

Platform R-3.5



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# 1. About this Guide

# 1.1. Document History

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

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

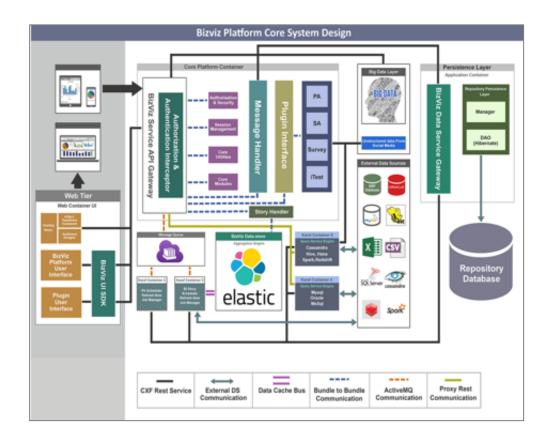
• A browser that supports HTML5



- Operating System: Windows 7
- o 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: <u>http://apps.bdbizviz.com/app/</u>
- ii) Enter your credentials to log in
- iii) Click the 'Login' option



Ŧ

Login

Copyright © 2015-2018 BDB (BizViz Technologies Pvt Ltd)

# Welcome big Data BizViz (BDB) Big Data Pipeline Framework Dashboard Designer ErtL (Self-Service Data Preparation) Geospatial Analysis (Location Intelligence) Predictive Analysis Play (Beta Release) Self-Service BI (Business Story) Social Media Browser Sentiment Analysis

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



# 4.1.1. Forgot Password Option

Survey

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



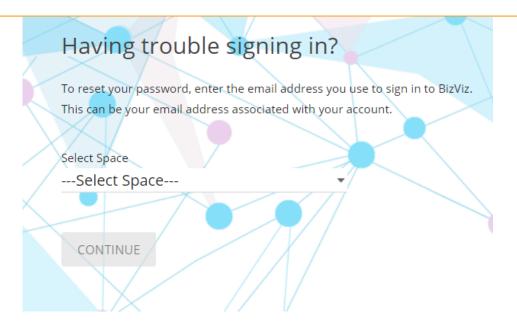
Decision Platform	
🖸 Email	
Password	
	Forgot password?
Enterprise	•
Login	
Copyright © 2015-2018 BDB (BizViz Tech	nnologies Pvt Ltd)

- 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

Having trouble signing in?
To reset your password, enter the email address you use to sign in to BizViz. This can be your email address associated with your account.
Email address
Email address
CONTINUE

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





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

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

- 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



Rese	et Password
You've c	onfirmed ownership of the BizViz Account, Reset your password now to regain access.
New Pas	
Confirm	New Password
Conf	firm New Password
RESE	T PASSWORD

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.

- Navigate to the Platform homepage i)
- ii) Click the 'Apps' iii iconiii) 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' C**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.)

	Decision Platform					
	Inbox	Select All	G	Î	$\succ$	
Î	Trash	admin		g	5/22/18 10	):53 AM
		Copying Document				
		Copying Document admin Copying Document	 		5/21/18	5:01 PM

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

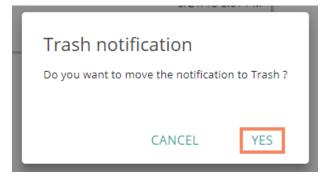
Inbox	Select All	C 🔋 🖬 🏠	Subject: Copying Document
Trash Trash	Copying Document	5/22/18 10:53 AM	From:admin Document copied with title Business Story successfully!!!
	admin Copying Document	5/21/18 6:01 PM	

Icons provided on the inbox window:

Icons Name		Task Assigned				
Trash		Displays messages in a list of all the deleted messages				
C	Refresh	Receives the latest messages				
	Trash	Moves the selected messages into the				
	Message	Trash folder				
$\geq$	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

Inbox	Select All	•	×	$\succ$	
👕 Trash	admin				
	Datastore Notification for Sales_Conto	SSO			
	admin				
	Datastore Notification for CCD Time	Data: De	v Test 2		

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

Inbox	Select All	V	X	$\searrow$	Subject: Datastore Notification for Sales_Contosso
👕 Trash	admin Datastore Notification for Sales Con	tassa			From:admin
	admin				Failed to load datastore 'Sales_Contosso'!
	Datastore Notification for CCD Time	Data: Dev	Test 2		

Icons provided on the Trash-box window:

Icons	Name	Task Assigned
	Trash	Displays messages in a list of all the
		deleted messages
	Move to	Moves the selected messages to the
	Inbox	inbox
	Delete	Removes the selected messages
	Forever	permanently
$\geq$	Unread	Marks messages status as ' <b>unread'</b>
	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



#### 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

← → C  Secure   https://bdbizviz.com/documentation.html						☆
<b>BBR</b>	What We Do	Products	Solution & Services	Discover BDB	Connect to BDB	
BDB	Docum	entatior	n and Help			
Version 3.5	Rele	ease 3.5	]	USER GUID	ES	
				<ul><li> Platform Adm</li><li> Business Stor</li></ul>	ninistrator Guide Y	
				Data Preparat	tion	

## 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



BBB Decision Platform		 🤌 🛛 😣
My Documents 🖤		× 🗐 💷
My Documents		👪 Order By: Name
Public Documents	Business Story	
Shared Documents		
🚞 Favorites	1. A. 💽	

- My Documents
  - o '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
  - o Users can view documents shared by others
- Shared Documents
  - $\circ$  The documents shared by users will be part of the 'Shared Documents'
  - Users can not edit or delete the shared documents
- Favorites
  - o 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.

My Documents 🏼			Search	× 🗐 🏢
				↓₹ Order By: Date
asdasd ♦	Legends-Portrait	Legends-Portrait	Legends123	tes12 *
MY Test ws-response-t	test_bi	funnel-	d3-chart-static	mysql 10 🔅
Tst 🔅 Cricket Live BS 🔅	mobile_pie_iss 🌣	pie2 🌣	test-sai 🌞	checkBSPRED 🌣

- 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:

Back / Search Result				restassured	≝ <b>€ 8</b> × ⊞ ⊞
RestAssuredPu •	RestAssuredPu 🔅	RestAssuredPu 🔹	RestAssuredPu 🔅	RestAssuredPu 🌣	RestAssuredPu 🌣
		RestAssuredPu	RestAssuredPu 🌣		

# 4.2.7. Displaying and Ordering Documents

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

• List Panel: Click 'List' icon (I) to display all the documents in the tree structure.

My Documents Public Docu	ments 🕑 Favorites	Search ×
- 🚞 Samples		
- 🚞 adfasdf	네 🦼 🧉 중tory for share	¢
🚞 con		
🚞 Test123	test123	o
🚞 Yujaa		-
🚞 SMB		
🚞 RestAssuredPublicFolder	2	¢
🚞 public folder		
🚞 RestAssuredPublicFolder	play_in_publicdoc	0
📄 RestAssuredPublicFolder		
RestAssuredPublicFolder	SF-INVTR	*
- 📄 RestAssuredPublicFolder	SF-INVIR	0
- RestAssuredPublicFolder		
RestAssuredPublicFolder	1 atahs	¢
- 🔲 RestAssuredPublicFolder		
- 💼 undefined	url_2april	0
🛏 🚞 Folder1		-

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

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



My Documents 🖤				Search	× 🗉 🛄
					↓ <b>?</b> Order By: Date
asdasd 🔅	dsBs	Legends-Portrait	Legends-Portrait	Legends123	tes12 *
MY Test	ws-response-t *	test_bl 🌣	funnel-	d3-chart-static •	mysql 10 *

• **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

	J. Order By: Date
2	Name
	Date
ľ	Custom
	000

- 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



My Documents 💙				Search	× 🗊 💷
					👫 Order By: Date
QAQ *	Test_Sj ¢	mobile view		Priyanka_DB 🌣	29jan ↔
dinesh 🔷	Test ETL 🔷	Sachin_Twitter	QA1	BarTitle12	asas 🌣

#### 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

Document Management		Administration
Configurations and Settings	$\sim$	The Administration area can be used to configure and administer your account.
Document Migration		
Schedule Monitoring		
Authentication	$\sim$	
Session		
Server Monitor		
Audit Trail		
Encryption		

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

Document Management	
Configurations and Settings	~
Document Migration	
Schedule Monitoring	
Authentication	^
AD Configuration	
CAPPM Configuration	

#### 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

1 Document Management	2	Document Management				
Configurations and Settings	~	Users: Enterprise =	Doc	uments		
Document Migration		Search user Showing 35 out of 35	Search d	ocument	Showing 28 ou	ut of 28
Schedule Monitoring		paadmin				
Authentication	$\sim$		Ľ	story 22 Mar		Ø
Session	3	upgrade test		www	$\triangleleft$	
Server Monitor		auttest		row_as_header	<	Î
Audit Trail		msa	•	rh	<	Î
Encryption		gsh	Ľ	PolygonGeoDocument	<	Î

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)
Î	Delete Document	Removes the document from the list
Ø)	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



Document Management	Email Server Configuration
Configurations and Settings	SMTP Host *
2 Email Settings	smtp.emailsrvr.com
Z Ennan Settings	SMTP Port *
Password	23
Audit Trail Settings	2/4
Abort Hull Screngs	Encryption Type 💌
Data Management Settings	From *
Geo Settings	support@bdbizviz.com
Ū.	Password *
Predictive Settings	
SMB Server Configuration	User Name
-	projectadmin@bdbizviz.com
Custom Field Settings	

- 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

Email Server Configuration		
SMTP Host *		
smtp.emailsrvr.com		
SMTP Port *		
23		
Encryption Type		2/4
TLS		-
From *		
support@bdbizviz.com		
Password *		
User Name		
projectadmin@bdbizviz.com		
	CLEAR	SAVE

# 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' Coption

Document Management	2 Password Settings
Configurations and Settings	Password Expiry(Days) *
Email Settings	90 Password Strength (Characters) *
1 Password	6
Audit Trail Settings	Password Reuse *
Data Management Settings	Login Failures (before account is locked) *
Geo Settings	6

- 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

assword Settings		
Password Expiry(Days) *		
120		
Password Strength (Characters) *		
6		
Password Reuse *		
5		
Login Failures (before account is locked) *		
5		
	CLEAR	SAVE

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.

Document Management		Audit Trail Settings	
Configurations and Settings	^	General Settings	DBConfiguration Setting
Email Settings		<b>0</b> 1	O Default O Custom
Password	_		
1 Audit Trail Settings	- 1		

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

	Audit Trail Settings				
	General Settings				
	2				
	🔲 Info 🛛 Debug 🔲 Error				
Click ' <b>SAVE'</b>					
	CANCEL 4 SAVE				

c.



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'

DBConfiguration Setting		
● Default ○ Custom		
	CANCEL	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'

DBConfiguration Setting		
O Default O Custom		
Host *		
Port *		
User Name *		
Password *		
	CANCEL	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

Docu	ument Management	- 1	Data Manage	ement Settings	
Conf	figurations and Settings	^ 2	DATA SET	_	
	Email Settings	- 1	Туре	Max Fetch Size	
	Password	- 1	MySQL	30000	3
	Audit Trail Settings	- 1			
0	Data Management Settings	- 1	MSSQL	5000	
	Geo Settings	- 1		5000	
	Predictive Settings	- 1	Oracle		
	SMB Server Configuration			5000	
	Custom Field Settings		Hive		
Docu	ument Migration			5000	

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'



Google Setting	s		
Мар Туре *			
google			
Map Key *			
		CLEAR	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'

<sub>l</sub> Leaflet Settings		
Мар Туре *		
leaflet		
Map Uri *		
Attribution *		
		A
		Ŧ
	CLEAR	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')



d.	iv.		le: Brows are suppo	se a shapet		the drop-d he system		enu oad (Only 'j:	son 'and 'js'
Upload Geo!	Shape	File +							
Upload	Geo	ShapeFi	le						
Name *									
Geometry Type	e *								0 / 15
Polygon									*
Area Type *									
World									•
Shape File									
f. g.	All Selo i. ii.	the uploa ect a Geo Polygon Line	aded Geo ometry Ty	Shapefile ype using t	s will be c he check:	file has be lisplayed ir box eo Shapefile	n the lis		SUBMIT
	(	Polygon	O Line					Search	Shape
		Name				^	Action		
		USA Country					Î		
		USA Geo Shap	2				Î		
		USA State Leve	1				Î		
		USA States FM					Î		

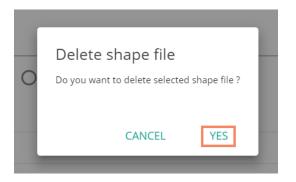
# • Deleting a Geo Shape File

- 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	Î
India Country	Î
India State	<b>i</b>
India_30May	Î

- 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:

Configurations and Settings	^ P	redictive Settings					
Email Settings	2	<b>R</b> SPARK	PYTHON	SCHEDULER			
Password							
Audit Trail Settings		R-Server Settin	ngs				
Data Management Settings		R Servers +					
Geo Settings		Server Name	Cores	Workflow	Scheduler	Edit	Delete
1 Predictive Settings		172.31.42.225	1	۲	۲	1.	Î
SMB Server Configuration							
Custom Field Settings						TEST	APPLY



- 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

Add R-Server Configuration		•
IP Address *	Port *	
		0 / 5
User Name *	Password *	
R Server Name *		
		•

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

Add R-Server Configuration	^
Elastic Search Port *	
	4/5
R Visualization URL	
R VISUAIIZATION ORL	
Provide Hilf OKL For K-Boken -	
	-

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



R Working Directory		
Provide R-Working Directory *		
/opt/Rutil/		
Enable Parallel Processing		
Enable Parallel Processing		

- 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

R Servers +					
Server Name	Cores	Workflow	Scheduler	Edit	Delete
172.31.42.225	1	۲	۲	ï	Î
					TEST APPLY

#### 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.

Server Settings					
Server Name	Cores	Workflow	Scheduler	Edit	Delete
172.31.42.225	1	۲	۲		Î
				1	TEST APPLY

- 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



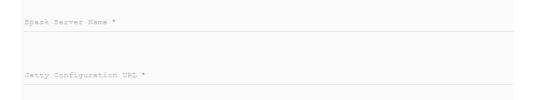
d. Click 'Add' + icon to add a new Spark server confirmation

Spark Servers 🕂

- 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

Add Spark Server Configuration		^
Host *	Port *	I
	0/5	ł
User Name *	Password *	I
		I
Spark Sarpar Nama *		

- 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' <sup>+</sup> icon to add a new Spark server confirmation

Python Server Settings	
Python Servers (+)	

- 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

Add Python Server Configuration		•
Host *	Port *	
	0/5	
User Name *	Password *	
Buther Server Ners *		Ŧ

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

Python Server Name \* Elastic Search Port \*

- 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'



Web Socke	t URL *					
	tion URL *					
visualiza	tion UKL ~					
Protocol	🖲 НТТР	O HTTPS				
				CANCEL	TEST	SAVE

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

Python Server Settings			
Python Servers +			
Server Name	Default	Edit	Delete
172.31.42.225	۲	ľ	Î
			TEST APPLY

## 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

Predictiv	/e Settings			
R	SPARK	PYTHON	SCHEDULER	
		nfiguration		
Sche	duler-Max Pa	rallel Processin	g: 10 🧪	

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

R	SPARK	PYTHON	SCHI	EDULER	
Sche	duler Cor	nfiguration Ç	~	$\otimes$	



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 🖍

Configuratio	ns and Settings	Media Browser Configuration
Email	Settings	Host *
Passv	vord	172.31.41.103
Audit	Trail Settings	Port *
/iddit		8090 4/4
Data	Management Settings	Application * * * * * * * * * * * * * * * * * * *
Geo S	ettings	
Predi	ctive Settings	Protocol 🖲 HTTP 🔿 HTTPS
	Server Configuration	UserName *
SWB		Passord *
Custo	m Field Settings	
Document N	ligration	

- 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

rivas "		
172.31.41.103		
Port *		
8090		
Application *		4/4
smb-war		
User Name * SMB		
Password *		
	CLEAR	SAVE



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

SMB Server Settings has 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

Geo Settings	Custom Field Settir	ngs 🗾			
Predictive Settings					
SMB Server Configuration	Key * REgion	Description * defines the user r	Input Type Manual 💌	_	~
Custom Field Settings		dennes the user r	Manual	Mandatory	~
Document Migration					

- 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 dropdown 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



_					
Cus	tom Field Settir	ngs			
	Key *	Description *	Input Type		
	Region	defines the user r	Manual 🔻	Mandatory	×
	Key *	Description *	Input Type		
	Nationality	defines the user r	Manual 🔻	Mandatory	×
			ADD FIELD	CLEAR	SAVE

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'



Document Management	2	Welcome to Docur	ment Migration	
Configurations and Settings	~			
1 Document Migration	6	Source Domain N http://127.1.1.0:8080/app/	Step 1 Document Migration     Login	<ul> <li>Step 4 Selection of Destination</li> <li>Select any Folder from 'Destination</li> </ul>
Schedule Monitoring		http://www.bdbizviz.com/app/ http://app.bdbizviz.com/	<ol> <li>Enter the 'Source Domain Name(http://127.1.1.0:8080/app/,</li> </ol>	List'.
Authentication	~	Email	http://www.bdbizviz.com/app/ or http://app.bdbizviz.com/)'.	Document into a 'New Folder'.
Session		Password	2. Enter the 'Username'	3. Select 'System Documents',
			3. Enter the 'Password' and click	4. Click on 'Migrate' button.
Server Monitor		Enterprise 👻	'Login'.	Step 5 View History of
Audit Trail			Step 2 Select Source Document	Migration 1. Check on 'View History'.
			1. Select Root Folder 'My Documents/Public Documents/	·
Encryption		4 Login	Documents/Public Documents/ System Documents' (by default My	<ol> <li>Click on the Document Name in list to get more details.</li> </ol>
			Documents).	-

#### 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

Select Source Document				Logged in as	() Logou
My Documents Publ Syst	Find Dependency	History			
Search					
B IPL Story B Business Story					
B BI Story NLQ     B Story					
۶ 📔 Sample Folder					

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'



Select Source Document			Logged in as O Logout
My Documents Publ Sy 7	Find Dependency History	Dependent Data Sources	Dependent Cubes
		All Cubes	• NLQ
Search B IPL Story B Business Story B BI Story NLQ S Story Sample Folder 9	Migrate Overwrite Select Destination Folder My Docum Public Doc	● Mysql Connector ØEdit	
			Document BI Story N. Name
			Description Description
			10 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

11 Dependent Resources Information	×
Dependent Data Sources	Dependent Cubes
All Cubes  Mysql Connector	●NLQ
2	
er	
<ol> <li>NOTE: Unavailable Resources Will Not Migrat</li> <li>Available Resource</li> <li>Unavailable Resource</li> </ol>	te . 12 Close Migrate

## 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

Find Dependency	4 History	
15 Migration Histo Migrated Date &	Document Name	Status
Time 24/05/2018 16:01	BI Story NLQ	Success

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

Document Migration details
BI Story NLQ
DataSource
Mysql Connector migrated successfully.
Cube
NLQ migrated successfully.
Views
migrated successfully.
Story
BI Story NLQ migrated successfully.
From Url
https://qa.bdbizviz.com/cxf

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



My Documents ♥ / Business Story ♥     Search ♥	← → C ▲ Secure https://app.bdbizviz.com/modules/home/home.html		@☆ 😪 :
It Order B	Decision Platform	:	<b>■ ■ 0 0</b>
BI Story NLQ 🔅	My Documents 🏼 / Business Story 👻		× 🗊 💷
			🔰 Order By: None

#### 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.

Dependent Data Sources	Dependent Cubes
All Cubes	• NLQ
Mysql Connector	

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



	Dependent R	Resources Information	1 1	D.4. C	× ube
	Mysql Conne	ector			- 1
ory Q	Current Pref	erences	New Preferen	ces	_
	Host:	192.168.1.10	Host:	Host	
ler	Port:	3306	Port:	Port	
l	User name:	gunjan01	User name:	User name	315
I			Password:	Password	005
l					
I			(	Close Test Continue	

## 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

Document Management		Schedule Monitoring	5	
Configurations and Settings	$\sim$	Data Store 🗳		Schedulers 👳
Document Migration		All Schedule		May16_FileDataStore
Schedule Monitoring		• sdsddd	Ċ	may16
Authentication	$\sim$	• aaa	с	MAY14_MYSQL_dstore
Session		• May16_FileData		MATI4_MI3QL_05016
Server Monitor		• may16		CSV
Audit Trail		• CSV		eld_csv
Encryption				

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)



Schedule Monitoring				
Data Store 🗘				
Search Schedule				
All Schedule				
<ul> <li>Doc Mig_Data</li> <li>Store_04</li> </ul>	Ċ			
<ul> <li>Doc Mig_Data</li> <li>Store_04</li> </ul>	Ċ			
Doc Mig_Data Store_03	Ċ			
<ul> <li>Doc Mig_Data</li> <li>Store_01</li> </ul>	Ċ			
• m2	Ċ			

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

Schedulers 👳				
Scheduler Name	Last Updated Date 🔍	Recurrence	Status	
DS: 500 Records	5/22/2018, 9:59:14 AM	-	Refresh success	0
DS: 500 Records Copy	5/22/2018, 9:58:21 AM	-	Refresh failed	0
DS: 500 Records Copy	5/22/2018, 9:57:18 AM	-	Refresh failed	0
Oracle_may14	5/21/2018, 2:28:24 PM	-	Refresh failed	0
Oracle_may14	5/21/2018, 11:58:01 AM	-	Refresh failed	0

#### Note:

- a. Click the 'Start/Stop' U 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.



ile Mo	nitoring			
tore H	listory Details		×	
hedi				
ule	Name:		DS: 500 Records	Las
	Last Update:		5/22/2018, 9:59:27 AM	- 10
pay	Recurrence:			5/2
н	Status:		Data load completed!	5/2
ilddr	Name:	DS	500 Records	5/2
ayer	Last Update:	5/2	2/2018, 9:59:28 AM	ł
Pla	Recurrence:			5/2
Proje	Status:	Loa	aded data saved successfully	5/2
				5/2

- d. Use 'Filter' option \Xi 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

Search	By Date		×
÷	From Date * 2017-06-23	Ŧ	6/2
Ē	To Date * 2017-06-28	Ŧ	6/2 6/2
SUBN	ЛІТ		5/2

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	0
TEST_MAP	6/27/2017, 5:21:39 PM	-	Refresh success	0
MAP_ASIA	6/27/2017, 5:16:05 PM	-	Refresh success	0
New Store	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	0
VIVEK_STORE_9_1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	0
May25Mysql	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	0
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

Document Management	Active Directory Configuration		
Configurations and Settings	CONFIGURATION PARAMETERS SYNC CONFIGURATION		
Document Migration	Service Account *		
Schedule Monitoring	Password *		
2 AD Configuration	Host Name *		
CAPPM Configuration	Port *		
Session			0/4
Server Monitor	Domain Name *		
Audit Trail			
Encryption		CLEAR	SAVE

- 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.

CONFIGURATION	PARAMETERS	SYNC CONFIGURATION		
Service Account *				
Password *				
Host Name *				
Port *				0/4
Domain Name *				074
			CLEAR	SAVE
b. <b>P</b>	arameters			
i) Active Directory Confi	i. Fir ii. La iii. De iv. Ad v. Co 1. 2.	ser parameters by using this rst Name: Provide the first of st Name: Provide the last n escription: Add description Id a new custom field by cli onfigure the following prope . User Property: Select an of . Active Directory Propert context menu	name of the user ame of the user cking the <b>'Add'</b> icon erties to add a Custom F option from the availabl	e context menu
CONFIGURATION	PARAMETERS	SYNC CONFIGURATION		

CONFIGURATI	ION PARAMETERS	SYNC CONFIGUR/	ATION			
Parameters			Added Custom F	ields		Đ
First Name	First Name		User Property		Active Directory Property	
			manager	×	manager	× 🗎
Last Name	Last Name			~		
Description	Description					
			4			
					CLEAR	SAVE

- 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'

## Active Directory Configuration

CONFIGURATION	PARAMETERS	SYNC CONFIGURATION
User Group List *		
adminuser		*
User List	Se	lected User List
testuser1 kalanidhi.m manu.mohan anil.kumar anoop.vp vimal.m bijeesh.op sivan.n	→ ▶ ← ◀	
		SAVE

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

User list updated successfully...Please contact administrator to add respective user groups

## 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 rovided 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

Document Management	CAP	PPM Configuration
Configurations and Settings	~	Username *
Document Migration		dashboard Password *
Schedule Monitoring		
Authentication	~	CA PPM Server *
AD Configuration		User Access NQUERY
CAPPM Configuration		

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

CAPPM Configuration				
1 Sync Configuration				
Clarity User List		Selected User List		
akrishna mnewburg KAMAT R jsmith jsauer keckert@pcyc.com sstoneburg pberks dpatel drigsby dashboard dl pt	2 →	egillian		
				CANCEL 3 SAVE

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

## 5.2.6. Sessions

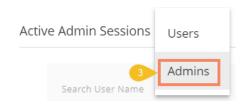
The 'Sessions' is an administrative module to display active platform users.



- i) Click 'Sessions' from the list of Admin options
- ii) Users will be redirected to the 'Active Admin Sessions' page

111)							
Document Management	2 Acti	ve Admin S	Sessions T				
Configurations and Settings	~	Course Ha					
Document Migration		Search User Name -					
Schedule Monitoring			Email Id	User Name	Session Time(Minutes)		
Authentication 1 Session	~		ranjit.krishnan@bdbizviz.com	Ranjit	1		
Server Monitor			vishal.venugopal@bdbizviz.com	vishalvenugopal	14		
Audit Trail			ajith.r@bdbizviz.com	ajith	1		
Encryption			paadmin@bdbizviz.com	paadmin	1		

- iv) Click the 'Filter' Ticon
  - 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



#### Active Admin Sessions

	Search Use	er Name		5
	$\square$	Email Id	User Name	Session Time(Minutes)
		ranjit.krishnan@bdbizviz.com	Ranjit	1
		vishal.venugopal@bdbizviz.com	vishalvenugopal	14
4		ajith.r@bdbizviz.com	ajith	1
		paadmin@bdbizviz.com	paadmin	1

**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

Document Management Configurations and Settings	2	Server Monitor	NODE4 NODE	5 NO	DE6	NODE7 NODE	8	
Document Migration		• Last Updated: 5/25/2018, 5:06:01 PM				OS Details	90%	
Schedule Monitoring			Current Heap Size	1501	ИВ			
			Committed Heap Siz	e 2048 !	ИВ	Committed Virtual N	1emory	135 GB
Authentication	~		Max Heap Size	2048	ИВ	Free Physical Memo	ry	3 GB
Session		Current Heap Size				Total Physical Memo	əry	30 GB
Server Monitor		Search Bundle						
Audit Trail		Bundle Name		Start Id	Versi	on		State
Encryption		Apache CXF Compatibility Bundle Jar		162	2.7.1	1		Active
		camel-core		168	2.15.	3		Active
		camel-catalog		169	2.15.	3		Active
		camel-spring		170	2.15.	3		Active



## 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

Document Management	Select a User           William Martin	Enter Star 201		d Date 18-05-25 🗸	FILTE	RAUDIT
Configurations and Settings V	Message Id	0	Request	0	Response	Audit
Document Migration	/	Q		Q	Q	Q
Schedule Monitoring	444bb9ba8cbb56fb7c2d7a935721553	c	[Request]=[pluginService]= spacekey : 1	1 💿	null	null
Authentication	7a9b413bae95670888f88b6fdc0f9a6c	ł	[Request]=[getAllMenuContext]= space	(ey 💿	null	null
	cca40e8ea0786a2c2cf98aba2207661f		[Request]=[getlistview]= spacekey : 1113	3 💿	null	null
Session	8ab140eb0f50cc57480a8538548b7e5	e	[Request]=[pluginService]= spacekey : 1	1 <b>O</b>	null	null
Server Monitor	70623f838baa796b47a687895d4965c	ld	[Request]=[logout]= spacekey : 1113 , t.		null	null
Audit Trail	a5b1af6fbbfb2c84f721953d2b314c68		[Request]=[authenticateuser]= custome	erke 📀	null	null
Encryption	d7bf213ea57cdd45b8c7cac0bfcef66c		[Request]=[pluginService]= spacekey : 1	1 <b>O</b>	null	null
	e5c0cfb88c3016b5872288d2e63c1e0	b	[Request]=[getAllMenuContext]= space	(ey 💿	null	null
					Previous	1/5 Next

- 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

	Enter Star	t Date 3 Enter End Date 8-05-15 - 10 2018-05-24	Ŧ	4 FILTE	R AUDIT
Message Id	Q	Request	Q	Response Q	Audit Q
9b29fc3b9bef003a64d86c95fc7c96c2		[Request]=[authenticateuser]= customerke	0	null	null
e4b112831c30262f7fdaaf86454adc4a		[Request]=[authenticateuser]= customerke	0	null	null
b405d370fd64117e17d986d60d738658		[Request]=[pluginService]= spacekey : 11	0	null	null
09d33f4f95dde48f6de3942677246fbb		[Request]=[getAllMenuContext]= spacekey	0	null	null
7e2521736f182f9edd612f8235c7d6c2		[Request]=[getlistview]= spacekey : 1113	0	null	null
a23ad090f80929f51a5e9641aeaf5e37		[Request]=[getData]= spacekey : 1113 ,	0	null	null
26d42692868d82a58b695acd76f7d9e4		[Request]=[getlistview]= spacekey : 1113	0	null	null
36c5d6ff1b4744c0c3c6579a951839e0		[Request]=[getWikiByDocId]= spacekey : 1	0	null	null
				Previous	1/37 Next

## 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

Document Management	2	Encryptio	n Configuration		
Configurations and Settings	~	3 🔽	Enable Encryption		
Document Migration			51		
Schedule Monitoring				4 SAVE	
Authentication	~				
Session					
Server Monitor					
Audit Trail  I  Encryption					

# 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

User Manager	nent											NEW
User Group					<sub>Type</sub> Enterprise	•	Status Active	<b>.</b>		ĄZ		
Search User Group		– Showing	g 6 out of 6	5	Search User						Showing	5 out of 5
All Group												
alls		$\oslash$	Ê	1	Platform User					$\oslash$	Î	G
allcaseci	<b>1</b> *	$\oslash$	Ê	l	etl admin				1	$\oslash$	Î	G
allcase1e		$\oslash$	Ê	l	William Martin				-	$\oslash$	Î	G
test		$\oslash$	Ê	l	BI Prod User				1	$\oslash$	Î	G
Viewer Role			Ê		Dev User				1	$\oslash$	Î	C
Admin Role			Ê	•								

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



	NEW
+🚉 Group	
+ <b>_</b> User	

- 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)

User Group	CANCEL	SAVE
Group Name *		
Sample Oser Group		17 / 20
Description		
		0 / 150

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

	Add User to Group ×
User Group	search da
Add User to Group 1 Selected	Select All
	David Brown
Ourse Description 1	RestAssuredAutomate



	Add	User to Group >	<
User Group	search		
		Select All	
Add User to Group		Dev User	
		BI Prod User	
Group Permission		Platform User	
		etl admin	
Folder Permission		William Martin	

d. **Group Permission**: Click the 'Add' button <sup>+</sup> 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).

	Group Permissions	×
User Group	Select All	
Croup Remission	Vser 🗸	~
Group Permission	Data Center	~
Folder Permission	GeoSpatial	~
	Admin	~
File Permission	✓ Designer	~
	Predictive	~

e. Folder Permission: Click the 'Add' button <sup>+</sup> provided next to the Folder Permission option. Assign various folder permissions to the User Group via the 'Folder Permission' menu list.



	Fo	der Permission	×
User Group		Select All	
	~	Create Folder	
Group Permission	<b>~</b>	Link a URL	
Folder Permission	<b>~</b>	Rename	
	<b>~</b>	Delete	
File Permission	<b>~</b>	Сору	
	~	Paste	

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

	File Permission X
User Group	Select All
	Modify Document
Group Permission	Rename
Folder Permission	Velete
	Сору
File Permission	Add To Favorite
	Remove From Favorite

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

User Group	CANCEL	SAVE	

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



#### User Management

User Group			
Search User Group	S	howing 1	3 out of 13
All Group			
Sample User Group	-	$\checkmark$	â
BI Trainees		$\oslash$	ê
ETLTest		$\oslash$	ê
ABCGroup	1	$\oslash$	ê
Demo Viewers	1	$\oslash$	ê

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
$\oslash$	Block Group	To block the selected user group
Ê	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 <sup>1</sup> 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'

User Group				2 Assign Custom Field To Group Users	SAVE
Search User Group	2	Showing 1	3 out of 13	Group Name	_
All Group				Sample User Group	
Sample User Group	1	<b>_1</b>	8	Select Custom Field 1	
BI Trainees	1	$\oslash$	ê	State Reld value	*
ETLTest	1	$\oslash$	8	California	
ABCGroup	1	$\oslash$	Ê		
Demo Viewers	1	$\oslash$	ê <sup>6</sup>	Select Users	
BizViz Partners	/	$\oslash$	ê	1Selected	
Permission	/	$\oslash$	ê		+



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'

V)

- ii) A context menu opens
- iii) Select the 'User' option from the context menu

		NEW	
+ <b>@</b> )	Group		
+•	User		

- iv) Users will be directed to the 'New User' form
  - 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

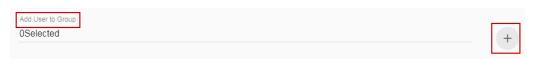
New User	CANCEL	SAVE
Email *		
jmartin@abc.com		
Short Name *		
John Martin		
Full Name *		11 / 20
John Martin		
		11 / 20
Description		
Password *		0 / 150
Confirm Password -		8 / 16



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)

Custom Fields	
State	
California	
City *	
Sacramento	
Manager*	
David	
Department	
Dev.	

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

	Add User to Group X
New User	search no
Description	Select All
Password *	TestGroupAnoop
	NonAdmin Group
Confirm Password *	
Add User to Group 1Selected	

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



Туре	Status	5							
Enterprise	▼ Activ	ve	~			ĄZ			
Search User							Showing	85 out of	85
John Martin					<b>/</b> *	$\oslash$	Î	C	4
userTestAudit				۵	<b>*</b> *	$\oslash$	Î	C	
GKTESTFOUR					-	$\oslash$	Î	C	
GKTESTTHREE					-	$\oslash$	Î	C	
uhuihuhu					-	$\oslash$	Î	C	
Buser						$\oslash$	Î	C	

Options	Name	Description
1	Edit	Update/Edit the user specific details for a selected user
0	Dlask	
$\oslash$	Block	Block the selected user
Î	Remove	Remove the selected user from the user list
C	Reset	A Reset password will be sent to the registered
Ŷ	Password	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



CANCEL
5 / 20
11 / 20
0 / 150
8 / 16

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

New User	CANCEL	SAVE
Custom Fields		
Nationality		
USA		
State California		
City Sacramento		
Sacramento		
Manager		
Admin		
Department		
Platform		

v) Do not add the user to any group



Add User to Group	
0Selected	+

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)

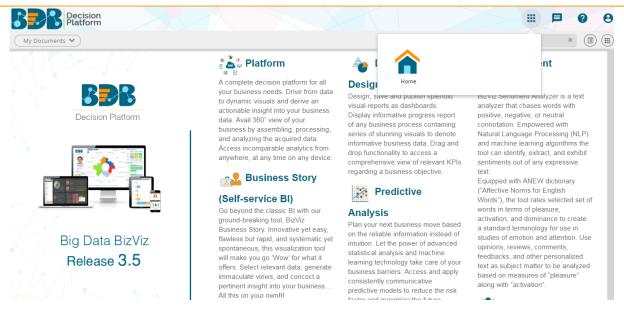
Туре		Status						
Enterprise	•	Active	*		ĄZ			
Search User						Showing	86 out c	of 86
David Brown				i	$\oslash$	Î	C	<b>^</b>
John Martin				1	$\oslash$	Î	C	
userTestAudit				1	$\oslash$	Î	G	

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

	sion Platform
🗹 david.brown@bdbizv	/iz.com
£	
	Forgot password
Enterprise	•
	Login

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



User: Enterprise Type Status Enterprise Active T		ĄĴ	2	
Search User				
yashu	/	$\oslash$	Î	G
ANI	1	$\oslash$	Î	G
Reshma khan	1	$\oslash$	Û	G
usrRestykoth	/	$\oslash$	Û	G
T two user	/	$\oslash$	Î	G
usrResttbbio	1	$\oslash$	Û	G
usrRestgqnhw	/	$\oslash$	Û	C

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 C to set a new password for an activated user

	Туре	Status		
	Enterprise	1 Expired	<b>~</b>	ÂŹ
	Search User			Showing 14 out of 14
2	demouser			
	neelamana			√ C
	Fred Lybbert			✓ C

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

i)

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

rv Storv User Data Center Designer œ Sentiments Play Survey Social Media Predictive Data GeoSpatial

Click the 'Data Center' option 🧧 from the apps menu

Users will be directed to the Data Center page ii)

Data	Center							NE	W
	Data Connectors	Data Connector Type							
	Data Sets	All							
ő	Data Store	Search Data Connectors				Showi	ng 230 d	out of 23	30
	Data-Store Meta Data	Edkal-Mysql		6	G	<	1	Î	
		Mysql Connector		6	G	<	1	Î	



- iii) Click the 'NEW' option
- iv) A context menu opens
- v) Select 'Data Connectors' from the context menu

		NEW
	Data Connectors	
	Data Sets	
ő	Data Stores	
3	Data Store Meta [	Data

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

Data	Center								NEW
	Data Connectors	~	<b>S</b>						
	Data Sets	MySQL	Microsoft	ORACLE <sup>®</sup>	<b>E</b> HIVE	SAP HANA			
ß	Data Store	MySQL		Oracle	Hive	SAP Hana	MS Sql Olap	Data Store	cassandra
ő	Data-Store Meta Data	MysQL	INDOQL	Uracle	nive		ma ayi Olap		Cassanura
		Open Data Protocol	<b>Spark</b> sal	AMAZON REDSHIFT	DATA	$\sim$	Ÿ	Linked <mark>in</mark>	
		OData	Spark SQL	AWS Redshift	File	Google Analytics	JIRA	Linkedin	Google Sheet
		f			<u>a</u>		ZOHO Books	infut QuickBooks,	twitter

- 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



MySQL Data Connector	
Data Connector Name *	
Description	
User Name *	
Password *	
IP/Host *	
Port	
Database Name	
	CANCEL TEST SAVE

- 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.

Data	Center							NE
	Data Connectors	Data Connector Type						
5	Data Sets	MysqL						
6	Data Store	Search Data Connectors				Sho	wing 20	) out of 2
3	Data-Store Meta Data	Sample MySQL Data Connector		8	C	<	/	Î
		newcheck		8	C	<	/	Î
		pred	5	ø	С	<	-	Î
		newETL	5	6	C	<	1	Î

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



MySQL Data Co	nnector		
Data Connector N	ame *		
Description			

- 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

Password *			
IP/Host *			
Port			
Database Name			

#### 2. MSSQL Data Connector

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

MSS	SQL Data Connector	
	Data Connector Name *	
	Description	

- 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



User Name *	
Password *	
IP/Host *	
Port *	
Database Name *	
	CANCEL TEST SAVE

#### 3. Oracle Data Connector

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

Ora	cle Data Connector	
	Data Connector Name *	
	Description	

- 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)

Password *		
IP/Host *		
Port *		
SID/ServiceName *		

## 4. Hive Data Connector

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



Hive	Data Connector	
	ata Connector Name *	
	escription	

- 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

User Name *	
Password *	
IP/Host *	
Port *	
	CANCEL TEST SAVE

#### 5. SAP Hana Data Connector

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

SAP	Hana Data Connector	
	Data Connector Name *	
	Description	

- 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



Password *		
IP/Host *		
Port *		
	CANCEL TEST SAVE	

#### 6. MSSQL Olap Data Connector

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

MsC	Dlap Data Connector	
	Data Connector Name *	
	Description	

- 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

User Name *	
Password *	
Address Type IP O Host	
lb <b>*</b>	
Port	
Database Name *	
	CANCEL TEST SAVE

- 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



Elastic SQL Data Connector	
Data Connector Name * 	
Data Store Service *	
	CANCEL SAVE

#### 8. Cassandra Native Data Connector

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

Cassandr	Native Data Connector
Data Co	nector Name *
Descript	nc

- 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)

Password *				
IP/Host *				
Multiple comma separated host	s can be given			
Port *				
Default Keyspace Name				
Consisten				
one 🔻				

#### 9. O Data Connector

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



OD	Data Data Connector	
	Data Connector Name *	
	Description	

- 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

	OData V1-V2 🔻			
Password Base Lirl *	User Name			
Race Lirl *	Password			
5550 011	Base Url *			

#### 10. Spark SQL Data Connector

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

Spa	rk SQL Data Connector	
	Data Connector Name *	
	Description	

- 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

Password *			
IP/Host *			
Port *			



## 11. AWS Redshift

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

AWS	S Redshift Data Connector
	Data Connector Name *
	Description

- 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

User Name *			
Password *			
IP/Host *			
Port *			
Database Name *			
	CANCEL	TEST	SAVE

#### 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.

Data	Center							NEV	N
()())	Data Connectors	Data Connector Type							
	Data Sets	All							
Ś	Data Store	Search Data Connectors				Sho	wing 29	out of 29	)
ő	Data-Store Meta Data	File Data Connector		6	C	<	/	Î	^
		dbstoryX-axis Test	0 <sub>m</sub>	ß	G	<	1	Î	

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

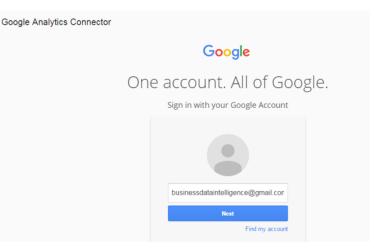
Data	Center								NEW
	Data Connectors								
	Data Sets	MySQL	Microsoft	ORACLE	<b>KIVE</b>	SAP HANA			
6	Data Store	MySQL	SQL Server	Oracle	Hive	SAP Hana	MS Sql Olap	Data Store	Cassandra
	Data-Store Meta Data	WySQL	MISSQL	Uracle	nive	SAP Hana	ws sqi olap	Data store	Cassandra
		OData Open Data Protocol	<b>Spark</b> sal	AMAZON REDSHIFT	DATA	$\sim$	Ÿ	Linked <mark>in</mark>	
		OData	Spark SQL	AWS Redshift	File	Google Analytics	JIRA	Linkedin	Google Sheet

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

ogle Analytics Connector	
Select Account	
Data Connector Name *	
Description	



- 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

Google		bi	usinessdataintelligence@gmail.com ╺
	- BIZVIZ wou	uld like to:	
	8 Have offline access	Ū	
		Deny	

- 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'



$\leftrightarrow$ $\rightarrow$ C	O Not secure   bi.bdbizviz.	com/modules/data-center/data-center.html#/connector/googleanalytics/createacode=4%2FAACU2vgn19i2nPHCTx8teKpGR0tAFy7RQwSgNaYzrrt5SOIg0iXL 🍳 😒	<b>©</b> :
	Decision Platform	III 🖻 🛛	0
Data	Center	N	EW
	Data Connectors	Google Analytics Connector	^
	Data Sets		Т
ő	Data Store	You are Logged in!!	
ő	Data-Store Meta Data	Data Connector Name * Sample Google Analytics Data Connector	
		Description	
		CANCEL SAVE	Ţ

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

Data	Center							NEV	N
	Data Connectors	Data Connector Type							
	Data Sets	All							
ő	Data Store	Search Data Connectors				Sho	owing 30	) out of 30	)
8	Data-Store Meta Data	Sample Google Analytics Data Connector	)))	ß	C	<	1	Ĩ	^
		File Data Connector	9	6	G	<		Î	I.

#### 14. JIRA

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

JIR	A Data Connector
	Data Connector Name *
	Description

- 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



Password *			
Server URL (Example: https://your-domain	atlaccian not) *		
Server one (Example, https://your-domain	atlassiannetj		

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

CANCEL TEST	SA
	CANCEL

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

Data	Center						N	EW
	Data Connectors	Data Connector Type						
5	Data Sets	All						
6	Data Store	Search Data Connectors			Showi	ng 665	out of 6	65
	Data-Store Meta Data	Sample JIRA Data Connector	6	C	<	/	Î	<b>^</b>

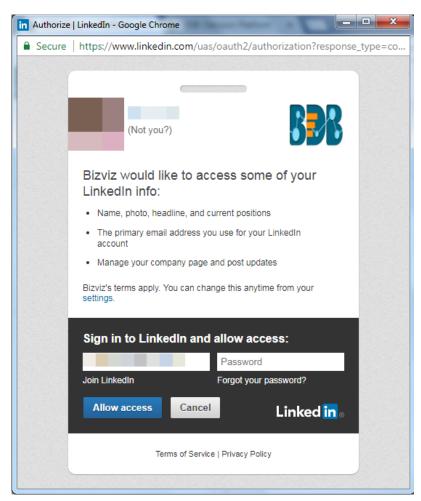
# 15. LinkedIn

- 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



nkedin Connector			
Login to Linkedin account			
SELECT ACCOUNT			
Data Connector Name *			
Description			
		CANCEL	SAVE

- 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

kedin Connector		
Login to Linkedin account		
CHANGE ACCOUNT		
Data Connector Name *		
Sample LinkedIn Data Connector		
Description		
		CANCEL SAVE

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

Data	a Center						NE	w
	Data Connectors	Data Connector Type						
	Data Sets	All						
8	Data Store	Search Data Connectors			Sho	wing 29	out of 2	29
3	Data-Store Meta Data	Sample LinkedIn Data Connector	6	C	<	1	Ĩ	^
		dbstoryX-axis Test	6	С	<	1	Î	н

#### 16. Google Sheet

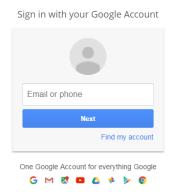
- i) Select 'Google Sheet' connector from the Data Connector page
- ii) Users will be redirected to the Google Sheet Connector page
- iii) Click 'SELECT ACCOUNT' to login to a Google Sheet



oogle Sheet Connector	
Login to Google Sheet account	
SELECT ACCOUNT	
Data Connector Name *	
Description	
Description	
	CANCEL SAVE

iv) Enter the credentials of your Google Account

# Google



- v) Users will be redirected to share their information with BizViz
- vi) Click 'Allow' to share the same

Google				@gmail.com 👻
		- BIZVIZ would like to:		
	4	View and manage the files in your Google Drive	(j)	
	8	View and manage your spreadsheets in Google Drive	(j)	
	4	View metadata for files in your Google Drive	(j)	
	accorda	ing Allow, you allow this gop and Google to use your information in nee with their respective privacy policies. You can change this and ot Permissions at any time.	her	
		Deny	Allow	

- 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



Goo	gle Sheet Connector
	You are Logged in!
	CHANGE ACCOUNT
	Data Connector Name *
	Sample Google Sheet Connector
	Description
	CANCEL SAVE

#### 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

Data	Center						N	EW
	Data Connectors	Data Connector Type						
5	Data Sets	All						
6	Data Store	Search Data Connectors			Showi	ing 666	out of 6	66
	Data-Store Meta Data	Sample Google Sheet Connector	6	C	<	/	Î	-

#### 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

ebook Connector		
Select Account		
Data Connector Name *		
Description		
	CANCEL	



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

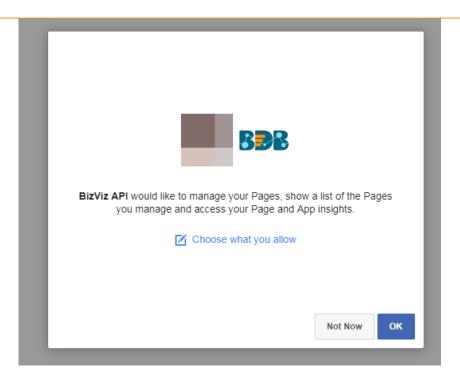
facebook	Sign Up	
	Log in to Facebook	
	Email address or phone number	
	Password	
	Log In	
	Forgotten account? · Sign up for Facebook Not now	

- 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.

BizViz API will receive: your public profile and email address. Edit This
Continue as
Cancel
This doesn't let the app post to Facebook
App Terms · Privacy Policy

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

cebook Connector	
You are Logged in!!	
Data Connector Name *	
Sample Facebook Data Connector	 
Description	
	CANCEL SAVE

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

Data	Center						NEW	
())))	Data Connectors	Data Connector Type						
	Data Sets	Facebook						
6	Data Store	Search Data Connectors			Sho	owing 3	out of 3	
	Data-Store Meta Data	Sample Facebook Data Connector	6	C	<	/	Î	
		FaceBook	6	С	<	-	Î	

#### 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

ailChimp Connector		
Select Account		•
Data Connector Name *		
Description		
	CANCEL SAV	

- 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

	5 <b>9</b> 8	$\stackrel{\longrightarrow}{\longleftarrow}$	
		BizViz <b>to you</b> Bzviz MailChi	
Username			
Password			
Log In			



- 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

ilChimp Connecto	r			
Account :				
Data Connector Name * Sample MailChimp Data Co	appertor			
Description	intector			
			CANCEL	SAVE
			CANCEL	SAVE

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

Data	Center						NEW
	Data Connectors	Data Connector Type					
	Data Sets	MailChimp -					
6	Data Store	Search Data Connectors			Sho	owing 1	out of 1
۲	Data-Store Meta Data	Sample MailChimp Data Connector	ß	C	<	/	Ĩ

#### 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

Login to Flipkart account			
SELECT ACCOUNT			
Data Connector Name *			
Description			



- Users will be redirected to enter the credentials for a Flipkart Permission Registration account iv) for login
- By entering the correct credentials, the users will be redirected to the Flipkart Connector page V)

	Flipkart Permission Registration	
vi) vii) viii) ix)	Provide a title for the data Connector Click the 'SAVE' option	Please sign in Email address Password Sign in nges into the 'CHANGE ACCOUNT' option or
	Flipkart Connector Account : Email_ID Data Connector Name * Sample Flipkart Data Connector Description	
x)	The newly created Flipkart Connect	CANCEL SAVE
·	Data Center	NEW

Data	Center							NEW
	Data Connectors	Data Connector Type						
5	Data Sets	Flipkart 👻						
6	Data Store	Search Data Connectors				Sh	owing 1	out of 1
<b></b>	Data-Store Meta Data	Sample Flipkart Data Connector	<b>S</b>	6	C	<	/	Î

#### 20. Amazon

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

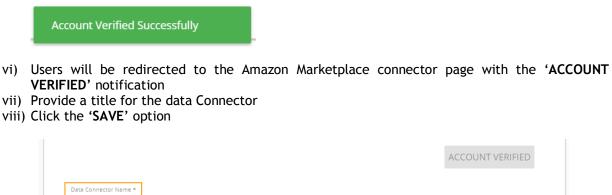


b. MWS Auth Token

с.	Click	<b>'VERIFY</b>	ACCOUNT'	option
----	-------	----------------	----------	--------

azon Marketplace Connector	
IN - https://mws.amazonservices.in	•
Seller Id *	
MWS Auth Token *	
	VERIFY ACCOUNT

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



ription	
	0
	G



Account Verified Successfully	Ν
IN - https://mws.amazonservices.in	•
Seller Id *	
A1L6L48QERPKYO	
MWS Auth Token *	
	ACCOUNT VERIFIED
Data Connector Name *	
Description	
	CANCEL SAVE

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

Data	Center							N	EW
	Data Connectors	Data Connector Type							
	Data Sets	All							
ő	Data Store	Search Data Connectors				Sho	owing 30	) out of	30
ő	Data-Store Meta Data	Sample Amazon Marketplace Data Connector		6	G	<	/	Î	^
		File Data Connector	5	6	G	<	/	Î	

### 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

opbox Connector	
Login to Dropbox account	
SELECT ACCOUNT	
Data Connector Name *	
Description	
	CANCEL



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

\*\*

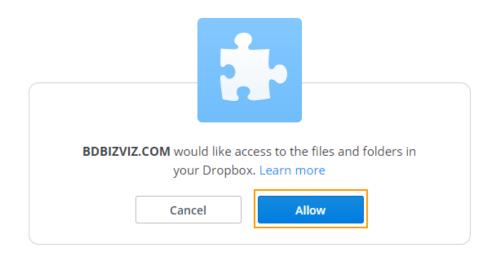


Sign in to Dropbox to link with BDBIZVIZ.COM

G Sign in with God	ogle
or	
Email	
Password	
Forgot your password?	Sign in

New to Dropbox? Create an account

- 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



Dro	pbox Connector	
	Account :	
	Data Connector Name *	
	Sample Dropbox Data Connector	
	Description	
		CANCEL SAVE

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

Data	Center							NE	w
	Data Connectors	Data Connector Type							
	Data Sets	All							
ß	Data Store	Search Data Connectors				Showi	ng 671 d	out of 67	'1
3	Data-Store Meta Data	Sample Oracle Data Connector		6	C	<	1		•
•		Sample MSSQL Data Connector	0))	6	С	<	1	Î	
		Sample Dropbox Data Connector	9	6	С	<	1	Î	

#### 22. ZOHO Books

- i) Select 'ZOHO Books' connector from the Data Connector pageii) 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

Data Connector Name *			
Description			
User Name *			
Password *			
		CANCEL TEST	



Click 'SAVE' after the data connection gets verified d.

Data Connector Name *		
ZohoBooks Data Connector		
Description		
User Name *		
Password *		

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

Data	Center							NEW
	Data Connectors	Data Connector Type						
5	Data Sets	ZOHO Books						
<b>6</b>	Data Store	Search Data Connectors				She	owing 5	out of 5
<b></b>	Data-Store Meta Data	Sample ZOHO Books Data Connector	9	ß	C	<	1	i i
		ZB QA 618	5	6	C	<	/	Î

## 23. QuickBooks

- i) Select 'QuickBooks' connector from the Data Connector page
- ii) Users will be redirected to the QuickBooks Connector pageiii) Click 'SELECT ACCOUNT' for login to a QuickBooks account

uickBooks Connector		
Login to QuickBooks account		
SELECT ACCOUNT		
Data Connector Name *		
Description		
		CANCEL SAVE



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

quickbooks.	
Don't have an account? Sign up now.	
Sign in	
G Sign in with Google	
or	
Email or user ID	
Password	
Remember me	
a Sign In	
I forgot my user ID or password	
Intuit simplify the business of life	

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

o guidante de la companya
Don't have an account? Sign up now.
Let's make sure it's you
We'll send you a code to verify your info. This helps keep your account safe. Learn more
Choose one option:
In the second
Get a code emailed to: v*****@bdbizviz.com
Confirm my account a different way (takes longer)
Cancel
nint 🕑 turbotax 🔞 quickbooks 🔞 proconnect 🕕 mint



- 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

QuickBooks Connector		
Account :		
Data Connector Name *		
QuickBooks Data Connector		
Description		
		CANCEL SAVE

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

Data	Center							NEW
	Data Connectors	Data Connector Type						
5	Data Sets	Quickbooks						
6	Data Store	Search Data Connectors				Sho	owing 1	out of 1
	Data-Store Meta Data	QuickBooks Data Connector	3	6	G	<	1	Î

#### 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



witter Connector	
BDBizviz	•
Note:If you are already loggedIn using one account and want to try using another accoun Data Connector Name *	at then first logout from https://twitter.com
Sample Twitter Data Connector	
Description	
	CANCEL SAVE

- 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)

Authorize LOCAL HOST VILLAA	
Authorize LOCALHOST YUJAA	BRR
DATA CONNECTOR to use your account?	
	LOCALHOST YUJAA DATA CONNECTOR
Username or email	bdbizviz.com/
Password	http://localhost:8080/com.bdbizviz.ui/modu center/oauth-redirect.html? connectorType=twitterapiconnector
Remember me · Forgot password?	Privacy Policy
Authorize app Cancel	Terms and Conditions
This application will be able to:	
Read Tweets from your timeline.	
See who you follow, and follow new people.	
Update your profile.	
<ul><li>Post Tweets for you.</li><li>See your email address.</li></ul>	
• See your email address.	

vii) Users will be redirected to the Twitter Login page

itter		
ember me · Forgot pass	word?	
p	p now »	ember me · Forgot password? p now » ia text message? Activate your account »

#### viii) Users will be redirected to the Twitter Connector page

- a. Enter a Data Connector Name
- b. Click the 'SAVE' option

tt	er Connector
A	Account :
	Note: If you are already loggedin using one account and want to try using another account then first logout from https://twitter.com
D	Jaza Connector Name *
9	Sample Twitter Connector
D	Description
	CANCEL SAVE

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

Data	Center							NE	EW
	Data Connectors	Data Connector Type							
5	Data Sets	Twitter							
6	Data Store	Search Data Connectors				Sho	owing 31	l out of 3	31
-	Data-Store Meta Data	twitter	3	8	G	5	1		^
•		Sample Twitter Connector	5	6	c	<	1	Î	

## 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

FTF	<sup>2</sup> Server Data Connector
	Data Connector Name *
	Description

- 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

Host *	
Port *	
User Name *	
Password *	
Start Path *	
Select Server Type *	
	CANCEL TEST SAV

- 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

Data	Center							NEW
	Data Connectors	Data Connector Type						
	Data Sets	FTPServer 👻						
6	Data Store	Search Data Connectors				Sho	wing 13	out of 13
Š	Data-Store Meta Data	FTP Server Data Connector	l	6	G	<		Ĩ
		repoftp	I	6	C	<	1	•

# 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

Data	Center						NEW	
	Data Connectors	Data Connector Type						
5	Data Sets	All						
<b>6</b>	Data Store	Search Data Connectors			Sho	wing 30	out of 30	
8	Data-Store Meta Data	Sample Amazon Marketplace Data Connector	6	G	<	1	• 1	
		File Data Connector	6	C	<	1	•	

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

# 7.1.3. Reconnecting a Data Connector

- Navigate to the Data Connector list i)
- Select a Data Connector and click the 'Reconnect' icon  ${f C}$  provided in the connector list ii)
- iii) A message will pop-up to assure the action

Data	Center	3 Successfully reconnected!!						NEW
	Data Connectors	Data Connector Type						
9	Data Sets	All						
6	Data Store	Search Data Connectors				Sho	wing 30	out of 30
۲	Data-Store Meta Data	Sample MySQL Data Connector	0jjj	2	C	<	1	
		newcheck		6	G	<	/	

The selected data connector will be reconnected iv)

# 7.1.4.

- Sharing a Data Connector i) Navigate to the Data Connector list
  - Select a Data Connector and click the 'Share' icon < ii)

Data	Center							NE	N
	Data Connectors	Data Connector Type							
5	Data Sets	All							
6	Data Store	Search Data Connectors				Sho	wing 30	out of 30	D
٢	Data-Store Meta Data	Sample MySQL Data Connector	9	8	c <sup>2</sup>	$\triangleleft$	/	Ē	
		newcheck	<b>S</b>	6	C	<	1	Î	

- 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)

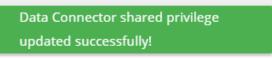
3 Share Data Connecto	pr	×
USER GROUP	EXCLUDE USER	^
etl admin BI Prod User Dev User 7 Platform User	> > < <	

- vii) The selected user(s)/user group(s) will be moved to the box given on the right
- viii) Click 'SAVE'

	Share Da	ita Connect	or					×
C	USER	USER GROUP		EXCL	UDE USE	R		<b>^</b>
5	etl admin BI Prod User Dev User		*	7 > ★ <	Platforn	n User		A
Ŀ			-					÷
					(	8 CANCEL	SAVI	



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



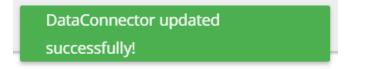
By completing the steps mentioned above, a data connector can be successfully shared with the selected user/user group. The selected users can be excluded from their privileges as well.

## 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

SQL Data Connector		
Data Connector Name *		
Sample MySQL Data Connector		
Description		
User Name *		
predictive		
Change Password		
IP/Host *		
192.168.1.10 Port		
3306		
Database Name		
predective_analysis_v2		
	CANCEL TEST SAVI	E

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

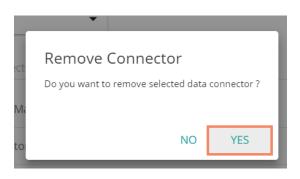


viii) The updated details will be saved for the selected data connector



# 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

Data	Center				NEW
())))	Data Connectors	Data Connector Type			Data Connectors
	Data Sets	All	3	9	Data Sets
ß	Data Store	Search Data Connectors		ő	Data Stores
	Data-Store Meta Data	Sample Amazon Marketplace Data Connector	ß	ő	Data Store Meta Data
		File Data Connector	ß	G	< / 1

- 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

4 Data	Center		NEW
	Data Connectors 5	Data Source	
	Data Sets	MySQL -	
6	Data Store	Search Data Connectors	
ő	Data-Store Meta Data	B Sample MySQL Data Connector	CREATE DATA SET
		newcheck	CREATE DATA SET

- 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

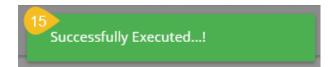
Data Set		
9 Service Name *		
10 Description		
11 Data Connector Name		
Sample MySQL Data Connector		
predective_analysis_v2		

- 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

Query	
*Use Ctrl+Space for assistance	0
	VALIDATE SAVE CANCEL



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



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

Preview Result 16						
SepalLength	SepalWidth	PetalLength	PetalWidth	Species	Â	
5.1	3.5	1.4	0.2	setosa		
4.9	3	1.4	0.2	setosa		
4.7	3.2	1.3	0.2	setosa		

- 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

Data	Center	NEW	
	Data Connectors	Data Connector Type Data Connector Publish Status	
	Data Sets	MySQL   Sample MySQL D;  All	
ő	Data Store	Search Data Sets Showing 1 out of 1	
<i>S</i>	Data-Store Meta Data	Sample Data Set 🥖 🛃 🛃 🛃 🛃 🛃	

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

Option	Name	Task
<u>+</u>	Download	To download the Data Set
0	View Link	To display the Data Set link
1	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
Î	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



1	select date(tran_date) as dt, item_code , item_name,
2	itemamt as sm
3	from ccddb.bill
4	Where item_code=@itemcode@
5	limit 100



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

	Enter Filter Values X	
	itemcode	
em	2003	
0		
	CANCEL CONTINUE	

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

Preview Result				×
dt	item_code	ltem_name	sm	Ê
2009-04-01	A005	TROPICAL ICE BERG	58.5	
2009-04-01	A005	TROPICAL ICE BERG	58.5	
2009-04-01	A005	TROPICAL ICE BERG	175.5	
2009-04-01	A005	TROPICAL ICE BERG	58.5	-

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

Data	Center								NEW
	Data Connectors	Data Connector Type	Data Connector	Publish Status					
9	Data Sets	MySQL -	Sample MySQL D: 🔹	All	•				
ő	Data Store	Search Data Sets					Sh	owing 1	out of 1
Ś	Data-Store Meta Data	Sample Data Set 🛛 🖪		<u>+</u>	0	1	<	/	Î



Note:

a. Use 'Ctrl+Space' to get assistance while writing a query.

b. Click the 'Help Center' icon ② 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.

Н	elp Center	
1.	In query table name should be in brackets	
	e.g:- [table]	
2.	In final select statement can't use column name as Table.Column we should give alias name to these type of columns.	
	eg:- a.year -> a.year as year	
3.	In final select statement cannot use any column alias name in single or double quotes	
	e.g:- In Final select Statement alias name of column should not be like this:- 'Alias Name' It should be without single quotes like this: - Alias Name	
4.	In final select statement can't use space in column alias name it should be single word.Or two words should be concatenate by underscore(_	)

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.

Data	Center	NEW
	Data Connectors	Data Connector Type Data Connector Publish Status
	Data Sets	MySQL   Sample MySQL Di  All
6	Data Store	Search Data Sets Showing 1 out of 1
	Data-Store Meta Data	Sample Data Set 1

# 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



	Data Connectors
3	Data Sets
6	Data Stores
8	Data Store Meta Data

- 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

Data	Center		NEW
	Data Connectors	Data Source	
5	Data Sets	Google Analytics -	
6	Data Store	Search Data Connectors	
	Data-Store Meta Data	5 Sample Google Analytics Data Connector	DATA SET

- 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

Sample Google Ana	alytics Data Connector		
	,	 	
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)

Dimensions
User Type, Count of Sessions, Session Duration, Full Referrer, Campaign
Selected Dimensions ga:sessionCount ga:userType ga:sessionDurationBucket ga:fullReferrer ga:campaign

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

Metrics *
New Users , Bounce Rate , Avg. Session Duration , Organic Searches
Selected Metrics ga:newUsers ga:bounceRate ga:avgSessionDuration ga:organicSearches

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

ielect Web Property *	
ielect View *	
Dimensions	

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



ga:browser==Firefox;ga:operatingSystem==Windows

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

14 Date Type *							
Fixed type							•
0	From date *		To date *				
	4/1/2018	•	6/14/2018	•			



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

Date Type * 14	
Dynamic type	•
Select Date Range *	
7 Days ago	-

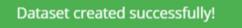
#### h. Click the 'PREVIEW DATA' option



ix) After getting the data preview in the tabular format, click the 'SAVE' option

Preview of 10 rows	are shown b	elow			CA	NCEL PREVI	16 EW DATA SAVE	
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

Data	Center									N	EW
	Data Connectors	Data Connector Type	Data Connector		Publish Status						
	Data Sets	All	All	•	All	•					
ő	Data Store	Search Data Sets						Showi	ing 105 (	out of 1	05
	Data-Store Meta Data	Sample Google Analytics Da	ata Set		<u>+</u>	0	1	<	1	Î	
		123 🔺			<u>+</u>	0	1	<	1	Î	



# 7.2.3. Creating a New FTP Data Set

i) Select 'Data Sets' from the 'NEW' context menu

	NEW
	Data Connectors
3	Data Sets
6	Data Stores
	Data Store Meta Data

- 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

Data	Center		NEW
	Data Connectors 2	Data Source	
5	Data Sets	FTPServer •	
6	Data Store	Search Data Connectors	
ő	Data-Store Meta Data	FTP Server Data Connector	Τ
		repoftp CREATE DATA SE	т

- 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

Dataset Name *	
Description	
Data Connector Name	
FTP Server Data Connector	

- 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



Selected File : F	L_insurance_2MB.xlsx				
_ /					*
<ul> <li>Yujaa</li> <li>HRIS Da</li> <li>HRIS Da</li> <li>Merchar</li> <li>Categori</li> </ul>					
DATE TE	ST 1800.xlsx				-
		11 PR	EVIEW DATA	SAVE	

#### Click 'SAVE' option after getting the data preview vi)

						PREVIEW				
urance_sample										
Shows only 10 reco	ord for fast pro	cess								
point_granularity	hu_site_limit	line	county	point_latitude	statecode	fl_site_limit	fr_site_limit	poin		
1.0	498960.0	Residential	CLAY COUNTY	30.102261	FL	498960.0	498960.0	-81.3		
3.0	1322376.3	Residential	CLAY COUNTY	30.063936	FL	1322376.3	1322376.3	-81.3		
1.0	190724.4	Residential	CLAY COUNTY	30.089579	FL	190724.4	190724.4	-81.3		
3.0	79520.76	Residential	CLAY COUNTY	30.063236	FL	0.0	0.0	-81.		

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

viii)

Data	Center	13	Dataset created successfully	!						N	EW
	Data Connectors	Data Connector Type	Data Connector	Publish	n Status						
	Data Sets	All	All	All		•					
ő	Data Store	Search Data Sets						Showing	g 1449 o	ut of 14	49
		Sample FTP Data Set			+	0	4	<		-	
ő	Data-Store Meta Data	Sample FIF Data Set			<u> </u>	· ·		•		-	



## 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

	Decision Platform	
⊠ Email		
Password		
CA PPM	-	
	Login	

ii) Select Data Center from the Apps menu

ry	Home	Story	Admin
=	User	Data Center	Designer
	Survey	Sentiments	Play
	Data Preparation	ft in g Social Media	Predictive
	GeoSpatial		

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

	Data Compositor Trac						
Data Connectors	Data Connector Type						
Data Sets	All						
📸 Data Store	Search Data Connectors				S	Showing	8 out of
Data-Store Meta Data	CA	9	ø	G	<	1	Î
	oracle 6 april	9	6	G	<	1	Î

Service Name *	
Service URL	
	CANCEL SAVE

- 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

Mandatory Filter
quer:task_status
quer:task_status_from
quer:task_status_to
quer:task_status_in
Custom Filter
quer:task_int_id
quer:task_int_id_from

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

Data	Center		Successfully created clarity service	/ Query						NE
	Data Connectors	Data Connector Type	Data Connector	Publish Statu	s					
	Data Sets	All	All	▼ All		•				
ß	Data Store	Search Data Sets						Sho	owing 36	out of 3
<b>a</b>	Data Store Data-Store Meta Data	Search Data Sets	4		<u>+</u>	Ο	1	Sho	owing 36	out of 3

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

Data	Center			2 NEW
	Data Connectors	Data Connector Type		Data Connectors
	Data Sets	All		Data Sets
6	Data Store	Search Data Connectors	3	Data Stores
ð	Data-Store Meta Data	Sample Google Analytics Data Connector	8	Data Store Meta Data
		Sample Amazon Marketplace Data Connector	ß C	< / 1

- 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



Data	Center		NEW
	Data Connectors 4	Data Source	
	Data Sets	MySQL  -	
6	Data Store	Search Data Connectors	-
Š	5 Data-Store Meta Data	hiring_data 6 CREATE DATA STORI	E
		hiring_data CREATE DATA STORI	E

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

	Data Connectors						
	Data Sets	0	2	3	4	5	6
D	Data Store	Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
		Data Store Nam Data Connector Nam					
		hiring_data Database Name					
		BDB_Hiring_Dat					
		Query					

## 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

1	2	3	4	5	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Data Store Name *					
Sample Data Sto	ore				
2 Data Connector Name					
hiring_data					
3 Database Name					
BDB_Hiring_Data	a				

- 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



4 Quer	ry	
1	SELECT hiring_data.id, hiring_data.candidate_id , hiring_data.name as name, hiring	_data.gender as Gender, hiring_data
	4	,
*Use	Ctrl+Space for assistance	0

## 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

V ting Data Dat	2 ta Type Definition	3 Hierarchy Definition	Batch Query	5 Data Restrictions	Schedule Data Refresh
Dimensions		Measures		Time	
name	123 🕓 Î	id	Abc 🕓	expected_joining_date	Abc 123
Gender	123 🕓	candidate_id	Abc 🕓	isjoined	Abc 123
source	123 🕓	experience	Abc 🕓		
Designation	123 🕓	previous_ctc	Abc 🕓		
Team	123 🕓	offered_ctc	Abc 🕓		
previous_organisation	123 🕓 🗸	expperyear_ctc	Abc 🕓 🗸		

#### 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

	$\sim$	3	4	5	6
etting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Fields		Hierarchy Definition			<del>(+)</del>
Abs name		Drill Def- 1 Team — Designation	- name -		×
Abo Gende	r	Drill Def- 2	home		~
Abo SOURCE		expected_joining_date:	expected_joining_date:	expected_joining_date:	- ×
Abi Design	ation	4			•
Abo Team					
	•				
					_
PREVIOUS					CANCEL N

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:

Drill Def- 2				
OPENING:	OPENING: month	_	OPENING: date	_

#### 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



			4	5	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Select Dimension Gender					CLEAR
3 Distinct Query					2 GENERATE
	<u> </u>		_data INNER JOIN monthly candidate_data.candidate		candidate_id = monthly_sal

- 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

5 Ba	atch Query	4 GENERATE
5	,hiring_data.source	*
6	,designation AS Designation	
7	,team AS Team	
8	,previous_organisation	
9	,hiring_data.skills AS Primary_Skills	
10	.joining_status	
11	,CASE WHEN joining_status = 'Declined' OR joining_status = 'Absconded' THEN 0 ELSE 1 END AS isjoined	
12	,current_status	
13	4	*
PR	REVIOUS	

### 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

Getting Data	Oata Type	Hierarchy	Batch Query	5 Data	6 Schedule Data
Ŭ	Definition	Definition		Restrictions	Refresh
Dimension	User	Property		<del>(+)</del>	
name	Count	ry		_	
PREVIOUS				C	ANCEL NEXT



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

					6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Schedule C	Configuration	]			
DAILY	WEEKLY	MONTHLY	YEARLY		
O Day 1	of every	1	month(s)		
O The First	Monday	▼ of every 1	month(s)		
Start time 12	▼ : 00	•			

- 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'

Refresh Now		
Enable Email Notification		
Email Address *		
PREVIOUS	CANCEL	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

Data	Center		NEW
	Data Connectors	Data Connector Type Data Connector	
	Data Sets	MySQL	
ø	Data Store	Search Data Stores Show	ving 1 out of 1
8	Data-Store Meta Data	Sample Data Store	/

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



0	2	3	4	5
Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions	Options
Data Store Name *		Data Connector Name		
Sample Flat File Data	Store	FileConnector		
Choose File				
Sample Flat File.xlsx				
3 Sheet2	*			
4 Sheet Layout *				
Column Heade	ers 💌			
				CANCEL NE

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

Dimensions			Measures			Time		
JIIICHSIOHS			Wiedsures		<b>^</b>	Time		
DRDER_ID	123	U	ISPAYMENTDONE	Abc	C	CREATED_DAT	E Abc 123	
OCATION_ID	123	J	SPACE_KEY	Abc	C			
OCATION_DROP_OFF_ID	123	()	TOTAL_AMOUNT	Abc	0			
			TOTAL_COMMISSION	Abc	C			
			ISDELETED	Abc	C			
			ACCOUNT_HOLDER_ID	Abc	<b>.</b>			

#### 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



Getting E	Data Data Type Def		3 y Definition	Image: Addition of the second	Option	
Field	S	Hierarchy Definit	tion		(+	
Abc	ORDER_ID	Drill Def- 1	LOCATION_ID -	LOCATION_DROP_OFF_ID -	×	
Abc	LOCATION_ID	Drill Def- 2				
Abc	LOCATION_DROP_OFF_ID	CREATED_DATE: .	CREATED_DATE: month	CREATED_DATE:	- x	
C	CREATED_DATE					
PREVIOU	JS				CANCEL	NEXT

#### 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

Getting Data	Oata Type Definition	Nierarchy Definition	4 Data Restrictions	5 Optio	ns
Dimension ORDER_ID	User Prope	erty	+ -		
PREVIOUS				CANCEL	NEXT

#### Step 5 - Options



i) Click 'FINISH' option to complete the Data Store creation process

				5
Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions	Options
PREVIOUS				CANCEL FINIS

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

Data	Center									NE	w
	Data Connectors	Data Connector Type	Data Connector								
	Data Sets	All	All	•							
ð	Data Store	Search Data Stores						Showi	ng 843 (	out of 84	13
ð	Data-Store Meta Data	Sample Flat File Data_Stor	e		0	G	<	Ð	-	Î	<u> </u>
		GA STORE 634			0	G	<	Ð	-	Î	

### 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

Data Connectors	Data Source	
Data Sets	Google Sheet 🔹	
Data Store	Search Data Connectors Hiri	
Data-Store Meta Data	6Feb Hiring Data	CREATE DATA STORE
	Hiring Google Account	CREATE DATA STORE
	Hiring Data 11 Jan WS	CREATE DATA STORE
	Hiring Data in Google Sheet for Demo	CREATE DATA STORE
	3 Hiring Data in Google Sheet	4 CREATE DATA STORE

- 2. Data connector name will be pre-displayed Select a data set using the 'Data Set List' drop-down menu
   Click 'NEXT' option

Data Type	Hierarchy	Data Restrictions	
Definition	Definition	Data Restrictions	Schedule Data Refresh
Data Store			
Sheet			
	Data Store	Data Store	Data Store

- vi) Users will be redirected to the 'Data Type Definition' tab
  - Interchange the available Dimensions, Measures, and Time fields to define data
     Click 'NEXT' to proceed



	2	3		4	5
Getting Data	Data Type Definiti	on Hierarchy	Definition	Data Restrictions	Schedule Data Refresh
Dimensions		Measures		Time	
currentstatus	123 🕓	offeredctc	Abc 🕓	expectedjoiningdat	te Abc 123
comments	123 🕓	expyrsperctc	Abc 🕓		
gender	123 🕓	experience	Abc 🕓		
referralof	123 🕓	usdbilling	Abc 🕓		
source	123 🕓	previousctc	Abc 🕓		
team	123 🕓 🗸	candidate_id	Abc 🕓		
PREVIOUS					CANCEL NEXT

- 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

etting I	Data Data Type De	finition Hierarchy Definition D	ata Restrictions	Schedule Data Refres
Field	s	Hierarchy Definition		+
Abc	skills	Drill Def- 1 team — designation — name -	-	×
Abc	name	Drill Def- 2		
Abc:	previousorganisation	expectedjoiningdate: - expectedjoinin year month	expecte date	djoiningdate: —X
Abc	designation			
J	expectedjoiningdate 👻			

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



Getting Data	Data Type Definition	Hierarchy Definition	4 Data Restrictions	Schedule Data Refresh
Dimension	User Prope	rty	<del>()</del> _	
PREVIOUS			C	ANCEL NEXT

- 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

					6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Schedule (	Configuration	]			
DAILY	WEEKLY	MONTHLY	YEARLY		
O Day 1	of every	1	month(s)		
O The First	t 🔻 Monday	▼ of every 1	month(s)		
Start time 12	▼ : 00	•			

- 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'

Refresh Now		
Enable Email Notification		
Email Address *		
PREVIOUS	CANCEL	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

Data	Center									N	EW
	Data Connectors	Data Connector Type	Data Connector								
	Data Sets	All	All	•							
ð	Data Store	Search Data Stores						Show	ng 844 (	out of 8	44
3	Data-Store Meta Data	Sample Google Sheet Data	a Store		0	C	<	•	1	Î	^
		Sample Flat File Data_Stor	e		0	C	<	¢	1	Î	

#### 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.'

Data-store Meta Data	Data	Center								NEW
Data Store   Data-Store Meta Data     Data-Store Meta Data     TestHiring     C <th></th> <th>Data Connectors</th> <th>Data Connector Type</th> <th>Data Connector</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>		Data Connectors	Data Connector Type	Data Connector						
Data Store     Data-Store Meta Data       TestHiring     C < O /		Data Sets	MySQL -	hiringData 👻						
	ð	Data Store	Search Data Stores					Sh	owing 2	out of 2
	ð	Data-Store Meta Data	TestHiring		0	C	<	•	/	Ĩ
WORKHOW_THARS			workflow_mar8		0	C	<	Ð	1	Î

## 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

Data	Center								NEW
	Data Connectors	Data Connector Type	Data Connector						
	Data Sets	MySQL -	• hiringData •						
	Data Store	Search Data Stores					Sh	owing 2	out of 2
•	Data Store			-	_	-3			-
	Data-Store Meta Data	TestHiring		0	C	<b>~</b>	•		<b>İ</b>
		workflow_mar8		0	C	<	•	1	Î

- 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'

$\mathbb{Z}/\mathbb{Z}$		A A	
4	NLP Synonyms: TestHiring		×
nn <mark>(5</mark>	Fields	monthly_salary	
	Attribu 👻	Synonyms	
	Search 7	Add New Synonym	
	monthly_salary	March_sal	+
iring	usd_billing	Jan_sal	- 0
low_r	cur_monthly_payment	Feb_sal	- 0
	name		- 1
		•	
		8	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:



	X	$ \land $			
1	NLP Syno	nyms: Sample	Data Store	-	×
onn <mark>2</mark>	Fields	3 Value Fields	Fe	male	
	Value	Gender	•	Synonyms	
	Search		5 Ad	d New Synonym	
n Data : 4 25	Female		6 w	omen	- +
23	Male				
e1					
5					
ing				7	SAVE

## 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



1	2	3	4	
Meta Store Details	Data Type Definition	Hierarchy Definition	Data Rest	rictions
Data Store Name *		ES Index Name(Optional)		
Sample Data Store Meta D	Data	14876698mv1		-
			CANCEL	NEXT

- 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'

Meta Store Details		Data	2 Type Definition	3 Hierarchy Defir	ition	<b>4</b> Data Restrictions
Dimensions Name		+	Measure Name Measures	+	Time Name	+
Gender	× 123 (	J Î	Score	× Abc () *	DOB	× Abc 123
Middle Name	× 123 (	Q	Student Number	X Abc	Assessment Year	× Abc 123
First Name	X 123 (	D	Туре	X Abc 🕓		
Subject	X 123 (	9	LEP	X Abc 🕓		
Ethnicity	X 123 (	3	GPA	X Abc 🕓		
School	X 123 (	J -	Detail	X Abc 🕓 🗸		
PREVIOUS						CANCEL 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
(L)	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



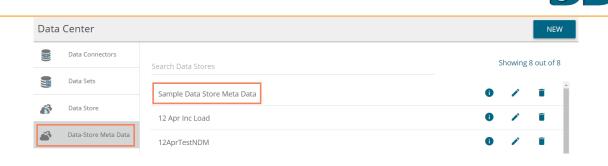
Meta Stor		Data Type Definition	4 Data Restrictions
	1		
Fields	Lannary	Hierarchy Definition     Drill Def- 1	+
Ahr	School	School - Subject - First Name -	×
Abc	Last Name	Drill Def- 2	
Abc	Race	Assessment Year: - Assessment Year: - Assessment Year: - Year: date	
0	DOB		
S	Assessment Year		
	_		
PREVIOUS	5		CANCEL NEXT

- 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
----------------	----------	--------

Veta Store Details	Oata Type Definition	Hierarchy Definition	Jata Restrictions
Dimension	User Property	<del>()</del>	
Ethnicity	▼ Country		
PREVIOUS			CANCEL FINISH

xiv) A pop-up window will appear to confirm that the configuration has been savedxv) Newly created Meta Data will be added to the list displayed on the left pane of the page



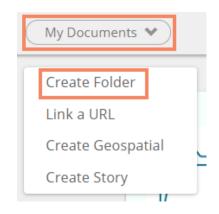
Option	Name	Task
0	Latest Scheduler Status	Display the stored information via a pop-up window
1	Edit	Edit the data store meta data fields
Î	Remove	Remove a data store metadata from the list

# 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



Create Folder	]		×
1 Name	New Folder		a
2 Description	Description	3 Save	// Close

## ix) A success message will pop-up

Create Folde	er	×
Name	Sample Folder	~
Description	Description	•
	Folder created successfully!	

#### x) The folder will be created

My Documents 💙					*
					👪 Order By: Name
BI Story	Business Story 🌣	Copy of Busine 🔅	Published Das 🌣	Sample Folder	Sample Folder1

## • 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)

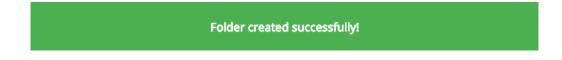
- i) Select a folder
- ii) Click the '**Options**' <sup>‡</sup> icon to display the various options
- iii) Select the 'Create Folder' option

Sample Folder	Sample Folde Create Folder
	Link a URL
	Rename
L	Delete
	Сору
	Add To Favorite
	Create Geospatial
	Properties
	Create Story
	Move To

- 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

	Create Folder	]		×	
isine	Name	Sub-Folder		~	
	Description	Description		11	-
			Save	Close	

viii) A success message will pop-up.





#### ix) The (sub) folder will be created

My Documents	Search X
	↓↑ Order By: None
Sub-Folder	

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

#### 8.1.2. Linking a URL

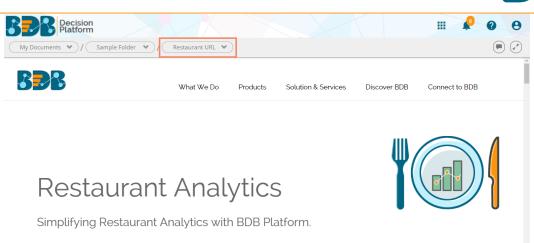
Users can connect a URL to the required platform documents.

- i) Select a folder
- ii) Click the '**Options'** icon <sup>‡</sup> 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

cision itfo		
)/( Link a URL		×
1 URL Name	Restaurant URL	~
2 Type URL	https://www.bdbizviz.com/restaurant.html	~
3 Description	Description	
4 URL Parameter	+	h
	5 Save Clo	se

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.

cisi tfo	on Link a URL	×
)/(		
l	URL Name	Sample URL
	Type URL	https://qa.bdbizviz.com/opendocument.html?
	Description	Description #
I	URL Parameter	+
	City	User Properties 🖍 City 🖌 🗶
		Save



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

Link a URL	×
URL Name	Sample URL 🗸
Type URL	https://qa.bdbizviz.com/opendocument.html?  docid=106070087
Description	Description 4
URL Parameter	+
token	System Properties 🗸 Token 🖍
	Save

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

Rename			× ,	
1 New Name	Folder		✓ ar	mp
3		2 Save	Close	[
				L

v) The folder will be renamed



My Documen	ts 🖤					× 🗊 🏢
						<b>↓</b> ↑ Order By: None
	IPL Story	Business Story	BI Story NLQ	Story 🌣	Folder	¢
	III ▲ ♥ ••• •• •••	<b>1 ▲ ⊄</b> *	·	III ▲ ♥ •• •• ••		)

## 8.1.4. Deleting a Folder

- i) Select a folder.
- ii) Click the '**Options**' <sup>(1)</sup> 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

	Delete	×	rch
\$	Do you want to delete selected Folder ?		old
4	Cancel		[
di j	•• •• •• •• •• ••		L

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**' <sup>©</sup> icon to display various options
- iii) Select the 'Copy' option

Folder	Oreate Folder
	Link a URL
	Rename
	Delete
	Сору
	Add To Favorite
	Create Geospatial
	Properties
	Create Story
	Move To



iv) Select another folder and click the 'Settings'  ${}^{igodoldsymbol{\Phi}}$  icon

#### Or

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

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

Create Folder	
Link a URL	
Paste	
Create Geospatial	
Create Story	

- 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

1	Paste				>	<b>&lt;</b> ro
sine	Name	Copy of Folder	Sa	ive	Close	

- 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**

My Documents 👻			× 🗐 🏢
			1 Order By: None
IPL Story       Image: Story       Im	LQ * J C + p + p + + Copy of Folder *	Folder	New Folder



## 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' <sup>‡</sup> icon for options
- iii) Select the 'Add to Favorite' option

Folder	Create Folder
	Link a URL
	Rename
	Delete
	Сору
	Add To Favorite
	Create Geospatial
	Properties
	Create Story

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

Add To Favori	te	×
he	Folder added to favorites!	
- As 1		

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

Favorites 🖤	
	Folder –

- 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!"



Favorite Documents		×
	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

	Properties		×	
Bu	BI Story			¢
	Properties			2
	Created By:	William		
	Kind:	Folder		
	Where:	My Documents		
I	Created:	Wed Mar 28 2018 18:35:30 GMT+05:30 (India Standard Time)		
I	Modified:	Wed Mar 28 2018 18:35:30 GMT+05:30 (India Standard Time)		
	Version:	3.5.0		
I	Upload Image:	Browse Max 100kb		
I	Description:			

## 8.1.8. Creating a Geospatial

- i) Select a folder
- ii) Click the 'Settings'  $\stackrel{\bullet}{\mathbf{\Sigma}}$  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** 

Create Geospatial		×
2 Select GeoSpatial Analysis	Geospatial HR Attrition	*
3 Display Name	Sample Geospatial Analtytics	~
4 Description	Description	
		li
	5 Save Clo	se
		_

## vii) A success message will pop-up

Create Geospatial		×
Select GeoSpatial Analys	is Geospatial HR Attrition	*
Display Nan	Sample Geospatial Analtytics	~
Descriptio	Description	•
	GeoSpatial Analysis created successfully!	

## viii) The geospatial will be created

Sample URL Sample Geosp	] <b>*</b>



## 8.1.9. Creating a Story

- i) Select a folder
- ii) Click the 'Options' <sup>©</sup> 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

Create Story	]	×	
1 Title	Sample Business Story	~	
2 Description	Description		
		3 Save Close	
_			

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

My Documents  V Sample Folder Sample Business Story: Design New	✔)/ Sample Business S ♥		
incir	Data Store	×	
	Search	۹	
	food mart cube	~ I	
	food mart cube	*	
	wtmodelTs	~	
	ExpSummary	~	
	ExpData	✓	
	ExpData	~	
	wttestmrv	<b>*</b>	

- 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**' <sup>‡</sup> 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

ŀ	Move To	×
в	My Documents	
	<ul> <li>New Folder</li> <li>Copy of Folder</li> </ul>	>
l		Move

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

My Documents 🔹	
	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 <sup>‡</sup> 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

latfo Link a	URL	×
0	1 URL Name	Business Story URL
6	2 Type URL	nttps://qa.babizviz.com/openaocument.ntmi/ docid=157418074&token=0B14FEA70CC5D6E949A1E31F5EE 68D843306
P.10	3 Description	Description
	4 URL Parameter	+
	Parameter Nam	Select properties 🔹 🗶
		5 Save Close

- vii) A success message will appear
- viii) The linked URL document will be added to the folder

My Documents 💙			
IPL Story	Business Story 🔅	BI Story NLQ	Story 🔅
		Business S	tory *

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



( My Documents ♥)/ Business Story URL ♥)			
View Level Merge	Data Search	Q (₫) (₹)	
Comparing Diff. Measures $\Rightarrow$ $\equiv$ By SID $100 - \frac{56}{94} = \frac{66}{94} = \frac{66}{$	Sum( MARK ) By SID 100 0 20 		

• Options Assigned to a URL

#### 8.2.1. Modifying a Document (URL information)

- i) Select a linked URL document
- ii) Click the '**Options**' <sup>(2)</sup> 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

1 URL Name	Business Story URL
2 Type URL	https://qa.bdbizviz.com/opendocument.html? docid=157418074&token=0B14FEA70CC5D6E949A1E31F5EE
3 Description	Description
4 URL Parameter	+
Parameter Name	Select properties 🔹 🗶

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

			X		
Folder	Rename			×	
(1	New Name	Business Story URL1		~	
			2 Save	Close	
	_			_	

vii) The linked URL document will be renamed

My Documents 👻	
	*

#### 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



	Delete	×	rch
ine	Do you want to Delete selected File ?		
1	Cancel Delete		7
	· · · · · · · · · · · · · · · · · · ·		1

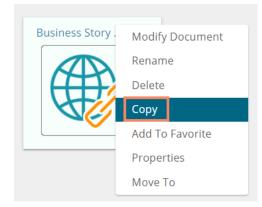
vi) The selected URL file will be removed

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

C	My Documents 🗙
	Create Folder
	Link a URL
	Paste
	Create Geospatial
	Create Story



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

	Paste			×
sine	Name	Copy of Business Story URL	1	
 •	V* -1	• • • •	Save	Close

### xi) A success message pops-up

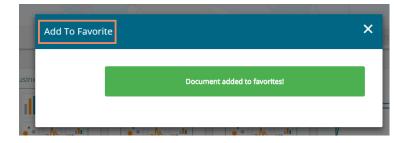
xii)The copied link URL gets replicated with a different name.

My Documents 💙			
IPL Story 🔅	Business Story 🔅	BI Story NLQ	Story
		Business Story 🌣	Copy of Busine 9

## 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' <sup>‡</sup> 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

Favorites 🖤	
	Business Story

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

Favorite Documents		×
	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 <sup>‡</sup> 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



Business Story U	IRL1
Properties Shar	e With Exclude User
Created By:	
Kind:	Link URL
Where:	My Documents
Created:	Wed Mar 28 2018 18:35:30 GMT+05:30 (India Standard Time)
Modified:	Wed Mar 28 2018 18:35:30 GMT+05:30 (India Standard Time)
Version:	3.5.0
Open Document Link:	https://qa.bdbizviz.com/opendocument.html? docid=176751061&token=0B14FEA70CC5D6E949A1E31F5EE 68D843306
Upload Image:	Browse Max 100kb
Description:	

- 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
    - × Properties Business Story URL1 Share With Exclude User Properties User Group User List Selected User List integration testcopyto chitra + egillian manu.mohan\* H Jatin jitu Adm anagha manjhari DRU pauser
  - 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

I	Properties	×	l
ł.	Business Story URL1		
В	Properties Share With	Exclude User	¢ ح
	User List Ranjit Anoop Mani Rajat Arun Rub Mahadevan Vineet pa	Selected User List Kadandale	]
	pa paone karthikps vishal	• Save	

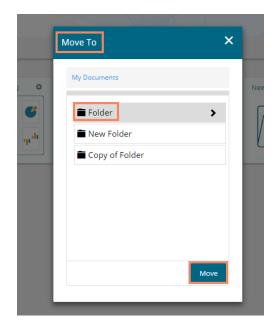
4. User privilege gets updated, and the selected users will be unable to access the linked URL document

## 8.2.7. Moving a URL File

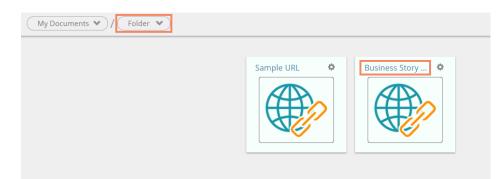
- i) Select a linked URL document
- ii) Click the 'Settings' icon 🍄 for options
- iii) Select the 'Move To' option
- iv) A new pop-up window will appear displaying the available folders
- v) Select a folder from the pop-up window



vi) Click the 'Move' option

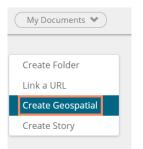


- vii) A success message will appear
- viii) The desired URL will be moved to the selected space



## 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 Geospatial 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

Create Geospatial		×
2 Select GeoSpatial Analysis	Sales Transactions	*
3 Display Name	Sales Geospatial Analysis	~
4 Description	Description	
		h
	5 Save Clo	se
		_

ix) The Geospatial will be created

My Documents 🏼			
	Business Story 🌣	Business Story	Sales Geospati

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.

Sales Geospati.	Modify Document
	Rename
	Delete
	Сору
	Add To Favorite
	Properties
	Move To



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

Create Story	]		×
1 Title	Sample Story		~
Pescription	Description	3 Save C	//

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

Sample Story: Design New          Data Store       *         Search       Q         food mart cube       •         food mart cube       •         food mart cube       •         twmodelTs       •         ExpData       •         ExpData       •         wttestmrv       •	My Documents 🔹 / Sample Story 👻			
Search     Q       food mart cube     ✓       food mart cube     ✓       food mart cube     ✓       wtmodelTs     ✓       ExpSummary     ✓       ExpData     ✓	Sample Story: Design New			
food mart cube food mart cube food mart cube wtmodelTs ExpSummary ExpData ExpData		Data Store	×	
food mart cube wtmodelTs ExpSummary ExpData ExpData V		Search	۹	
wtmodelTs  ExpSummary  ExpData  ExpData		food mart cube	~ 1	
ExpSummary  ExpData ExpData		food mart cube	✓	
ExpData  ExpData		wtmodelTs	✓	
ExpData 🗸		ExpSummary	×	
		ExpData	*	
wttestmrv 🗸		ExpData	*	
		wttestmrv	*	

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



My Documents 🖤					× 🗊 💷
					👪 Order By: Name
Business Story 🔅	Business Story	Sales Geospati 🌣	Sample Folder	Sample Story	*

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.
  - R Decision Platform Designer 🕂 New 🗸 Workspaces (1) Dashboards (1) ) C Q Q 🚊 Manage All Dashboards Sales t. 0 : Open from Local Disk Workspace Î Ì ★ Preferences Trash × 💾 Save as Help 🕑 Exit
- 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.

Publish		×
Name	Sales	
Description	Published from dashboard designer	
Location	K Home	
	My Documents	
	Public Documents	
	System Documents	
	Publish	Cancel

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



My Documents 💙	
Published from dashboard desig.	
	Sample Folder

## • 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**' <sup>‡</sup> icon
- v) A context menu opens with options

Sales	Ø	Sample Folde
	Modify D	ocument
	Rename	=
_	Delete	
10 (15 @	Сору	-
	Add To Fa	avorite
	Propertie	'S
	Move To	

## 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

Modify Dashboard		×
Dashboard Type	HTML5	*
2 Dashboard Name	Sales	
3 Select Dashboard	Sales.Bvzx	
4 Description	Published from dashboard designer	1,
5 Dashboard Parameter	+	
Parameter N	Select propertie 🔹 🗶	
	6 Save Clo	se

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

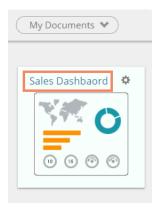
- i) Select a dashboard
- ii) Click the '**Options**' <sup>©</sup> icon for more options
- iii) Select 'Rename'
- iv) A pop-up window will appear
- v) Enter a new name for the dashboard
- vi) Click 'Save'

1 Rename			×
2 New Name	Sales Dashbaord		✓ or
		3 Save	Close
		وي مقارضا كو مع م	

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**' <sup>(2)</sup> icon for more options
- iii) Select the 'Delete' option
- iv) A new window pops-up to confirm the deletion
- v) Click the 'Delete' button

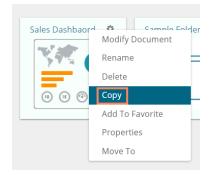
l	Delete	×	rch
mpl	Do you want to Delete selected File ?	_	. 4
[	Cancel Delete	~~	<b>С</b> 1.1.1.

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**' <sup>‡</sup> icon for more options
- iii) Select the 'Copy' option





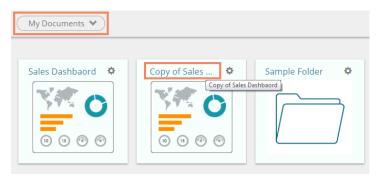
- iv) Select another folder and click the 'Settings' 🌣 icon Or
- v) Navigate to 'My Documents' or 'Public Documents' and right-click anywhere
- vi) A context menu will appear with the 'Paste' option
- vii) Select the 'Paste' option

Create Folder Link a URL Paste Create Geospatial Create Story
Paste Create Geospatial
Create Geospatial
Create Story

- 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'

1	Paste				×	:h
ampl	Name	2 Copy of Sales	Dashbaord			
				3 Save	Close	<b>;</b>

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**' <sup>‡</sup> icon for more options
- iii) Select the 'Add to Favorites' option



My Documents <b>*</b>	•
Sales Dashbaor	Modify Document Rename Delete Copy
	Add To Favorite
	Properties
	Move To

- 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

Favorites 🖤	
	Sales Dashbaord –

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

Favorites 🔹	
	Sales Dashbaord

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



Favorite Documents		×
	Document removed successfully!	
		- 1

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

) Sales Dashbaord	1
Properties Shar	e With Exclude User
Created By:	William
Kind:	HTML5
Where:	My Documents
Created:	Wed Mar 28 2018 18:35:30 GMT+05:30 (India Standard Time)
Modified:	Wed Mar 28 2018 18:35:30 GMT+05:30 (India Standard Time)
Version:	3.6.0
Open Document Link:	http://bi.bdbizviz.com/opendocument.html?docid=4079616 8&token=
Upload Image:	Browse Max 100kb
Description:	Published from dashboard designer

- 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



Sales Dashbaord       Properties     Share With       Exclude User       User     Group       User List     Selected User List	
Properties Share With Exclude User	
Properties Share With Exclude User	
User Group	
User List Selected User List	
Jeya admin	-
testCl	
BI Prod User	
*	
<del>~</del>	
*	
· · · · · · · · · · · · · · · · · · ·	~
Save	

- 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

Sales Dashbaord				
Properties Share Wit	h Exclu	ide User		
User List			Selected User List	
biserver testing_all_case1			William	<u></u>
testCl		<b>→</b>		
		₩		
		+		
		*		
	-			Ŧ



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

	Move To	×
Si	My Documents	
	Sample Folder1	
	💼 Bl Story	
	🖀 Sample Folder	>
		Move

- vii) A success message will appear
- viii) The dashboard will be moved to the selected space

My Documents V Sample Folder V	$\Box$		
	Sub-Folder	Sample URL	Sales Dashbaord



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.



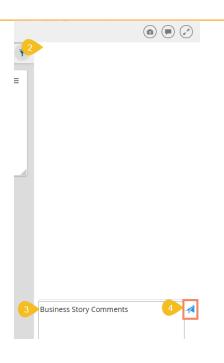
### b. Steps to Insert a Comment

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.



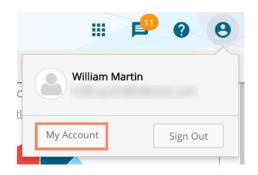
Note:

- 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:

L Information	★ Preferences	Change Password					
			€Ed	it	API token access		
Info	rmation				API token is not available.		
	Email	@bdbizviz.com			Create		
	Full Name	William Martin			Password Expiry Co	nfiguration	
Mo	obile Number	MobileNumber			Password Never Expires	• Yes	O No
Land	Line Number	Land Line Number					
	Address	Address					
			//				
				Save			

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'

		CEdit
Information		
Email	@bdbizviz.com	
Full Name	William Martin	
Mobile Number	MobileNumber	
Land Line Number	Land Line Number	
Address	Address	
		h.
		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

L Information	★ Preferen	nces 🛛 🔒 Change P	assword			
Prefer	ences					
1 Docum	ent Settings	5				
2 Sele	ect Type	O Folder	O Document	O Shared		
3 Do	cument	Select Any One			•	
4 Theme	Settings					
Select	t Theme	Default Theme			•	
					5	Save

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

	★ Preferences	Change Password	
Chan	ge Password		
Old I	Password O	ld Password	
New	Password	lew Password	
Confirm I	Password	onfirm Password	
		Sav	e

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

API tol	ken acces	SS	
API toke	n is not avai	ilable.	
Create			

- 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

API token access
------------------



64768039628CB22062823C74C0A638051113

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

Password Expiry Co	nfiguration	
Password Never Expires	O Yes	

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.

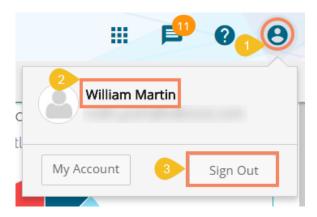


Note: The authentication options can be changed through the administration module.

# **11. Signing Outs**

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

- i) Click the 'User' icon **2** 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.