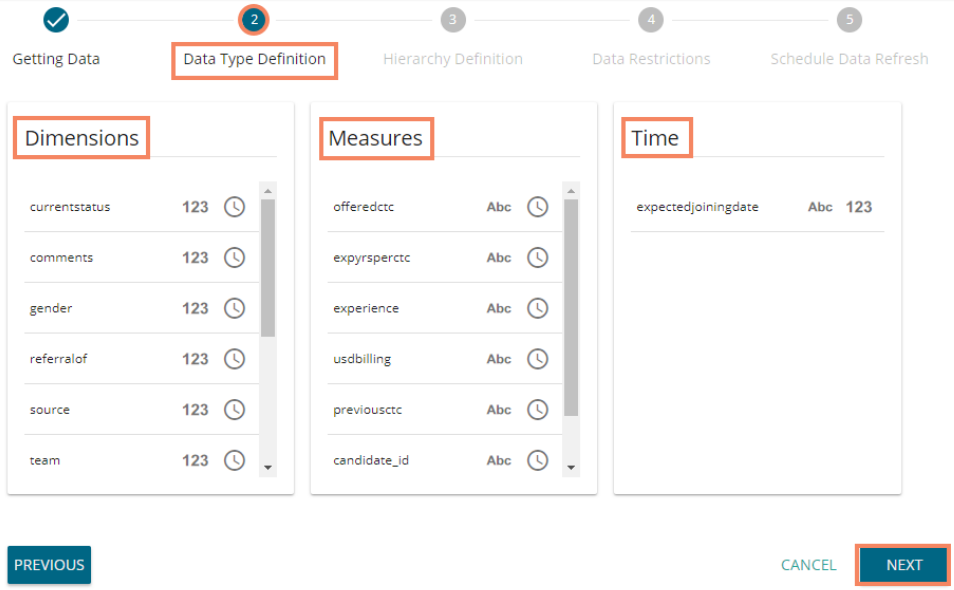
v) Users will be redirected to the '**Getting Data**' tab

1. Give a name for the Data Store
2. Data connector name will be pre-displayed
3. Select a data set using the '**Data Set List**' drop-down menu
4. Click '**NEXT**' option

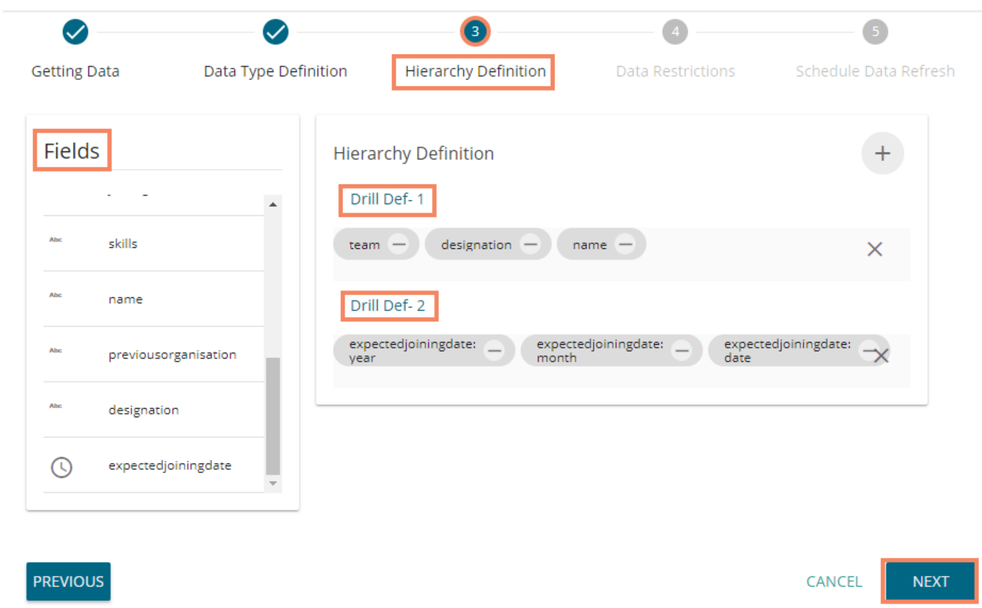


vi) Users will be redirected to the '**Data Type Definition**' tab

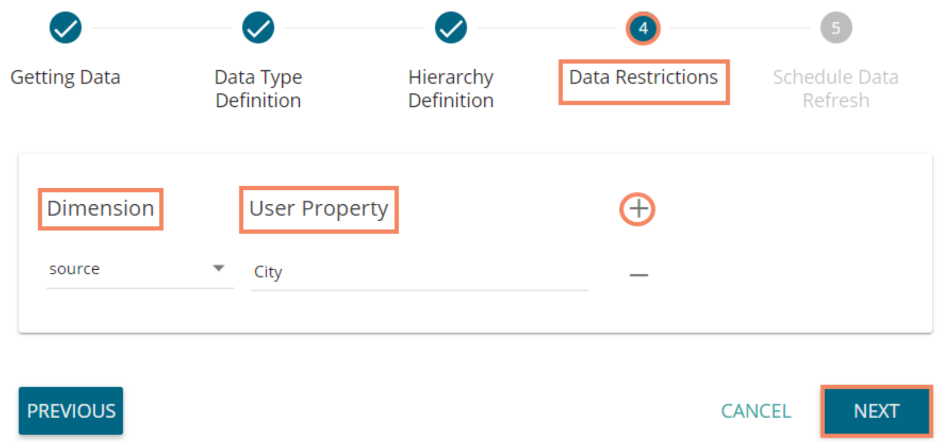
1. Interchange the available Dimensions, Measures, and Time fields to define data
2. Click '**NEXT**' to proceed



vii) Users will be redirected to the '**Hierarchy Definition**' tab
1. Add a new Drill Def. box by clicking the '**Add**' icon
2. Drag and drop Dimension fields or Time field to create hierarchy (Time fields dropped once will get divided into three level granularities, E.g., Year>Month>Date)
3. Click '**NEXT**' to proceed

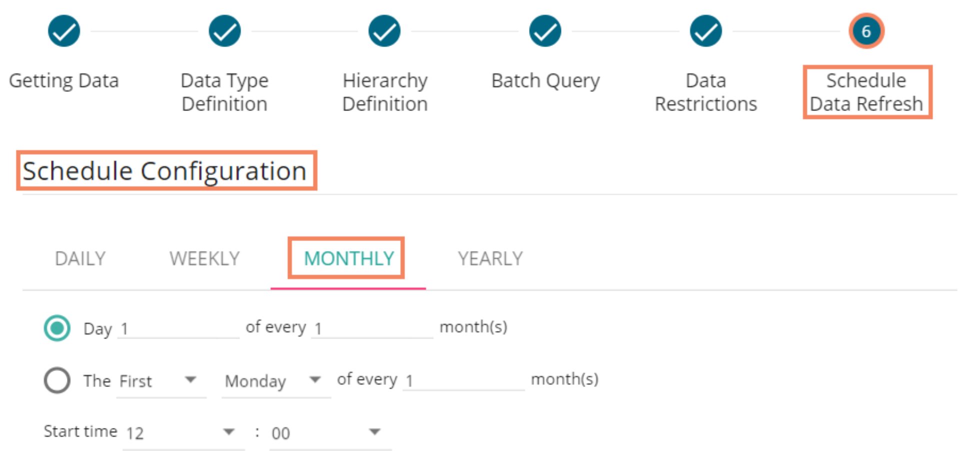


viii) Users will be redirected to the '**Data Restriction**' tab
1. Select a Dimension from the drop-down menu
2. Enter a User Property based on the inserted custom fields of a specific user(s) or user group(s)
3. Click '**NEXT**' to proceed

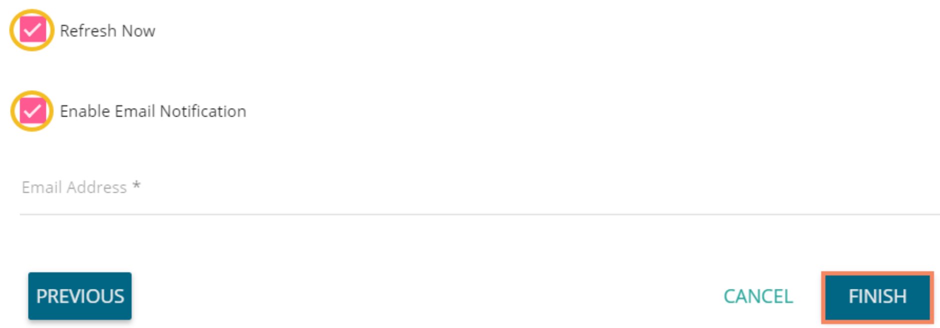


ix) Users will be redirected to the '**Schedule Data Refresh**' tab

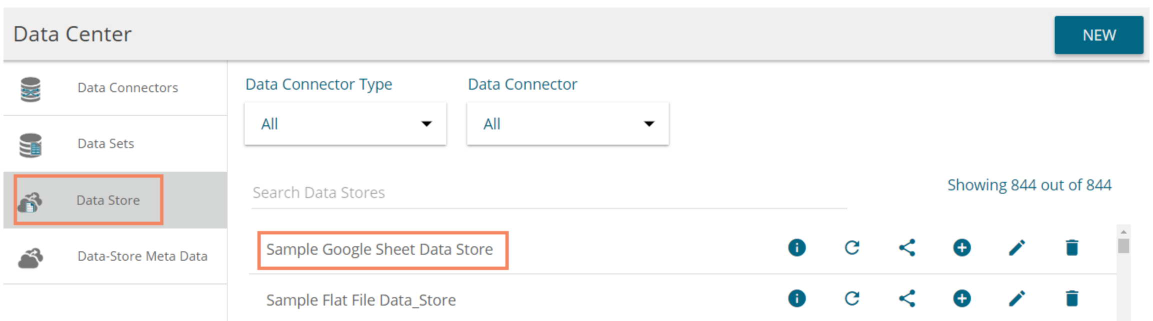
1. The following options are provided to refresh the data:
   a. Daily
   b. Weekly
   c. Monthly
   d. Yearly
2. Select any one option from the above-given list and configure the required information to set the data refresh interval



3. Select the '**Refresh Now**' option by enabling the box to refresh the data store immediately after it has been created
4. Enable Email Notification by enabling the option
   a. Provide the Email Address on which you want the notification email to be sent
5. Click '**FINISH**'

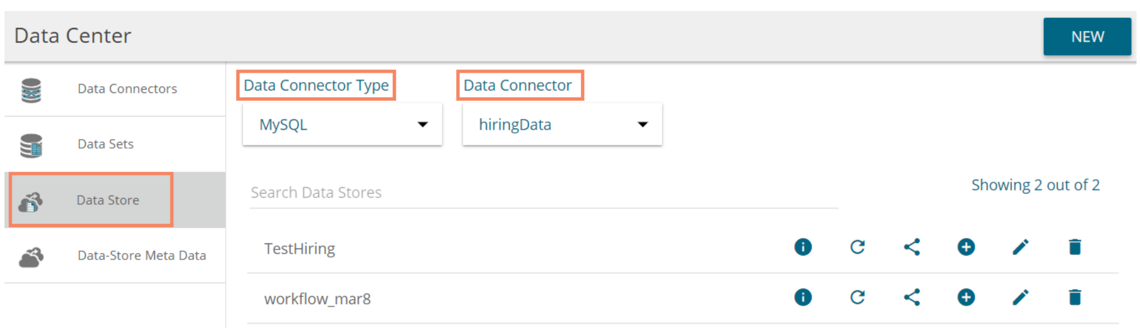


x) A success message appears to inform that a new data store has been created
xi) The newly created data store will be added to the Data Stores list



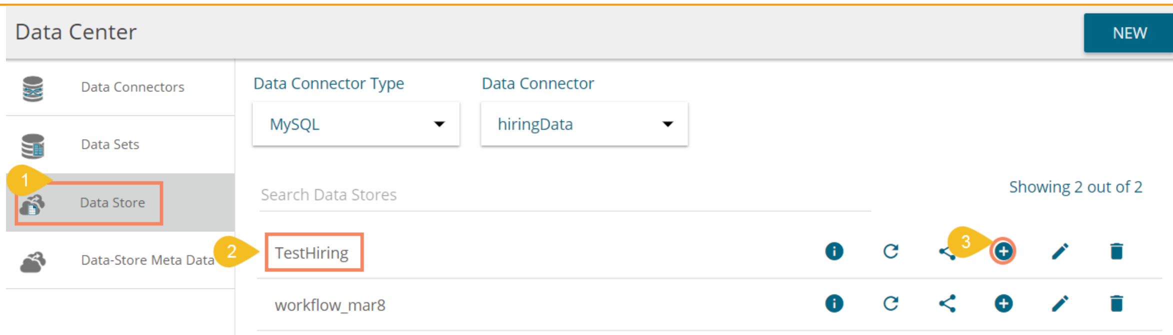
Note:

a. ‘**Getting Data**’ tab opens by default while creating a new data store.
b. Click ‘**PREVIOUS**’ to be redirected to the previous page.
c. Users can click ‘**CANCEL**’ to cancel the creation of a new data store at any step.
d. Enabling NLP service will allow the ‘**Data Search**’ bar provided on the Storyboard of the Business Story to display data from the selected data store.
e. Users can filter the created data stores based on ‘**Data Connector Type**’ and ‘**Data Connector.**’

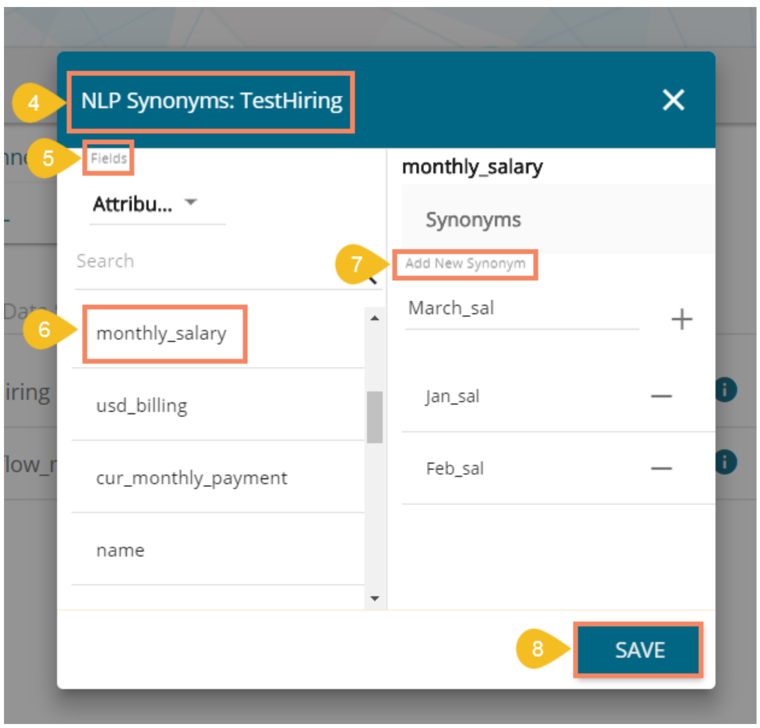


7.3.4. Adding Synonyms to a Datastore

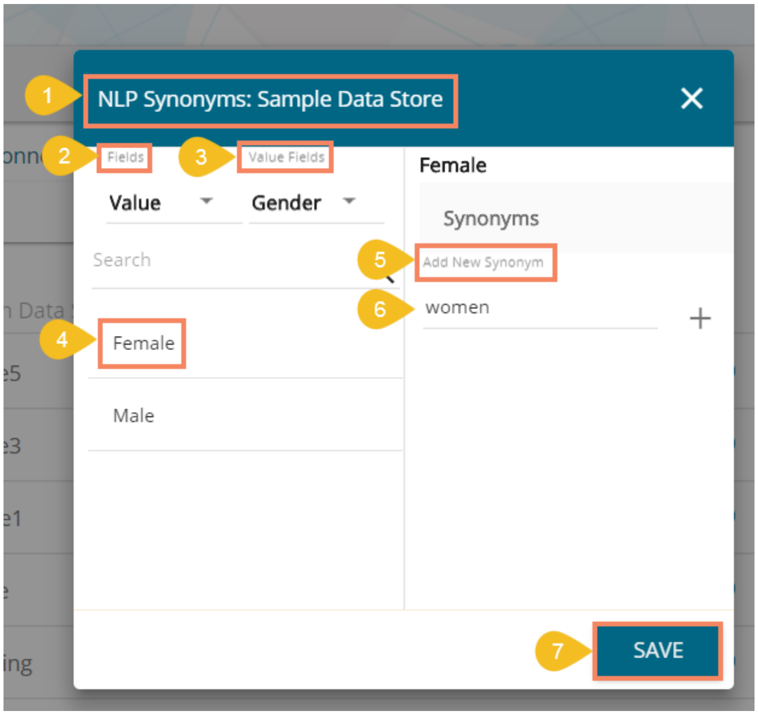
i) Navigate to the Datastore list.
ii) Select a datastore
iii) click the ‘**Add Synonym to Datastore**’ option



iv) Users will be redirected to a new pop-up window
v) Select either ‘**Attribute**’ or ‘**Value**’ using the Fields drop-down
vi) Select an attribute or value from the displayed list
vii) The selected data element will be moved to the right-side
viii) Add new Synonym below the selected data element
ix) Click ‘**SAVE**’



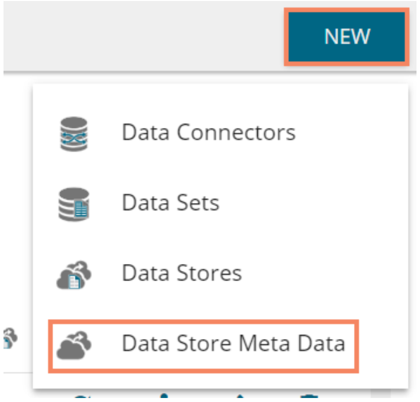
Note: By selecting ‘**Value**’ as an option from the field drop-down the available values will be listed under the ‘**Value Fields.**’ The sub-values will be displayed based on the selected values. Users can add synonyms based on the chosen sub-value as shown in the following image:



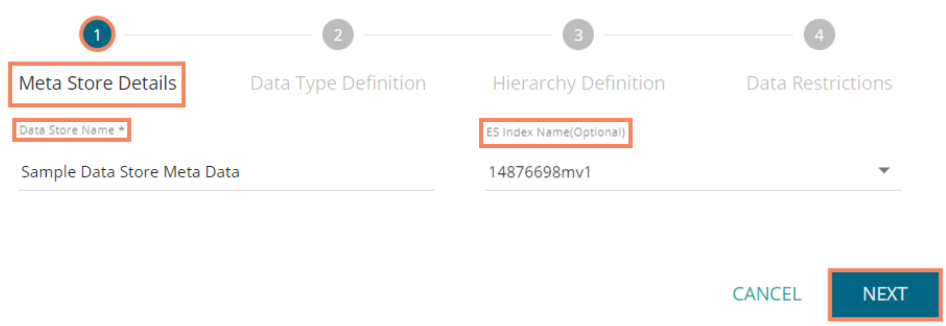
7.4. Data Store Meta Data

The Data Store Meta Data is a database created to store metadata. It is a structure/index in which the actual data can be stored/written using an application such as ETL.

i) Navigate to the Data Center page
ii) Select '**Data Store Meta Data**' from the '**NEW**' context menu



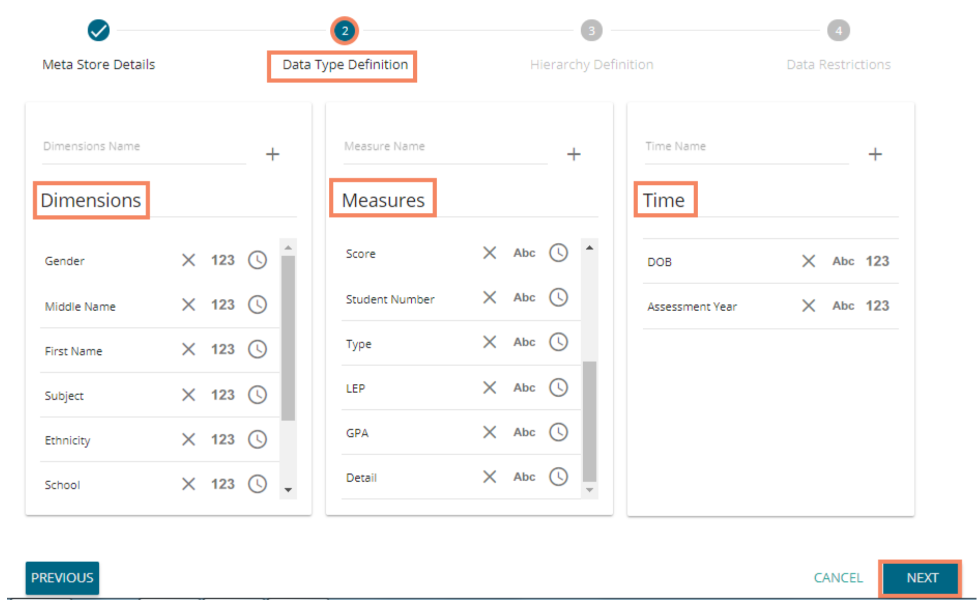
iii) Users will be directed to get Meta Store details
iv) Enter a Data Store Name
v) Choose an ES Index number from the drop-down list (optional)
vi) Click the '**NEXT**' option



vii) Users will be directed to define the data type (if users have not chosen the ES index then they need to insert the fields name manually, else the fields names will be selected from the chosen ES index)

viii) Users can interchange the Dimensions, Measures, and Time fields

ix) Click '**NEXT**'



Note: Users can change the categories of a dimension, measure, and time value by clicking the following options:

Options	Description
Abc	Move to Dimensions
123	Move to Measures
	Move to Time

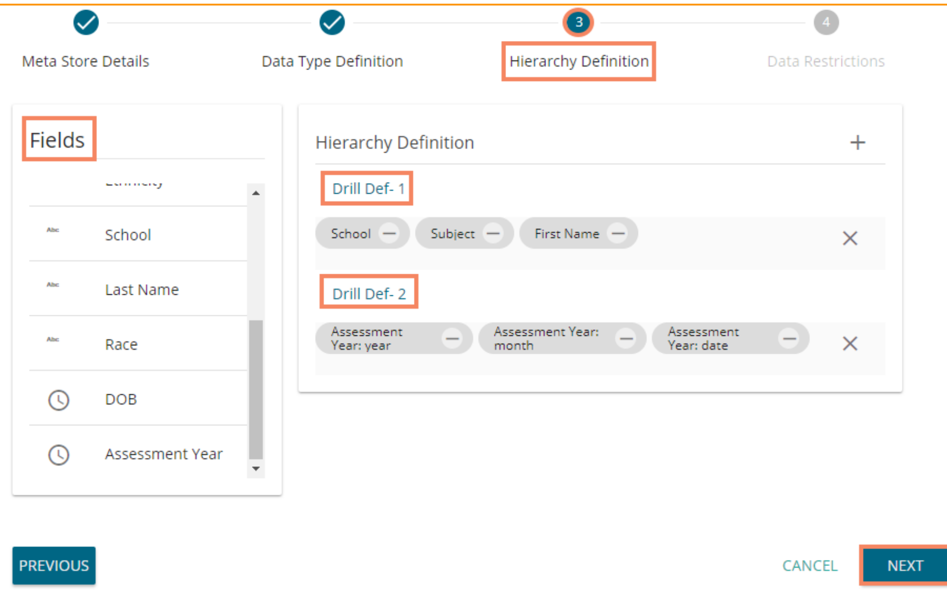
x) Users will be directed to define the hierarchy using Dimensions and Time dimensions

a. Click the '**Add**' option + provided in the Hierarchy Definition window

b. A new '**Drill Def**' box will be added

c. Drag and drop the dimensions or time options to define a hierarchy

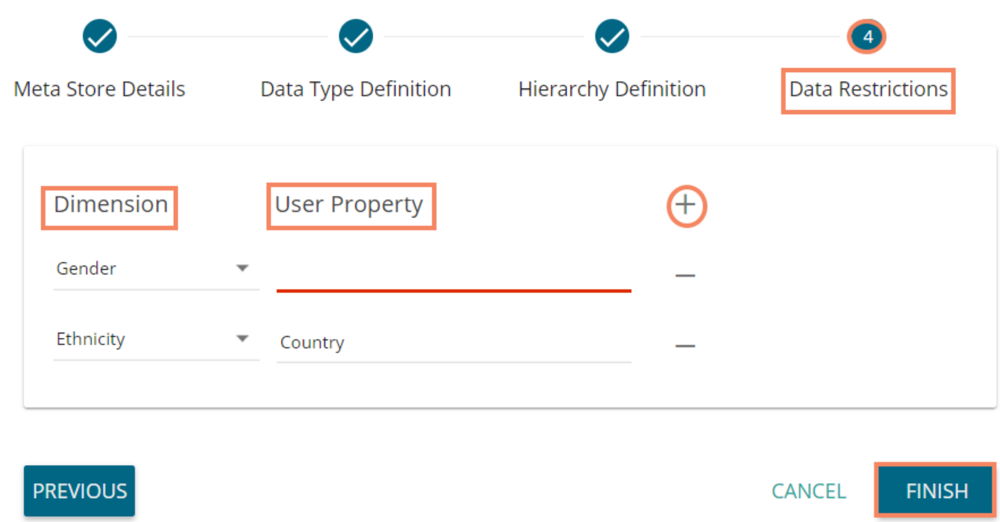
xi) Click the '**NEXT**' option



xii) Users will be directed to the '**Data Restrictions**' page. The Data Restriction tab will allow the user/user group to access data as per the selected '**User Property**' options

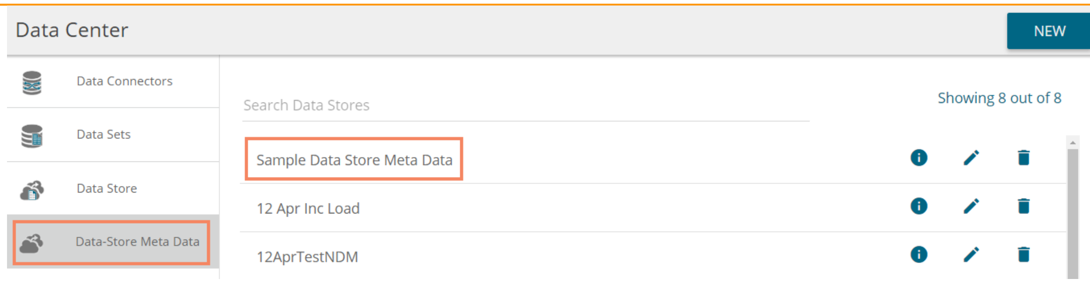
a. Select a dimension from the drop-down menu to apply filter values on the data store
b. Enter a User Property to create a filter parameter based on the user

xiii) Click the '**FINISH**' option



xiv) A pop-up window will appear to confirm that the configuration has been saved

xv) Newly created Meta Data will be added to the list displayed on the left pane of the page



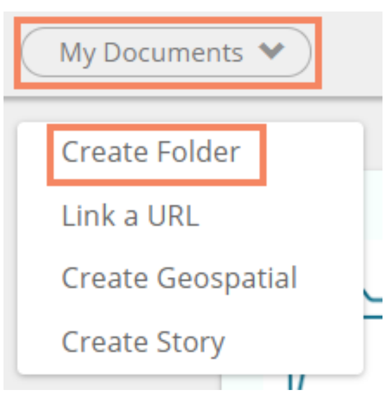
Option	Name	Task
	Latest Scheduler Status	Display the stored information via a pop-up window
	Edit	Edit the data store meta data fields
	Remove	Remove a data store metadata from the list

8. Options

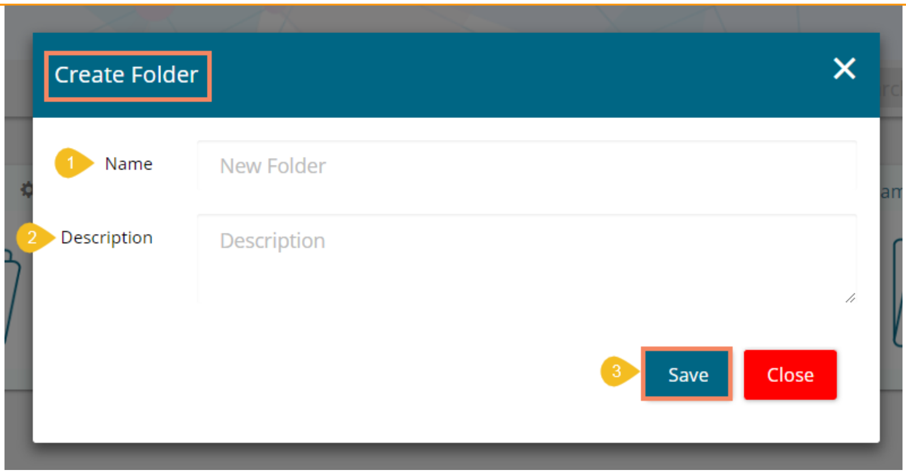
Users can access various options by using right-click anywhere on the **My Documents** or **Public Documents**.

8.1. Creating a Folder

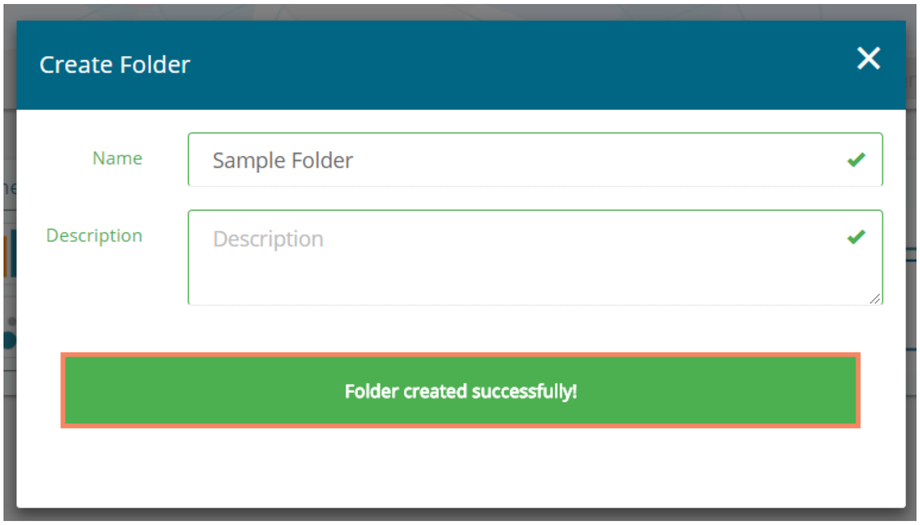
i) Navigate to the platform home page
ii) Open '**My Documents**' or '**Public Documents**'
iii) Right-click anywhere on the My Documents or Public Documents space
iv) A context menu opens
v) Select '**Create Folder**' from the context menu



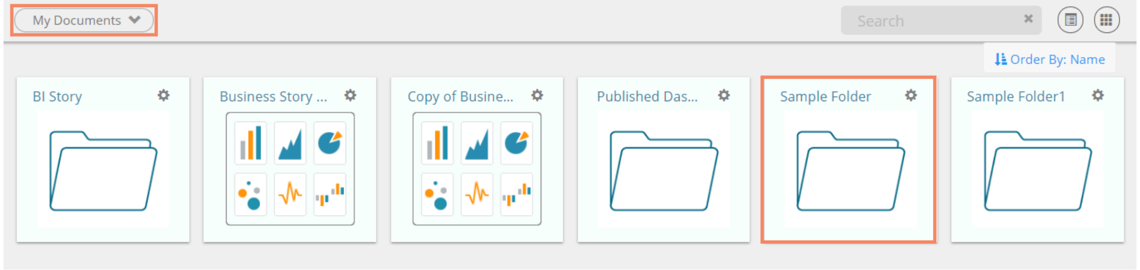
vi) A pop-up window will appear
vii) Fill in the following information:
   a. **Name**: Enter a folder name
   b. **Description**: Describe the folder (optional)
viii) Click the '**Save**' option



ix) A success message will pop-up



x) The folder will be created



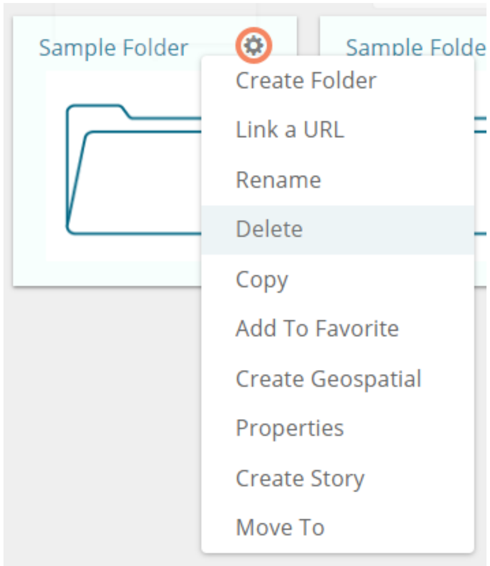
- **Options Assigned to a Folder**
  A single folder is credited with various options. All the options provided to a folder are described over here:

8.1.1. Creating a Folder (Sub-Folder)

i) Select a folder

ii) Click the '**Options**' icon to display the various options

iii) Select the '**Create Folder**' option



iv) Select the '**Create Folder**' option

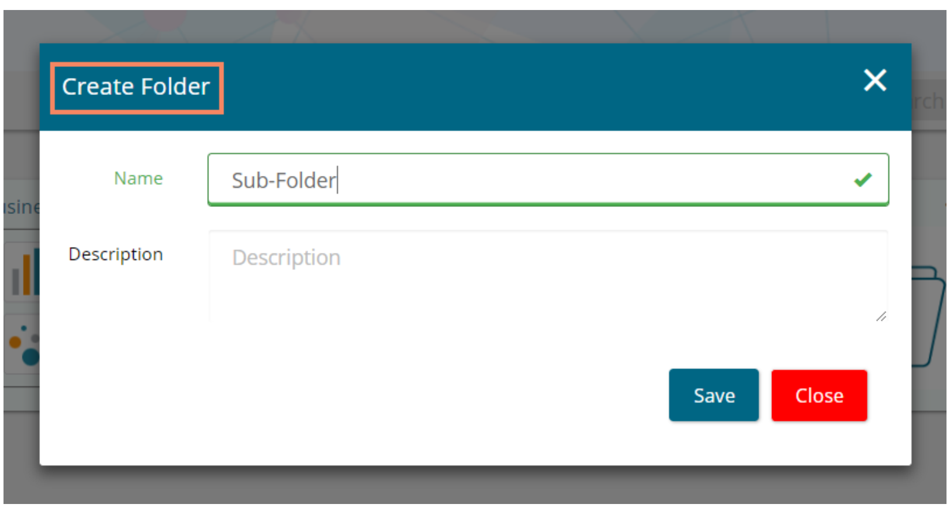
v) A new window pops-up

vi) Fill in the following information:

a. **Name**: Enter a folder name

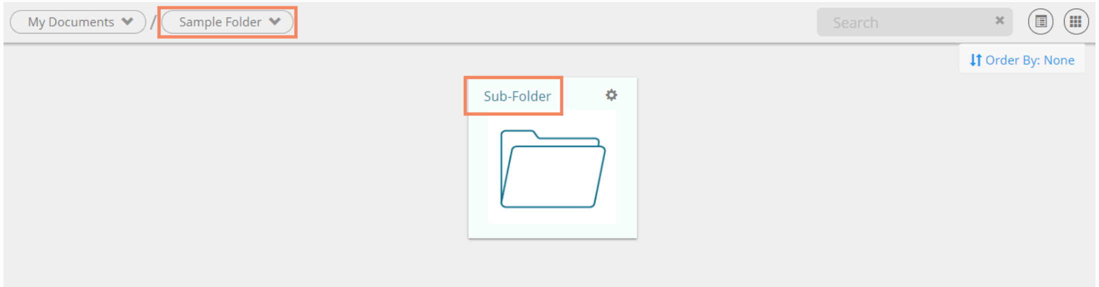
b. **Description**: Describe the folder (optional)

vii) Click the '**Save**' option



viii) A success message will pop-up.

ix) The (sub) folder will be created



Note: Users can create multiple sub-folders under a folder.

8.1.2. Linking a URL

Users can connect a URL to the required platform documents.

i) Select a folder

ii) Click the '**Options**' icon to display the various options

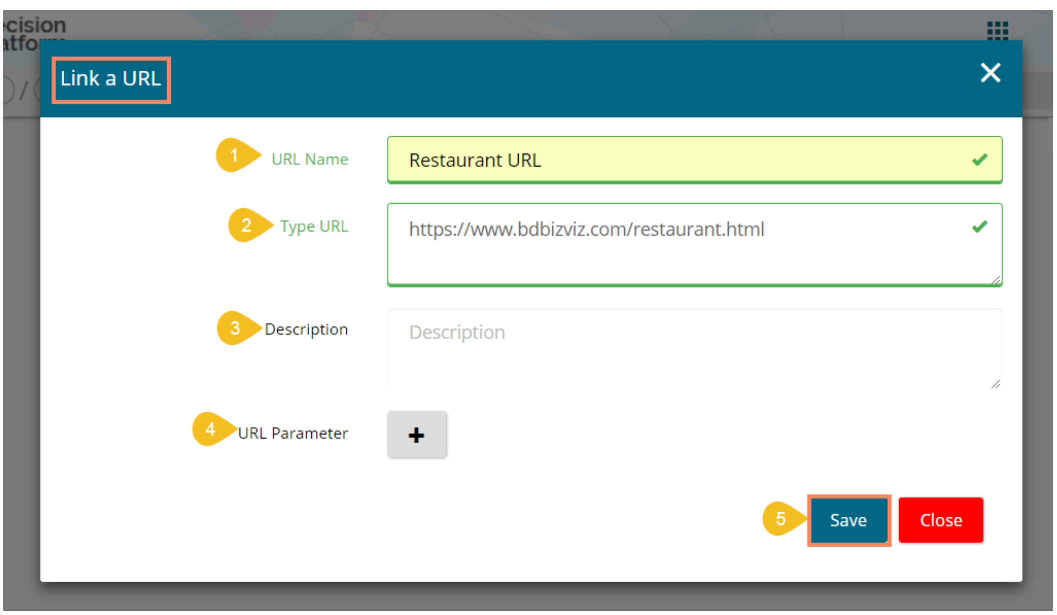
iii) Select the '**Link a URL**' option

iv) A new window pops-up

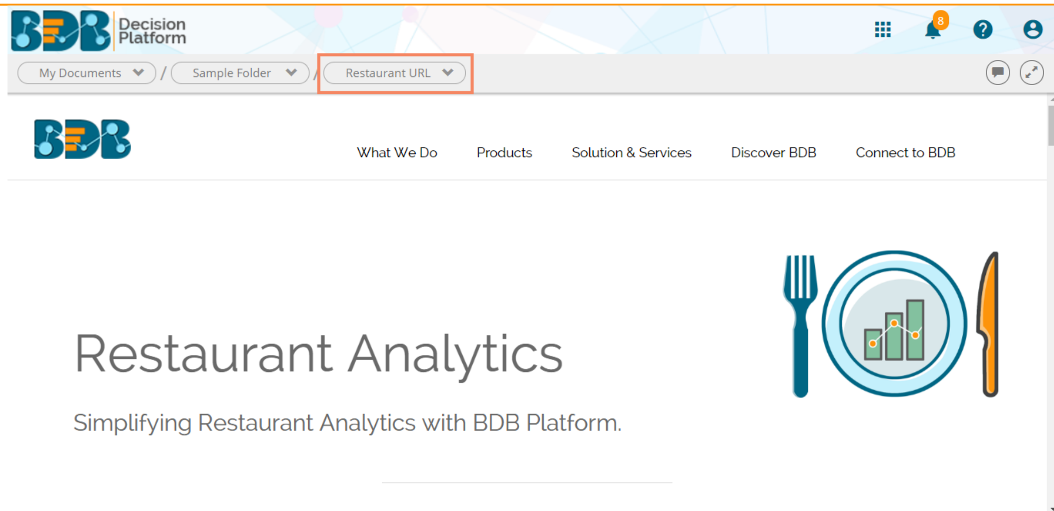
v) Fill in the required information:

a. **URL Name**: Enter a name for the URL
b. **Type URL**: Type the URL link that you wish to add
c. **Description**: Describe the URL (optional)
d. **URL Parameter** (Optional)

vi) Click the '**Save**' option

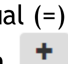


vii) The URL will be linked to the folder



8.1.2.1. Adding or Removing a URL Parameter:

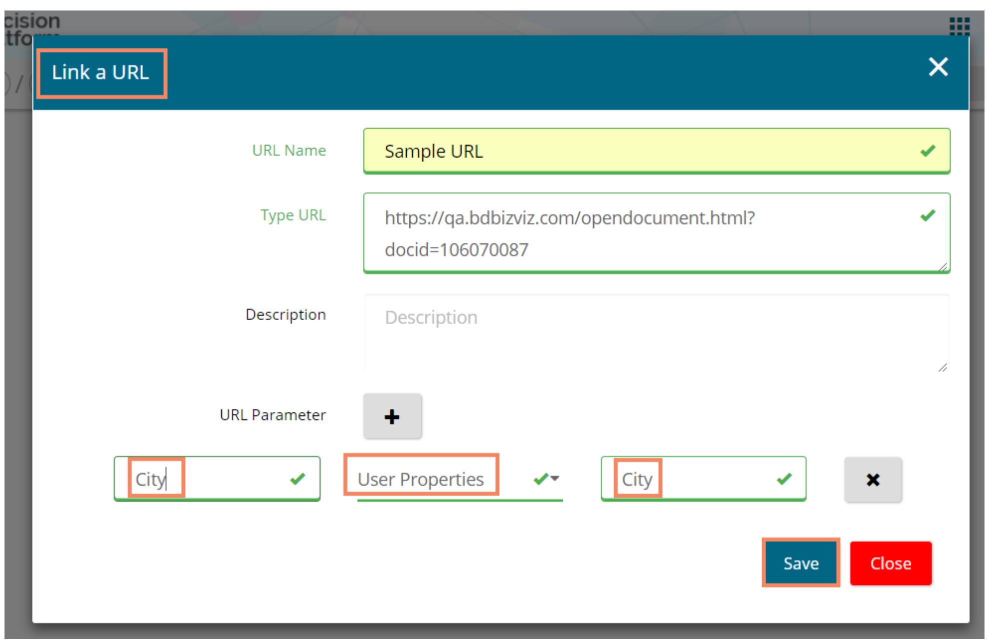
Users can add URL parameters to the linked URLs. URL parameters are made of a key and value separated by an equal (=) and joined by end (&) symbol.

i. Click the '**Add**' button  to add a URL Parameter

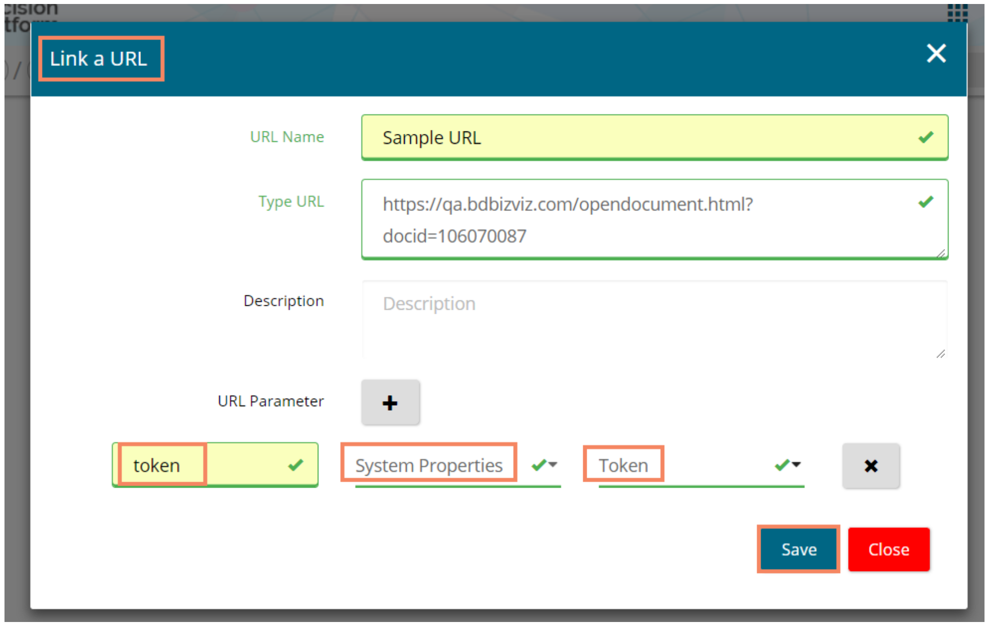
Users need to provide required information as described below:

1. Enter the Parameter name
2. Select a property option using the drop-down menu
   a. User Properties
   b. System Properties
3. This field will be displayed only after selecting a property option via the '**User Properties**' drop-down menu:

   a. Selecting the '**User Properties**' will need an administrator to link the added parameter with a valid user custom field. (E.g. In the below given image, the 'City' parameter has been linked with 'City' custom field provided for a user.



b. By choosing the '**System Properties**' as an option will require the administrator to select an option from the drop-down menu.



ii. Click the '**Remove**' button  to remove the inserted URL Parameter

Note: Users can easily connect internal URL links by using the parameters, while linking the external URLs requires security permission to link.

8.1.3. Renaming a Folder

i) Select a folder.

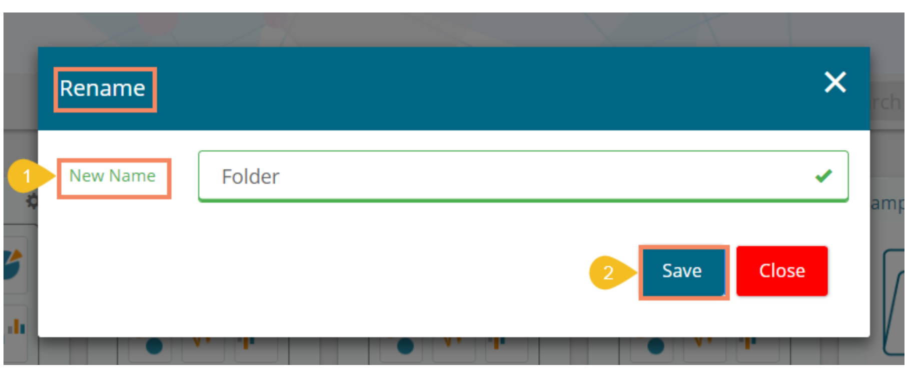
ii) Click the '**Settings**' ⚙ icon for options

iii) Select the '**Rename**' option

iv) A new window pops-up

a. Enter '**New Name**' in the folder

b. Click the '**Save**' option



v) The folder will be renamed

8.1.4. Deleting a Folder

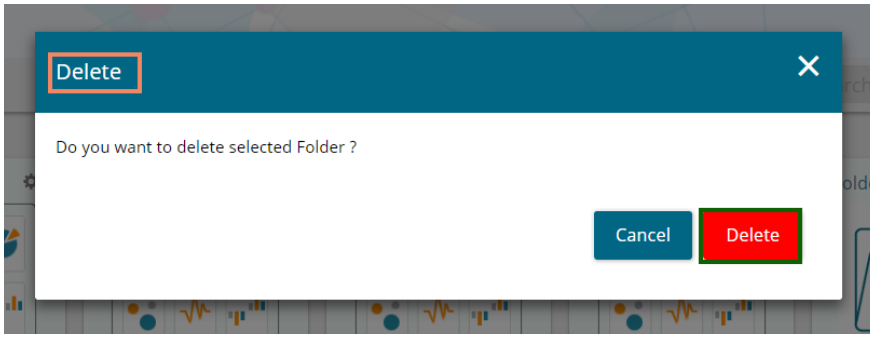
i) Select a folder.

ii) Click the '**Options**' ⚙ icon to display various options

iii) Select the '**Delete**' option

iv) A new window pops-up to assure the deletion

v) Click the '**Delete**' option



vi) The selected folder will be deleted

Note: Delete option is not available to the folders created or shared as the Public Documents.

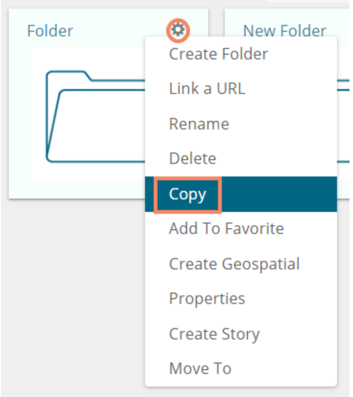
8.1.5. Copying a Folder

System users can copy a folder and paste it to a different folder.

i) Select a folder

ii) Click the '**Options**' ⚙ icon to display various options

iii) Select the '**Copy**' option

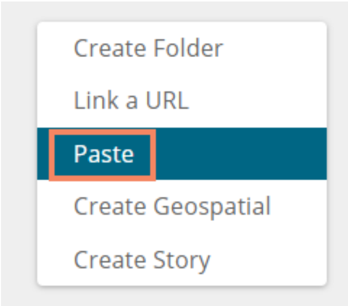


iv) Select another folder and click the '**Settings**' icon

Or

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

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

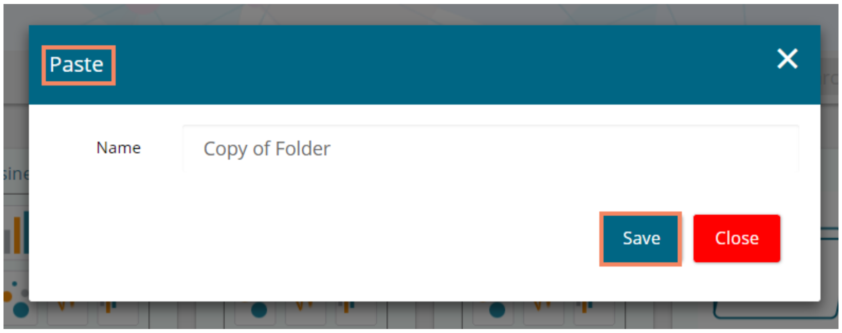


vi) Select '**Paste**'

vii) A pop-up window will appear

viii) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the folder (E.g., *Sample Folder 1* will have a new name *Copy of Sample Folder 1*)

ix) Click the '**Save**' option



x) A Message pops-up to assure that the copied folder has been copied successfully with a different name

xi) The following image shows that *Folder* from '**My Documents**' is named *Copy of Folder* and has been copied to the **Public Documents**

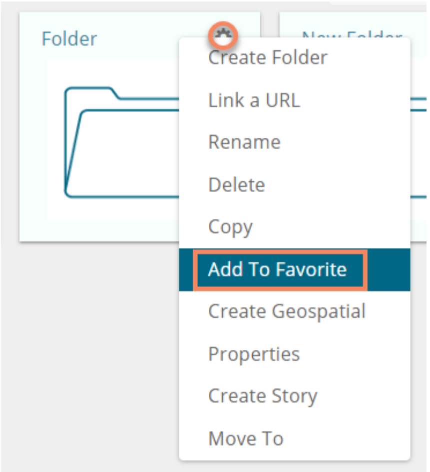
8.1.6. Adding/Removing a Folder to/from Favourites

The user can add a folder to or remove it from the Favorites.

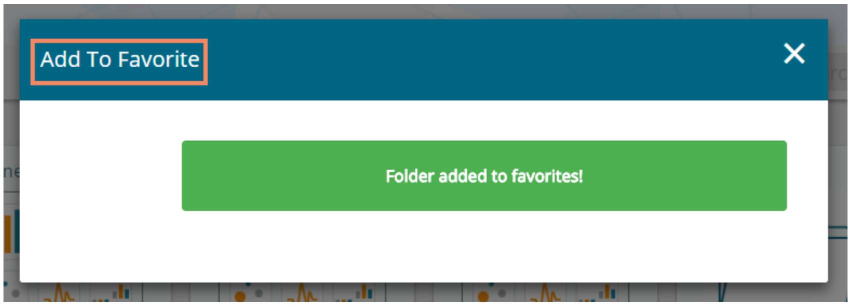
i) Select a folder

ii) Click the '**Settings**' icon for options

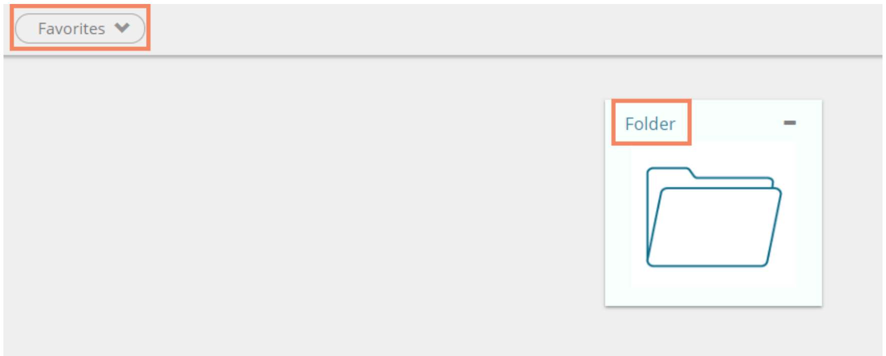
iii) Select the '**Add to Favorite**' option



iv) A new window pops-up with a message, "**Folder added to Favorite.**"



v) The selected folder will be added to the '**Favorites**' section

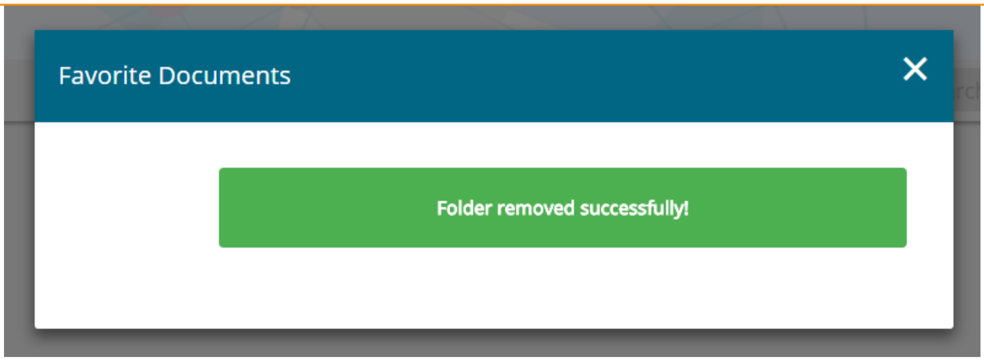


vi) Open the '**Favorites**' documents space

vii) Navigate to the folder you wish to remove

viii) Click on the '**Remove**' option

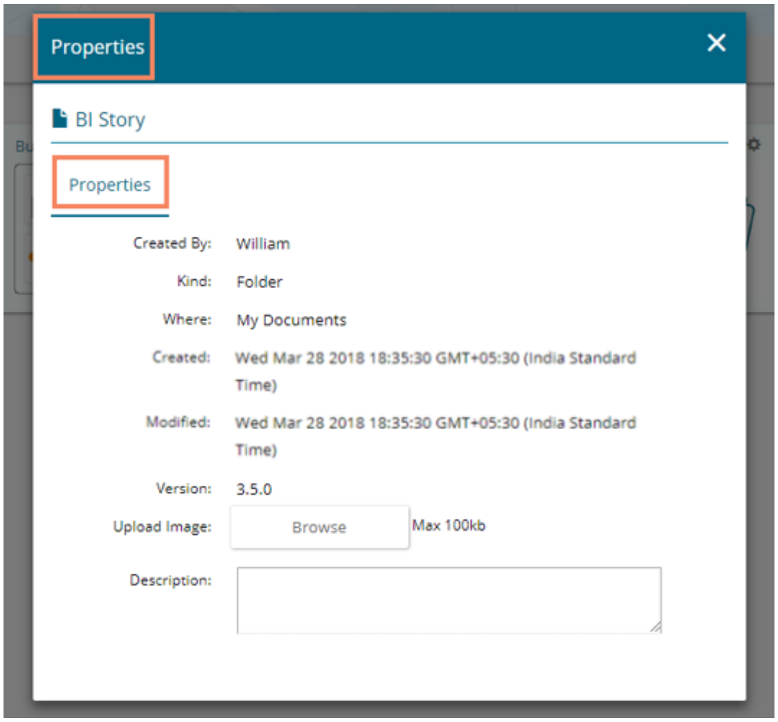
ix) A new window pops-up with a message, "**Folder removed successfully!**"



x) The desired folder will be removed from the '**Favorites**' documents space

8.1.7. Properties

i) Select a folder
ii) Click the '**Options**' icon ⚙ to display more options
iii) Select the '**Properties**' option
iv) The folder properties will be displayed

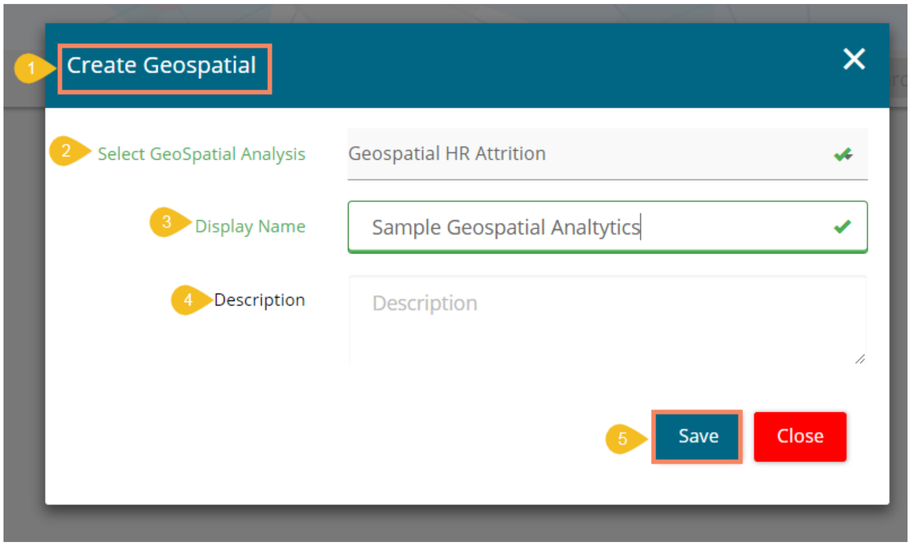


8.1.8. Creating a Geospatial

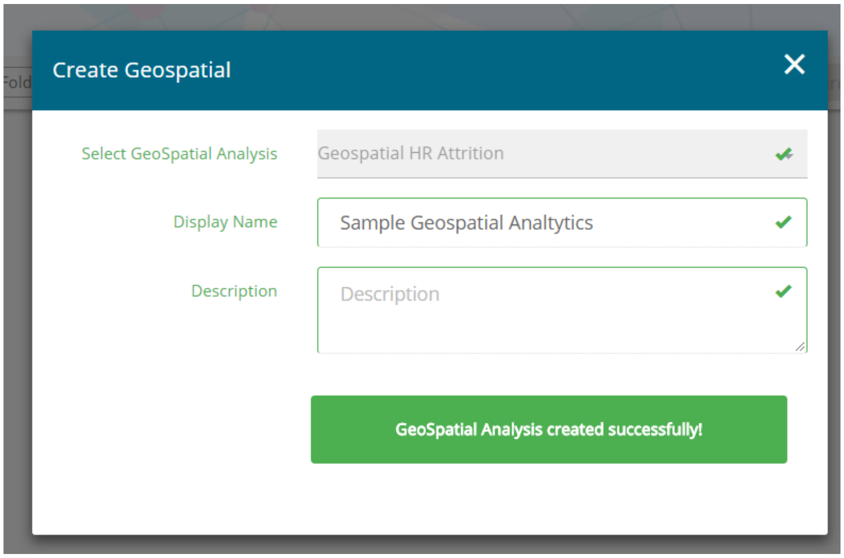
i) Select a folder
ii) Click the '**Settings**' ⚙ icon for options
iii) Select the '**Create Geospatial**' option
iv) A pop-up window will appear
v) Fill in the following information:
   a. **Select Geospatial Analysis:** Select any one option from the drop-down menu
   b. **Display Name:** Enter a name that will be displayed with the geospatial

c. **Description:** Describe the geospatial (optional)

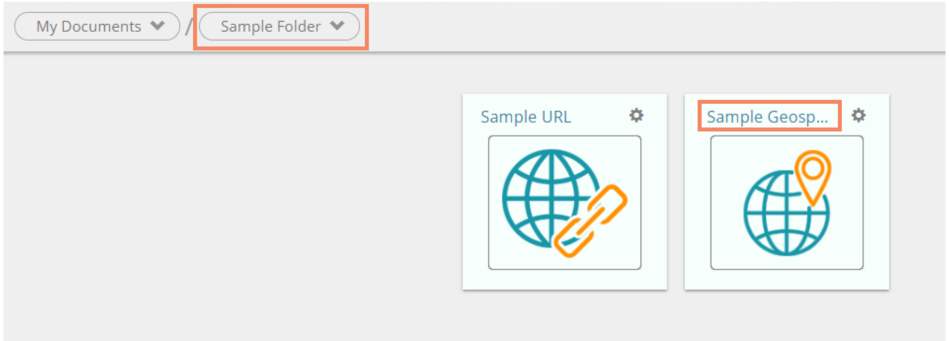
vi) Click the **'Save' option**



vii) A success message will pop-up

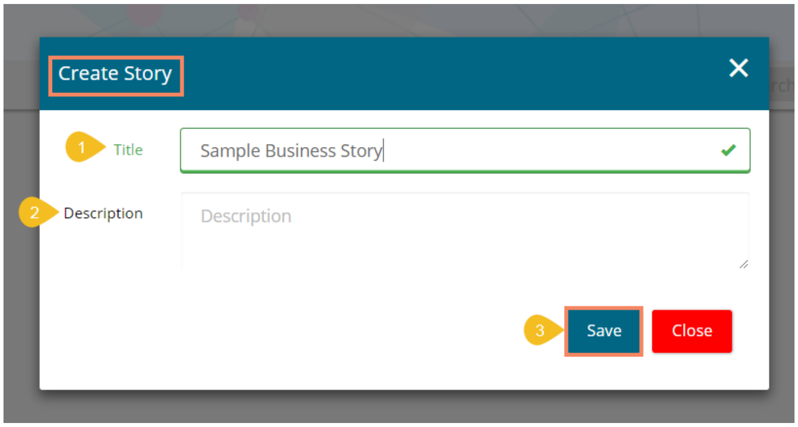


viii) The geospatial will be created

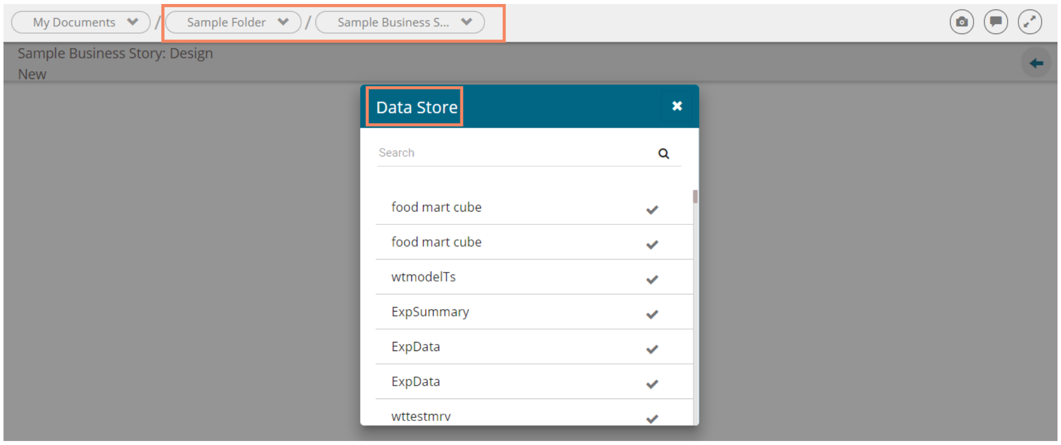


8.1.9. Creating a Story

i) Select a folder
ii) Click the ‘**Options**’ icon to display various options
iii) Select the ‘**Create Story**’ option
iv) A pop-up window will appear
v) Fill in the required information:
   a. **Title:** Enter a title for the story document
   b. **Description:** Describe the story document (optional)
vi) Click the ‘**Save**’ option



vii) Users will be directed to the following page of the story to select a data store

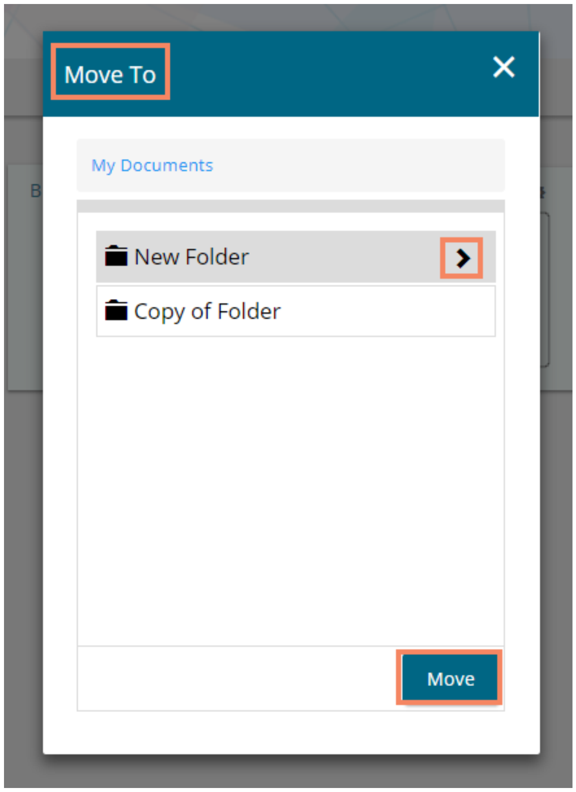


viii) Users can close the Data Store list and click on the ‘**Sample Folder**’ option
ix) The Story document will be created and added there.

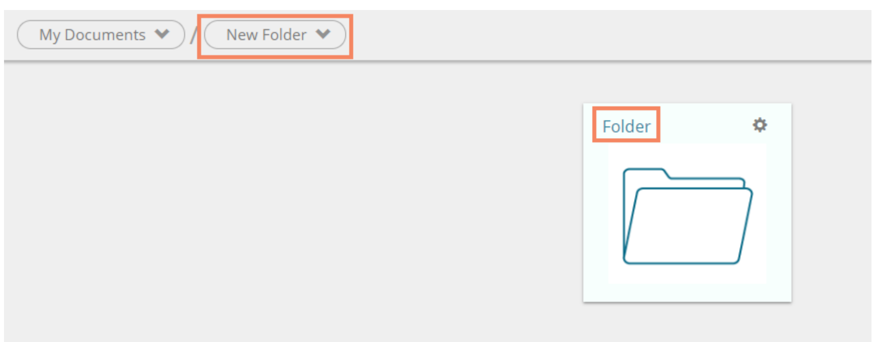
8.1.10. Moving a Folder

i) Select a folder.
ii) Click the ‘**Options**’ icon to display various options
iii) Select the ‘**Move To**’ option
iv) A pop-up window will appear displaying the available folders

v) Select a folder
vi) Click the ‘**Move**’ option



vii) A success message will pop-up
viii) The folder will be moved to the selected folder



8.2. Linking a URL

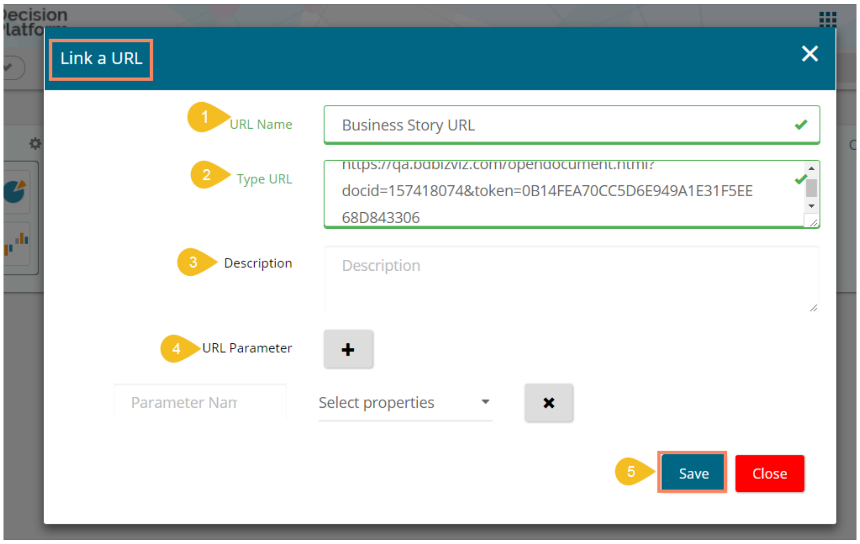
Linking a URL functionality enables users to connect the URLs with the chosen folders.

i) Select a folder
ii) Click the ‘**Options**’ icon ⚙ for options
iii) Select the ‘**Link a URL**’ option
iv) A new window pops-up

v) Fill in the required information:

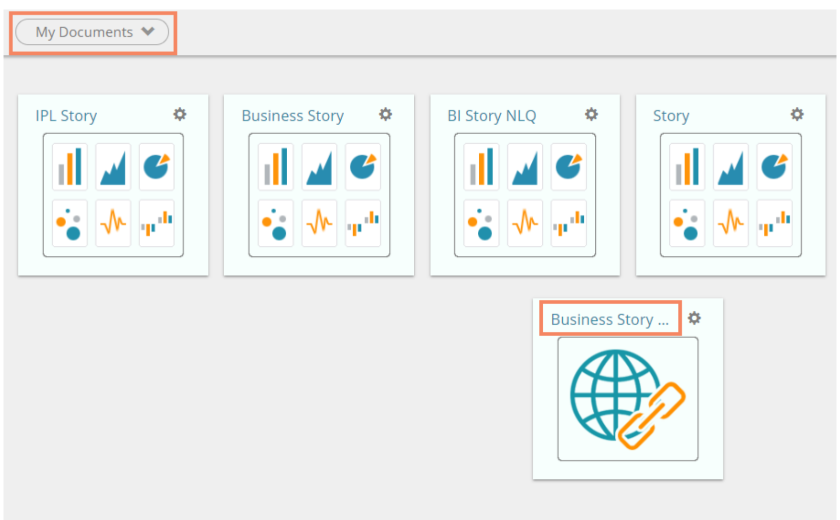
   a. **URL Name**: Enter a name for the URL
   b. **Type URL**: Type the URL link that you wish to add
   c. **Description**: Describe the URL (optional)
   d. **URL Parameter (Optional)**

vi) Click the '**Save**' option

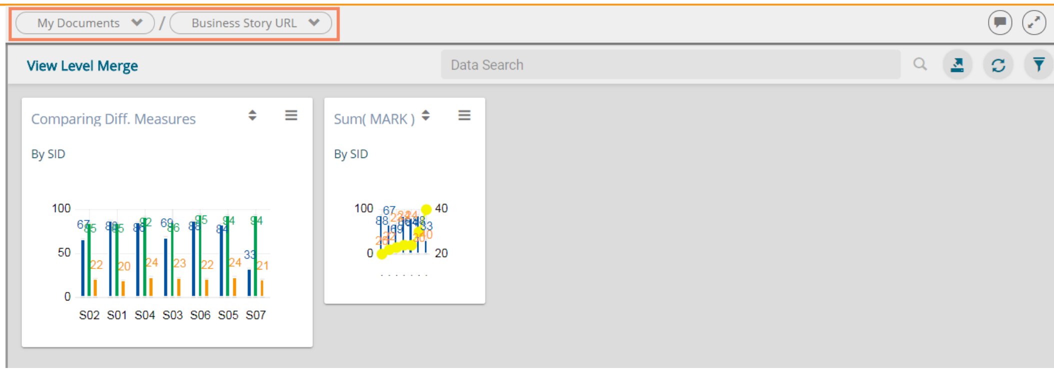


vii) A success message will appear

viii) The linked URL document will be added to the folder



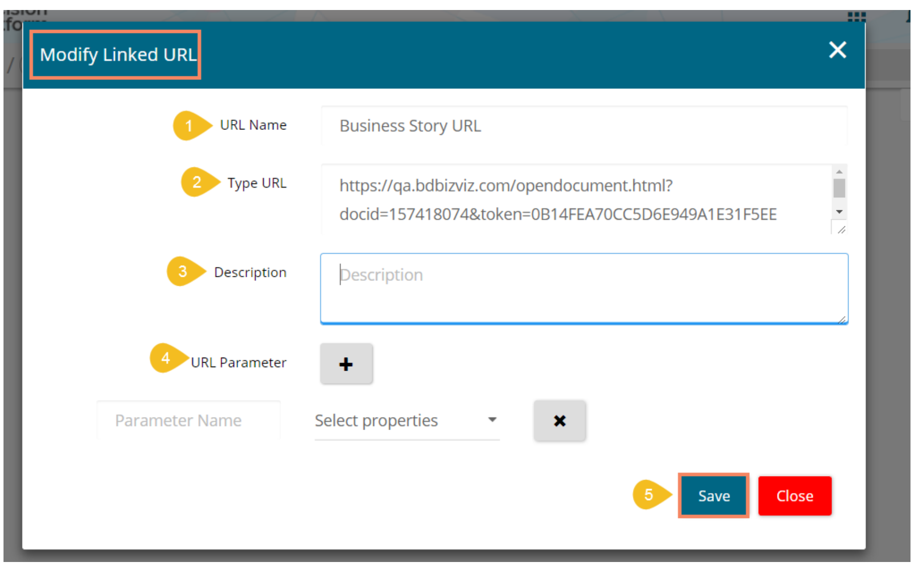
ix) Users can open the linked URL document by clicking on it



- **Options Assigned to a URL**

8.2.1. Modifying a Document (URL information)

i) Select a linked URL document
ii) Click the ‘**Options**’ icon for options
iii) Select the ‘**Modify Document**’ option
iv) A pop-up window will appear
v) Modify the following information:
  a. URL Name
  b. URL Link
  c. Description
  d. URL Parameter
    i. Click the ‘**Add**’ button to add the URL Parameter
    ii. Click the ‘**Remove**’ button to remove the inserted URL Parameter
vi) Click the ‘**Save**’ option

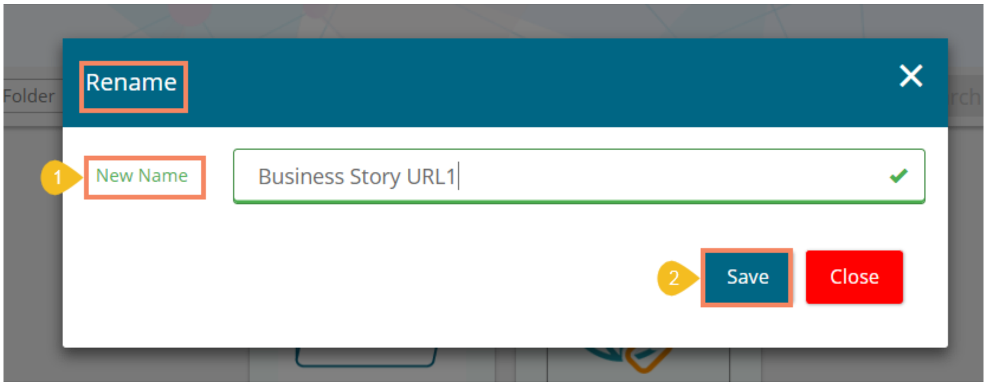


vii) The modified URL Link will be saved

8.2.2. Renaming a URL Document

i) Select a linked URL document
ii) Click the ‘**Settings**’ icon for options

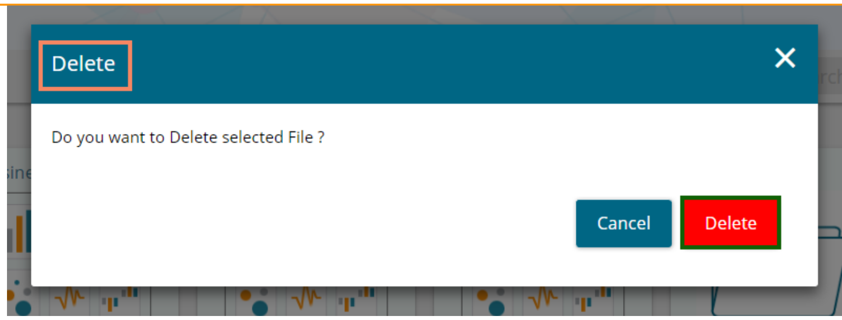
iii) Select the ‘**Rename**’ option
iv) A pop-up window will appear
v) Enter a New Name for the URL document
vi) Click the ‘**Save**’ option



vii) The linked URL document will be renamed

8.2.3. Deleting a URL Document

i) Select a linked URL document
ii) Click the ‘**Settings**’ icon for options
iii) Select the ‘**Delete**’ option
iv) A pop-up window will appear to confirm the deletion
v) Click the ‘**Delete**’ option



vi) The selected URL file will be removed

Note: Delete option is not available for the link URL created or shared as the Public Documents

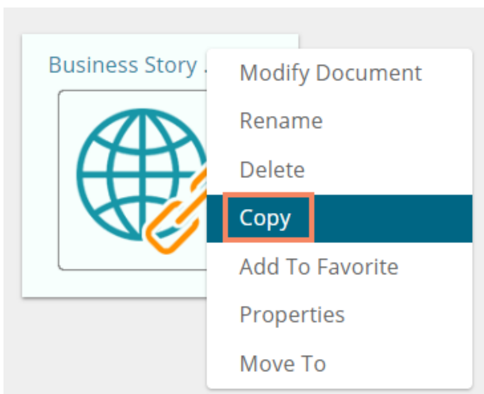
8.2.4. Copying a URL Document

It is possible to copy a link URL and paste it into a different place.

i) Select a linked URL document

ii) Click the '**Settings**' icon for options

iii) Select the '**Copy**' option

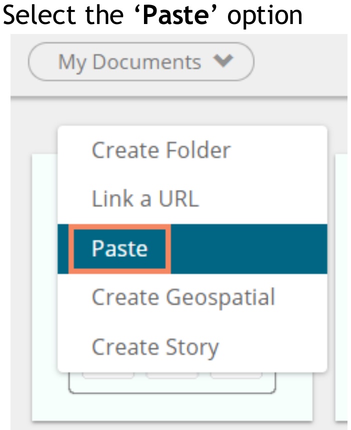


iv) Select another folder and click the '**Settings**' icon
Or

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

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

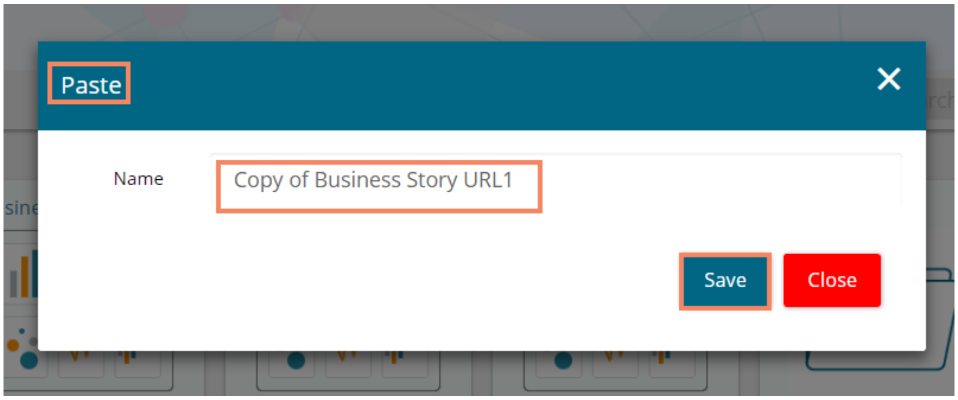
vii) Select the '**Paste**' option



viii) A pop-up window will appear

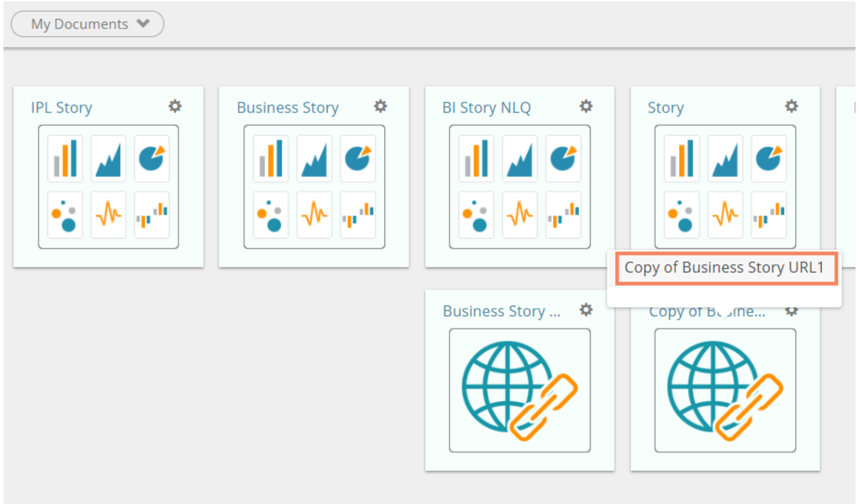
ix) The **Name** mentioned in the pop-up window shows prefix **'Copy of-'** before the original name of the folder (E.g., Sample URL 1 will have a new name *Copy of Sample URL 1*)

x) Click the **'Save'** option



xi) A success message pops-up

xii)The copied link URL gets replicated with a different name.



8.2.5. Adding/Removing a URL Document to/from Favorites

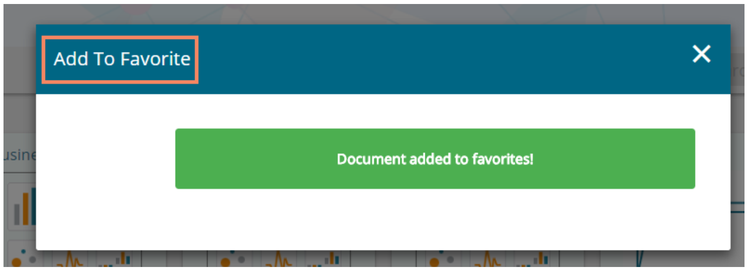
Users can add a URL document to or remove it from the **'Favorites'** section

i) Select a linked URL document.

ii) Click the **'Settings'** icon for options

iii) Select the **'Add to Favorites'** option

iv) A pop-up window will appear with a message, **"URL added to Favorite."**



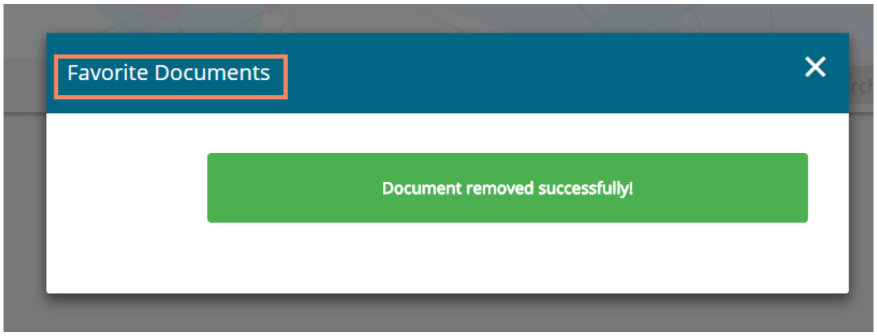
v) The selected link URL will be added to the '**Favorites**' section

vi) Open the '**Favorites**' section for documents

vii) Navigate to the link URL you wish to remove from the '**Favorites**' section

viii) Click on the '**Remove**' button

ix) A pop-up window will appear with a message, "**Document removed successfully!**"



x) The URL file will be removed from the '**Favorites**' section

8.2.6. Properties

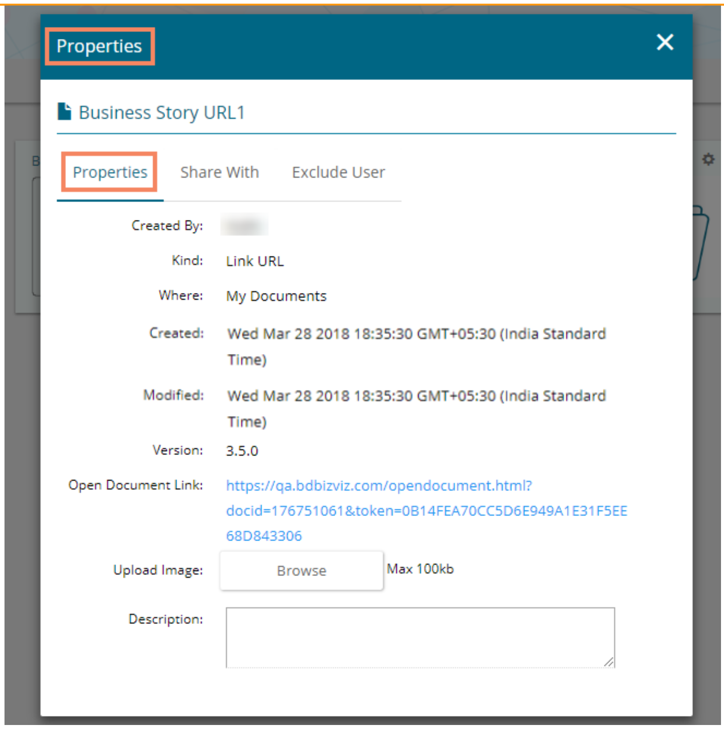
i) Select a linked URL document.

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

iii) Select the '**Properties**' option

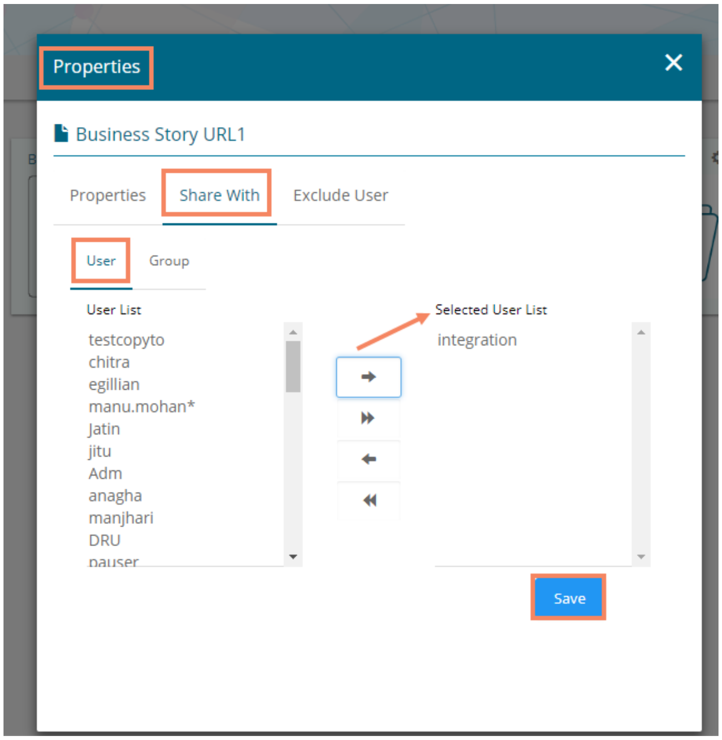
iv) A pop-up window will appear with three options

a. **Properties:** Properties of the linked URL documents will be displayed



a. **Share With:** The linked URL 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' option**
3. Move the selected user or group to the '**Selected User List**' or '**Selected Group List**' using the arrows
4. Click the '**Save**' option

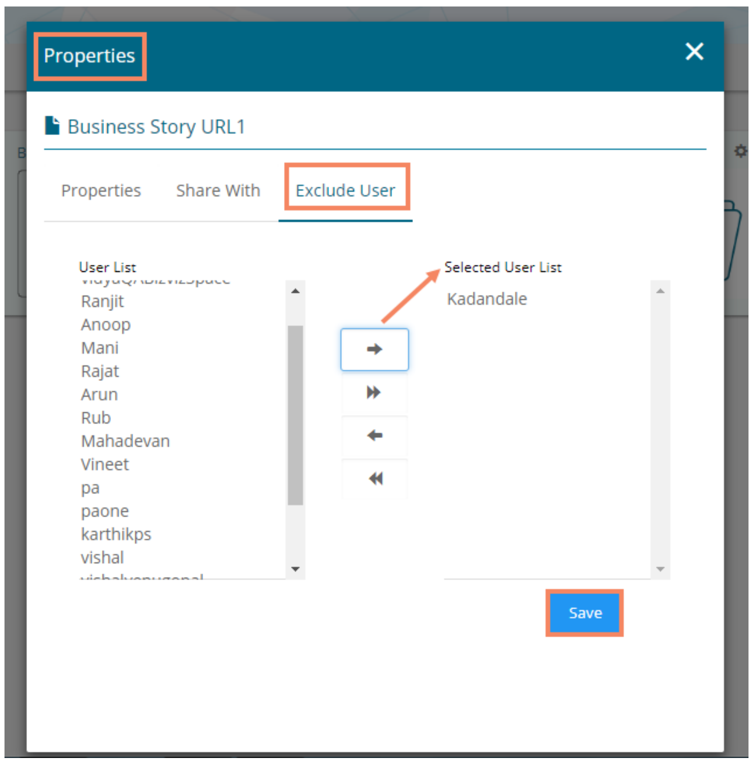


5. A success message will pop-up stating that the document privilege is updated

6. The linked URL document will be shared with the selected user or selected user group

Note: If a URL file is shared using this option, then it will open a view only copy for the selected user or selected user group.

b. **Exclude User:** The selected user will not be able to access the linked URL file.
   1. Select **'Exclude User'** on the Properties pop-up screen
   2. Select and move a user from **'User List'** to **'Selected User List'** using the arrows
   3. Click the **'Save'** option

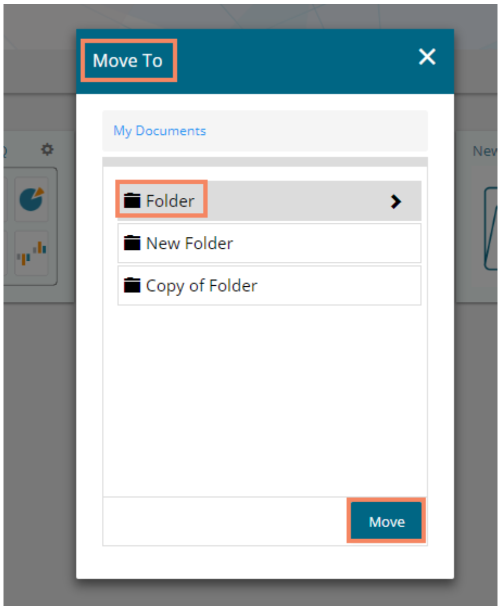


4. User privilege gets updated, and the selected users will be unable to access the linked URL document

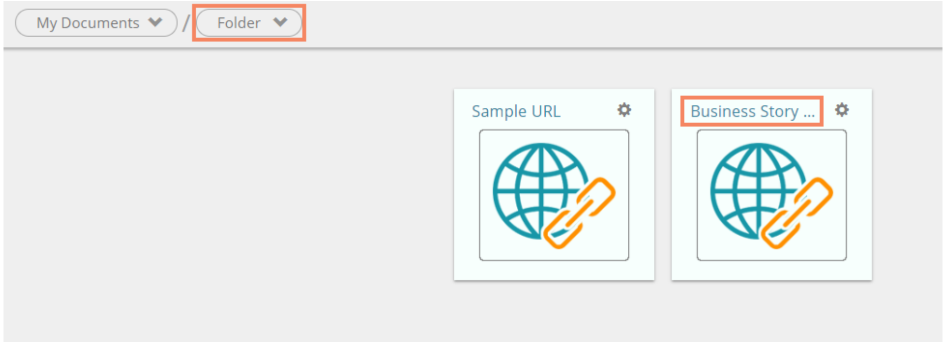
8.2.7. Moving a URL File

i) Select a linked URL document
ii) Click the **'Settings'** icon for options
iii) Select the **'Move To'** option
iv) A new pop-up window will appear displaying the available folders
v) Select a folder from the pop-up window

vi) Click the '**Move**' option

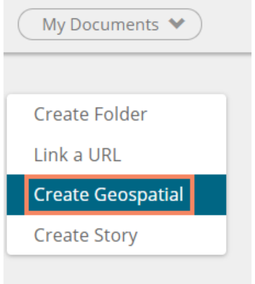


vii) A success message will appear
viii) The desired URL will be moved to the selected space



8.3. Creating a Geospatial

i) Navigate to the platform home page
ii) Open **My Documents** or **Public Documents**
iii) Right-click anywhere on the My Documents or Public Documents
iv) A context menu opens
v) Select the **Create Geospatia**l option

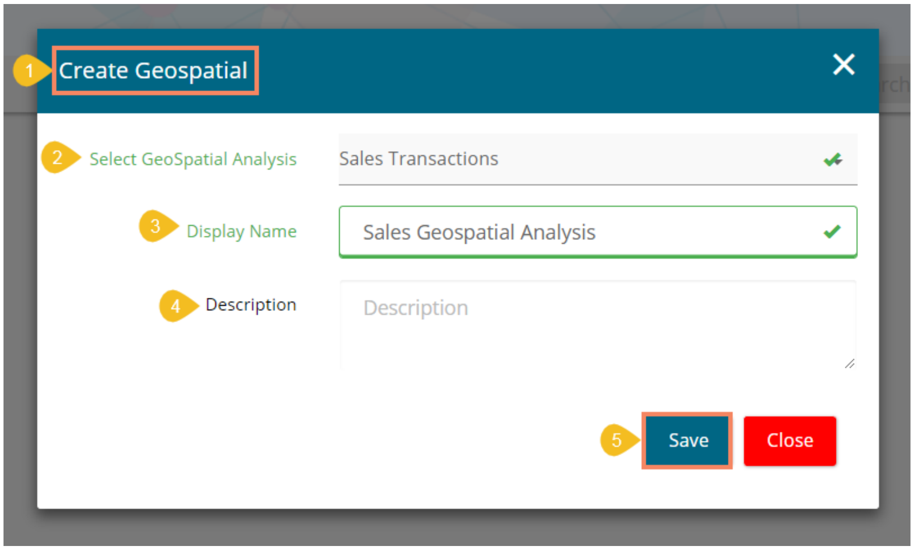


vi) A pop-up window will appear

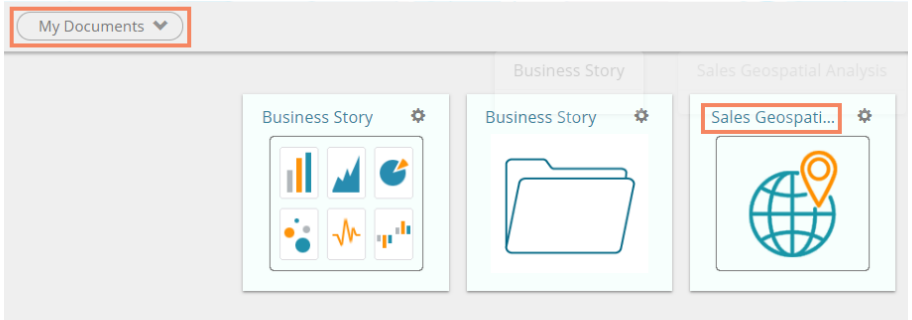
vii) Fill in the following information:

   a. **Select Geospatial Analysis**: Select an option from the drop-down menu
   b. **Display Name**: Enter a geospatial name
   c. **Description**: Describe the Geospatial (optional)

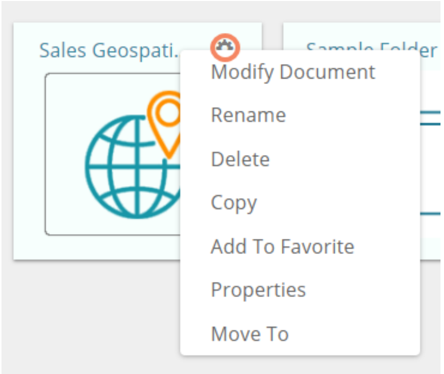
viii) Click the '**Save**' option



ix) The Geospatial will be created



x) The following options can be applied on a Geospatial document. The steps for which are similar to that of the 'Link a URL' option.



Note: Please refer to the Geospatial User Guide for more details on Geospatial Analytics.

8.4. Creating a Story

i) Navigate to the platform home page

ii) Open '**My Documents**' or '**Public Documents**'

iii) Right-click anywhere on the My Documents or Public Documents

iv) A context menu opens

v) Select the '**Create Story**' option

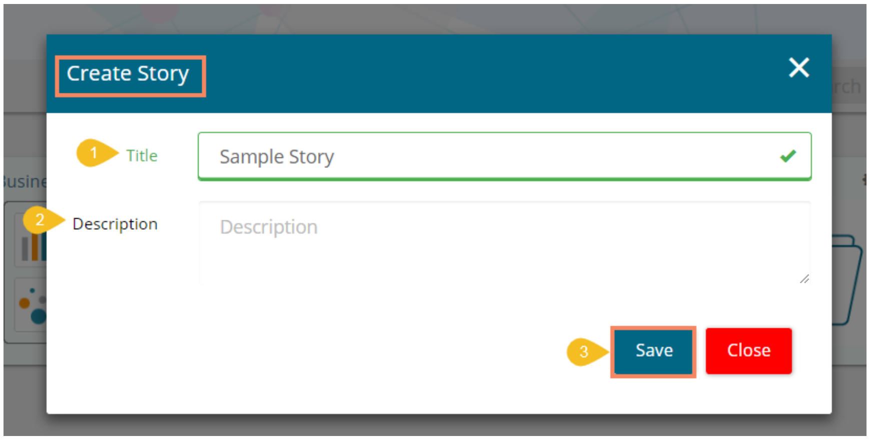
vi) A pop-up window will appear

vii) Fill in the following information:

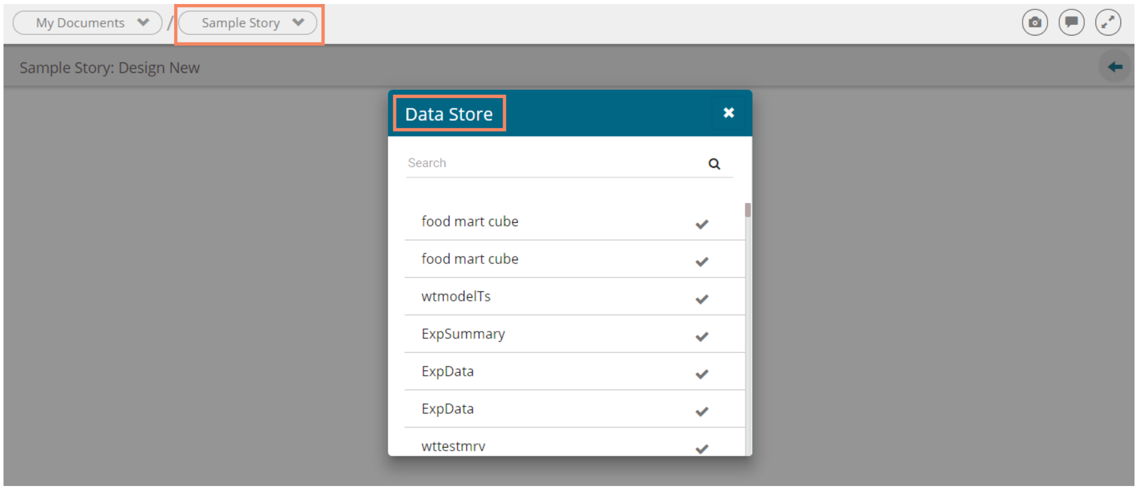
  a. **Title:** Enter a title for the story document

  b. **Description:** Describe the story document (optional)

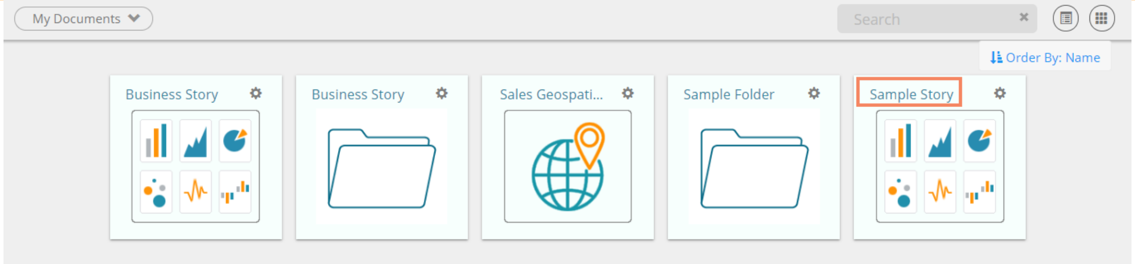
viii) Click the '**Save**' option



ix) The story document will be created, and users will be redirected to the following page



x) Users can close the 'Data Store' list and click on the 'My Documents' option to see the newly created Story document.



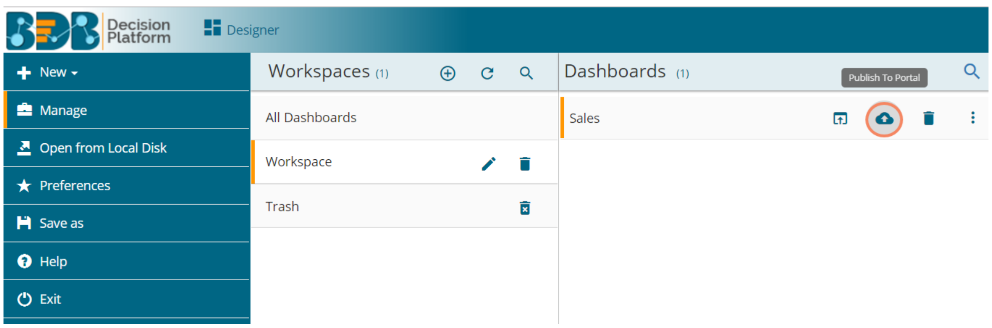
Note: Please refer to the Business Story (Self-Service BI) User Guide for more details on the Story option.

8.5. Published Dashboard on the BizViz Platform

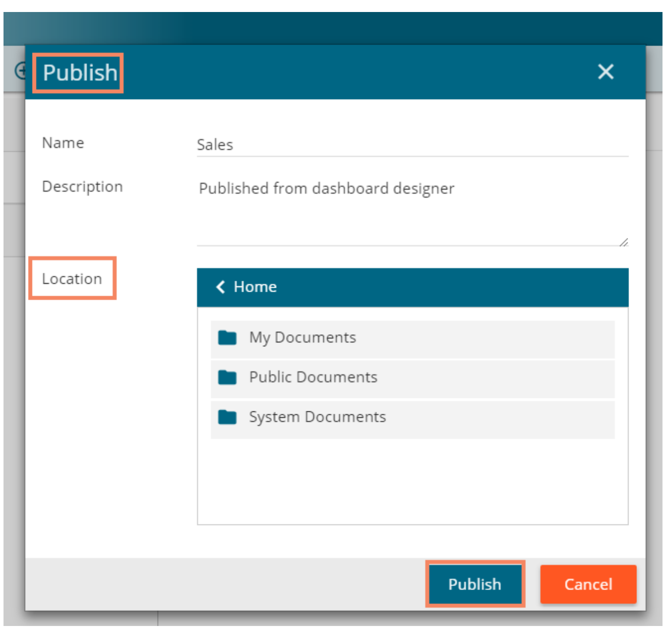
The user can publish various analytics dashboards to the BizViz Platform homepage via Dashboard Designer plugin via the ‘**Publish to Portal**’ option.

i) Users need to navigate to the Dashboard Designer plugin and create a new dashboard and save it in a workspace or select an existing dashboard from any workspace.

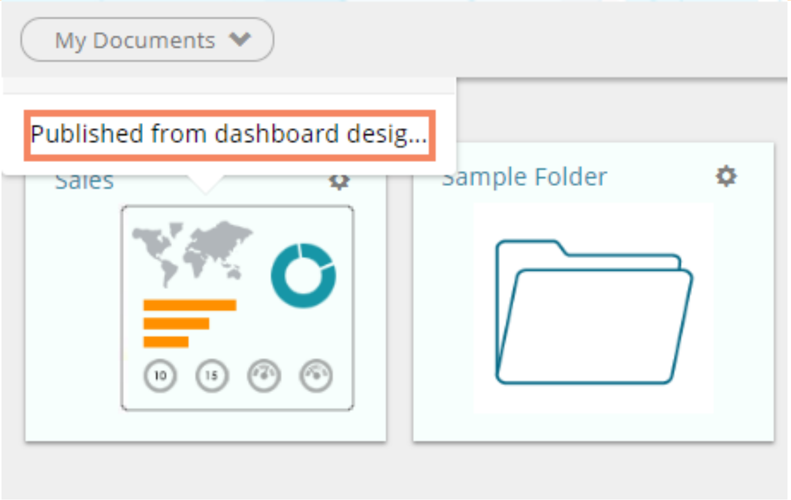
ii) Access the ‘Publish to Portal’ option from the list of Dashboards.



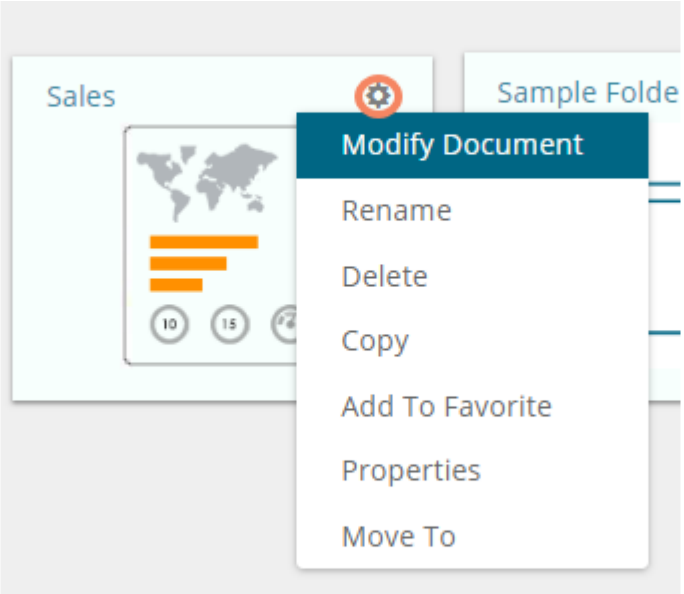
iii) Users will be redirected to a new wizard to configure the location to publish the selected dashboard.



iv) Users can access the published dashboard from the given location. E.g., location for the following dashboard is ‘**My Documents.**’



- **Options Assigned to a Published Dashboard**
  i) Navigate to the platform home page
  ii) Open '**My Documents**' or '**Public Documents**'
  iii) Select a published dashboard on the My Documents or Public Documents
  iv) Click the '**Options**' ⚙ icon
  v) A context menu opens with options



8.5.1. Modifying a Dashboard

This section explains step by step process to modify an existing dashboard.

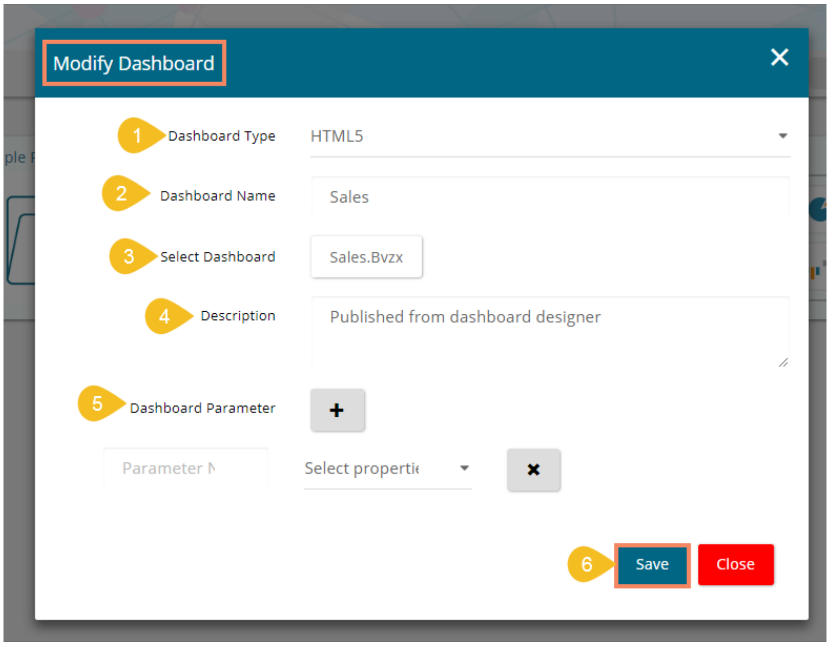
i) Select a dashboard
ii) Click the '**Settings**' ⚙ icon for options
iii) Select the '**Modify Document**' option
iv) A pop-up window will appear
v) Fill in the following information:
   a. **Dashboard Type:** Enter the dashboard type
   b. **Dashboard Name: Enter name for the dashboard**

c. **Select Dashboard:** Upload a dashboard from the local drive (The dashboard should be in a BVZ file format)
d. **Description:** Describe the dashboard (optional)
e. **Dashboard Parameter:**

i. Click the '**Add**' button to add a new dashboard parameter

ii. Click the '**Close**' button to remove the added dashboard parameter

vi) Click the '**Save**' option

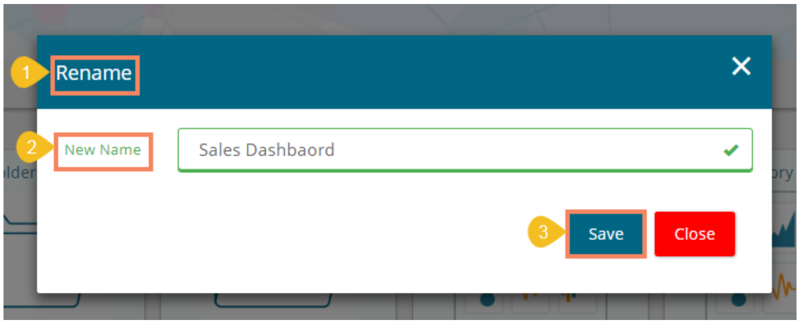


vii) A pop-up message will appear to assure that the required data has been updated

8.5.2. Renaming a Dashboard

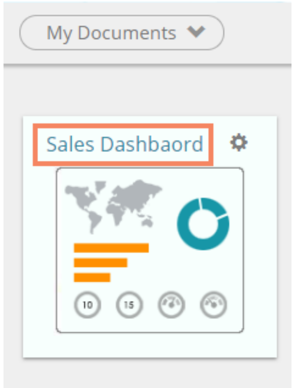
Administrators can change the name of an existing dashboard

i) Select a dashboard
ii) Click the '**Options**' icon for more options
iii) Select '**Rename**'
iv) A pop-up window will appear
v) Enter a new name for the dashboard
vi) Click '**Save**'



vii) A pop-up message appears to assure

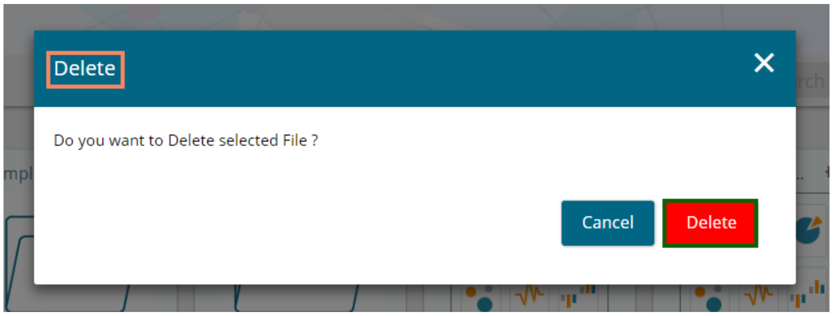
viii) The selected dashboard is renamed



8.5.3. Deleting a Dashboard

Administrators can remove a dashboard by following the given steps:

i) Select a dashboard
ii) Click the ‘**Options**’ ⚙ icon for more options
iii) Select the ‘**Delete**’ option
iv) A new window pops-up to confirm the deletion
v) Click the ‘**Delete**’ button

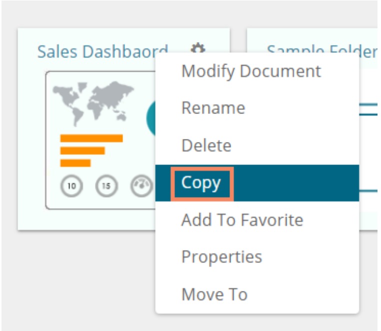


vi) The selected dashboard will be deleted

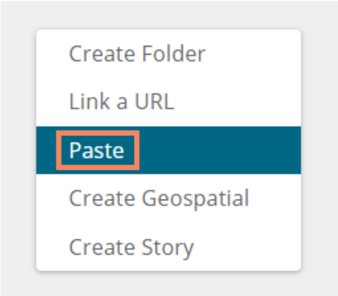
8.5.4. Copying and Moving a Dashboard

Administrators can copy an existing dashboard and paste it at any chosen place within My Documents or Public Documents of the platform.

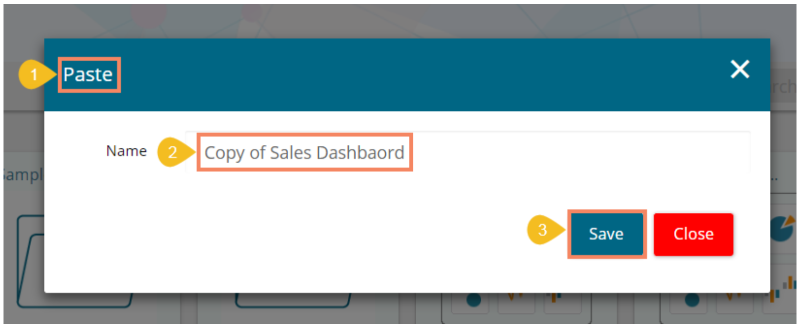
i) Select a dashboard
ii) Click the ‘**Options**’ ⚙ icon for more options
iii) Select the ‘**Copy**’ option



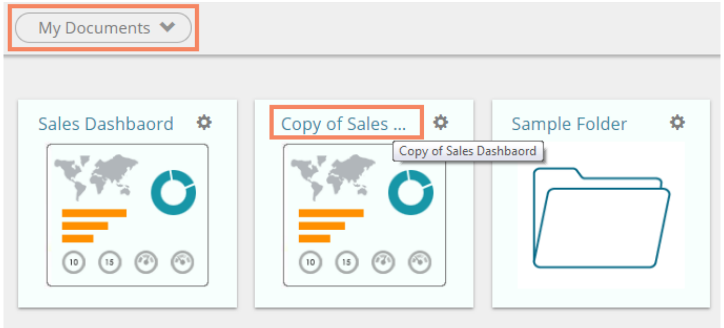
iv) Select another folder and click the ‘**Settings**’ ⚙ icon
Or
v) Navigate to ‘**My Documents**’ or ‘**Public Documents**’ and right-click anywhere
vi) A context menu will appear with the ‘**Paste**’ option
vii) Select the ‘**Paste**’ option



viii) A pop-up window will appear
ix) The **Name** mentioned in the pop-up window shows prefix ‘**Copy of-**’ before the original name of the dashboard (E.g., *Sales Dashboard* will have a new name *Copy of Sales Dashboard*)
x) Click ‘**Save**’

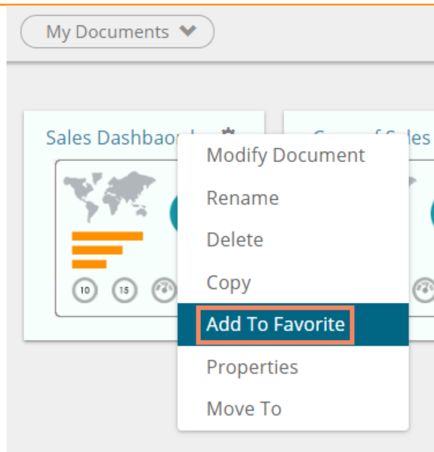


xi) The selected dashboard will be copied with a different name

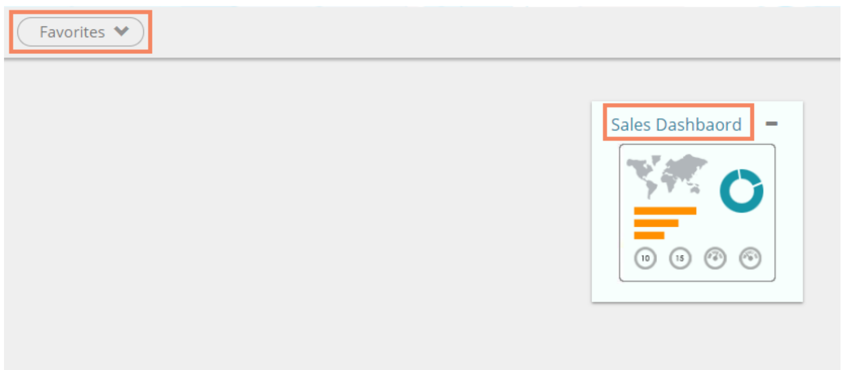


8.5.5. Adding/Removing a Dashboard to/from Favorites)

Administrators can add a dashboard to or remove it from the ‘**Favorites**’ section
i) Select a dashboard
ii) Click the ‘**Options**’ ⚙ icon for more options
iii) Select the ‘**Add to Favorites**’ option

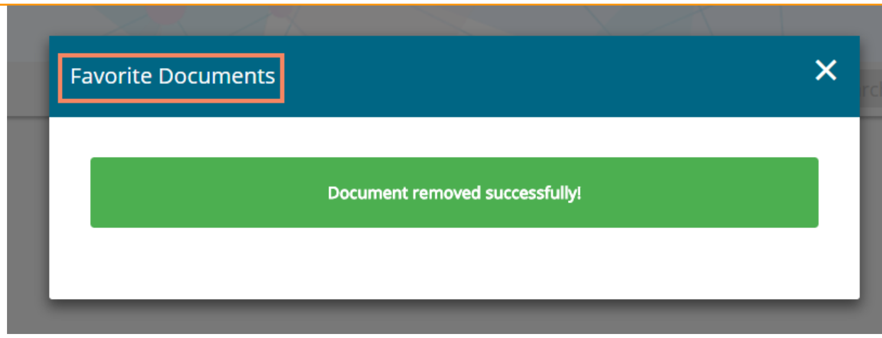


iv) A pop-up window will appear with a message, **"Document added to favorites!"**
v) The selected dashboard will be added to the '**Favorites**' section



vi) Open the '**Favorites**' section
vii) Select the dashboard you wish to remove from the **Favorites**
viii) Click on the '**Remove**' button

ix) A pop-up window will appear with a message, **"Document removed successfully!"**



x) The dashboard will be removed from the ‘**Favorites**’

8.5.6. Properties

Users can access the properties details of a selected dashboard by using this option.

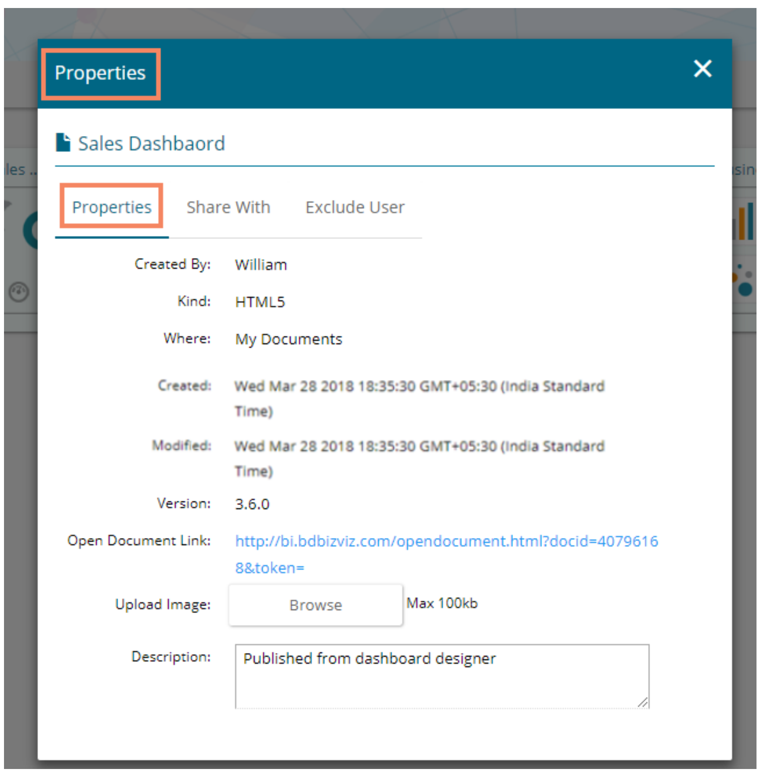
i) Select a dashboard.

ii) Click the ‘**Options**’ icon for options

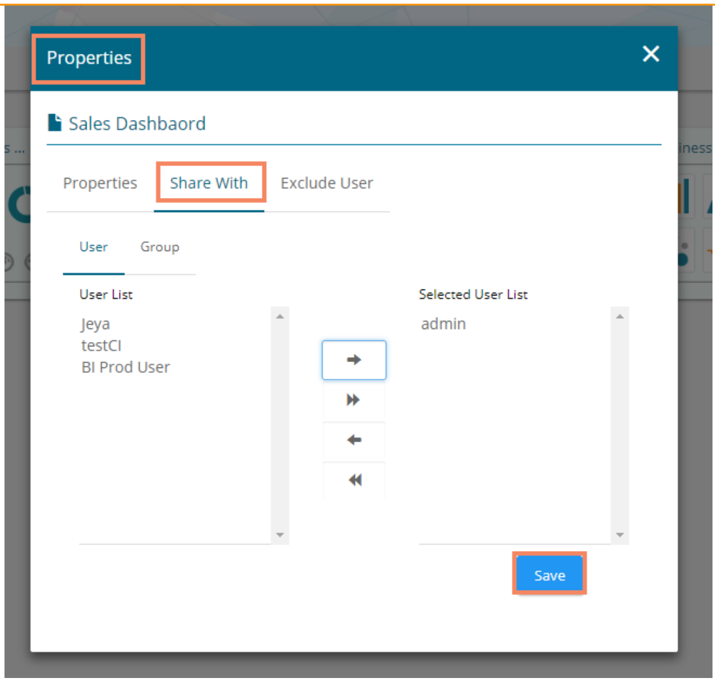
iii) Select the ‘**Properties**’ option

iv) A new window will appear with three options

- **Properties:** Dashboard properties will be displayed



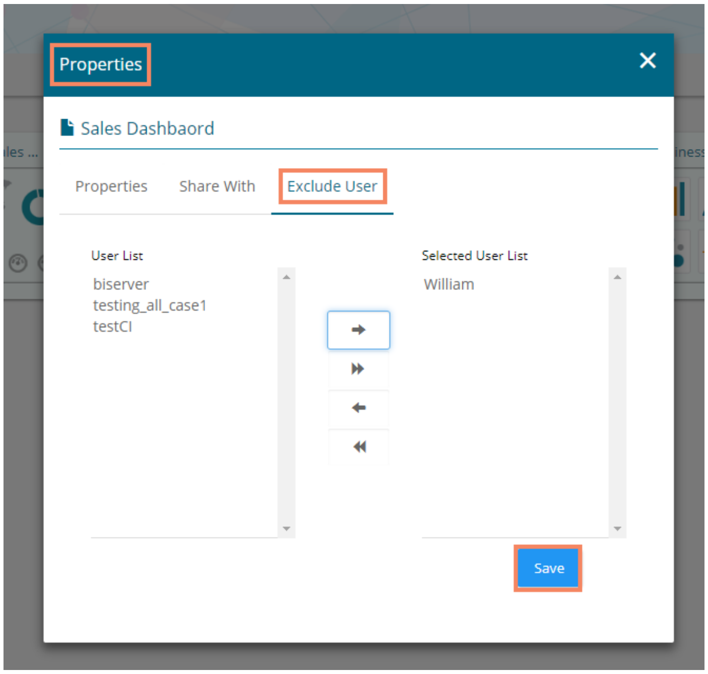
- **Share With:** The dashboard will be shared with the selected user or user group.
  1. Select ‘**Share With**’ on the Properties pop-up screen
  2. Select a user or group from either the ‘**User List**’ or ‘**Group List**’ option
  3. Move the selected user or group to the ‘**Selected User List**’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



5. A confirmation message will appear in at the bottom of the window
6. The dashboard will be shared with the selected user or selected user group

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

- **Exclude User:** The selected user will not be able to access the dashboard.
  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 the ‘**Save**’ option



4. The selected user will be unable to access the dashboard

8.5.7. Moving a Dashboard

Administrators can move a dashboard from one folder or document space (E.g. 'My Documents') to another folder or document space.

i) Select a dashboard.

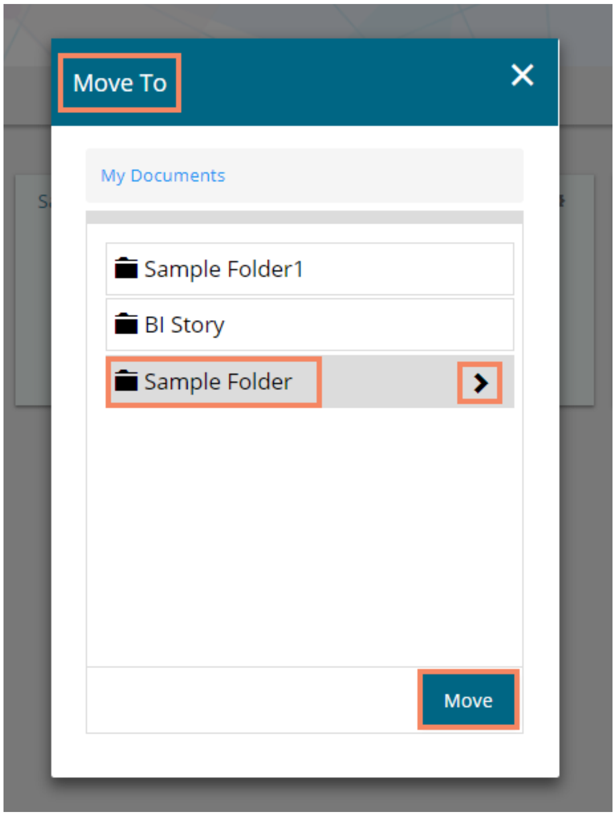
ii) Click the '**Settings**' icon for options

iii) Select the '**Move To**' option

iv) A pop-up window will appear displaying the available folders

v) Select a folder from the pop-up window

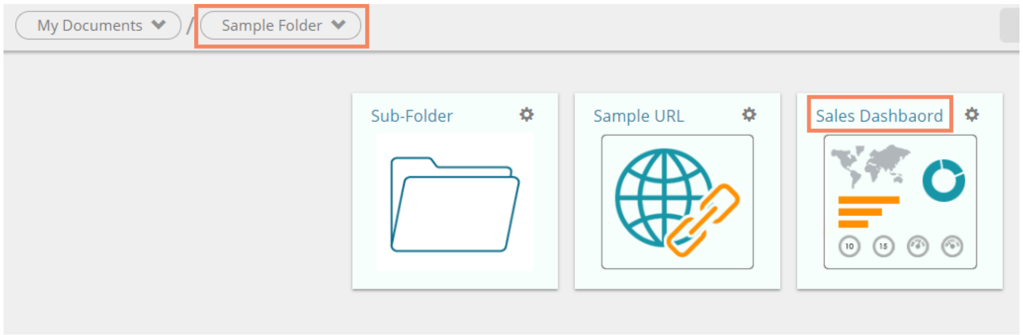
vi) Click the '**Move**' option



vii) A success message will appear

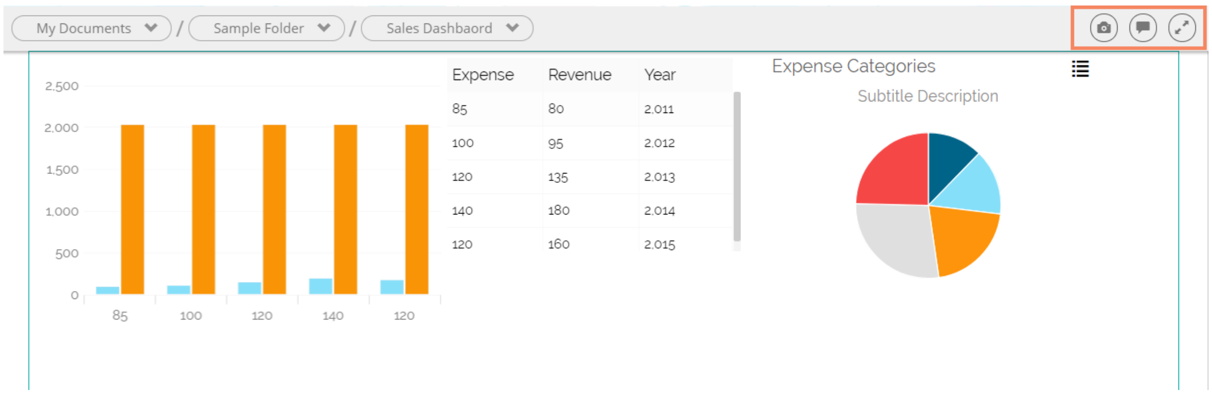
viii) The dashboard will be moved to the selected space

`



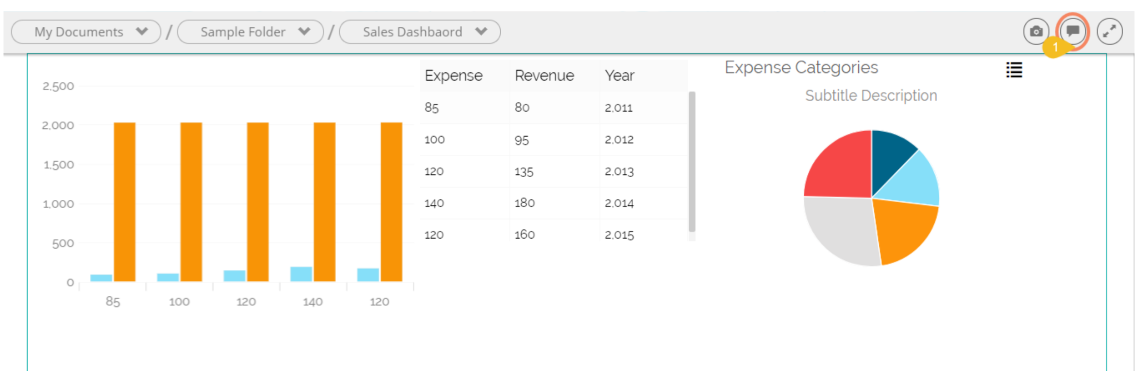
Note: To view a dashboard, use a click on the selected dashboard.

a. **The following options will be provided on a dashboard screen to facilitate users:**
- **Capture Image Icon**: Captures the dashboard image and redirects to save it.
- **Comments**: Explain the dashboard or insert feedback comments.
- **Full Screen/ Reduce Size**: View the dashboard in full screen or reduce the dashboard screen size.



b. **Steps to Insert a Comment**

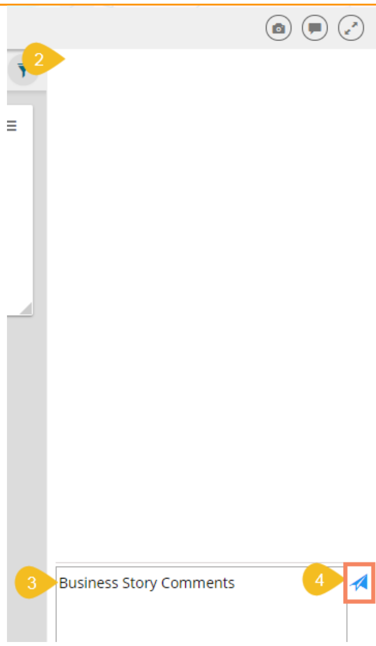
i) Click the ‘**Comments**’ icon from the Dashboard Header panel.



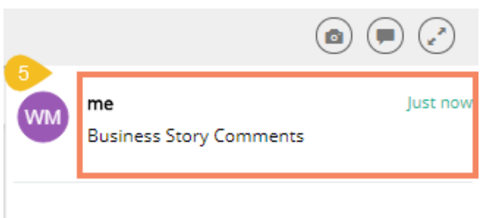
ii) A new window will open below with space to insert a message at the end of the window.

iii) Type a comment in the given ‘**Message**’ space.

iv) Click ‘**Send**’ 



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



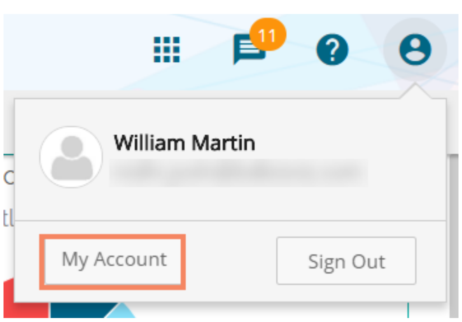
Note:

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

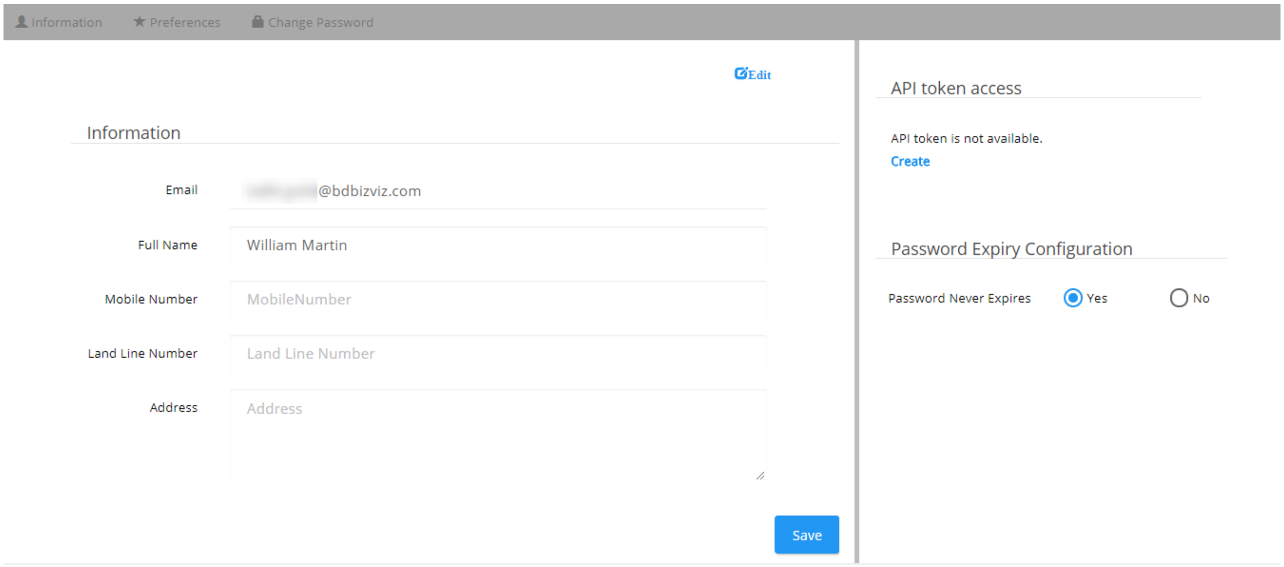
9. My Account

This section covers three options to manage settings for a user account.

i) Navigate to the Platform home page.
ii) Click the '**User**' icon
iii) Logged in details of the user will be displayed in a window
iv) Click the '**My Account**' option



v) Users will be directed to the following window:



Note: By selecting the user details, 'Information' option window will be displayed by default.

9.1. Information

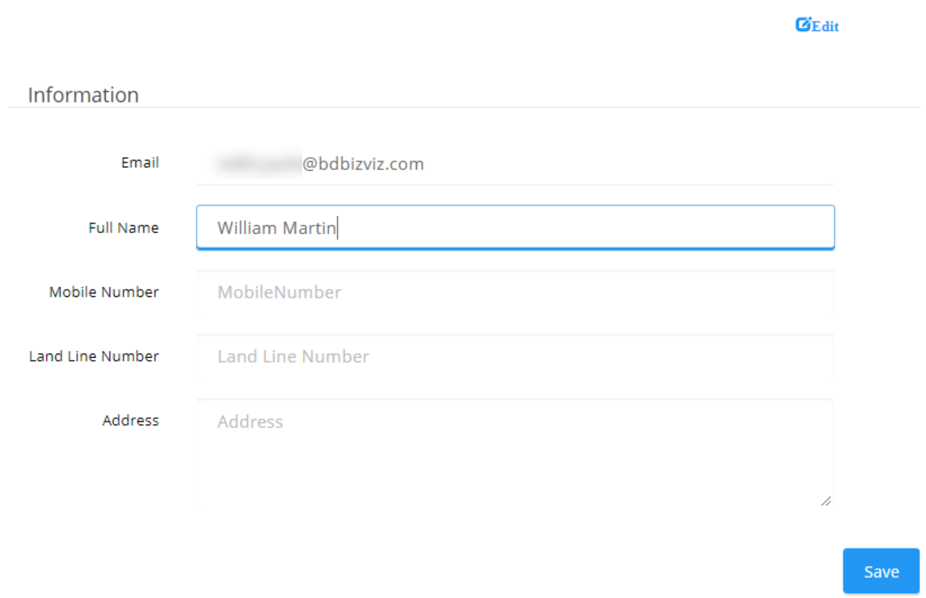
This module displays personal information about the user.

i) Click '**Information**' on the My Account menu row

ii) The following details will be displayed:

- Email
- Full Name
- Mobile Number
- Land Number
- Address

iii) Click the '**Save**'



iv) The user information will be saved

Note:

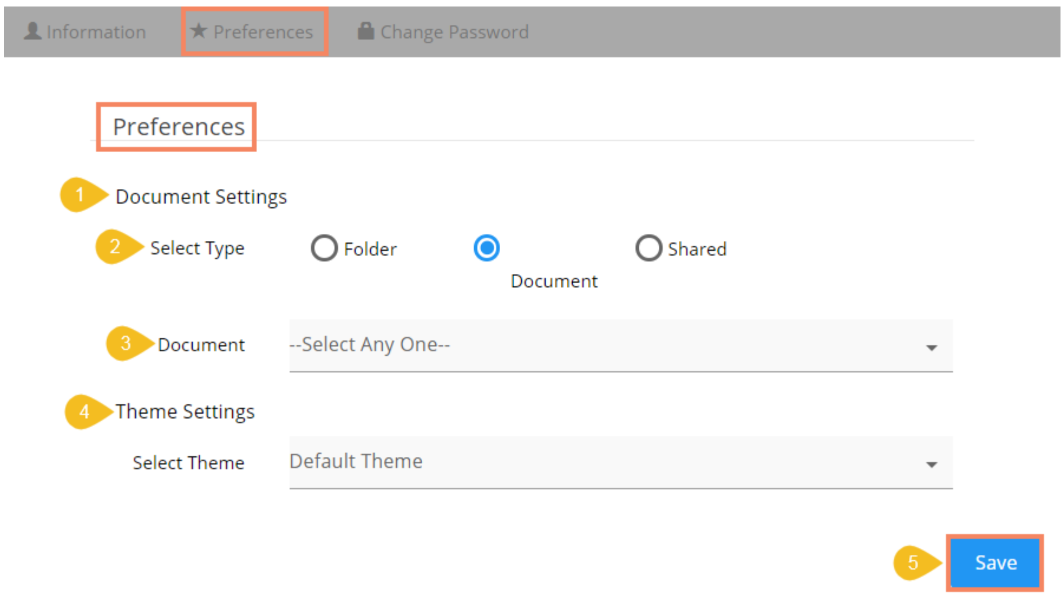
a. It is mandatory to click ‘**Edit**’ option to enter/modify the user information.
Steps to edit the Information:
Click ‘**Edit**’ -> Modify/ Change the details -> Click ‘**Save**’
b. Users can modify all other profile information except the Email by the ‘**Information**’ module.

9.2. Preferences

The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

i) Click ‘**Preferences**’ on the My Account menu row
ii) The ‘**Document Settings**’ options will be displayed
iii) Use a radio button to select either of the choices out of: ‘**Folder**’ or ‘**Document**’
iv) As per the selected choice, a drop-down menu will be launched
v) Select a file or document from the respective drop-down menu
vi) Select a theme from the drop-down menu
vii) Click ‘**Save**’
viii) A pop-up message will appear to assure that the preferences have been updated



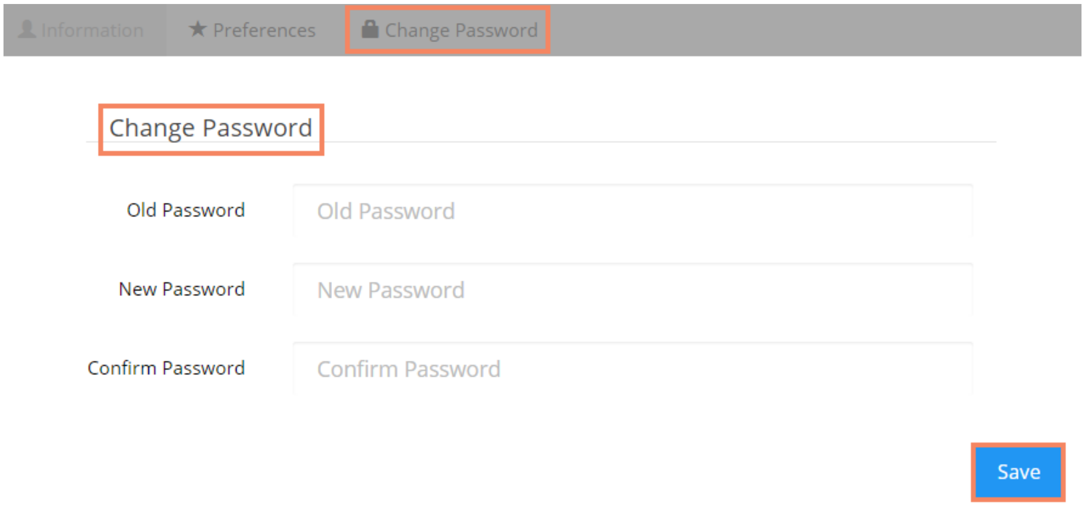
Note: Folders and documents will be displayed to the users as per the set preferences by the administrator

9.3. Changing Password

The user can reset the password for his account using this segment.

i) Click ‘**Change Password**’ on the My Account menu row
ii) A new page opens

iii) Enter **'Old Password'**, **'New Password'**, and **'Confirm Password'** (the newly set password)
iv) Click the **'Save'** option



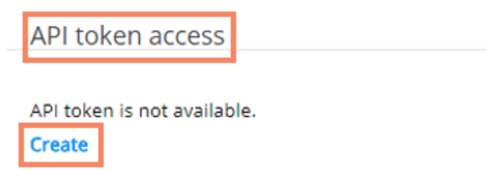
v) The password will be changed

9.4. Other Related Options

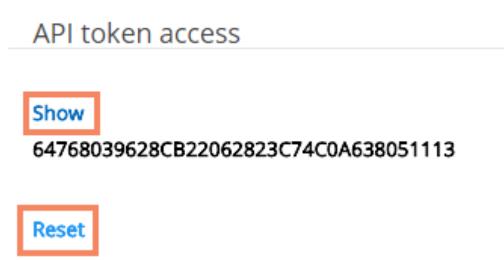
The API Token and Mobile Device access codes are displayed in the right pane of the **'My Account'** page. The Password Configuration can be accessed via the same page.

a. API Token

- It is an authentication token that is used to expose document as an open document.
- API token can be accessed and reset using the **'My Account'** option.
    a) Click the **'Create'** option

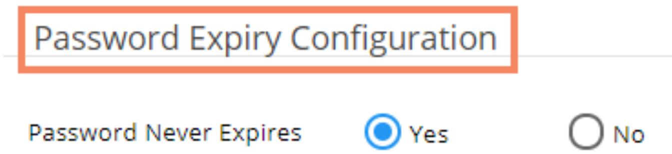


b) A new API token will be created
c) Users will get the following details after creating an API token
   a. Show: By clicking this option the API token will be displayed
   b. Reset: By clicking this option the API token will be reset



b. Password Expiry Configuration

- Password expiry limit can be configured via this option.
- Users need to select either of the choices for the ‘**Password Never Expires**’ option out of: ‘**Yes**’ or ‘**No**’ and click the ‘**Save**’ option



Note: By selecting ‘Yes’ via the password expiry configuration section, user’s password will never get expired.

10. Securing Platform: Authentication

BizViz Platform is provided with some authentication features to keep it secure all the time.

10.1. Enterprise

Enterprise authentication is the default authentication method for the BizViz platform; it is automatically enabled when you first install the system - it cannot be disabled. The BizViz platform maintains user and group-specific information within its database while adding or managing users and groups. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BizViz platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server. You do not have to configure or enable Enterprise authentication. However, users can opt for another authentication option to meet their organization's security requirements.

10.2. Windows AD

The Windows AD security enables you to map user accounts and groups from your AD 2008 user database to the BizViz platform. It also allows the system to verify all logged on requests that specify AD Authentication. Users are authenticated against the AD user database and have their membership in a mapped AD group verified before the BizViz platform grants them an active session. You can use the plug-in to configure updates for the imported AD groups.

10.3. Clarity

Security in CA Clarity PPM has two aspects: i) securing the application and, ii) securing its data. The security mechanism and control are the same for both.

a. **Securing the Application**: It verifies that the correct users have access to the appropriate application functionality. This type of clarity security controls user access and capabilities.
   E.g., Administrator is provided more rights than an end user.

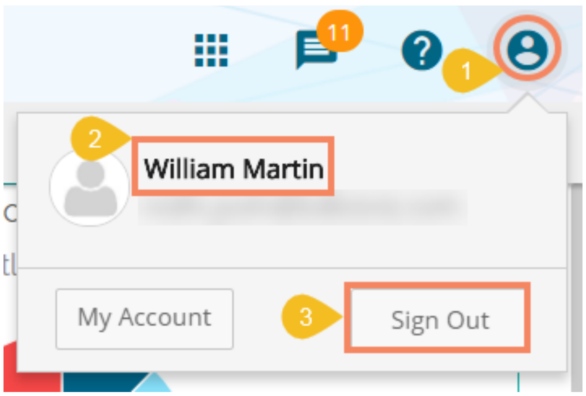
b. **Securing the Application Data:** It verifies that resources have access only to the assigned data.
   E.g., everybody should be able to see the platform page, but with their assigned projects and functionalities.

Note: The authentication options can be changed through the administration module.

11. Signing Outs

The following steps describe how to log out from the BizViz Platform.

i) Click the '**User**' icon  on the Platform home page
ii) A menu appears with the logged in user details
iii) Click the '**Sign Out**' option



iv) Users will be successfully logged out from the **BizViz Platform**

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