

Business Story R-3.6



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1. About this Guide

1.1. Document History

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

Product Version	Date (Release date)	Description
BizViz Business Story 2.0	February 21 st , 2016	The first release of the document
BizViz Business Story 2.1	May 25 th , 2016	Updated document
BizViz Business Story 2.5	November 9 th , 2016	Updated document
BizViz Business Story 2.5.3	March 16 th , 2017	Updated document
BizViz Business Story 3.0	August 31 st , 2017	Updated document
BizViz Business Story 3.0	October 26 th , 2017	Modified document
BizViz Business Story 3.2	February 2 nd , 2018	Updated document
BizViz Business Story 3.5	April 15 ^{th,} 2018	Updated document
BizViz Business Story 3.5.1	July 5 th , 2018	Updated document
BizViz Business Story 3.6	August 20 th , 2018	Updated document

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

1.2. Overview

This guide covers:

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

1.3. Target Audience

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

2. Introducing BDB Business Story

2.1. Introduction

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

2.2. Prerequisites and Supported Devices

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



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

3. Getting Started with BizViz Business Story

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

- i) Open BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials to log in to the platform.
- iii) Click 'Continue'

Welcome	
to BDB Decision platform	RDR
Big Data Pipeline Framework	Decision Platform
Dashboard Designer	Decision Platform
• ETL (Self-Service Data Preparation)	Email * user@bdb.ai
Geospatial Analysis (Location	Password *
Intelligence)	Auth Type
Predictive and Prescriptive Workbench	Enterprise -
• Play (Beta Release)	Forgot your password ?
Self-Service BI (Business Story)	Continue
Social Media Browser	
Sentiment Analysis	
• Survey	
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iv) BDB Platform homepage opens.

My Documents			
X XXX X	e a the second	ashboard Designer	Sentiment Analysis
	A complete decision platform for all your business needs. Drive from data to dynamic visuals and derive an actionable insight into your business data. Avail 360°	Design, save and publish splendid visual reports as dashboards. Display informative progress report of any business process containing series of	BizViz Sentiment Analyzer is A ext analyzer that chases words with positive negative, or neutral connotation. Empowered with Natural Language
Decision Platform	view of your business by assembling, processing, and analyzing the acquired data. Access incomparable analytics from anywhere, at any time on any device.	stunning visuals to denote informative business data. Drag and drop functionality to access a comprehensive view of relevant KPIs regarding a business objective.	Processing (NLP) and machine learning algorithms the tool can identify, extract, and exhibit sentiments out of any expressive text.
	Business Story (Self-	Predictive Analysis	Equipped with ANEW dictionary ("Affective Norms for English Words"), th tool rates selected set of words in terms of pleasure, activation, and dominance to
	Go beyond the classic Bl with our ground-breaking tool, Biz/Vz Business Story. Innovative yet easy, flawless but rapid, and systematic yet spontaneous, this visualization tool will make you go	Plan your next business move based on the reliable information instead of inituition. Let the power of advanced statistical analysis and machine learning technology take care of your business barriers. Access and apply consistently	create a standard terminology for use in studies of emotion and attention. Use opinions, reviews, comments, feedbacks and other personalized text as subject matter to be analyzed based on measures of "pleasure" along with
Big Data BizViz Release 3.6	'Wow' for what it offers. Select relevant data, generate immaculate views, and concoct a perfinent insight into your businessAll this on your own!!!	communicative predictive models to reduce the risk factor and maximize the future opportunities.	"activation".
	😪 Data Preparation	🌍 Geospatial Analysis	Interact with a real audience and collect reliable data in real time. Track unlimited
	Experience a secure vet self-driven mode	Access business information for the	questions and responses via BizViz

- v) Click the 'Apps' III menu icon.
- vi) Select 'Story' plugin from the Apps menu.





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

Сору	Create Story
	Name * Business Story
	Description //
	Close Save

x) The story document gets created under the selected document space ('My Documents' space opens by default), and users get redirected to select a Data Store.

My Documents 🔹				*
	Business Story			🔓 Order By: Name
BI Story	Business Story 🔅	Published Das 🌣	Sample Folder	

Note: Users can also choose the 'Create Story' option from 'My Documents' or 'Public Documents'



space to create a story document.

- i) Navigate to 'My Documents' or 'Public Documents' and use the right-click anywhere on the blank space.
- ii) A context menu opens.
- iii) Select the 'Create Story' option from the context menu.

My Documents 🕻	
Create Folder	
Link a URL	
Create Geospatial	
Create Story	1

iv) The 'Create Story' window opens as shown above to direct users for designing a story document.

3.1.1. Forgot Password Option

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

- i) Navigate to the Login page
- ii) Click 'Forgot your password?' option

Decision Platform
Email *
Password *
Auth Type
Enterprise -
Forgot your password ?
Continue

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





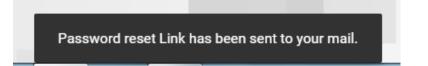
Having trouble signing in?

Continue

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 *

<u>Sign in</u>

vi) Users may be redirected to select a space in case of multiple spaces under one server link; they need to choose a space and click the 'Continue' option once again. Otherwise, a message will pop-up to notify that the password reset link has been sent to the registered email.



- vii) Click the link from your registered email
- viii) Users get redirected to the 'Reset Password' page to set a new password
- ix) Set a new password

Continue

- x) Confirm the newly set password
- xi) Click the 'Continue' option



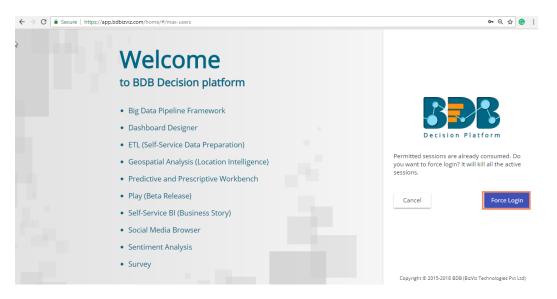
Reset Password	
You've confirmed ov	vnership of the BizViz
Account, Reset your	password now to regain
access. New Password *	
•••••	
Confirm New Password *	

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xii) The password is successfully reset for the selected BDB account

Note: The 'Force Login' functionality has been introduced to control the number of active sessions up to three. Users can access only 3 sessions at a time when try to access 4th session a warning message displays to inform that the user has consumed the permitted sessions and a click on the 'Force Login' would kill all those active sessions.



4. Creating a Business Story

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

4.1. Selecting a Data Source

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

- i) By clicking 'Save' on the 'Create Story' pop-up window, Users is redirected to select a data store as shown in the following image:
 - 1. Search a data store using the 'Search' bar (if needed).
 - 2. Select a data store from the displayed list by clicking the checkmark 🗹 option.

My Documents 🗲 Business Story			0 8
Business Story: Design New	DESIGN ACTIONS		•
	Data Store	×	
	ex	<u>(</u>	
	ExpSummary		
	ExpData	~	
	ExpData	×	
	Excel Test	✓	
	Expenditure	~	
	ExperincedPersons	~	



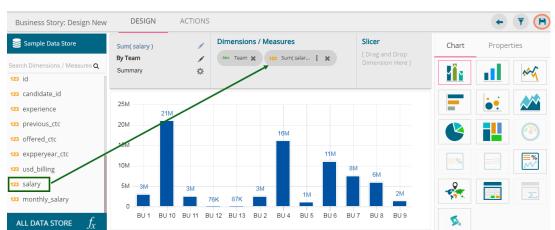
4.2. Designing a New View

This page explains the steps to create a new view.

- i) On selecting a data store, users get redirected to the 'DESIGN' tab to design a new view.
 - i. Name of the selected Data Store appears on the left side of the screen.
 - ii. A list of available Dimensions and Measures in the selected Data Store get displayed below the Data Store name.

Business Story: Desi	gn New	Ε	DESIGN	ACTIONS			(T)
Sample Data Store		Untitled Summary	/ / *	Dimensions / Measures [Drag and Drop Dimension or Measure Here]	Slicer [Drag and Drop Dimension Here]	Chart	Properties
 besignation biningStatus currentStatus comments PreviousOrganis Gender Source 	i i i i			ب			
be Name be Skills be Team ALL DATA STORE	i i fx		[Select Dimension or Measure to Visualize		*	

ii) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).iii) A graphical view (based on the selected dimensions/measures) gets created and displayed instantly. (The mixed chart type opens by default)



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

- v) The newly created view gets saved on the Storyboard.
- vi) Users need to click the 'Save' option to save the added view to the storyboard.

Sum(salary)	=
By Team	
40M	
21M 20M 3M 3M 76K87K ^{3M} 1M 3M 6M 1M 3M 6M 2M	
^{3M} ^{3M} 76K87K ^{3M} ^{1M} ^{2M} B. B. BU. B.	



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

4.2.1. Dimension Profiling

Dimension Profiling has been introduced to provide users with some more insights into a dimension.

i) Select the 'Information' icon from the list of displayed Dimensions on the 'Design New' page.

	Hiring_BIStoryNLP -	Adanin				
Sear	Search Dimensions / Measures Q					
Abc	Name	i				
Abc	Gender	i				
Abc	Source	i				
Abc	ReferralOf	i				
Abc	Designation	i				
Abc	Team	i				
Abc	PreviousOrganis	i				
Abc	Skills	i				
Abc	Month	i				
Abc	JoinningStatus	i				

- ii) A new window opens with the Data Profile information displaying the count of the selected dimension value.
- iii) Click on the 'MOVE TO DESIGN'

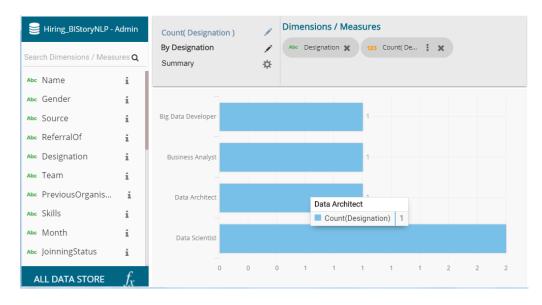
1	Dimensions / Meas	ures		
Dat	a Profile			×
Cou	nt(Designation)	1		
	signation			
_			MOVE TO DE	SIGN
D 80	100	120	140	160

iv) The data profile chart gets moved to the design new page.



Hiring_BIStoryNLP - Admin		Dimensions / Measures	Chart	Properties
Search Dimensions / Measures Q		Abe Designation 🗙 123 Count(De : 🗶		
Abc Name i				
Abc Gender i	AWS Consultant	10.0		
Abc Source i	Associate Software Engineer Big Data Developer Business Analyst Data Architect	12		
Abc ReferralOf i	Data Scientist 2 DevOps Engineer 1 DevOps Manager 1 Development Manager 1			
Abc Designation i	Lead OA Engineer	- 7		
Abc Team i	Project Manager 2 OA Architect QA Engineer QA Lead	419		
Abc PreviousOrganis i	Senior Development Manager	24	2	
Abc Skills 1	Senior QA Mahager 1 Senior Software Engineer Software Developer 1	75-	20.2	
Abc Month i	Solution Specialist		1	
Abc JoinningStatus 1	Sr Software Developer Technical Architect	7		
ALL DATA STORE $f_{\!X}$	0	10 20 30 40 50 60 70 80		

- v) Users can apply the various modification options from the Design page (E.g., The below given image displays an applied View Filter)
- vi) Click the 'Save' option from the Design New page to save the view to the Storyboard



vii) Click the 'Save' option provided on the Storyboard to save the updated story.

Business Story	Data Search		○ + < ▲ ● H ≥ ○ ▼
Count(Skills) By Team	\$ ≡	Sum(Monthly ≡ ₹17M	Sum(Experience) ⇔ ▼ ≡ By Team
0	6 32 7 52 12 32 12 30 22 27 27 BU9 BU2 BU11 BU13 BU8 BU10	Sum of Mon. Sal.	200 BU 10 129 73 0 Sum(Experience) 129 73 0 BU 4 BU 6 BU 7 BU 10 BU 8
s	Count(Designation) By Designation	\$ ≡	
1K 17263 220 Female Male	Big Data Develo. 1 Business Analyst 1 Data Architect 1 Data Scientist		

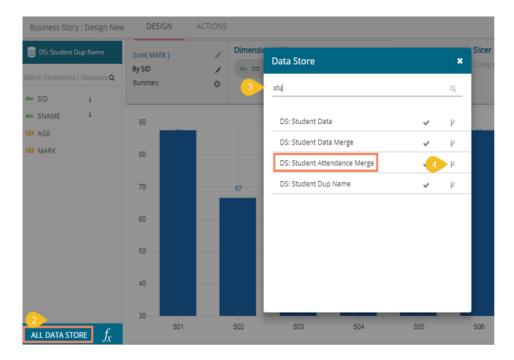


4.2.2. Datastore Merge at View Level

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

- Dimensions / Measures Slicer BS: Student Dup Na Sum(MARK) Chart Properties An SID x 123 Sum(MAR... 1 x By SID Q łî 🕯 ☆ 11 Ale SID A SNAME i 123 AGE 84 123 MARK 80 \$03 Su (MARK) **≣%** ∧∕∕ 70 60 * 50 5 40 30 s01 sh2 sha 804 805 808
- i) Select a Data Store and Navigate to the Design New page.
- ii) Drag and drop dimension(s) and measure(s) onto the canvas to create a new view.

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



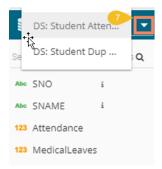
vi) Users get redirected to select a related field from the drop-down menu

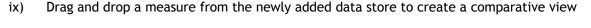
vii) Click on the 'MERGE' option

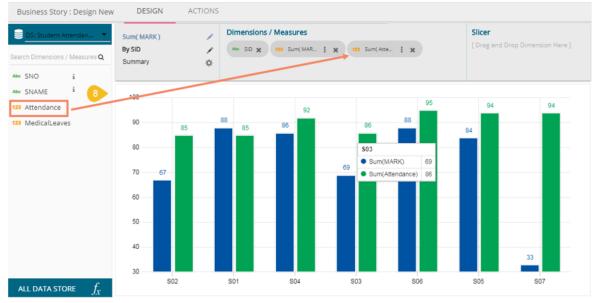


Data S	tore				×
DS: Stu	dent Attenda	ince Merg	e		
Select ti	e related field a	and click on	Merge to conti	nue.	
Relation					
SNO					•
			CANCEL	MEF	RGE
			l		

viii) The selected datastore gets added to the datastore space, and a drop-down menu displays to choose between any datastore.







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



Business Story : Design New	DESIGN	ACTIONS								+	6
DS: Student Data	Sum(MARK) By SID	1	Dimensions / I	Measures	and from large		Slicer	p Dimension Here]	Chart	Proper	ties
Se DS: Student Atten Q DS: Student Dup	Summary	10	123 Sum(AGE)		to somivee	: ×			<u>ki i</u>	al	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Abe SNAME i	100					95	94	94	=	<u>.</u>	
123 MARK	90 85	88	85	92	86	88	84				
	80				69						
	70 <u>67</u> 60								2		
	50										Σ
	40							33			
	30	22	20	24	23	22	24	21			
All data store $f_{\!X}$	20 502	2	S01	S04	S03	S06	S05	S07			

xiii) The view gets saved on the storyboard.



Note:

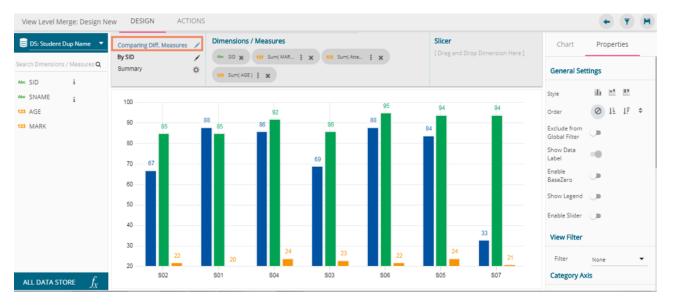
- a. All the merged data stores are available for the saved view.
 - 1) Users can modify the view by selecting the 'Edit' option from the storyboard.



- 2) Users can even change the title of the Business Story and the saved view.
 - a) Users can change the Business Story title from the Storyboard.

View Level Merge	Data Search Q 🕂	۹ 🔺 (• H Z	0 🔻
Comparing Diff. Measures ⇒ ≡ By SID				

b) Users can change the title of a Saved View title by opening the Design New page of the view via the 'Edit' option.



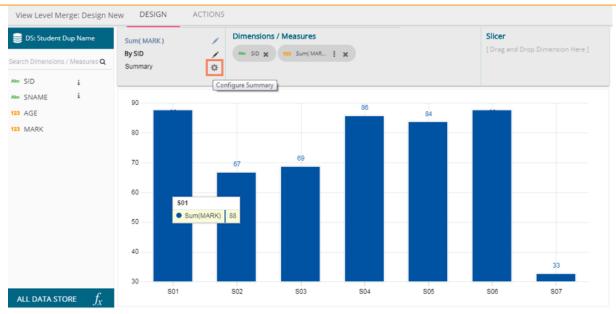
b. The Merged Data Stores are not available in the data store menu if the user wants to add the subsequent new view to the same Business Story. The user needs to merge the data stores yet again.

4.2.3. Measure Summary

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

- i) Navigate to the 'DESIGN' tab to create a new view.
- ii) Drag and drop the required dimensions and measures.
- iii) Click the 'Settings' 🗱 option to configure Summary.



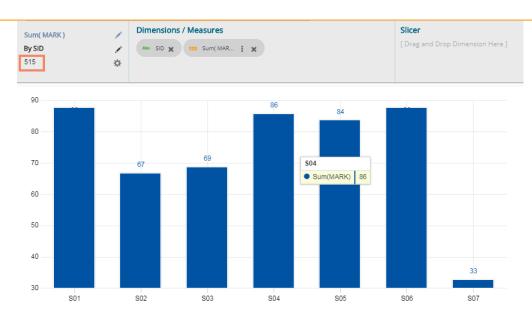


- iv) A window pops-up.
- v) Set the following details:
 - a) Show Summary: Enable or disable the summary option
 - b) Measure: Select a measure from the drop-down menu
 - c) Aggregation: Select an aggregation type from the drop-down menu
 - d) Format Type: Select a format type from the drop-down menu
 - e) Currency Type: Select a currency symbol from the available choices
 - f) Precision: Select a number to up to what the precision value can be displayed
- vi) Click the 'DONE' option.

Summary Prop	erties X
Show Summary	-
Measure	MARK
Aggregation	Sum 💌
Format Type	Auto 🔻
Currency Type	Ø€₹£\$¥
Precision	0
	CANCEL DONE
	CANCEL DONE

vii) The measure summary value gets displayed on the view page by enabling 'Show Summary' option.





4.2.4. Series Properties

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

- i) Navigate to the Design New page for a view that has at least one selected measure value.
- ii) Click the 'Series Properties' option ¹ provided next to the selected measure.

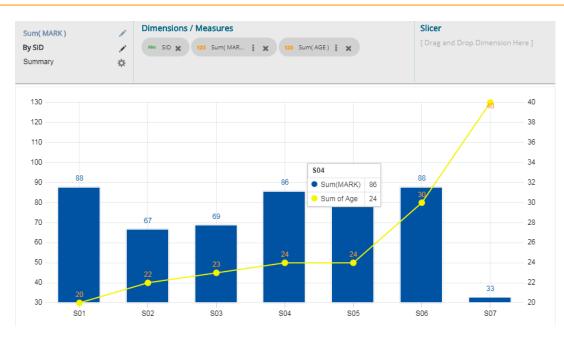
Sum(MARK)	1	Dimensions / Measures	Slicer
By SID		Abc SID 🗶 123 Sum(MAR : 🗶 123 Sum(AGE) 🚺 🗶	[Drag and Drop Dimension Here]
Summary	\$		

- Users can set the following properties from a pop-up window for a mixed chart with two measures dragged on the workspace:
 - a. Aggregation: Select an aggregation option from the drop-down menu
 - b. Display Name: Enter the title for the measure to be displayed in the data label
 - c. Axis: Select an axis out of the given choices (users need to enable 'Secondary Value Axis' to get 'Axis' option in the Series Properties window)
 - d. Color: Select a color of the chart presentation from the given menu
 - e. Data Label Color: Choose a color for data label from the given menu
- iv) Click 'APPLY' option.

23	Series Prope	rties: AGE	×	١
	Aggregation	Sum	•	
	Display Name	Sum of Age		
l	Series Type	h. N		ł
	Axis			I
ł	Color	#f5f500		ł
	Data Label Colo	r #ff9933		
		CANCEL	APPLY	

v) The selected measure properties get applied to the view.





Note:

- a. The 'Series Properties' may differ as per the selected chart components. Users need to enable 'Secondary Value Axis' from the Properties tab to get 'Axis' field in the Series Properties.
- b. Users need to refresh the selected data store to avail the data in the Business Story Views.
- c. View specific chart properties can be accessed from the 'Properties' tab.
- d. Users can change or modify the view title by clicking on the edit options provided next to the view name.

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

Sum(salary)	~
By Team	/
Summary	¢

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

lcon	Name	Description
+	Back	To redirect users on the storyboard page
T	View Filter	To apply filter conditions to the view
H	Save View	To save the newly designed view on the Storyboard.
	Save Screen Shot	To capture and save the screenshot
Comments	Comments	To allow users to describe the story
or 🗯	Full Screen/Reduce	To display the Story Board in the full-screen view OR
	Size	Reduces the Story Board display screen.
	Edit	To modify or change the storyboard title

4.2.5. Formula Field Editor

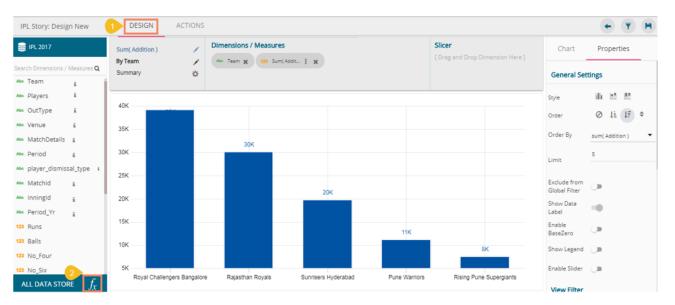
A formula field editor has been provided on the Design New page to create and add a calculated field in the selected datastore. The Formula Field Editor window offers two options 'Formula' and 'Range'



for users. Users can access the icon for Formula Field from the 'DESIGN' tab beside the 'ALL DATA STORE' option.

4.2.5.1. Creating a Formula

- i) Navigate to the 'DESIGN' tab after selecting a data store to create the Business Story.
- ii) Click the 'Formula Field Editor' icon.



iii) Users get redirected to the 'Create Formula' window.

6 500 100 100			Fields
< FORMULA RANGE		>	Team
	Туре		Players OutType
Formula Name *	Measure	-	Venue MatchDetails
			Period
			Operators
Formula Expression			Equal to Not Equal to Greater than Greater than or equal to Less than Less than or equal to Functions
			toLowerCase toUpperCase substring trim cos tan
			CANCEL SAVE

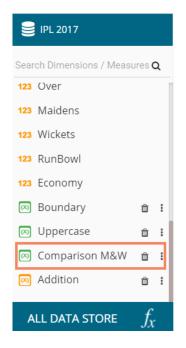
- iv) Users can provide the required information to create a formula field as shown below: a. Formula Name: Give a title to the formula field
 - b. Type: Select an option from the drop-down menu to decide on the type of the Formula Field
 - i. Dimension
 - ii. Measure
 - c. Fields: All fields from the selected data store list in this window. Users can select the required fields by tapping on them.



- d. Operations: All the available operations list in this window. Users can select the required operations to add to complete the formula.
- e. Functions: All the available functions list in this window. Users can select the required functions to apply it to the chosen field.
- v) Click the 'SAVE' option to save the formula.
 E.g. The following image displays a new formula field 'Comparison M&W' created using the Maidens and Wickets fields from the data store. The 'is equal to' operation has been used here.

Create Formula		×
FORMULA RANGE Formula Name * Comparison M&W	Type Dimension	Fields Strike_Rate Over Maidens Wickets RunBowl Economy
Formula Expression 1 [Maidens]==[Wickets]		Operators // + - String Concatenation Assignment Functions
		tan sin sqrt abs round if else
		CANCEL SAVE

vi) The selected data store gets newly created formula field.



4.2.5.2. Creating a Range

Users can create a new calculated field in the selected data store using the 'Range' tab.

- i) Users can navigate to the 'DESIGN' tab.
- ii) Click the 'Formula Field Editor' icon.

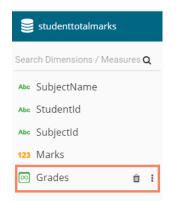


Story: Design New	1 DESIGN	ACTIONS				+ 🔻 H
estudenttotalmarks	Untitled	1	Dimensions / Measures	Slicer	Chart	Properties
Search Dimensions / Measures Q	 Summary	/ *		Dimension Here]		•••
Abc StudentId i					-	
123 Marks						
					≡ %	
					*	
ALL DATA STORE f_x			mension or Measure to Visualize D		\$	

- iii) Users get redirected to the 'Create Formula' window.
- iv) Select 'Range' tab and configure the following information:
 - a. Name: Provide a title for the formula field
 - b. Measure: Select a Measure value using the drop-down menu
 - c. Name: Provide a name for the defined range
 - d. From: Set a maximum value to define a specific range
 - e. To: Set a minimum value to define a specific range
- v) Click the 'SAVE' option

FORMULA	RANGE		
Name *		Me	easures
Grades		М	arks 🔻
Name	From	То	
A	90	100	Û
В	80	89	Û
с	70	79	Û
D	60	69	Û
E	50	59	Û

vi) The selected data store gets a new calculated field.



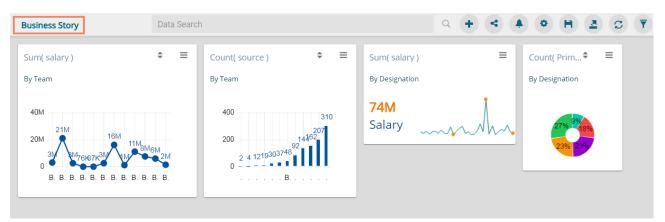


Note: If users move to storyboard without saving the designed view a pop-up window appears to confirm whether the changes for the views need to be saved to the story or not. Click 'YES' using the message window to save the view changes.



4.3. Storyboard

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



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

4.3.1. Data Search Bar

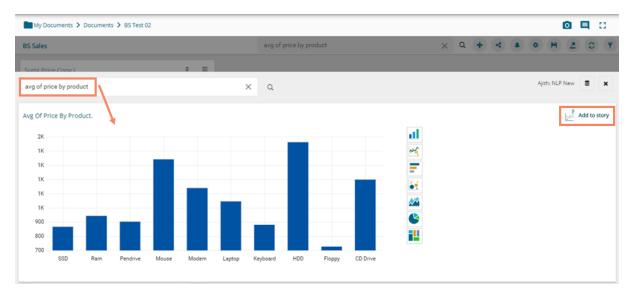
The 'Data Search Bar' helps users to quest for specific data all through the saved views and instantly displays the query results. Natural Language Query (NLQ) is the popular name for the 'Data Search Bar' that is used by users to view their desired data instantly.



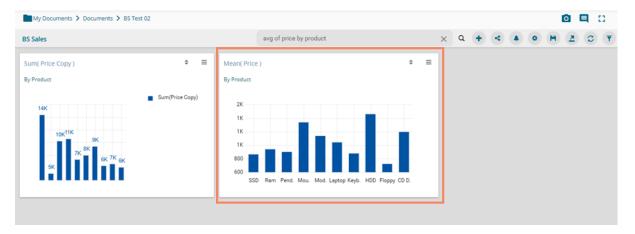
- i) Navigate to the Storyboard with multiple views.
- ii) Type-specific data search using the 'Data Search' bar.
- iii) Users get autosuggestions for the terms they desire to search.

My Documents > Documents > B5 Test 02													1	3
BS Sales			avg of price		\times	Q	+	4	٠	۰	H	2	C	Y
Sum(Price Copy) By Product	¢	=	avg of Price											
14K 10K11K 9K 5K 6K 7K 6K	ce Copy	•												

- iv) After typing your specific query click the 'Search' \bigcirc icon.
- v) The search result reflects beneath the search bar (In this case, a column chart displays the searched value *Avg of Price by Product*.
- vi) Click the 'Add to story' option to add the search view to the existing story.



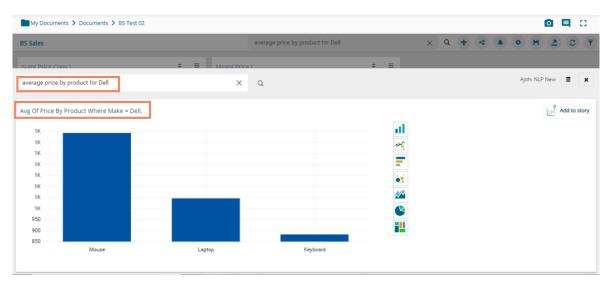
vii) The search result gets added to the story





viii) Users can search deep into the data dimension by using a specific drilling value and get the result.

E.g., Average price by product for Dell displays the below view with Mouse, Laptop, Keyboard as products.



Note:

- a. By default, the column chart appears while displaying the searched data that has one dimension and measure in the query, but users can switch any other visualization using the charting panel provided on the search result page.
- b. Users can change the data store by using the Data Store 🛢 icon provided on the Data Search page.

4.3.2. Shared Views

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

- i) Navigate to the storyboard.
- ii) Click the 'Shared Views' < icon.

Business Story		salary			9 0 3 A 8 B 2 C T
Count(Primary ◆	Sum(salary) By Designation	Ξ	Untitled	Ξ	Sum(experience) By Designation
27% 98 23% 23%	74M Salary	mm	Measure sum(salary)	Total 73883706	1K 500 0 Senior So. Lead Soft. Developm. QA Engin. Software E. Sr Softwa. Senior QA. QA Archite. Project Ma. QA Mana.

- iii) All the available shared views options appear.
- iv) Select a shared view by a checkmark in the box.
- v) Click the 'Save' option.



Business Story: Shared View	Search	Q 5 🕒
Sum(monthly_salary) Team-wise Monthly Salary	Sum(experience) By Primary_Skills	Comparing Team-wise Salary By Team
Preview Info	Preview Info	Preview Info
Total Experience By source	By Gender	Sum(experience) By Gender
Preview Info 4	Preview Info	Preview Info

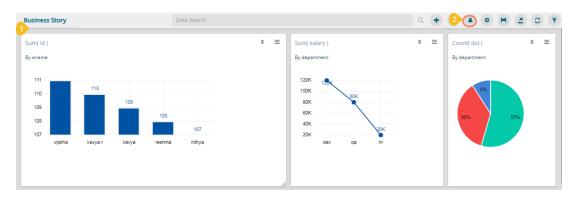
vi) The selected shared view gets added to the storyboard.

Business Story		salary			Q + 4 0 H 2 C Y
Count(Primary_Ski ♥	Sum(salary) By Designation	≡	Untitled	≡	Sum(experience) $\Rightarrow \equiv$ By Designation
275 748 276 255	74M Salary	·····	Measure sum(salary)	Total 73863706	1K 500 a 18 310 302 296 242 234 211 166 165 0 Senior So. Lead Soft. Developm. QA Engin. Software E. Sr Softwa. Senior QA. QA Archite. Project Ma. QA Mana.
Sum(salary)	÷ ≡	Count(source)	: ≡ Untitled	≡	Total Experience 🗢 🚍
By Team		By Team			By source
4М 2M 1M 2M 76К 87К	3M	60 48 40 BU 11 20 12 4			600 400 0 BDB Refer. Care.

4.3.3. Alert Center

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

- i) Navigate to the Story Board.
- ii) Click the 'Alert' 👇 icon.



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

Alert Center	<u>A</u>	(+)
Subscribed Alerts		

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



5	Alert	
	Data Source	
value nt Min(0.00.	Search	Q
	DataStoreGoogleSheet23	
	DataStoreGoogleSheet24	
	amazon store1	
	amazon store2	
6	check_alert_store	
	date	

- vii) The following fields display to fill the required information when selecting a data store (data source):
 - a. Title: Give a title to the created alert
 - b. Dimension/Measures: Select a dimension or measure from the drop-down list
 - c. Aggregation: Select an aggregation type from the drop-down list
 - d. Time Field: Select a time field from the drop-down menu
 - e. Schedule Intervals: Select a time range to schedule the refresh intervals using the dropdown menu
 - f. Lower Threshold: Set a value as a lower threshold (the default value for this field is 0)
 - g. Upper Threshold: Set a value as an upper threshold (the default value for this field is 100)
 - h. Max Good Value: Enable/disable the 'Max Good Value' by a checkmark in the box.
- viii) A Semi-Gauge chart displays the selected information on the right side of the screen with the value (E.g., in this case, the Semi-Gauge image displays a count of 12 teams)
- ix) Click the **'Save'** 🖹 icon.

Alert		<u>a</u> = ×
check_alert_store		
Title	alertt	
Dimensions / Measures	123 student_attendan 🔻	
Aggregation	Min 👻	
Time Field	Date_Key 💌	
Schedule Intervals	Daily 👻	
Lower Threshold	10	8 1.00
Upper Threshold	80	
Max Good Value	~	0

Note:

a. If users select a dimension from the Dimensions/Measures field then, only '**Count**' option can be accessed from the '**Aggregation**' field.



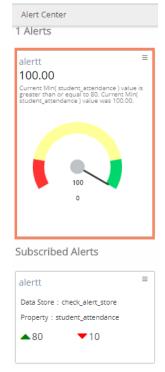
- b. By enabling or disabling 'Max Good Value,' the sequence of colors in the Semi-Gauge image change from 'green-yellow-red' to 'red-yellow-green.'
- x) The newly created alert gets added to the Subscribed Alert page.

Alert Center	• •
Subscribed Alerts 10 alertt	
Data Store : check_alert_store Property : student_standance	
▲80 ▼10	

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

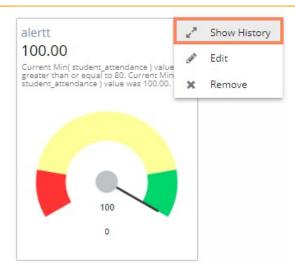
Alert Center		
Subscribed Ale	erts	
alertt	de la	Edit
Data Store : check_a		Remove
Property : student_at	tenua	nce
▲80 ▼	10	

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



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





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

rt Center		
ertt		
rent Min(student_attendance) value is greater than	r equal to 80. Current Min(student_attendance) value was 100.	
140.00	Date	Sum(Value)
135.00	1/19/1970, 1:31:50 AM	100.00
130.00		100.00
125.00		
120.00		
115.00		
110.00		
105.00		
100.00		
95.00		
90.00		
85.00		
80.00		
75.00		
70.00		
65.00		
60.00	/1970, 1:31:50 AM	
Li Il	1070, 1.31.30 Am	

4.3.4. Change Theme

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

- i) Click the 'Change Theme' icon from the storyboard.
- ii) A Context menu opens with the available themes for the story (The below image displays a Story in the Default theme).

Business Story	salary		Q + < 100 H Z C Y
Count(Primary_Ski 🗘 🗮 By Designation	Sum(salary) = By Designation 74M Salary	Untitled =	By Designation 2 Default 1K Moon
235 235		sum(salary) 73883706	500 18 310 302 296 242 234 211 166 165 0 Senior So. Lead Soft. Developm. QA Engin. Software E. Sr Softwa. Senior QA. QA Archite. Project Ma. QA Mana.

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



Business Story	salary		Q (+ < 4 (* (* (* 2) C))
Count(Primary♥	y) ≡	Untitled 🗧	Sum(experience) 🗧 🗧
By Designation By Designa	ion		By Designation
27% 97 arry 27% 23% 23%		Measure Total sum(salary) 73883706	1K 500 Senior Software Engineer • Sum(experience) 882.1 234 211 106 105 0 Senior So. Lead Soft. Developm. QA Engin Software E. Sr Softwa. Senior QA. QA Archite. Project Ma. QA Mana.
Sum(salary) 🗧 🗧	Count(source)	■ Untitled ■	Total Experience 🗢 🛛 🗮
By Team	By Team		By source
4M 3M 3M	60 48 40 <u>30 37</u>		600 200 abri _ , ,
2M 1M 2M	19		BDB Referral

The following image displays the story in the 'Moon' theme:

Business Story		salary				Q + < . (P)	2 C T
Count(Primary 🕈 🛛 🚍 By Designation	Sum(salary) By Designation	=	Unti	tled	Ξ	Sum(experience) By Designation	¢ ≡
27% ⁹⁵ 18% 23% 23%	74M Salary	m	Mea	sure (salary)	Total 73883706	1K 500 18 310 302 296 242 234 21 0 Senior So. Lead Soft. Developm. QA Engin. S Sr Softwa. Senior QA QA Archite. Projec	Software E.
Sum(salary) By Team	¢ ≡	Count(source)	=	Untitled	Ξ	Total Experience	
4M 3M 2M 1M 2M	3M 3M	60 48 40 30 20 19				600 400 200 8DB Referral	

4.3.5. Export

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

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

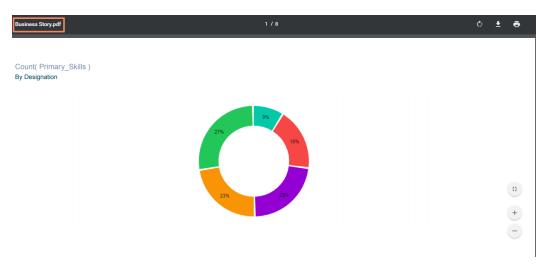
Business Story		salary				۹ + ۲	🍳 🖻 🔁 C 🔻
Count(Primary\$ ≡ By Designation	Sum(salary) By Designation	Ξ	U	intitled	=	Sum(experience) By Designation	Export as CSV XLSX
27% ²⁹ /18% 23% 23%	74M Salary	····	s	Measure um(salary) 73	Total 883706	0 Senior So. Lead Soft. Deve	PDF PPT 96 242 234 211 166 165 slopm. QA Engin. Software E QA Archite. Project Ma. QA Mana.
Sum(salary) By Team	\$ ≡	Count(source) By Team	=	Untitled	Ξ	Total Experience ⇒ ≡ By source	
4M 3M 3 Business Story.ppt	3M Business Stor	60 48 40 37		▲ Business Story.csv	^	600 400 200 m	Show all

- iii) The story gets downloaded in the selected export option.
 - a. The story data gets saved in the excel format by clicking 'CSV' and 'XLSX' options.



AutoSave 🤅	off 🖯 🗧 🕤) - ¢ - ∓			Bu	siness Story	- Excel			Sign in	Ā.	- 0	×
File Ho	me Insert	Page Layout	Formulas	Data	Review	View H	lelp ♀S	Search				E	🔆 Share
Paste	Calibri B I <u>U</u> →	• 11 • A				General 😴 + % :	▼ 0.00, 0.00 0.00 → 0	Condit		✓ Insert ✓ Insert ✓ Insert ✓ Insert ✓ Insert ✓ Insert ✓)	ort & Find &	
Clipboard 5	F	ont	Gi .	Alignment	Fai	Numb	er 🕞		Styles	Cells	E	diting	~
A1	▼ : ×	√ f _x [Designation										^
A	В	C D	E	F	G	н	I	J	к	L M	N	0	
1 Designation	count_Primar	y_Skills											
2 Senior Arc	2												
3 QA Archite	4												
4 Solution S	5												
5 iOS Devel	5												
6 Big Data D	6												
7 Designatio	sum_salary												
8 Analytics I	1560000												
9 Associate	850000												
10 Associate	1832474												
11 Big Data D	430000												
12 Data Archi	1560000												
13 Data Scier	1813200												
14 DevOps M													
	2552664												
15 Developm	2332004												
	Business S	itory 🕂											•

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



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

AutoSave 💽 📶 🗧 🕤 🗸 🖑 👿 🖛		Business Story - Saved to this PC	Sign in	⊞ – ø ×
File Home Insert Design Transitions A	Animations Slide Show Review	View Add-ins Help 🖓 Search		🖒 Share 🏳
Slide Slide	U S abc AV - Aa - A - A -			P Find line → B Replace → cts → B Select →
Clipboard 🕞 Slides	Font	Paragraph	Drawing	5 Editing
	Count(Primar By Designation	y_Skills)		
2				
*kr				
3 = =				
4		27 2		
5				* *
6 Click to add notes				
Slide 1 of 8 []2 English (India)			≜ Notes 🖪 🔠 🐺	+ 90% 🔄

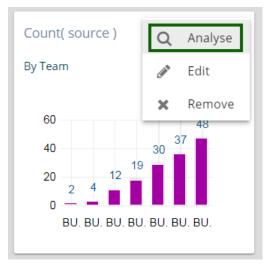


4.3.6. Options Assigned to a View

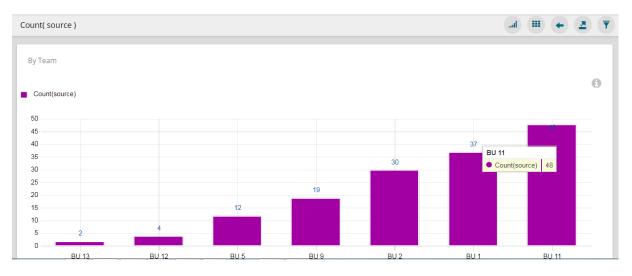
The following options supported by a view can be accessed from the Storyboard.

4.3.6.1. Analyze

- i) Select a view from the Story Board.
- ii) Click the '**Options**' icon \equiv
- iii) A context menu appears with various options.
- iv) Select 'Analyse' from the context menu.



v) The selected View displays in the full-screen.



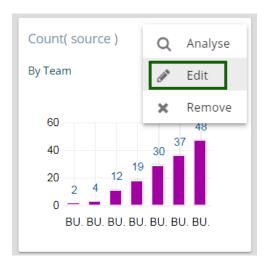
vi) Users can select any of the following options to analyze a Business Story view:

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

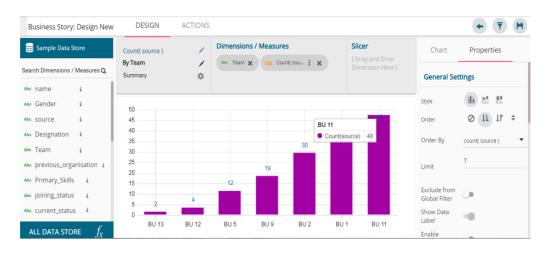


4.3.6.2. Edit

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



- iv) The Design New page opens.
- v) Edit the required details. (If required)
- vi) Click 'Save' option.

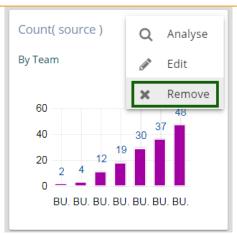


vii) The modified View gets saved successfully to the Storyboard.

4.3.6.3. Remove

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





- iv) A new window pops-up to confirm the removal of the view.
- v) Click the 'Yes' option.

ou	Do you want to	o remove th	is view ?	Т
	48	NO	YES	В

vi) The selected View gets removed from the storyboard.

4.4. Data Interactions/Exploration

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

4.4.1. Automatic Data Drill

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

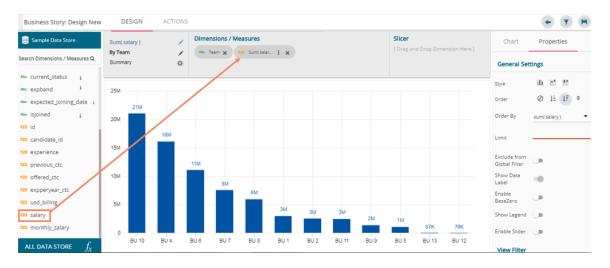
Users must define a hierarchical pattern for the time values in a data store via the '**Hierarchy Definition**' option of a Data Store.

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

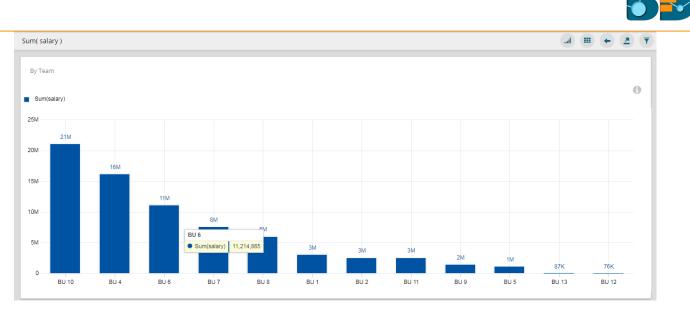


Getting Data	Data Type Definition	3 Hierarchy Definition	4 Batch Query	Data Restrictions	Schedule Data Refresh
Fields		Hierarchy Definiti	on		+
Abc name	A	Drill Def- 1 Team — Desig	gnation — name —		×
Abc Gender		Drill Def- 2			
Abe SOURCE	- 1	expected_joining_da year	te: _ expected_joini month	ing_date: expected_j date	oining_date:
Abc Designa	ation	4			•
Abc Team					
	*				

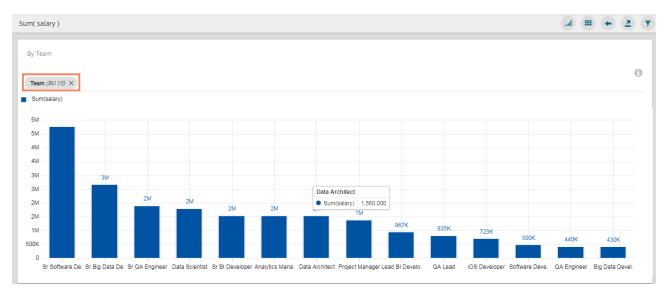
- vi) Select the data store with the defined drill path to create a new view.
- vii) Select the dimension for which the drill path has been defined and drag to create a view.
- viii) Click 'Save' option 🗎 to save the view on the Storyboard.



- ix) Access the saved view on the storyboard by double clicks on it.
- x) The Analyse window opens displaying team as the highest-level granularity of data drill.



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



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





Note:

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

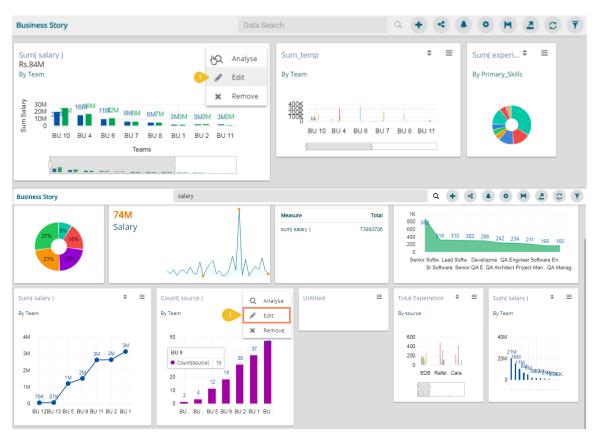
4.4.2. Actions

The Action tab includes various actions to be applied to a designed view.

4.4.2.1. Interactions

The 'Interactions' option is a next level of applying the Global Filter. The suggested new feature enables users to select multiple views of the storyboard to filter based on a specific view. By default, on a single click, all the views permitted for interactions get filtered.

- i) Navigate to the Storyboard.
- ii) Select 'Edit' view from the 'Options' \equiv menu.



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



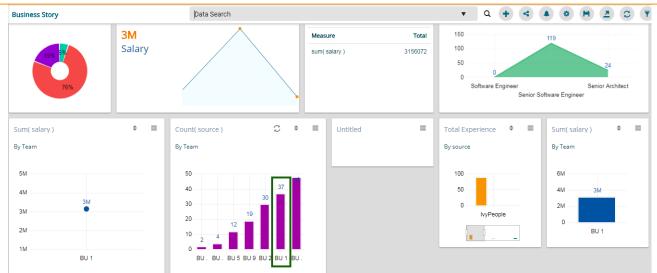
Sample Data Store	Count(source) By Team	1		t Measures	: x		Slicer [Drag and Dr	rop Dimension Here]	Chart	Properties
arch Dimensions / Measures Q	Summary	\$							General Set	tings
name i										(b) b) (b)
Gender ⁱ	50								Style	
source i	45							48	Order	0 11 17 ¢
Designation 1									Order By	count(source)
Team ⁱ	40						37			even avenue j
previous_organ… i	35								Limit	7
Primary_Skills i	30					30				
joining_status i	25								Exclude from Global Filter	()
current_status a	20				19				Show Data	
expband i									Label	••
	15			12					Enable	
expected_joiningi	10				_				BaseZero	
isjoined 1	5 2	_	4		_		_		Show Legend	()#
id	0								Enable Slider	0
candidate id	BU 13		BU 12	BU 5	BU 9	BU 2	BU 1	BU 11		

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



- viii) Users get redirected to the Storyboard with a pop-up message stating that the storyboard views are updated.
- ix) Select any one-dimension value from the view which was selected to develop a dependency, the other views get filtered accordingly.
 - E.g., By selecting BU 1, all the integrated views display the data for BU 1 team.





4.4.2.2. Web Socket

'WebSocket' option under 'ACTIONS' is provided to refresh story when an external event occurs. Users can achieve this by configuring a WebSocket. The WebSocket Configuration contains a WebSocket IP and a message.

On opening a WebSocket enabled business story, a WebSocket channel is established to receive messages. The story gets refreshed when Web Socket receives the same message configured from this channel.

- i) Create a story or open an existing story.
- ii) Edit any view from the story or create a new view.
- iii) Choose the 'WebSocket' option from the 'ACTIONS' tab.
- iv) Configure the following details:
 - a. Enable the WebSocket functionality
 - b. Provide a WebSocket IP
 - c. Insert a Message based on which the selected view(s) get updated (Enable View Restrictions, if required)
 - d. Click the 'APPLY' option
 - e. Save the configured view.

Busine	ess Story: Design New DESIGN	ACTIONS		7 🕒
Acti	on Settings	WebSocket		
cault	Interactions Click based interactions on other views	By enabling the Websocket functionality users will be able to get the latest updated data from the data source.	2	
	3	WebSocket IP * ws://businessstory.com/websocket/ws	Available Views	
f (x)	Custom Fields Create custom fields from view	ws.// businessalory.com/ websocket/ ws	Available views	
1	WebScocket Custom Websocket Settings	Message* New Employee Joins Enable View Restrictions.	Count(Primary_Skills) By Designation Sum(salary) By Designation Untitled	
			6	APPLY

v) The event triggers and the story gets refreshed data

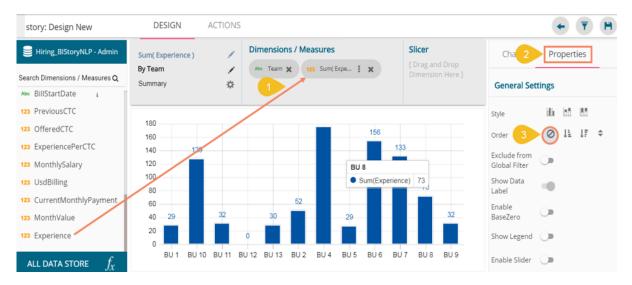


Note: The 'ACTIONS' tab also contains 'Custom Fields' option to be applied on the KPI Comparative tile. Please refer description given for KPI Comparative Tile to understand the 'Custom Fields' functionality.

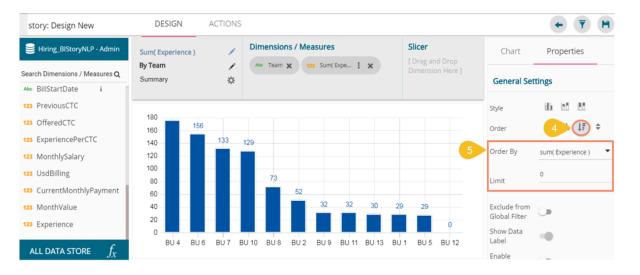
4.4.3. Order by and Limit

Users can sort the displayed data values in a chart by using this option from the chart Properties.

- i) Drag and Drop the desired dimensions and measures to create an instant view (By default the Mixed chart displays the dragged data)
- ii) Open the 'Properties' tab with a click.
- iii) By default, the chart displays 'none' as the selected any option using the 'Order' field.



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



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



story: Design New	DESIGN	ACTIONS							 ▼ 	H
Hiring_BIStoryNLP - Admin	Sum(Experience)	1	Dimensions			Slicer		Chart	Properties	
Search Dimensions / Measures Q	By Team Summary	∕ ☆	Abc Team 🗙	123 Sum(Exp	: X	Dimension Here]		Conservations	*!	
Abc BillStartDate i	Summary	245						General Set	tings	
123 PreviousCTC								Style	66 60 80	
123 OfferedCTC	180							Order	Ø IL IF	\$
123 ExperiencePerCTC	160		156	BU 7				order	0 1- 1.	
123 MonthlySalary	140				perience) 133		6	Order By	sum(Experience)	•
123 UsdBilling	120								5	4
23 CurrentMonthlyPayment	100 —							Limit		
123 MonthValue	80					73		Exclude from		
123 Experience	80					13		Global Filter		
	60 BU 4		3U 6	BU 7	BU 10	BU 8		Show Data Label	•	
ALL DATA STORE f_{χ}	504			201	2010	200		Enable		

Note:

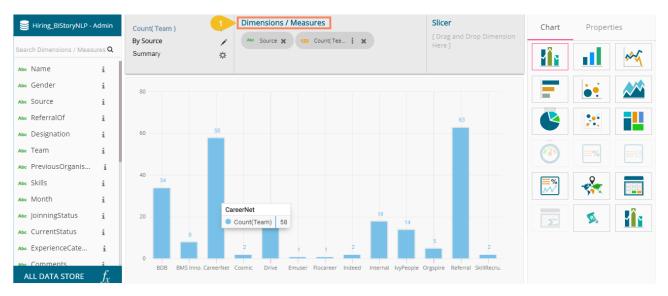
- a. This feature does not work for KPI tile, Semi Gauge, Map, TreeMap Chart, and Metric Summary.
- b. The view specific 'Sort By' option can be accessed from the storyboard.

story	Data Search		۹ 🕂	۹ 🔺	٠	H) (3	S (2	
Count(Skills) By Team	\$ ≡	Sum(MonthlySalary)	Sum(Ex	perience)			÷	=
200 1 0 3 ²⁹ 6 ²⁹ 6 ³² 7 0 BU 12 BU 5 BU 1 BU 9 BL		₹17M Sum of Mon. Sal.	200	BU 4 BU 6	133 BU 7	129 BU 10	73 BU 8	

4.4.4. Manual Sort

Users can manually sort a view by choosing the customized order they require. They can save the customized order and reuse it whenever required.

- i) Navigate to the Design new page
- ii) Choose any combination of one Dimension and Measure
- iii) A chart gets displayed in some order





- iv) Open the chart properties
- v) Click the 'Manual Sort' option

Chart 🙎	Properties				
General Settings					
Style	Cluster 🔻				
Order	0 # }				
Exclude from Global Filter					
Show Data Label	•				
Enable BaseZero					
Show Point	••				

- vi) A new window opens
- vii) Select the 'New' tab
- viii) Enter the order name
- ix) Arrange the fields by dragging them or using the arrows to arrange them in an order
- x) Click the 'APPLY' option after arranging the fields in the desired order

NEW SAVED		
Order Name *	Select Dimension	
Z to A	Source 🔻	
SkillRecruit	7 ∧ ∀ ↓	
Referral		
BDB		
BMS Innolabs		
CareerNet		
Cosmic		
Drivo		

xi) The View fields get displayed in the selected order



号 Hiring_BIStoryNLP - Admi	Count(Team)	Dimension	ns / Measures		Slicer	Chart	Properties
Search Dimensions / Measures (By Source Summary	Abc Source	X 123 Count(Tea : X		[Drag and Drop Dimension Here]	General Set	tings
Abc Name i						Style	Cluster 🗸
Abc Gender i	80					Style	
Abc SOURCE i						Order	⊘ ↓i ↓ī ≑
Abc ReferralOf i	63				58	Exclude from Global Filter	•
Abc Designation i	60					Show Data	-
Abc Team i						Label	
Abc PreviousOrganis i	40					Enable BaseZero	
Abc Skills 1					34		
Abc Month i						Show Point	•
Abc JoinningStatus i	20	18		15		Line Form	Curve 🔻
Abc CurrentStatus i		IvyPeople			8	Show Legend	
Abc ExperienceCate	2	5 Count(Team) 14 1 1	2		-	
Abc Comments i	6 SkillRecru. Referral	Orgspire lvyPeople Interna	al Indeed Flocareer Emuser I	Drive Cosmic Ca	reerNet BMS Inno. BDB	Enable Slider	

Note- The 'Saved' tab list all the saved order by the user. Users can follow the below given steps to use a saved order.

- i) Open the 'Saved' tab from the Manual Sort window
- ii) Select a saved order using the Select Order drop-down
- iii) Click the 'SAVE & APPLY' option

NEW SAVE)				
Select Dimension		t Order			
Source	2 Z to	A			•
SkillRecruit		~	\sim	1	÷
Referral					
Orgspire					
IvyPeople					
Internal					
Indeed					
Flocaroor					

iv) The selected saved order gets applied to the view

4.5. Adding a Slicer

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

- i) Drag and drop one dimension and one measure to the 'Dimensions/ Measures' column using the DESIGN tab.
- ii) Drag and drop another dimension as 'Slicer.'



iii) The slices get displayed in the created view based on the second-dimension value via a column chart (by default)

E.g. The following image shows designation wise salary for teams BU 6 and BU 10 through Mixed Chart.

story: Design New	DESIGN ACTIONS				+	T H
Hiring_BIStoryNLP - Admin Search Dimensions / Measures Q	Sum(MonthlySalary) By Team / Summary &	Dimensions / Measures	Slicer	Chart	Propert	ies
Abe Name i Abe Gender i Abe Source i Abe ReferralOf i	1M 1M	μ		F	••	
Ane Designation i Ane Team i Ane PreviousOrganis… i Ane Skills i	800K 600K	732K 497K	317K	-%		Σ
All DATA STORE f_{χ}	267 200K 117/2 ^{50K} 0	00K 239K 99 99 BU 6 BU	158К ²⁰⁰ ерккијеок Сулитадин Фон			

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

4.6. Applying Filters

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

4.6.1. View Specific Filter

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

story: Design New	DESIGN ACTIO	DNS		1	Т н
😸 Hiring_BIStoryNLP - Admin	Sum(Experience)	Dimensions / Measures	Slicer 2	Filter 5	∕ C ×
Search Dimensions / Measures Q	By Designation	Abs Designation 🗙 123 Sum(Expe 1	[Drag and Drop Dimensi Here]	Cesignation	
	Summary 3	¢:	-	Search	Q
Abc Year i				Select All	
Abc ExpectedJoinning i	300	27	7	RFP Analyst	4
123 PreviousCTC	250			Senior Architect	
123 OfferedCTC	200			Senior Development Manager	
123 ExperiencePerCTC				Senior QA Engineer	
123 MonthlySalary	150			Senior QA Manager	
123 UsdBilling	100	86		Senior Software Engineer	
123 CurrentMonthlyPayment	50	69 47 <u>40</u> 47	51	Software Developer	
123 MonthValue 123 Experience	3 8 1 6 2 2 12	9 3 7 ¹¹ 1 20 5 ¹⁵ 2 ^{12 15} ¹⁶	2 6 10 14 15 27 8 4	Software Engineer	
ALL DATA STORE $f_{\rm Y}$	0 + + + + + + + + + + + + + + + + + + +	D. D. D. Le. L. Le. O. P. Q. Q. Q. Q. R. S. S. S. S.	S. S. So. S. S. S. S. Te. iO.	Solution Specialist	\checkmark

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



story: Design New	DESIGN	ACTIONS				+	T H
Hiring_BIStoryNLP - Admin	Sum(Experience)	1	Dimensions / Measures	Slicer	Chart	Proper	ties
Search Dimensions / Measures Q	By Designation Summary	\$	Alle Designation 🗙 123 Sum(Expe : 🗙			al l	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Abe Year i							
Abe ExpectedJoinnit i	55		51		E.	•	
Abc BillStartDate i	50						
123 PreviousCTC	45						
123 OfferedCTC	40						
123 ExperiencePerCTC	35						≣% ₩
123 MonthlySalary	25		Software Engineer		0		
123 UsdBilling	20		• Sum(Experience) 51		- *		Σ
123 CurrentMonthlyPayment	15						
123 MonthValue	10			6	1		
123 Experience	5	2					
ALL DATA STORE $f_{\!X}$		RFP Analyst	Software Engineer	Solution Specialist			

Note:

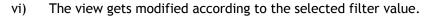
a. A '**Search**' bar has been provided for the View Filter panel to search a Dimensions, Measures, and Time value from the available list.

	← <u>₹</u> ₩
Filter	✓ 2 ×
st	Q
joining_status	
current_status	

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



story: Design New	DESIGN	ACTIONS	5			() 🕤 🖻
😂 Hiring_BIStoryNLP - Admin	Sum(Experience)	1	Dimensions / Measures	Slicer 2	Filter	≎ ×
Search Dimensions / Measures Q	By Designation Summary	/ \$	Abe Designation 🗶 123 Sum(Expe : 🗙	[Drag and Drop Dimension Here]	< Experience	-0
Abc Year i				4	is between	-
Abe ExpectedJoinning i	300		27	7	From 20	
Abc BillStartDate	250					
123 PreviousCTC	200				то 25	
123 OfferedCTC	200					
123 ExperiencePerCTC						
123 MonthlySalary	150					
123 UsdBilling	100		86			
123 CurrentMonthlyPayment			69 47 • 47	51		
123 MonthValue	50		47 40 47 22 20 15 12 15 16	2 6 10 14 15 27		
123 Experience	0	2 2 12 9	3 4 7 4 1 4 5 2 7 4 4 4	<u>┽┩┽┿┩┩┩┥┽</u>		
ALL DATA STORE $f_{\!x}$	A. A. A. A.	B. B. D. D.	D. D. D. Le. L. Le. O. P. Q. Q. Q. Q. R. S. S. S. S. S.	. S. S. So. S. S. S. S. Te. iO.		



story: Design New	DESIGN	ACTIONS						+	Y H
曼 Hiring_BIStoryNLP - Admin	Sum(Experience) By Designation	1	Dimensions / Mea	123 Sum(Expe i X		Slicer [Drag and Drop Dimension Here	Chart	Proper	ties
Search Dimensions / Measures Q	Summary	* *	Desgnation A	and point proference and				<u>al</u>	*
Abe Year i Abe ExpectedJoinnin i	22						=		
Abc BillStartDate i	22								
123 OfferedCTC	21				-	xperience) 20			
123 ExperiencePerCTC 123 MonthlySalary	21						2		
123 UsdBilling 123 CurrentMonthlyPayment	21						**		
123 MonthValue 123 Experience	20				20		X		
All data store f_{χ}	20	DevO	ps Manager		Development	Manager			

4.6.2. Global Filter

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



story	Data Search				۹ (+	4		\$	Ħ			D
Count(Skills)		¢	≡	Sum(MonthlySalary)	Sum	n(Ex	Filte	er	Saveo	d Filter			
By Team					Ву	2	Filte	r		5	$\overline{\mathbf{O}}$	H C	×
				74714		3	< Sou	irce					
200	⁵² 12 ³² 12 ³⁰ 22 ⁷³ 2	129		₹17M	2	200 -	Search						۹
0				Sum of Mon. Sal.		0 -	Selec	t All					
BU 12 BU 5 BU 1 BU 9 BU	J 2 BU 11 BU 13 BU 8 BU	J 10					BDB					4 🗸)
							BMS	Innolab)S				
							Care	erNet					
							Cosn	nic					

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

story		Data Search			Q + 4 🔺	•	A (2	; 🔻
Count(Skills) By Team		4	=	Sum(MonthlySalary)	Sum(Experience) By Team		¢	=
200 0 <u>3</u> BU 8	3 4 3 BL	4 27 129 4 27 BU 10		₹2M Sum of Mon. Sal.	200 129 0 BU 10	4 BU 7	3 BU 8	

Note:

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

+	4	• •		C	₹
	Filter	Saved Filter			
	Filter		~	Ħ 4	с х
22	de				Q
65	Gender				
	Designation				
nde. Or					

- b. The global filter can be applied only to those views on the storyboard where the filter values are used as dimensions.
- c. Global filter when applied to various views on a storyboard, subdues the view specific filter values.
- d. Users can insert views created via different data stores on one Story Board. By default, the Global filter panel displays all the available filter values across the data stores.
- e. Users can add a global filter based on the 'Measures' values.
 - i) Click the 'Global Filter' icon $\overline{\mathbf{y}}$
 - ii) The Filter panel opens on the Story Board.
 - iii) Select a measure as a filter value.
 - iv) Select a condition from the drop-down menu.



v) Click the 'Apply' option.

story	Data Search			Q 🕇	<	• H 2	
Count(Skills)	÷	≡	Sum(MonthlySalary)	Sum(Ex	Filter	Saved Filter	
By Team			Options	By <mark>2</mark> m	Filter	5	∕r ≎ ×
200			₹17M	200 -	< Experience		
200 1 0 3 ²⁹ 6 ²⁹ 6 ³² 7	$\begin{array}{c} & & & 129 \\ 52 & 12^{32} & 12^{30} & 22 \\ \end{array}$		Sum of Mon. Sal.	4	is between		•
· ·	2 BU 11 BU 13 BU 8 BU 10			0 -	From	21	
					То	23	\$

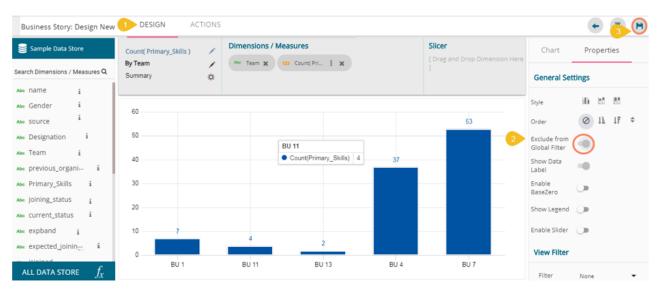
f. The selected filter value gets applied to all the saved views on the storyboard.

story	Data Search			Q + 4 4	• A 2	C	T
Count(Skills) By Team	\$	=	Sum(MonthlySalary)	Sum(Experience) By Team		÷	=
501	22 30 2	-	₹0M Sum of Mon. Sal.	40 20 0	22 BU 2		

4.6.2.1. Exclude from the Global Filter

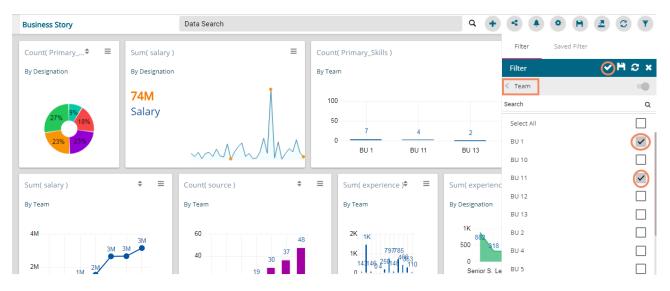
The Global filter values are applied to all the available views on a storyboard. Users can exclude a specific view from the Global Filter effect by selecting the 'Exclude from the Global Filter' option.

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

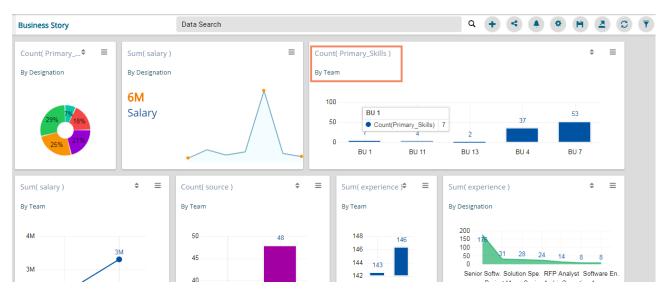




- iv) Users get redirected to the Storyboard.
- v) Click the '**Filter**' option and select a global filter value (in this case, it is BU 1 and BU 11 Teams).
- vi) Click the 'Apply' option.



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



4.6.3. Saving a Global Filter

- i) Click 'Global Filter' option.
- ii) Select the 'Filter' tab.
- iii) Select a filter value by check marks. E.g. In this Case, team BU 6 and BU 7 are the selected filter values.
- iv) Click 'Save' option.



+	4	•	A 10 T
	2 Filter	Saved Filter	
В	Filter		
3	Team		-0
	Search		Q
	Select All		
	BU 10		
	BU 4		
	BU 6		~
	BU 7		~
	BU 8		
	BU 11		

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

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

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

Fi	lter 7 S	aved Filter	
Fil	ter by Tean	ns 🕬	
		APPLY	REMOVE

4.6.4. Measure Filter

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

- i) Select one dimension and one Measure value from the list of the available Dimensions and measures. Drop the Measure value twice on the canvas.
- ii) Click the 'Series Properties' icon to open the measure specific Series Properties.



Business Story: Design New	DESIGN A	ACTIONS					+	T H
Sample Data Store	Sum(experience)		nsions / Measures		Slicer [Drag and Drop Dimension Here	Chart	Propert	ties
Search Dimensions / Measures Q	By Gender Summary		Sender X 123 Sum(expe i X		1	H Î x	al	~
Abc isjoined i								
123 id	1 300					-	.	
123 candidate_id	250			254				
123 experience	250			Male				(
123 previous_ctc	200			 Sum(experience) Min(experience) 				
123 offered_ctc								
123 expperyear_ctc	150							
123 usd_billing	100							
123 salary								
123 monthly_salary	50	35				S .		
∞ FF_exp 💼 🗄	0		2		0			
ALL DATA STORE $f_{\!X}$		Female		Male				

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

	Series Properties:							
3	Aggregation	Sum						
	Display Name							
-	Series Type	<u>h</u> ~						
-	Color	8						
	U	CANCEL 4 APPLY						

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

Series Prope experience		×
Color	8	_
Data Label Colo	<u></u>	_
5 Filter Options	T	
	CANCEL	APPLY



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

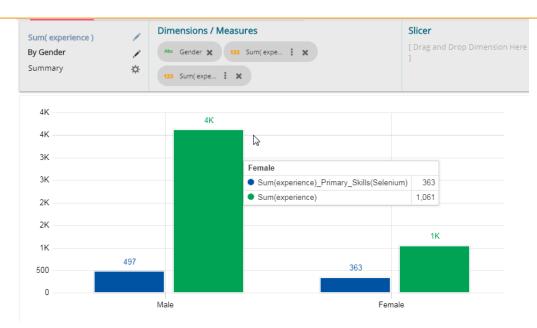
Series Prope experience			×
🛠 Filter		<mark>₿</mark> ⊘∂	×
6 Primary_Skills			
Search			۹
Select All			
Selenium		7	~
Java			
	CANCEL	APPL	Y
ensions / measures			
Ger Series Proper Experience		×	
Sun Filter	8	⊘ ≎ ×	ц.
6 Source			ь.
Search		۹	
Select All			
lvyPeople			
Orgspire			
7 Referral		\checkmark	
3 SkillRecruit			
_			

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

e e	Series Prope experience	erties: 🗶	
*	Color	<u> </u>	ļ
	Data Label Colo	or 🔛	
9	Filter Options	T	
			Į
		CANCEL 10 APPLY	

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

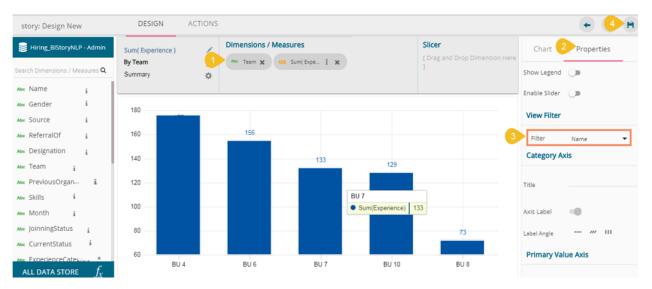




4.6.5. Custom View Filter

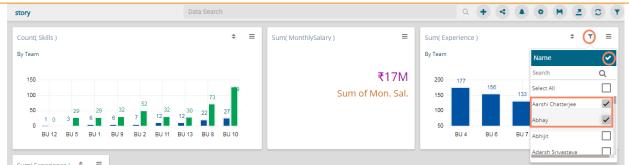
Users can access this filter option from the chart properties that appear in a chart on the storyboard when the view is saved.

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

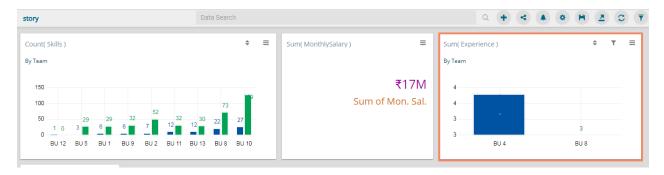


- v) Click the 'Filter' option.
- vi) Select a filter value.
- vii) Click the 'Apply' option.



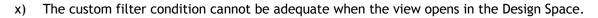


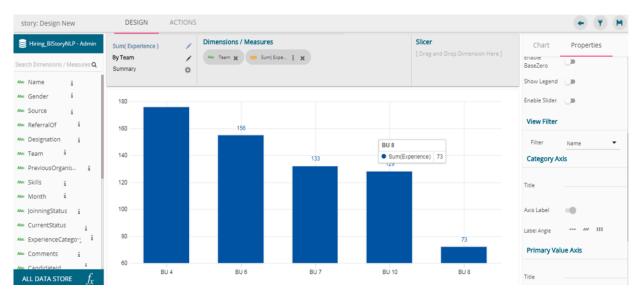
viii) The view gets customized as per the selected filter condition on the Storyboard.



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

story	Data Search	Q + 4 0 H 2 C T
		Sum(Experience) By Team 4 4 3 3 BU 4 BU 8





Note: The 'View Filter' choice is not available for the Semi Gauge chart, KPI Tile, KPI Comparative Tile, Matrix Summary.



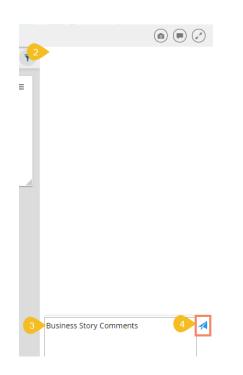
4.7. Comments

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

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

My Documents 🔹 / Business Story 👻				<u>∩</u>
story	Data Search		० 🕂 🗧 🌢 🔹	H 2 C 1
Count(Skills) By Team	\$ ≡	Sum(MonthlySalary)	Sum(Experience) By Team	÷ ▼ ≡
150 100 50 0 100 100 100 100 100 100 100	73 12 ³⁰ 22 27 BU 13 BU 8 BU 10	₹17M Sum of Mon. Sal.	100	73 73 U 10 BU 8

- ii) A new window opens below with space to insert a message at the end of the window.
- iii) Type a comment in the given 'Message' space.
- iv) Click the 'Send' 🗖 icon



v) The entered comment appears in the 'Comments' window.



Note:



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

5. Charts & Properties

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

5.1. Mixed Chart

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

Best situation to use Mixed Chart: To compare multiple categories

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

Variations of this chart:

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

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

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

Properties:

i) General Settings

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





ii) View Filter

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

iii) Category Axis

- a. Title: Provide a title for the axis
- b. Axis Label: Enable the category axis label by turning on the radio button
- c. Label Angle: Select a display angle for the axis label
- E.g., 'Teams' is the title for the category axis.



iv) Primary Value Axis

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



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		0 —	_					_						

v) Secondary Value Axis

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

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

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

Seconda	ry Value Axis	
Enable		

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

12	Series Proper Experience	ties:	×	
	Aggregation	Sum	•	
	Display Name	Sum of Experience		15
	Series Type	Ь. Л		Γ
l	Axis			
	Color	#005c2e	_	
	Data Label Color	#fff00	_	
		CANCEL	APPLY	



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



5.2. Column Stack Chart

f.

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

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

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

Variations of this chart

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

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

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

Properties:

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



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



ii) View Filter

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

- iii) Category Axis
 - a. Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by turning on the radio button
 - c. Label Angle: Select a display angle for the axis label
 - E.g., 'Teams' is the title for the category axis.





iv) Primary Value Axis

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

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v) Secondary Value Axis

The Second Value Axis Properties gets displayed when two measures are dragged on the canvas. Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display same on the chart

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

	Seconda	ry Value Axis			
	Enable				
b.	Click 'Seri	ies Properties'	provide	ed next to the measure	e name



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

nensic	ons / Measures			
• Tea	Series Prope Experience	rties:	×	
3 Min	Aggregation	Min	-	
	Display Name	Min of Experience		
	Axis		15	
	Color	#2e005c	_	
	Data Label Colo	#a300a3		
6		CANCEL	APPLY	

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

By T	int(Sk Team nmary	ills)		/ / ¢	Abc Tear	ons / Me	13 Count(Sk	il i x				Slicer [Drag an]	id Drop D	imensior	n Here	Chart Formac Type Currency Type	Properties
	60		6.0										54	6.0		Precision	0
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		BU 12	BU 5	BU '	BU 9	BU 2	BU 11 Te	BU 13 eams	BU 8	BU 1	10 BU	7 BU 6	BU 4			Precision	1

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



5.3. Line Chart

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

Best Situation to use Line Charts:

View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

Variations of this chart

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

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

Properties:

i) General Settings

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





ii) View Filter

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

iii) Category Axis

- a. Title: Provide a title for the axis
- b. Axis Label: Enable the category axis label by turning on the radio button
- c. Label Angle: Select a display angle for the axis label
- E.g., 'Teams' is the title for the category axis.



iv) Primary Value Axis

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



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	10 5	· ·	3	6				Currency Type	None
	0					~		Precision	
		BU 12	BU 5	Teams		BU 13	BU 11	Secondary \	/alue Axis
							=	Enable	

v) Secondary Value Axis

The Second Value Axis properties appear when two measures are dragged on the canvas. Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display the same on the chart

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



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

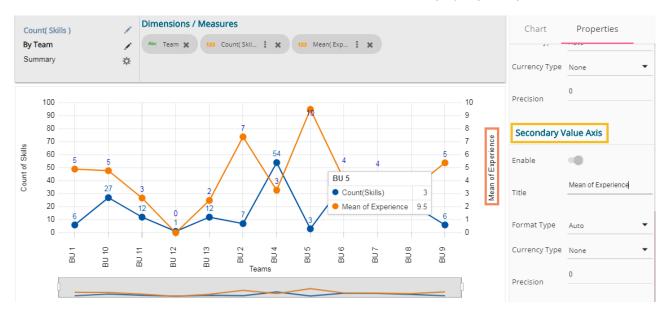
ions	/ Measures			
S E	eries Prope Experience	rties:	×	
	Aggregation	Mean	•	
	Display Name	Mean of Experien	ce	
	Axis			
	Color	#f57b00		
	Data Label Color	#0000a3		
		CANCEL	APPLY	
	00 8	ā	Ē	Ē



e. Navigate to the 'Properties' tab

f.

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



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

5.4. Bar Chart

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

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

Examples:

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

Variations of this chart:

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

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

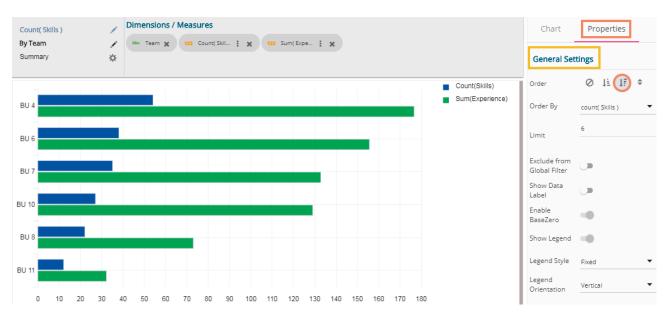
Properties:

i) General Settings

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



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

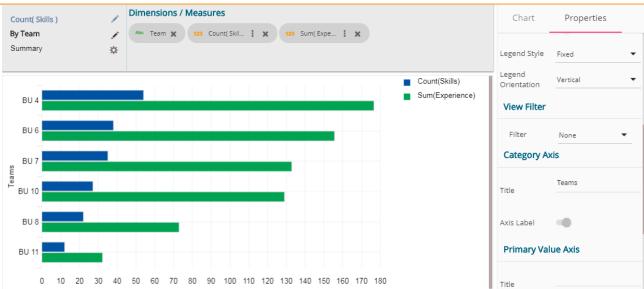


ii) View Filter

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

- iii) Category Axis
 - a. Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by turning on the radio button
 - c. Label Angle: Select a display angle for the axis label
 - E.g., 'Teams' is the title for the category axis.





iv) Primary Value Axis

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

Cour	nt(Skills)	1	Dimensions / Measures	Chart	Properties
By Te Sumi		.∕ ¢	Abc Team 🗶 123 Count(Skil : 🗶 123 Sum(Expe : 🗶	Title	reams
			Count(Skills)	Axis Label	•
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	BU 6		Count(Skills) 54 Sum(Experience) 176.6	Title	Count of Skills
	BU 7			Axis Label	-
	BU 10			Label Angle	/// 111
	BU 8			Format Type	Auto
	BU 11			Currency Type	None
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	40 ¢	8 & 10 & 9 ,10 ,10 ,19 ,19 ,19 ,19 ,10 ,10 ,10 ,10 ,10 ,10 ,10 ,10 ,10 ,10	Precision	0

## 5.5. Bubble Chart

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

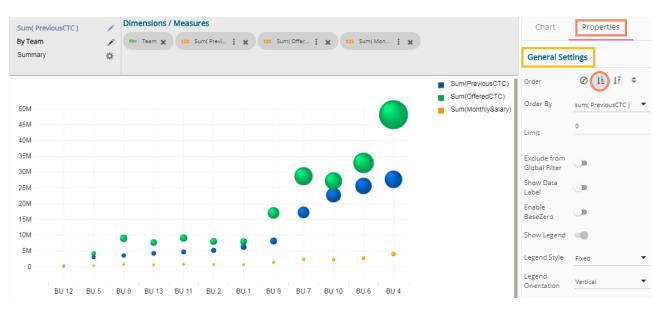
#### Best situation to use a Bubble Chart:

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



#### **Properties:**

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



#### ii) View Filter

- a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)
- iii) Category Axis
  - a. Title: Provide a title for the axis
  - b. Axis Label: Enable the category axis label by turning on the radio button
  - c. Label Angle: Select a display angle for the axis label
  - E.g., 'Teams' is the title for the category axis.





## iv) Primary Value Axis

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

ium( PreviousCTC )	Dimensions / Measures	Chart	Properties
<b>y Team</b> Summary	▲ Abe Team ★ 123 Sum(Previ i ★ 123 Sum(Offer i ★ 123 Sum(Mon i ★	Title	reams
	Sum(PreviousCTC)	Axis Label	•
50M	Sum(OfferedCTC)	Label Angle	/// 111
45M 40M		Primary Valu	ue Axis
35M 30M		Title	CTCs & Mon. Sal.
25M 20M		Axis Label	•
15M 10M 5M		Format Type	Auto
0		Currency Type	None
BU 12	3U 5 BU 9 BU 13 BU 11 BU 2 BU 1 BU 8 BU 7 BU 10 BU 6 BU 4 Teams	Precision	0

## 5.6. Area Chart

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

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

#### Examples:

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



#### Variations of this chart: Line charts

#### **Properties:**

- ii) General Settings
  - a. Style: Select a Style option from the drop-down menu
    - i. Overlaid
    - ii. Stacked
    - iii. 100%
  - b. Order: Select a sequence for displaying data
    - i. None
    - ii. Ascending
    - iii. Descending
  - c. By selecting an order, users will be required to configure the following fields:
    - i. Order By- Select a value option from the drop-down menu to order sequence of the data
    - ii. Limit- Set a number to display the ordered data by this limit
  - d. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
  - e. Show Data Label: Data label will be displayed by turning on the radio button
  - f. Enable Base Zero: Base will be presented from Zero by turning on the radio button
  - g. Show Legend: Displays legend by turning on the radio button
    - After enabling 'Show Legend,' users need to select the following information:
      - i. Legend Style: Select one of the following options by using the drop-down menu
        - 1. Fixed
        - 2. Floating
      - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option from the dropdown menu.
        - 1. Vertical
        - 2. Horizontal

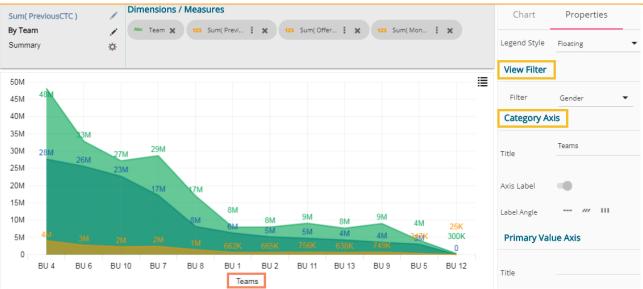


- iii) View Filter
  - a. Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image)

#### iv) Category Axis

- a. Title: Provide a title for the axis
- b. Axis Label: Enable the category axis label by turning on the radio button
- c. Label Angle: Select a display angle for the axis label
- E.g., 'Teams' is the title for the category axis.





## v) Primary Value Axis

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

Sum( PreviousCTC ) By Team Summary		• Team X		S (Previ	X 123	3 Sum( Offe	r I X	123 Sur	n( Mon	i ×	Chart Title	Properties
50M 45M 48M										1	Axis Label Label Angle	/// 111
40M 35M	И										Primary Valu	ue Axis
30M 28M 26		29M						J 13 Sum(Previo		4,235,000	Title	CTCs & Mon. Sal.
25M 20M	23M	17M	17M				•	Sum(Offere Sum(Month	dCTC)	7,650,000 637,501	Axis Label	•
15M 10M			8M	8M 6M	8M	9M	8M	9M	4M	25K	Format Type	Auto
5M 4 <mark>M 3</mark> N				662K	5М 665К	5M 756K	4M 638K	4M 749K	347K	300K	Currency Type	None
0 BU 4 BU	6 BU 10	BU 7	BU 8	BU 1 Teams	BU 2	BU 11	BU 13	BU 9	BU 5	BU 12	Precision	0

# 5.7. Pie Chart

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

## Best situation to use Pie Chart:

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

#### Variations of this chart:



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

### Properties:

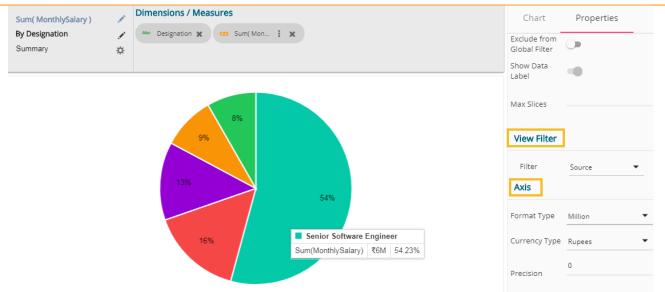
- i) General Settings
  - a. Style: Select a style to display data
    - i. Pie
    - ii. Doughnut
  - b. Order: Select a sequence for displaying data
    - i. None
    - ii. Ascending
    - iii. Descending
  - c. By selecting an order, users will be required to configure the following fields:
    -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

Sum( MonthlySalary )	Dimensions / Measures	Chart Properties
By Designation Summary	Alle Designation X 123 Sum(Mon : X	General Settings
		Style CO
		Order Ø 🕕 ↓ 🛱 🗢
	18% 7% 10%	Limit 8
	10%	Exclude from Global Filter
	14%	Show Data Label
	13%	Max Slices 0
	14%	View Filter

#### ii) View Filter

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





## 5.8. TreeMap Chart

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

## Best situation to use TreeMap:

To view all the hierarchical data at one time.

### Variations of this chart:

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

### **Properties:**

### i) General Settings

- a. Order: Select a sequence for displaying data
  - i. None
  - ii. Ascending
  - iii. Descending
- a. By selecting an order, users will be required to configure the following fields:
  - iii. Order By- Select a value option from the drop-down menu to order sequence of the data
  - iv. Limit- Set a number to display the ordered data by this limit
- b. Exclude from Global Filter: The view will be excluded from the Global Filter condition by turning on the radio button
- c. Show Data Label: Data label will be displayed by turning on the radio button
- d. Gradient: Enable or disable color gradient effect on the chart by using the radio button. By enabling the 'Gradient' option users gets redirected to set 'Start Color' and 'End Color' from the respective menus.



Sum( MonthlySalary ) 💦 🖉	Dimension / Measure	Slicer						Chart	Properties
By Designation 🖌 Summary	123 Sum( Mon 🚦 🗶	Abe Designation	×					General Set	tings
		Sr Software De 497K	eveloper Designation		2	Engineer 38K ware Develo	oper	Order By Limit Exclude from Global Filter	Designation  9
Software Er 1M	ngineer		Sum(Month	lySalary)	497,00 33K	0		Show Data Label	•
		Sr Big Data De 317K	veloper	iOS Dev 73K		Solutio 54K	So 40K	Gradient Start Color End Color	#2ECC71 #7be983

#### ii) View Filter

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

#### iii) Axis

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

Sum( MonthlySalary ) By Designation	// ./`	Dimension / Measure	Abc Desig	nation 🗙					Chart	Properties
Summary	☆								Start Color	#2ECC71
						A Engir 238K	neer		End Color	#fbe983
				re Developer 197K					View Filter	
				Designation	Sr Softwar	e Deve	eloper		Filter	None 🔻
So	oftware En 1M	igineer		Sum(MonthlySala	ary) 497,000		ום וכ	Dev	Axis	
					233K		15	8K	Format Type	Auto 🗸
			Sr Big Da	ta Developer					Currency Type	None 🔻
				317K	iOS Devel		utio	So	Precision	0
					73K	5	54K	40K	1 CODION	

## 5.9. Semi Gauge Chart

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



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

## Best Situation to use Semi-Gauge:

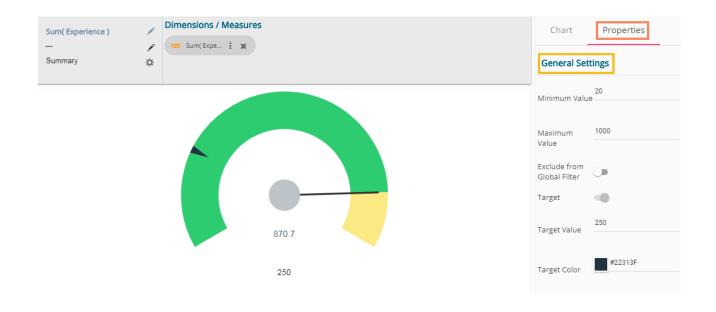
To monitor any performance that contains predefined ranges

## Examples:

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

## Properties:

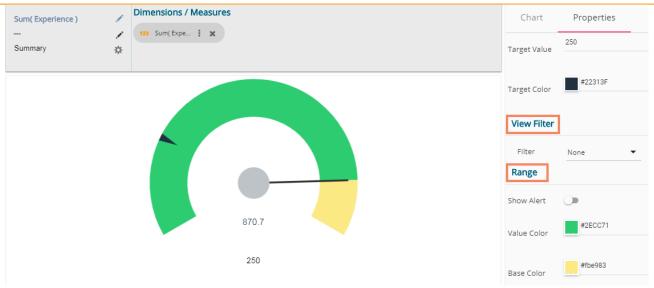
- i) General Settings
  - a. Minimum Value: Set a minimum value to be shown on the chart (It should be less than the maximum set value)
  - b. Maximum Value: Set a maximum value to be displayed on the chart (It should be more than the minimum set value)
  - c. Exclude from Global Filter: The view will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



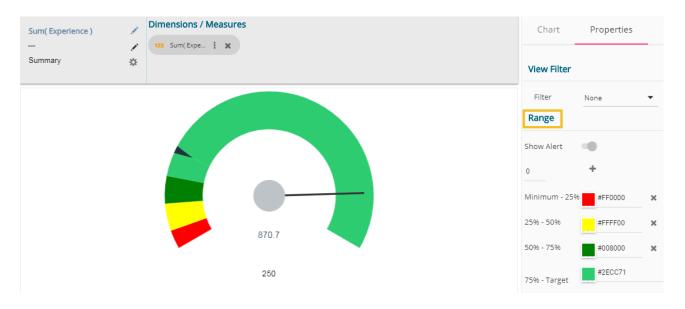
#### ii) View Filter

- a. Filter: Select a filter condition using the drop-down menu
- iii) Range
  - a. Show Alert: Enable various ranges (in %) by turning on the radio button
  - b. Value Color: Set a value color
  - c. Base Color: Set a base color





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



### Note:

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

## 5.10. KPI Tile

The KPI Tile displays the sum of quantity for ongoing evaluation.

#### **Properties:**

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



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

Sum( MonthlySalary )	/	Dimensions / Measures	Chart	Properties
			General Set	tings
			Label	Sum of Mon. Sal.
		<b>17M</b> Sum of Mon. Sal.	Label Color	#f57b00
			Label Font Size	
			Value Color	#5200a3
			Value Font Size	22 •
			Exclude from Global Filter	

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

## iii) Primary Value Axis

- a. Format Type: Select a desired format type from the drop-down menu
- b. Currency Type: Select a currency symbol to be displayed in the view
- c. Precision: Set the after-decimal value (It will show up to 5 precision)
- E.g., the below given image displays that Sum of Monthly Salary in 17 Million INR.

Sum( MonthlySalary )		Dimensions / Measures	Chart	Properties
	, <b>n</b> '	123 Sum( Mon 🚦 🗙	Value Color	#a300a3
		<b>₹17M</b> Sum of Mon. Sal.	Value Font Size Exclude from Global Filter View Filter	26 •
			Filter Primary Valu	None
			Format Type Currency Type	Million Rupees
			Precision	0

### 5.11. KPI Comparative Tile

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

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



BI Story: Design New	DESIGN	ACTIONS			+	<b>y</b> (H)
Sample Data Store	Sum( experience )	Dimensions / Measures		Chart	Proper	ties
Search Dimensions / Measures Q		123 Sum(expe 1 🗙			al	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Abc isjoined i						
123 id				_	<b>.</b>	
123 candidate_id						
123 experience			5K			<b>(</b>
123 previous_ctc			0			
123 offered_ctc				≡%	≡⊘	<b>*</b>
123 expperyear_ctc						
123 usd_billing				*		Σ
123 salary						
123 monthly_salary				<u> </u>		
🖂 FF_exp 💼 🗄						
ALL DATA STORE $f_{\!X}$						

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

BI Stor	ry: Design New DESIG	GN 3 ACTIONS			← H
Acti	on Settings	Custom Fields			5 NEW
L	Interactions Click based interactions on other views			6	Title
4 <b>f</b> (x)	Custom Fields Create custom fields from view	Salary 	ď	ů ů	Salary
9	WebScocket Custom Websocket Settings				2700000
					8 SAVE CANCEL

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

BI Stor	y: Design New DESI	GN ACTIONS		+ H
Acti	on Settings	Custom Fields		NEW
<b>Call</b>	Interactions Click based interactions on other views			
<b>f</b> (x)	Custom Fields Create custom fields from view	9 Salary	✓ [□]	
	WebScocket Custom Websocket Settings			



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

BI Stor	ry: Design New	DESIGN	ACTIONS			+	H
Acti	on Settings		Custom Fields			NEW	
<b>and</b>	Interactions Click based interactions o other views	n					
<b>f</b> (x)	Custom Fields Create custom fields from view	1	Salary Monthly Salary	dir dir	ů ů		
	WebScocket Custom Websocket Settin	gs					

# xi) Navigate to the 'Properties' tabxii) Enable Trend using the 'Properties' tab

Chart	Properties
General Set	tings
Label	
Label Color	#000000
Label Font Size	15 🔹
Exclude from Global Filter	•
Show Trend	•

# xiii) Configure the required fields for the 'Secondary Value Properties'

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

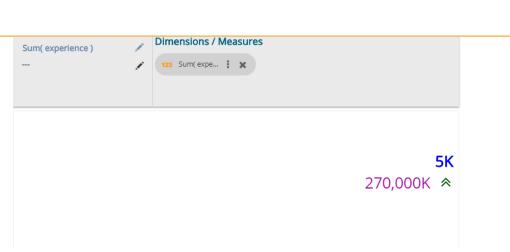


Sum( experience )	1	Dimensions / Measures		Chart 1	2 Properties
			13	Secondary V	alue Properties
				Secondary Value	Salary 🔻
			5К	Font size	22 🗸
			270,000K	Format Type	Thousand <b>•</b>
				Currency Type	None 🔻
				Precision	0
			14	Rules	¢

- xv) Configure the required 'Rules' fields as shown in the following image:
  - a. Primary Operator: Select an option from the drop-down menu
    - b. Operation: Select an operation from the drop-down menu to be applied as a condition on the selected Primary Operator
    - c. Secondary Operator: Select an option from the drop-down menu
    - d. Primary Value Color: Select a color for the primary value field
    - e. Secondary Value Color: Select a color for the Secondary Value field
    - f. Trend Direction: Select a trend direction using the drop-down menu
    - g. Trend Color: Select a trend color from the menu
    - h. REMOVE: Selecting this option removes the added rules
  - i. ADD: Selecting this option adds a new rule configuration
- xvi) Click 'APPLY' to apply the configured Rule.

Primary Operator	Operation	Secondary Operator	Primary Value Color	Secondary Value Color	Trend Direction	Trend color
Primary Value 🔻	less than or equal to 🔹	Secondary Value 🔻		Up	•	

xvii) The Primary and Secondary values get displayed in the selected colors if the rule condition is met.



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

Sum( experience )	1	Dimensions / Measures	Chart	Properties
		an multiple 1 K	REMOV	E
			When	Primary Value
			IS	greater than
		5К		Secondary Value
		ЗК ¥	Primary Color	#ff8000
			Secondary Color	#fff00
			Trend Direction	Down 🔻
			Trend Color	#ff0000
			REMOV	E
			ADD	APPLY

Note: The KPI Comparative Tile contains General Settings, View Filter, and Primary Value Axis like KPI Tile, but it has additional properties such as Secondary Value Axis and Rule to insert comparative approach.

## 5.12. KPI Sparkline

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



BI Story 3.2: Design New	DESIGN	ACTIONS			+	<b>y H</b>
Sample Data Store	Count( Team )		Nimensions / Measures	Chart	Propert	ies
Search Dimensions / Measures Q	By Designation		Alic Designation 🗙 123 Count(Tea : 🗙		al	~
Abe name i					••••	• •
Abc Gender i				=	i i i	
Abc source i						
Abc Designation						
Abc Team i						
Abc previous_organis i	1K			≡%		<b>≣%</b> ≫∕∕
Abc Primary_Skills i						
Abc joining_status i				- 🦛 -		Σ
Abc current_status i						
Abc expband i				5		
Abc expected_joining i						
Abc isjoined i		1				
ALL DATA STORE $f_{\!X}$						

### **Properties:**

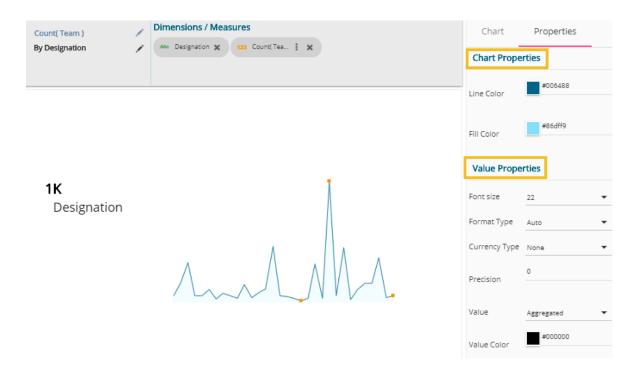
- i) General Settings:
  - a. Label: Provide a label name by using this field
  - b. Label Color: Select a label color from the menu
  - c. Label Font Size: Set the label font size
  - d. Exclude from Global Filter: Enabling this option excludes the selected view from the Global Filter condition
- ii) View Filter:
  - a. Filter: Select a filter condition to be applied to the view on the storyboard.

Count( Team )	Dimensions / Measures	Chart Properties
By Designation	Abc Designation 🗙 123 Count(Tea : 🗙	General Settings
		Label Designation
		Label Color #000000
1K		Label Font size 20 💌
Designation		Exclude from Global Filter
		View Filter
	A	Filter Gender   Chart Properties

- iii) Chart Properties:
  - a. Line Color: Select a line color for the Sparkline chart
  - b. Fill Color: Select a fill color for the Sparkline chart
- iv) Value Properties:
  - a. Font Size: Set Font size of the displayed value using the drop-down menu
  - b. Format Type: Select a format type using the drop-down menu
  - c. Currency Type: Select a currency type using the drop-down menu
  - d. Precision: Set the after decimal value to be displayed
  - e. Value: Select an option from the drop-down menu



- i. Aggregation
- ii. Last
- f. Value Color: Select a value color from the menu



### 5.13. Map Chart

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

### Best Situation to Use Map:

To represent any information in geographical context.

#### Examples:

The unemployment rate in the geographical context of Asia.

#### **Chart Properties:**

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





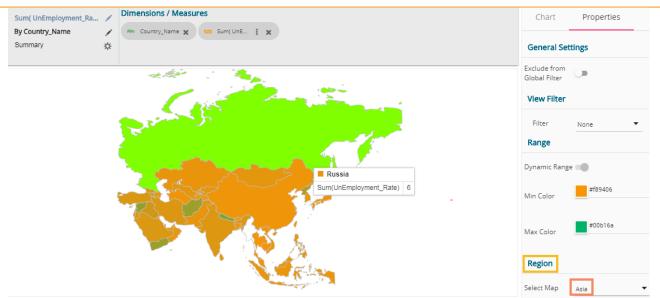
Note:

- a. By disabling the dynamic range, the map projects the selected **Max Color**. The user can change the color by clicking the '**Color**' properties option.
  - i. Disable the dynamic range.
  - ii. The entire map reflects the selected Max color (by default).



- b. Based on the selected 'Region,' the displayed visualization gets changed.
  - i. Select a map using the 'Region' drop-down menu.
  - ii. The map of the selected region gets highlighted based on the chosen dimensions and measures.





## 5.14. Data Grid

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

Chart Properties:

- i) General Settings
  - a. Order: Users can order the displayed data by selecting an option from the given choices:
    - i. Ascending,
    - ii. Descending
    - iii. None
    - iv. Users can also apply 'Order By' option on the dimensions chosen or Measures to display the determined order
  - b. Font Size: Select a font size out the given choices
  - c. Font Style: Select a font style out of the given choices
  - d. Font Color: Select a font color using the menu
  - e. Background Color: Select a background color using the menu
  - f. Exclude from Global Filter: Enabling this option excludes the view from the Global filter condition
- ii) View Filter
  - a. Filter: Select a filter condition from the drop-down menu



Sum( experience )	1	Dimensions / Meas					Chart	Properties
By name Summary	\$	Abc name X Abc	Gender 🕽 🗙 123	Abe Designation X	; Abc Team 🗶 123 Si	um( expe İ 🗙	General Set	tings
Name	Gender	Designation	Team	Sum(experience)	Sum(monthly_salary)	Sum(usd_billing)	Order	(∅) ti ti ÷
Abhay	Male	Senior Software Engineer	BU 4	15.20	300.00K	10.40K	Font Size	
Adarsh Srivastava	Male	Software Engineer	BU 4	10.50	250.00K	9.00K	Font Style	DI
Ahsan	Male	QA Manager	BU 6	165.00	1.60M	44.00K	Font Color	#5200a3
Ajay	Male	Senior QA Engineer	BU 8	21.00	275.00K	10.20K		
Akash Prasad	Male	Senior Software Engineer	BU 4	25.00	666.70K	15.00K	Background Color	#99ffcc
Akshay Nimgaonkar	Male	Senior Software Engineer	BU 4	11.60	193.30K	8.80K	Exclude from Global Filter	
Alok	Male	QA Architect	BU 8	81.90	1.50M	34.20K	View Filter	1
Amit Kumar Soni	Male	Senior Software Engineer	BU 11	28.00	597.30K	18.20K	Filter	None 🔻

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

## 5.15. Metric Summary

The Metric Summary displays the measure wise summary. Users can select any number of Dimensions and Measures to show the metric summary.

## Chart Properties:

- i) General Settings
  - a. Measure Description: Provide heading for the selected dimensions or measures column.
  - b. Summary Description: Provide heading for the displayed summary column.
  - c. Exclude from Global Filter: Enabling this option excludes the view from the Global.

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

### 5.16. R

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

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



Test Story: Design New	DESIGN			+ 7 H
Se MPG	Untitled	R Script	Chart	Properties
Search Dimensions / Measures Q		· ·		
Abc manufacturer i				
Abc model i			_	
Abc trans i				
Abc drv i				
Abc fl i				
Abc class i			≡%	
Abc No i				
123 displ				
123 year			<b>P</b> • • •	
ALL DATA STORE $f_{\!X}$		[Select Dimension or Measure to Visualize Data ]	<b>S</b> .	

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

Test Story: Design New	DESIGN			+	<b>7 H</b>
Search Dimensions / Measures Q	Untitled	<pre>title='Bubble chart') g + geom_jitter(aes(col=manufacturer, size=hwy)) + geom_smooth(aes(col=manufacturer), method='lm', se=F)</pre>	Chart	Proper	ties
Abe manufacturer i Abe model i Abe trans i		Я			
Abe drv i Abe fl i Abe class i Abe No i			<b>*</b>		
123 displ 123 year ALL DATA STORE $f_X$		[Select Dimension or Measure to Visualize Data ]	**		Σ

- Open 'Properties' tab iv) V)
  - Configure the below given Settings fields:
    - a. Function: Select an option from the drop-down menu
    - b. Data Frame: Select an option from the drop-down menu
- vi) Click 'Apply'

Test Story: Design New	DESIGN		+ <b>T</b> H
Se Mpg	Untitled	main <- function(mpg) {	Chart Properties
Search Dimensions / Measures Q		# load package and data library(ggplot2) data(mpg, package="ggplot2")	Settings
Abe manufacturer i Abe model i Abe trans i			Function     main       Data Frame     mpg
Abc drv i Abc fl i			Apply
Abc class i Abc NO i 123 displ			
123 year $f_X$ ALL DATA STORE $f_X$		Select Dimension or Measure to Visualize Data ]	
ALL DATA STORE $J_X$			

vii) The canvas displays visualization based on the inserted R script.

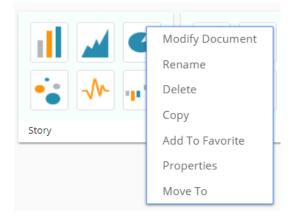


Test Story: Design New	DESIGN		← <b>〒</b> 用
🛢 мрд	Untitled	main <- function(mpg)	Chart Properties
Search Dimensions / Measures Q		# load package and data library(ggplot2)	Settings
Abc manufacturer i		data(mpg, package="ggplot2")	a
Abc model i		Builbein chant mgg Deplacement vs Chy Milleage	Function main 🔻
Abe trans i		:	Data Frame mpg 👻
Abc drv i		II it is it is the second seco	Apply
Abc fl i			
Abc class i		e"	
Abc NO i		navlatur 	
123 displ		13	
123 year			
ALL DATA STORE $f_{\!X}$		12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	

# 6. Options

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

- i) Navigate to 'My Documents' or 'Public Documents.'
- ii) Select a story document
- iii) Use the right-click on it to display the following context menu:



# 6.1. Modifying a Document

- i) Select 'Modify Document' from the story options menu
- ii) A new window to modify the story details appears
- iii) Modify the following information:
  - a. Title: Enter a title for the Business Story
  - b. Description: Describe the story (Optional)
  - c. Click the 'Save' option

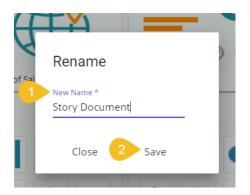


F		_	
4	Modify Stor	ry	
0	Name *		C
ру с	Story		- 1
2	Description		
ı.	3		~ ~
	Close	Save	
•	V *- 1	•	

iv) The chosen information for the story document gets modified

## 6.2. Renaming a Story Document

- i) Select 'Rename' from the Story options menu
- ii) Configure the following information to rename the story
  - a. Enter 'New Name' in the story document
  - b. Click the 'Save' option



- iii) A success message appears
- iv) The story document gets renamed successfully

My Documents >				
Image: state	Business Story	Copy of Sales Geo Analysis	0 (s) (c) Finance Overview	
III III € IIII III € IIII IIII € IIII IIII IIII IIII	III III € IIII III € IIII IIII € IIII IIII	Test Story	test story 2	
Document renamed successfully!				



## 6.3. Deleting a Business Story

- i) Select a story document
- ii) Click 'Settings' 🍄 for options
- iii) Select 'Delete'
- iv) A new window will pop-up to assure the deletion
- v) Click 'Delete'

6		1	C
C	Delete		C
ору с	Do you want to File ?	delete selected	
a.	Close	Delete	74

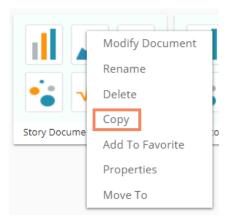
vi) The selected story document gets removed.

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

## 6.4. Copying and Moving a Business Story

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

- i) Select a story document.
- ii) Click 'Settings' ^C for options.
- iii) Select 'Copy.'



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

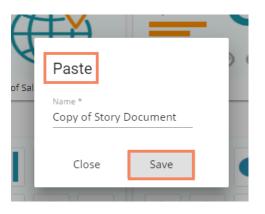
Navigate to 'My Documents' or 'Public Documents' and right-click anywhere.

- v) A context menu appears with the 'Paste' option.
- vi) Select the 'Paste' option.



	My Documents >	
Γ	Create Folder	
	Link a URL	5
	Paste	
Ľ	Create Geospatial	
L	Create Story	

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



x) A message pops-up to assure that the copied story document has been pasted successfully with a different name.

E.g., The following image shows that *Story Document* is named *Copy of Story Document* and has been pasted to the '**My Documents'** space.

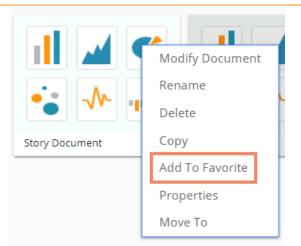
My Documents >				Search	Q ≓Name :
III III III IIII IIII IIIIIIIIIIIIIII	Business Story	Copy of Sales Geo Analysis	Copy of Story Document	10 3 2 C	Image: state
Sample Folder	III II € III III III € IIII III IIII IIII IIII	Story Document	Test Story	test story 2	

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

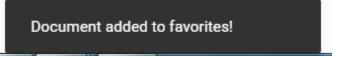
The user can add a business story document to or remove it from the Favorites.

- i) Select a story document
- ii) Use the right-click to open the options menu
- iii) Select the 'Add to Favorite' option from the menu

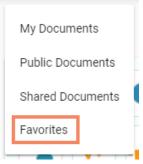




iv) A new message pops-up, "Document added to Favorites!"



v) Open 'Favorites' using the 'My Document' drop-down menu



vi) The selected story document gets added to the 'Favorites' space

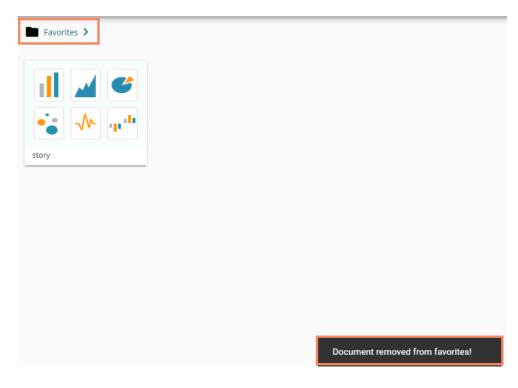
Favorites >	
•••••	····
story	Story Document



Click the 'Remove from Favorite' option that appears by using a right-click on the story document vii)

Favorites >	
	Remove From Favorite
story	Story Document

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



## 6.6. Properties

- Select a story document. i)
- Click the 'Settings' icon for options. Select the 'Properties' option ii)
- iii)
- A new screen pops-up with four options: iv)
  - **Properties:** Displays the basic properties of the selected Business Story. a.



Story Document	
< Properties	Share With User Share With Group Exclud
Created By:	Will
Kind:	Business Story
Where:	My Documents
Created:	Wed Oct 03 2018 18:52:14 GMT+05:30 (India Standard Time)
Modified:	Wed Oct 03 2018 18:52:14 GMT+05:30 (India Standard Time)
Version:	3.6.0
Open Document Link:	https://app.bdbizviz.com/home/#/opendocument2 docid=313655326&doctype=12&token=6900BD6DEE788 29FD7ACDB0B9CF5C51E3306
Description:	
Upload Image:	Choose Files No file chosen Save

- b. Share With User: The story document gets shared with the selected user or users.
  - 1. Select 'Share With' on the Properties pop-up screen.
  - 2. Select a user or multiple users from the User List that appears on the left side
  - 3. Move the selected user or users to the right-side box using the arrows.
  - 4. Click the 'Save' option
  - 5. A success message appears stating, "Document privilege updated successfully!"

Story Documer		Share With U	Jser	Share With Group	Exc	clud
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admin			>			
Nikitaa		· · · · ·	••			
Shipra			<			
sivan		•	••			
vichal		•				
Close	Save					

- 6. The story document gets shared with the selected user or users.
- c. Share With Group: The story document gets shared with the selected user group or user groups.
  - 1. Select 'Share With Group' on the Properties pop-up screen.
  - 2. Select a user group or multiple user groups from the list that appears on the left side
  - 3. Move the selected user group or user groups to the right-side box using the arrows
  - 4. Click the 'Save' option



5. A success message appears stating, "Document privilege updated successfully!"

Kpmg Group testUserGroup	s Share W	th User St	Exclud >
Permission BizViz Partners Demo Viewers		<ul><li></li><li></li><li></li><li></li><!--</td--><td></td></ul>	
Close Sa	ve		 <b>*</b>

6. The story document gets shared with the selected user group or user groups.

**Note:** If a story document is shared using this option, then the selected users or user groups will receive a view only copy. The shared story document gets added to the '**Shared Documents**' space.

- d. Exclude User: The selected user gets excluded from the privilege to access the story document.
  - 1. Select the 'Exclude User' option on the Properties pop-up screen
  - 2. Select and move user or users from the user list given on the left side to the selected user list provided on the right-side using the arrows
  - 3. Click 'Save.'
  - 4. A success message appears stating, "Document privilege updated successfully!"

	Arun Kadandale	Share With Group	Exclude User	
,	Mahadevan Vineet karthikps	< 41		¥

5. The selected user or users are unable to access the story document.



- e. Copy To: A copy of the story document gets created and shared with the selected users.
  - 1. Select 'Copy To' from the Properties pop-up screen.
  - 2. Select and move a user or multiple users from the user list given on the left to the selected user list provided on the right-side
  - 3. Click the 'Save' option
  - 4. A message comes stating, "Document copying process started. Please check Notification for confirmation."

Story Documen	t Share With Group	Exclu	ide User	Сору То	>
admin	-		testMigratePrd		-
Nikitaa					
Shipra		••			
sivan		<			
vishal		44			
Brakash	•				-
Close	Save				
Close	Save				

5. Users can open the 'Notification' window to see the updates on the current task of copying the story document.

	# 🕑	)
	Last 3 Notifications	V
	admin Copying Document Document copied with title Story Document successf	
ile	admin Datastore Notification for Hiring_BIStoryNLP - Ad Loaded data to datastore 'Hiring_BIStoryNLP - Admin'	
	admin Datastore Notification for Hiring_BIStoryNLP - Ad Loaded data to datastore 'Hiring_BIStoryNLP - Admin'	
	See All	

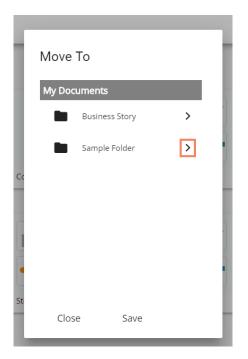
6. A copy of the story document gets shared with the selected user or users.



**Note:** If a story document is shared using this option, then the selected users have right to modify the received story. The copied story document can be accessed from the 'Shared Documents' space.

## 6.7. Move To

- i) Select a story document
- ii) Select the 'Move To' option from the context menu
- iii) A new screen pops-up with available folder options
- iv) Select a folder or subfolder
- v) Click on the 'Move' > option to open a list of available sub-folders



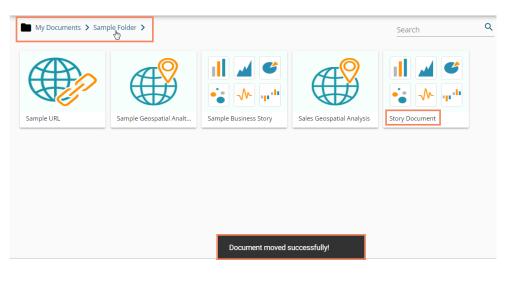
- vi) Users get redirected to the next screen
- vii) Click the 'Save' button

f	Move To	ł
	← Sample Folder	
Cc		
St		
50	Close Save	J

viii) A success message appears at the bottom of the screen



ix) The story is moved to the selected folder or subfolder

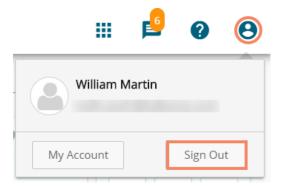


Note: 'Move To' option is not provided to the story documents shared as the Public Documents.

# 7. Signing Out

It is possible for a user to log out from the Business Story at any given stage. Follow the below given steps to log out from the BizViz Platform.

- i) Click the '**User**' icon ^O on the Platform homepage.
- ii) A menu appears with the logged in user details (User's name and email id).
- iii) Click 'Sign Out.'



iv) Users successfully log out from the BizViz Platform.

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