



User Guide

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

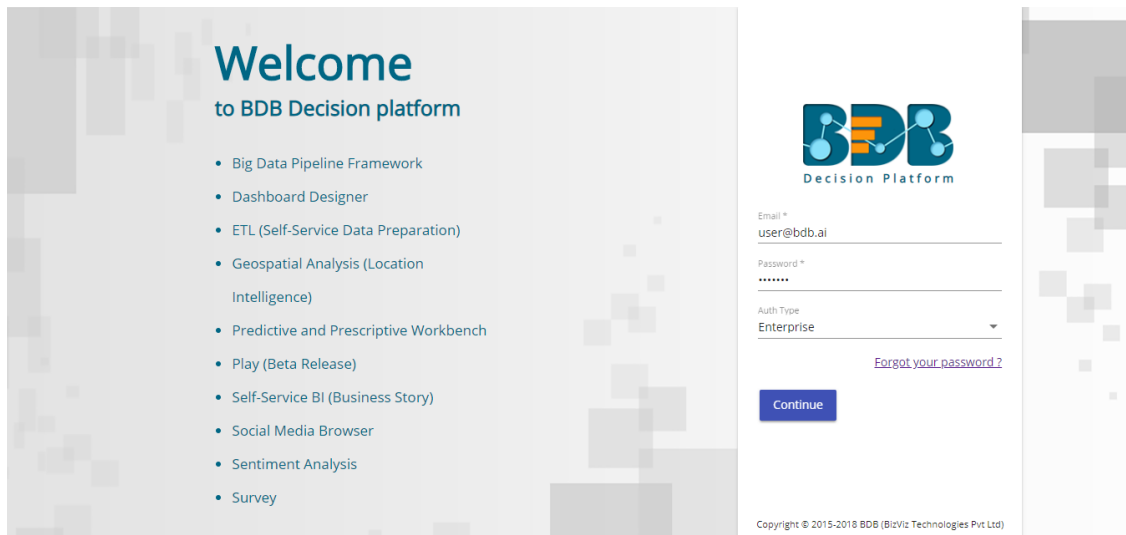
- A browser that supports HTML5
- Operating System: Windows 7

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

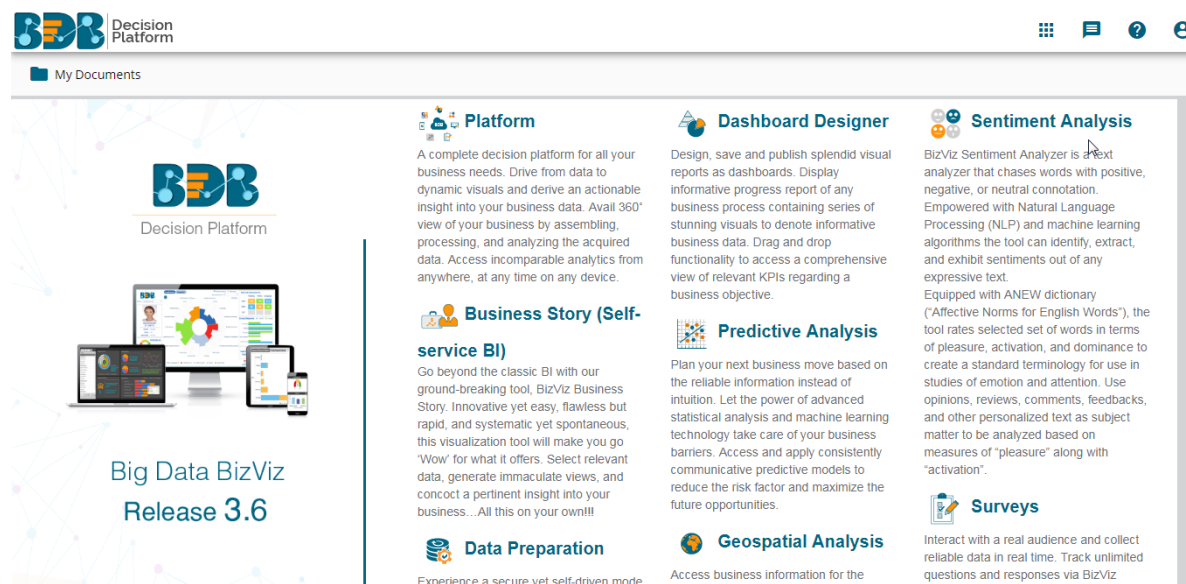
3. Getting Started with BizViz Business Story

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

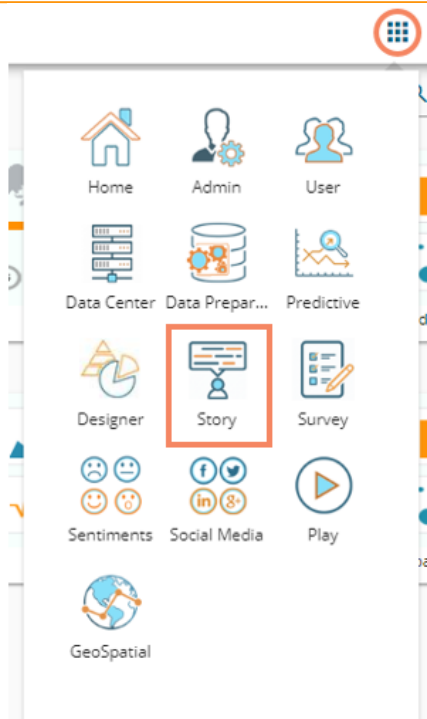
- i) Open BDB Enterprise Platform Link: <https://app.bdb.ai>
- ii) Enter your credentials to log in to the platform.
- iii) Click 'Continue'



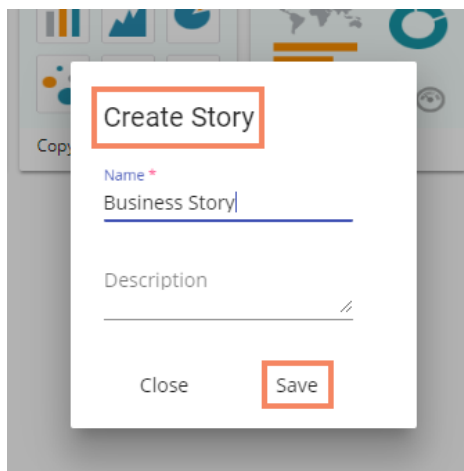
- iv) BDB Platform homepage opens.



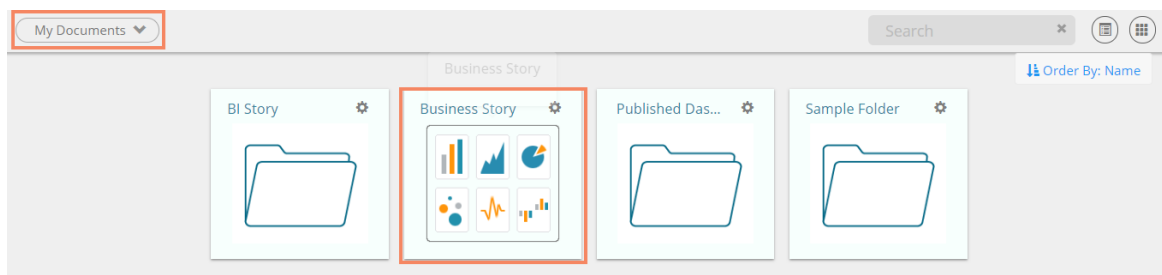
- v) Click the 'Apps' menu icon.
- vi) Select 'Story' plugin from the Apps menu.



- 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'**



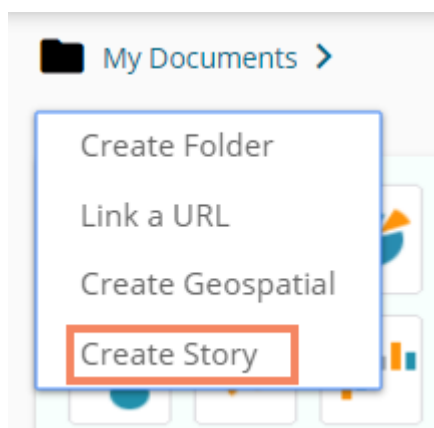
- x) The story document gets created under the selected document space ('My Documents' space opens by default), and users get redirected to select a Data Store.



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.



- 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



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?

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 *

[Sign in](#)

Continue

- 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.

Password reset Link has been sent to your mail.

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



Reset Password

You've confirmed ownership of the BizViz Account, Reset your password now to regain access.

New Password *

.....

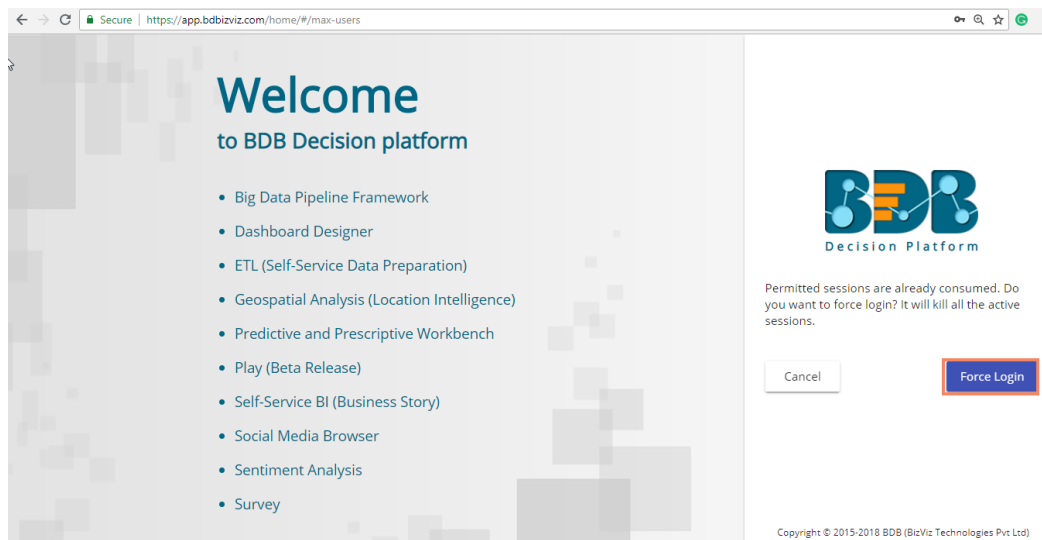
Confirm New Password *

.....

Continue

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.



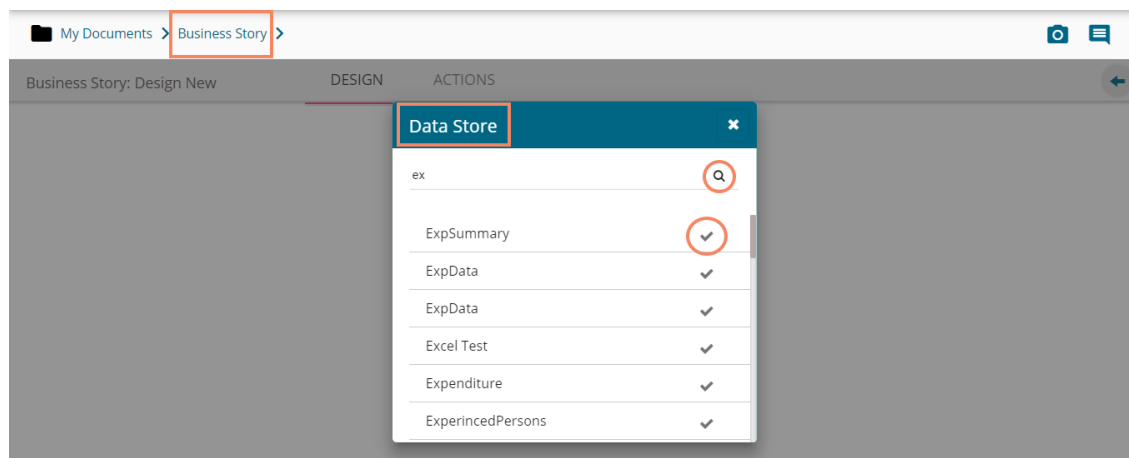
4. Creating a Business Story

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.

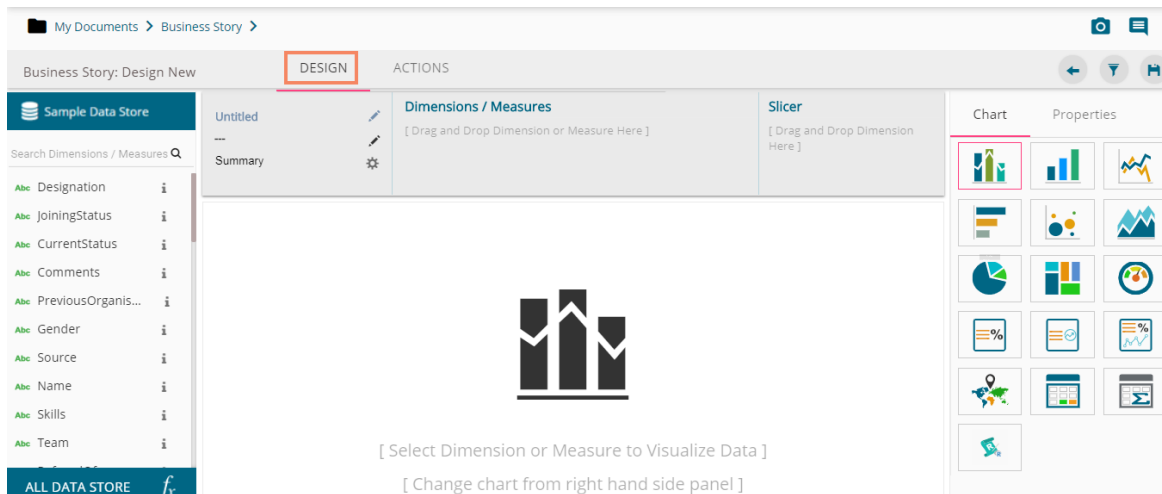
- i) By clicking **'Save'** on the **'Create Story'** pop-up window, Users is redirected to select a data store as shown in the following image:
 1. Search a data store using the **'Search'** bar (if needed).
 2. Select a data store from the displayed list by clicking the checkmark option.



4.2. Designing a New View

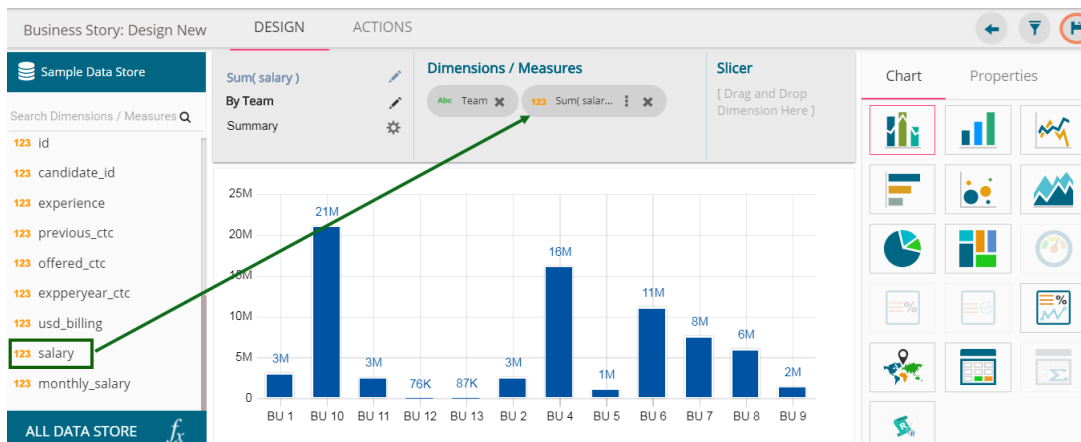
This page explains the steps to create a new view.

- 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.

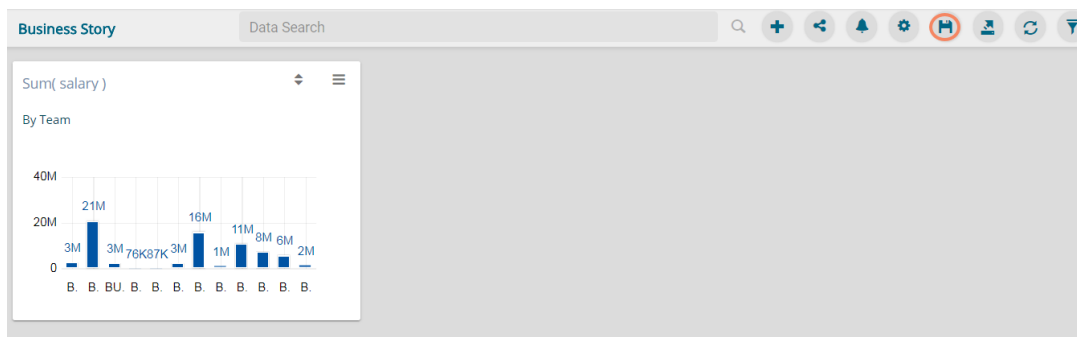


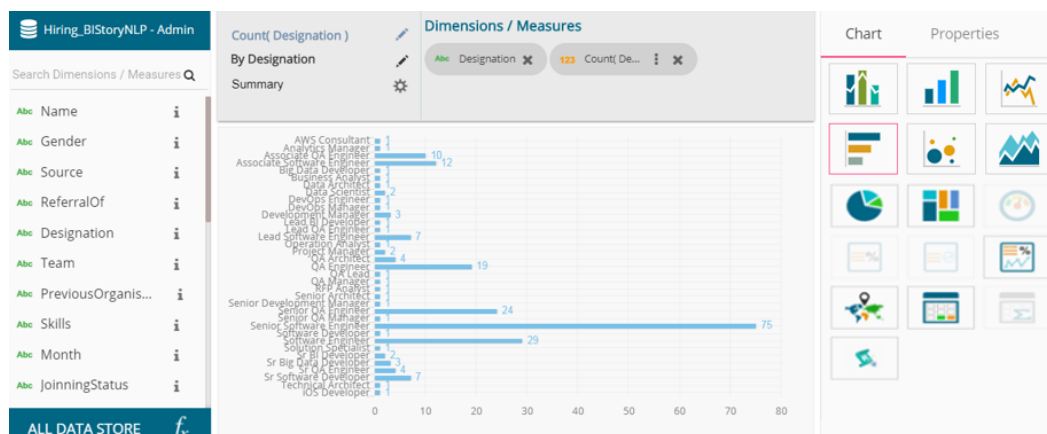
- ii) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).
- iii) A graphical view (based on the selected dimensions/measures) gets created and displayed instantly. (The mixed chart type opens by default)

- iv) Click the 'Save' icon.

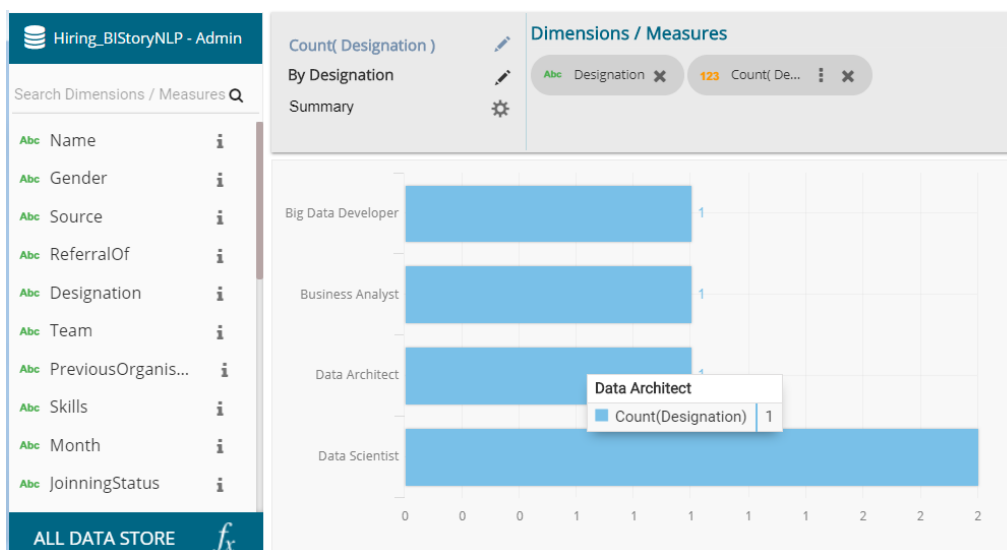


- v) The newly created view gets saved on the Storyboard.
- vi) Users need to click the 'Save' option to save the added view to the storyboard.

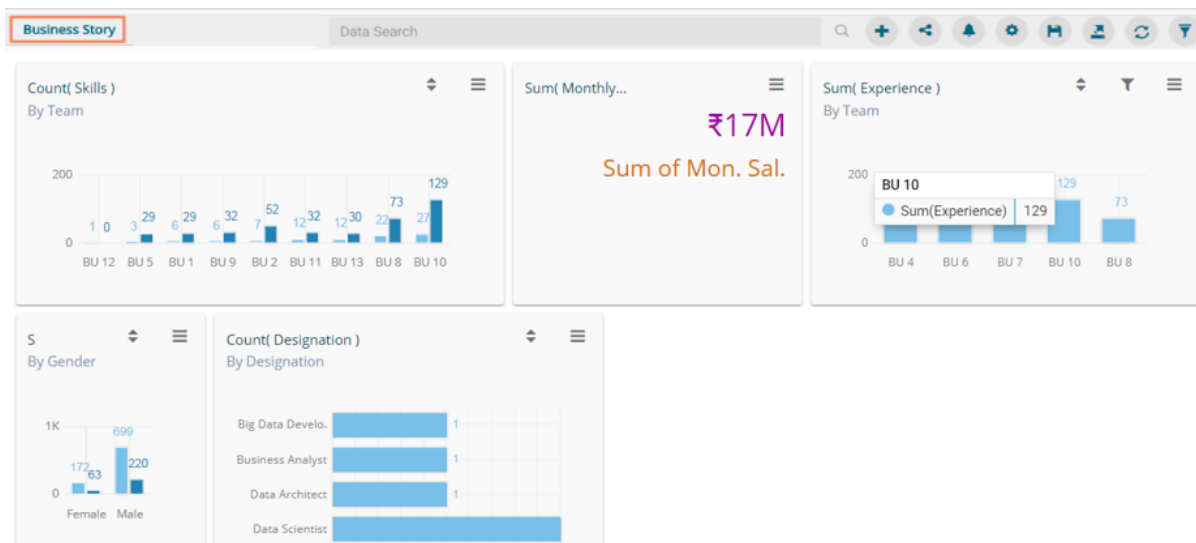




- v) Users can apply the various modification options from the Design page (E.g., The below given image displays an applied View Filter)
- vi) Click the 'Save' option from the Design New page to save the view to the Storyboard



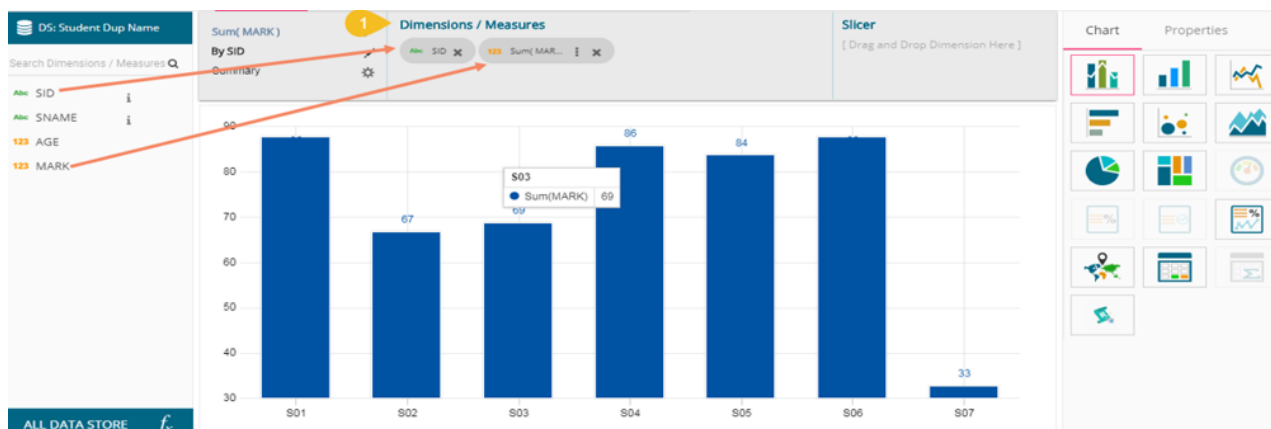
- vii) Click the 'Save' option provided on the Storyboard to save the updated story.



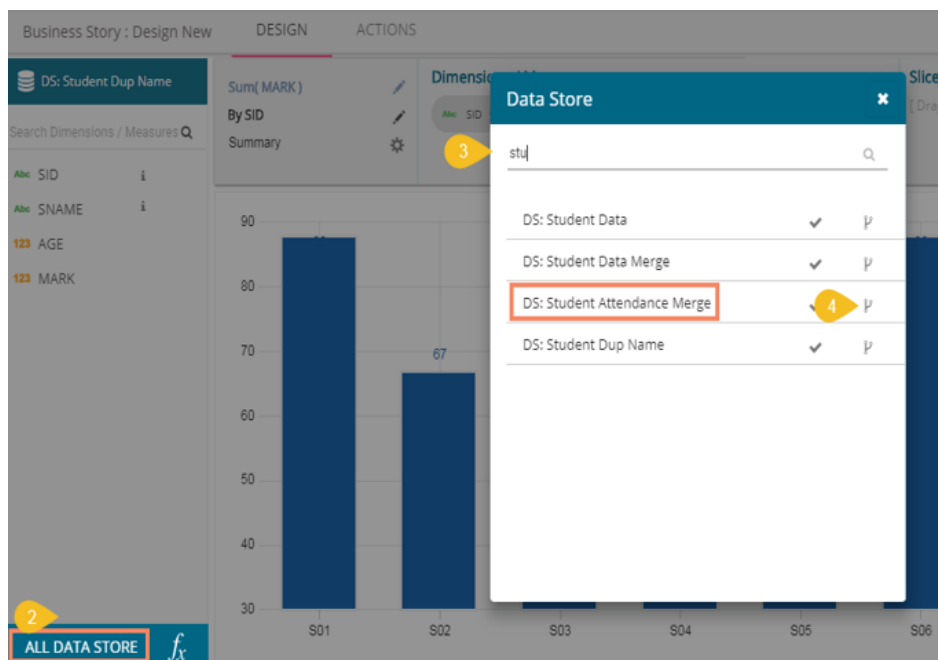
4.2.2. Datastore Merge at View Level

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

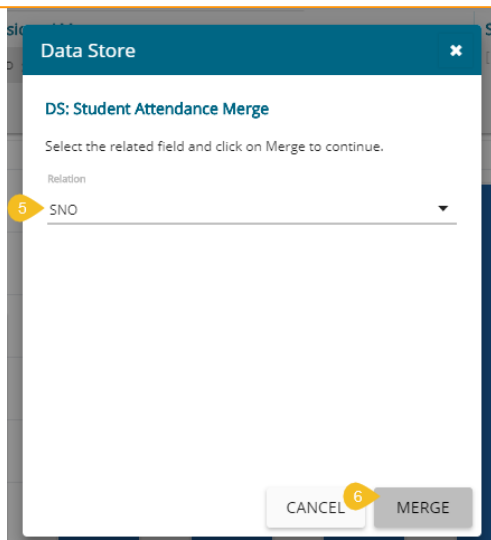
- i) Select a Data Store and Navigate to the Design New page.
- ii) Drag and drop dimension(s) and measure(s) onto the canvas to create a new view.



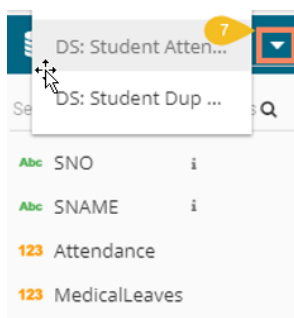
- iii) Click the 'ALL DATA STORE' option
- iv) Search for a datastore using the search bar
- v) Click 'Merge' icon for the selected datastore



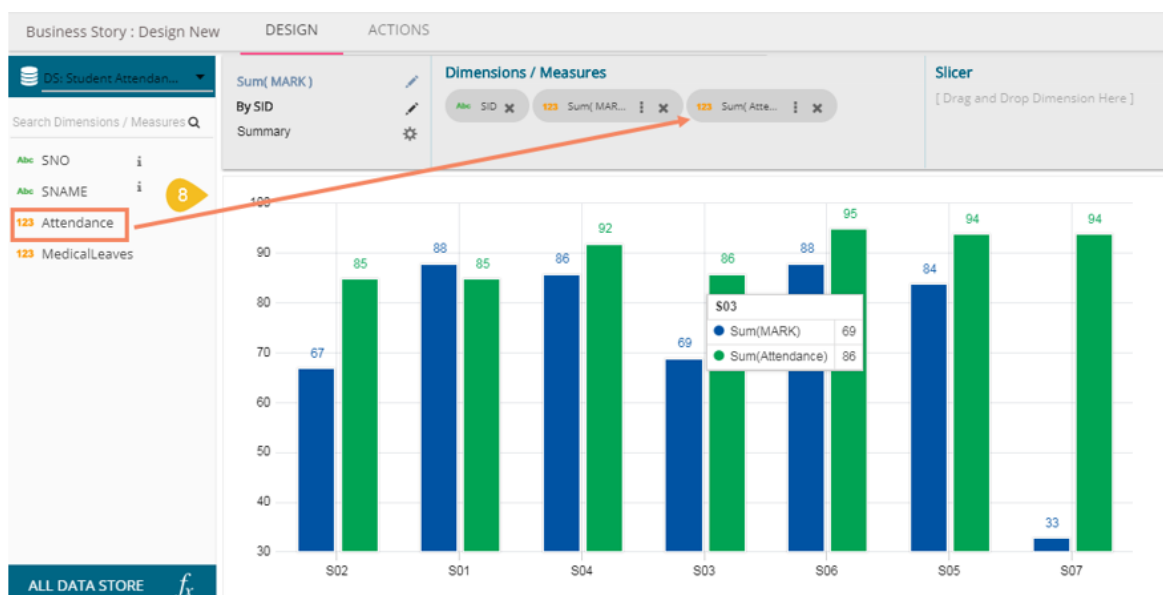
- vi) Users get redirected to select a related field from the drop-down menu
- vii) Click on the 'MERGE' option



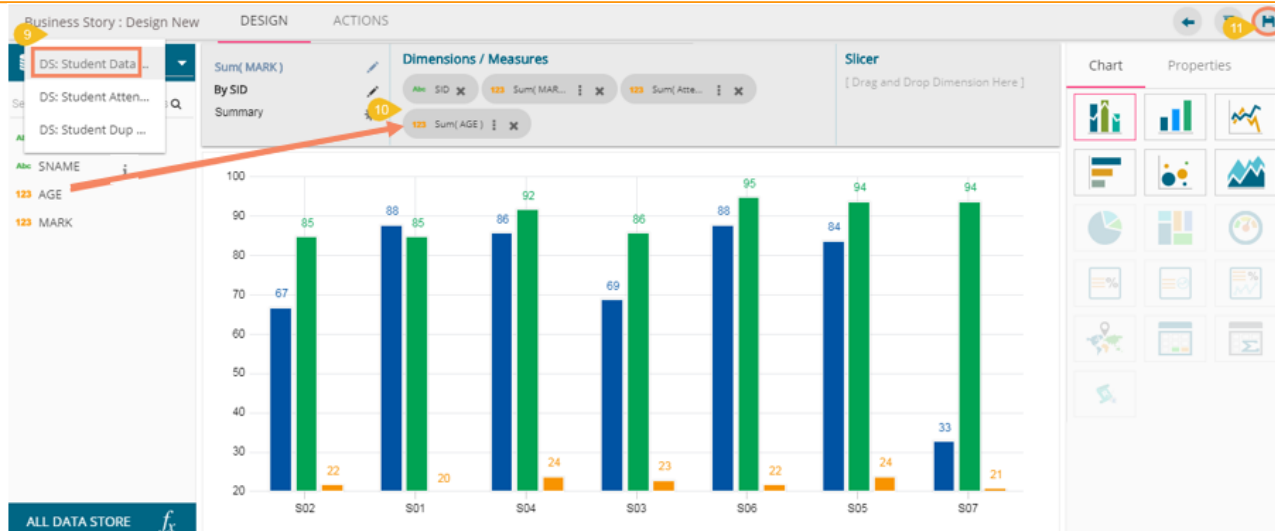
- viii) The selected datastore gets added to the datastore space, and a drop-down menu displays to choose between any datastore.



- ix) Drag and drop a measure from the newly added data store to create a comparative view



- 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.

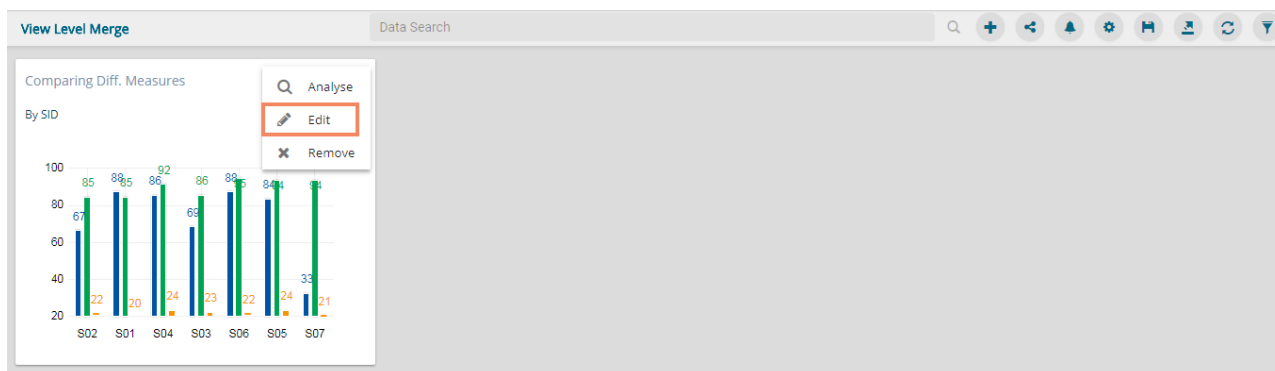


xiii) The view gets saved on the storyboard.

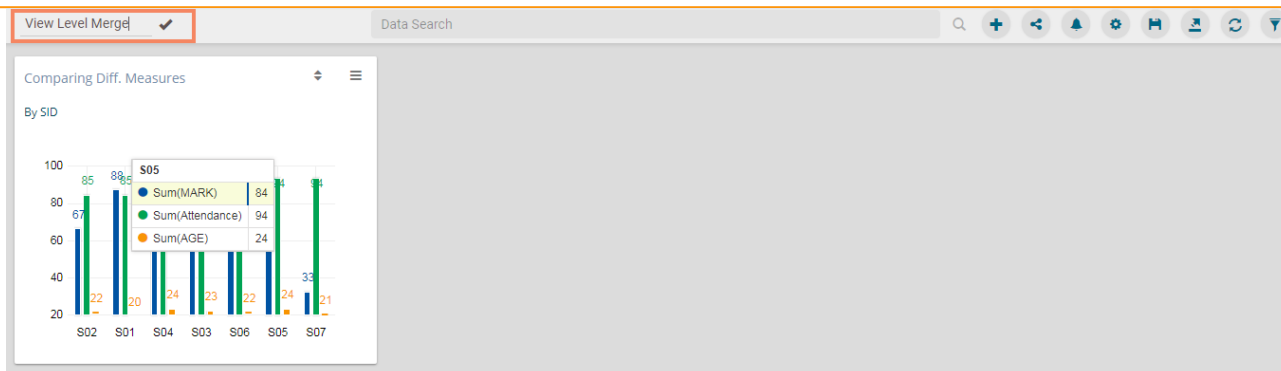


Note:

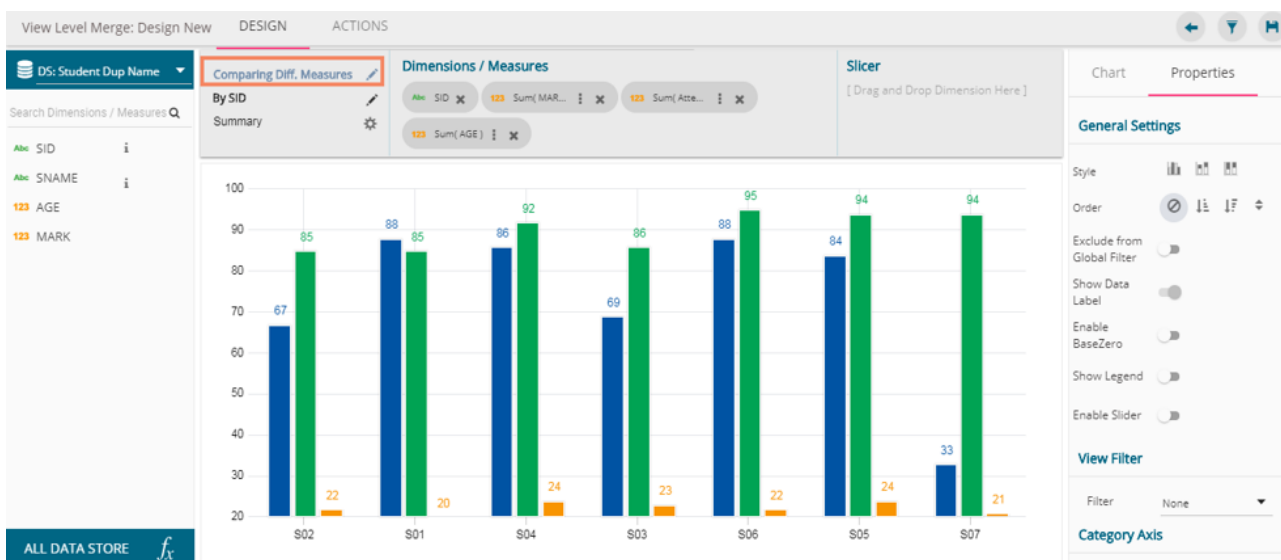
- a. All the merged data stores are available for the saved view.
 - 1) Users can modify the view by selecting the 'Edit' option from the storyboard.



- 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.



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

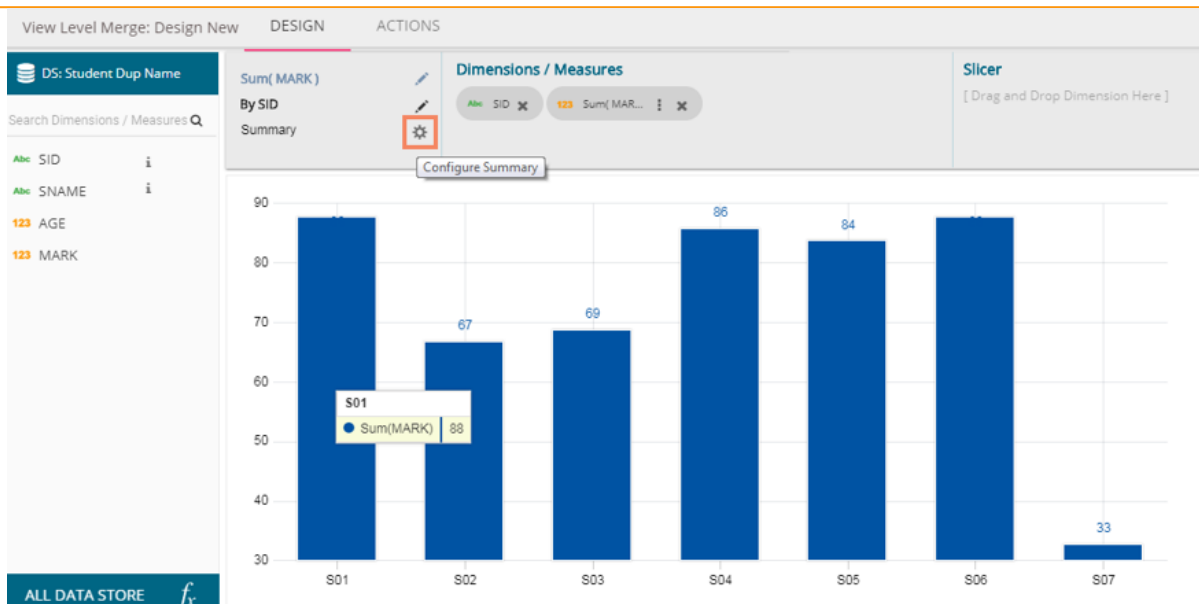


- b. The Merged Data Stores are not available in the data store menu if the user wants to add the subsequent new view to the same Business Story. The user needs to merge the data stores yet again.

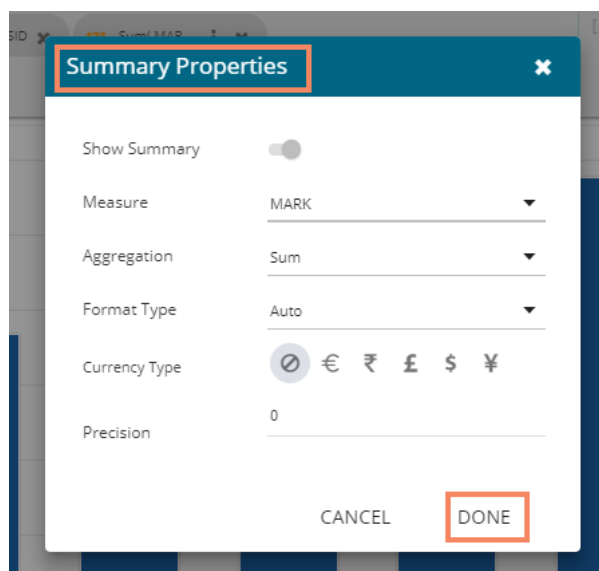
4.2.3. Measure Summary

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.




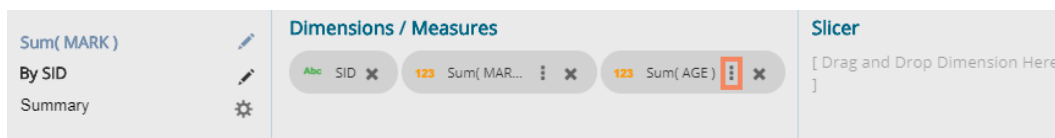
- vii) The measure summary value gets displayed on the view page by enabling 'Show Summary' option.



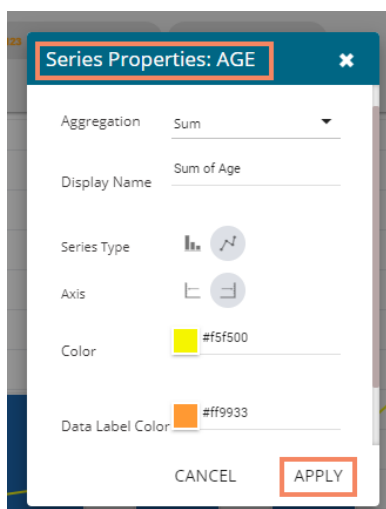
4.2.4. Series Properties

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

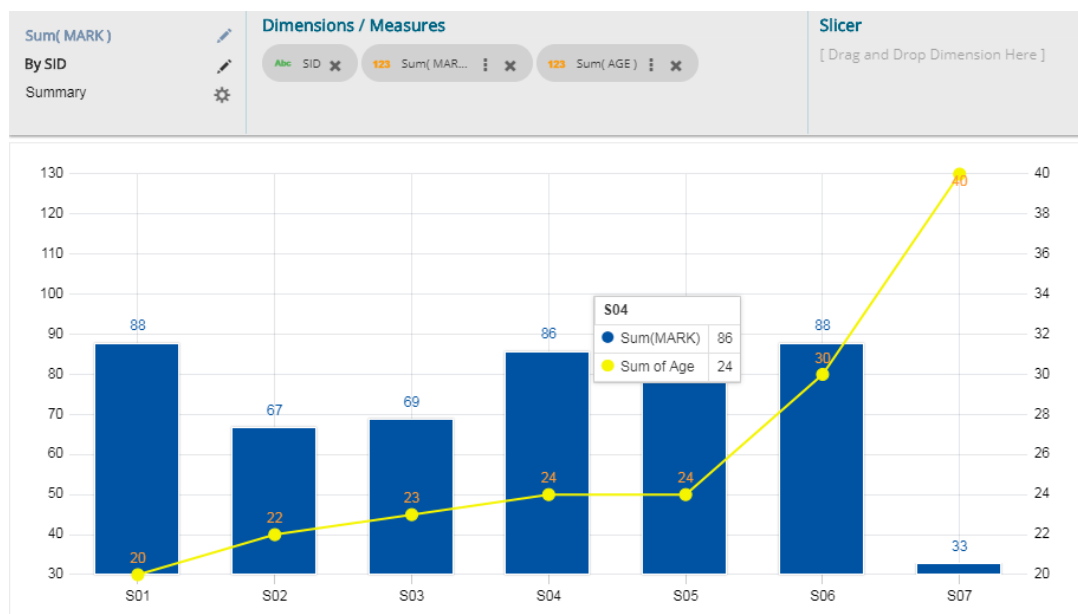
- i) Navigate to the Design New page for a view that has at least one selected measure value.
- ii) Click the 'Series Properties' option  provided next to the selected measure.



- iii) 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.

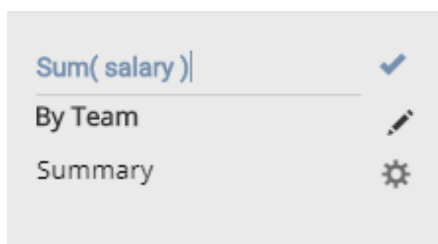


- v) The selected measure properties get applied to the view.



Note:

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



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

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

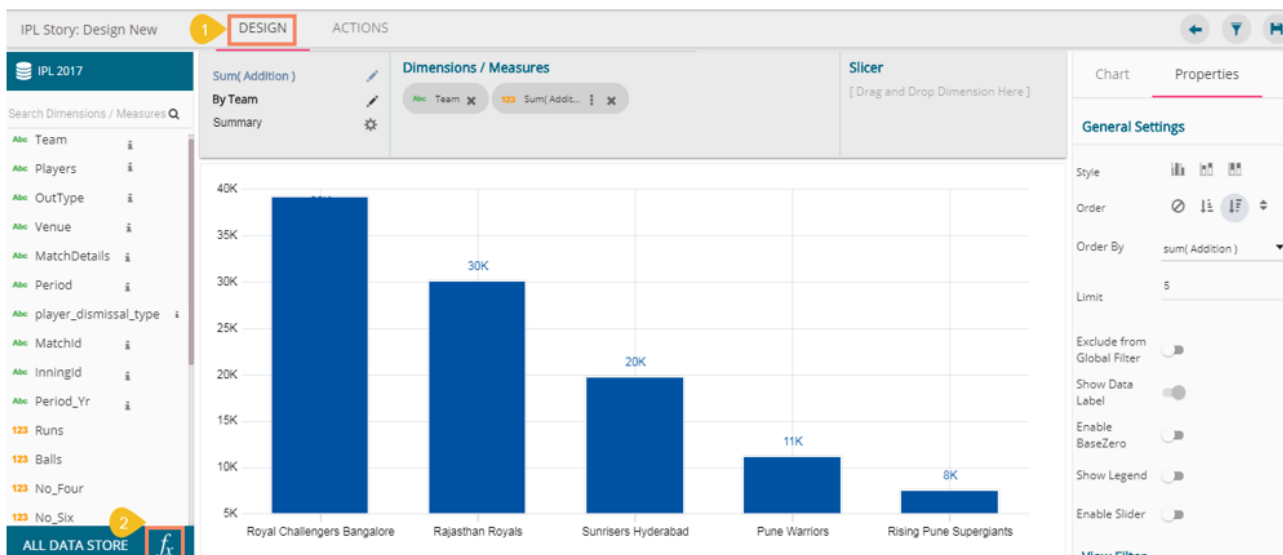
4.2.5. Formula Field Editor

A formula field editor has been provided on the Design New page to create and add a calculated field in the selected data store. 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

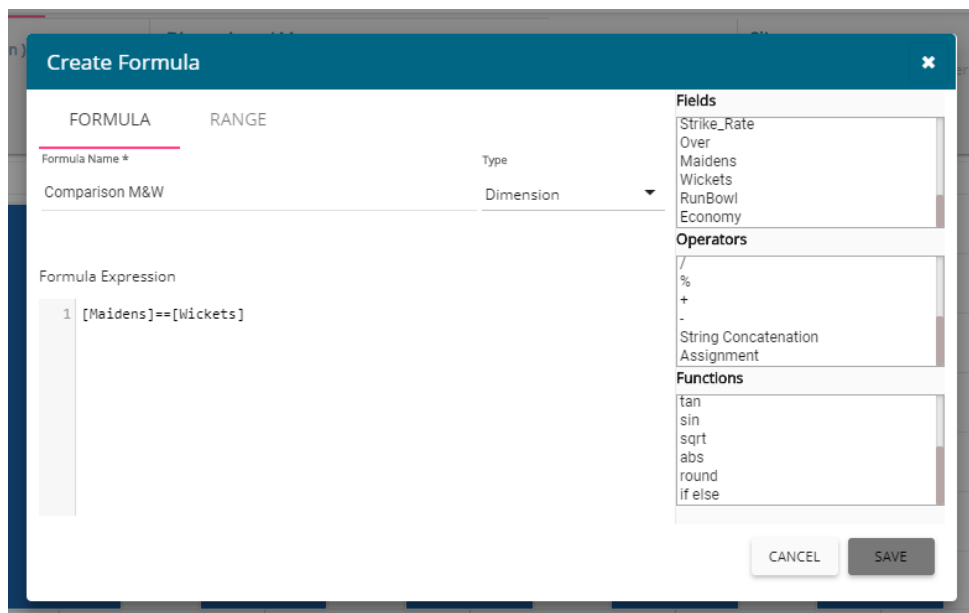
- i) Navigate to the ‘DESIGN’ tab after selecting a data store to create the Business Story.
- ii) Click the ‘Formula Field Editor’ icon.



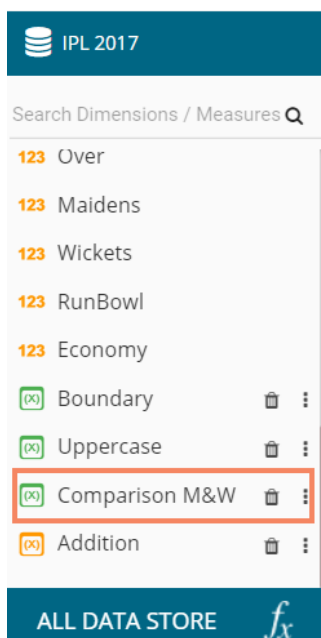
iii) Users get redirected to the ‘Create Formula’ window.

- 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.



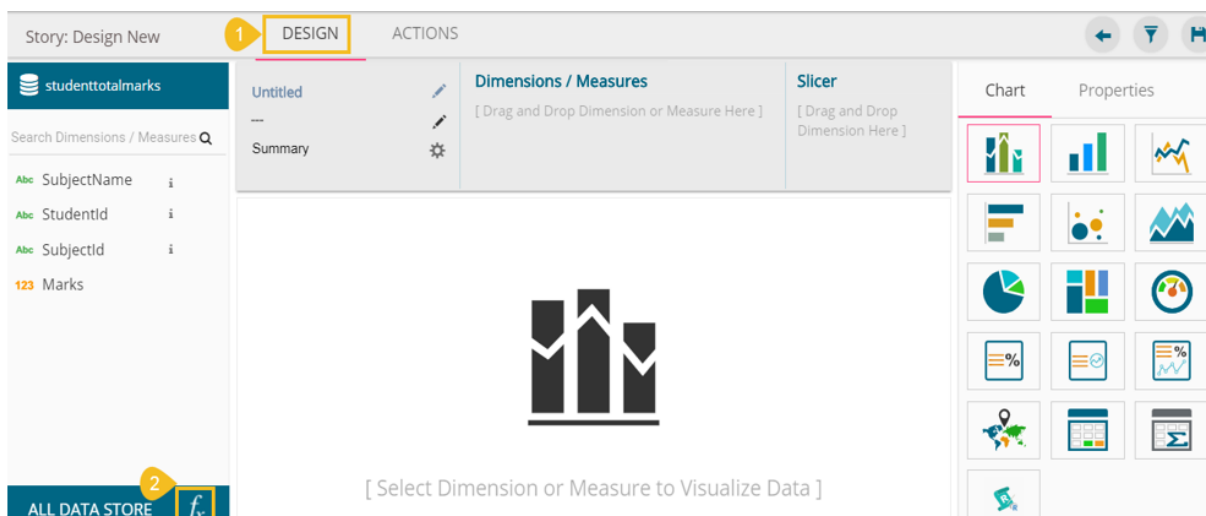
- vi) The selected data store gets newly created formula field.



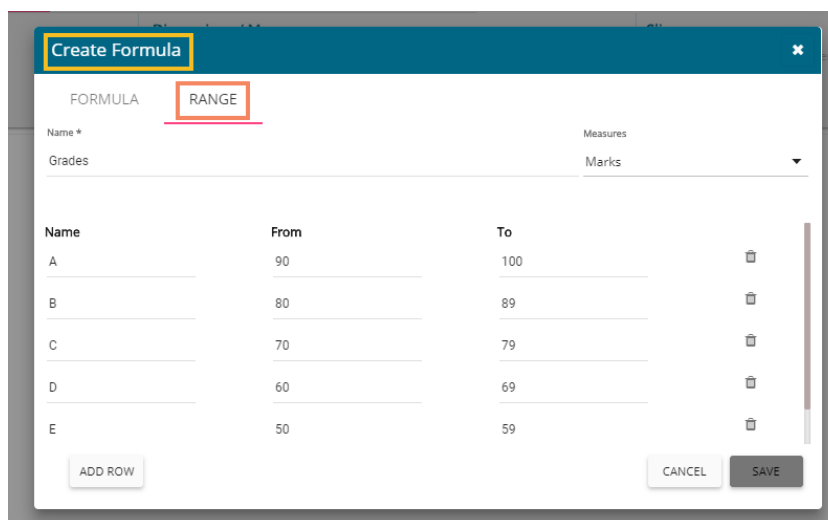
4.2.5.2. Creating a Range

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

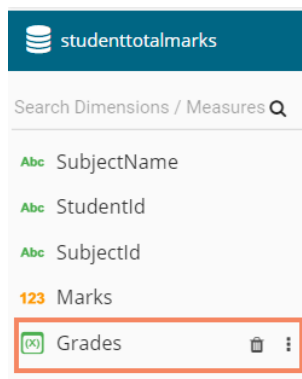
- i) Users can navigate to the **'DESIGN'** tab.
- ii) Click the **'Formula Field Editor'** icon.



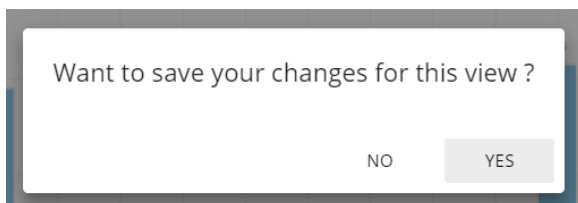
- iii) Users get redirected to the 'Create Formula' window.
- iv) Select 'Range' tab and configure the following information:
 - a. Name: Provide a title for the formula field
 - b. Measure: Select a Measure value using the drop-down menu
 - c. Name: Provide a name for the defined range
 - d. From: Set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



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

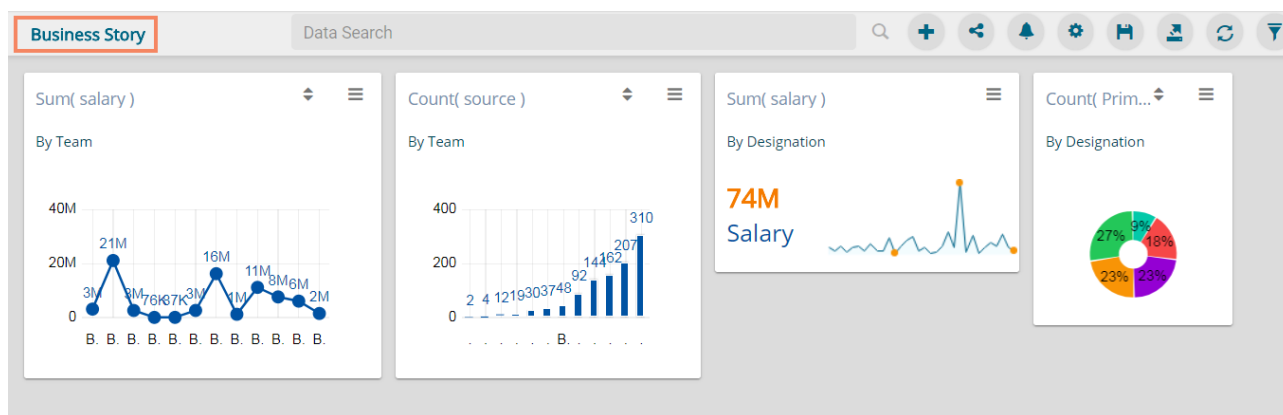


Note: If users move to storyboard without saving the designed view a pop-up window appears to confirm whether the changes for the views need to be saved to the story or not. Click ‘YES’ using the message window to save the view changes.



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.

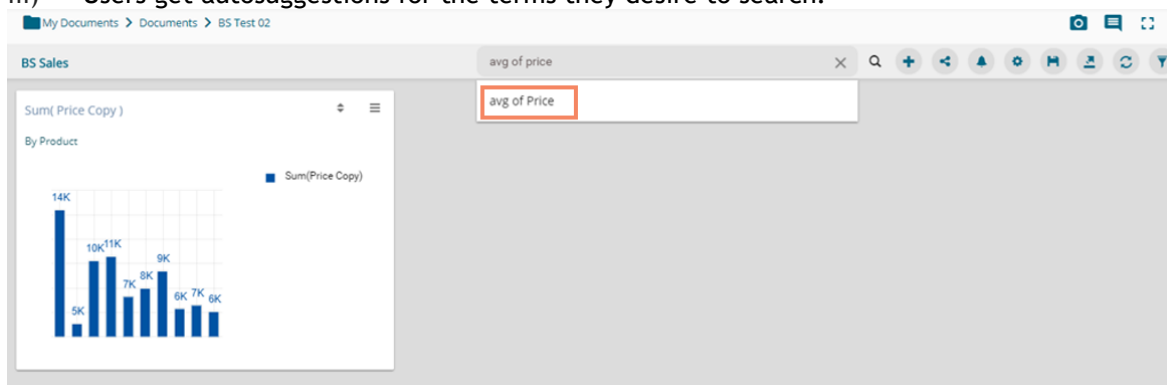


Icon	Name	Description
	Click to Edit	To edit the story title
	Save	To save the modified story title
	Data Search Bar	To search the queried data from the data store.
	Create New View	To redirect users to the story designer page to create a new view.
	Shared Views	To add a shared view to the storyboard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

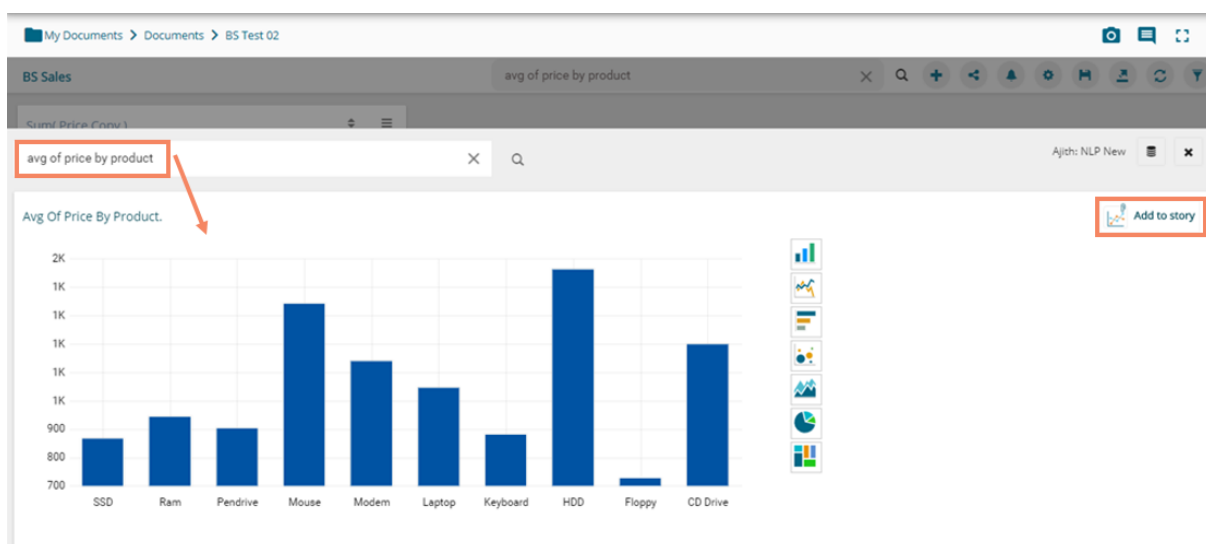
4.3.1. Data Search Bar

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.

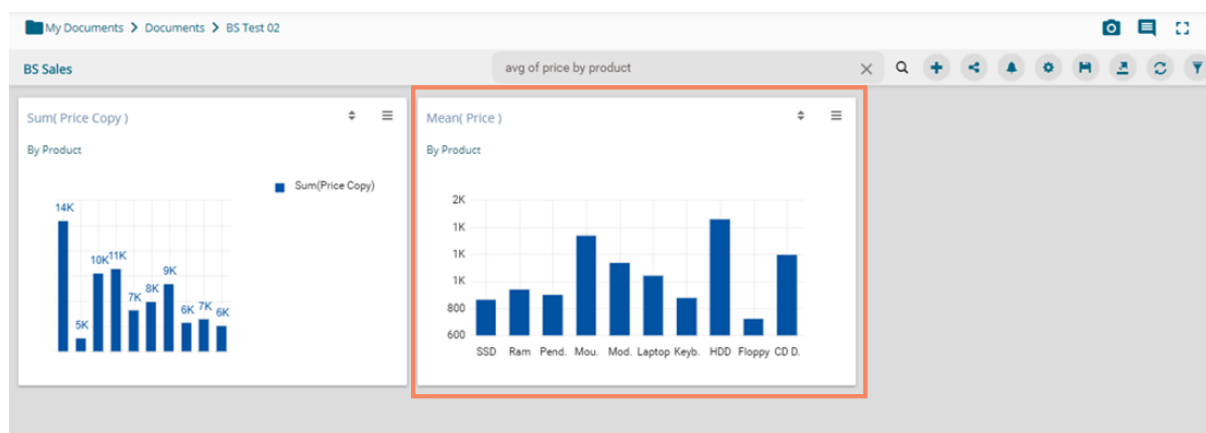
- i) Navigate to the Storyboard with multiple views.
- ii) Type-specific data search using the 'Data Search' bar.
- iii) Users get autosuggestions for the terms they desire to search.



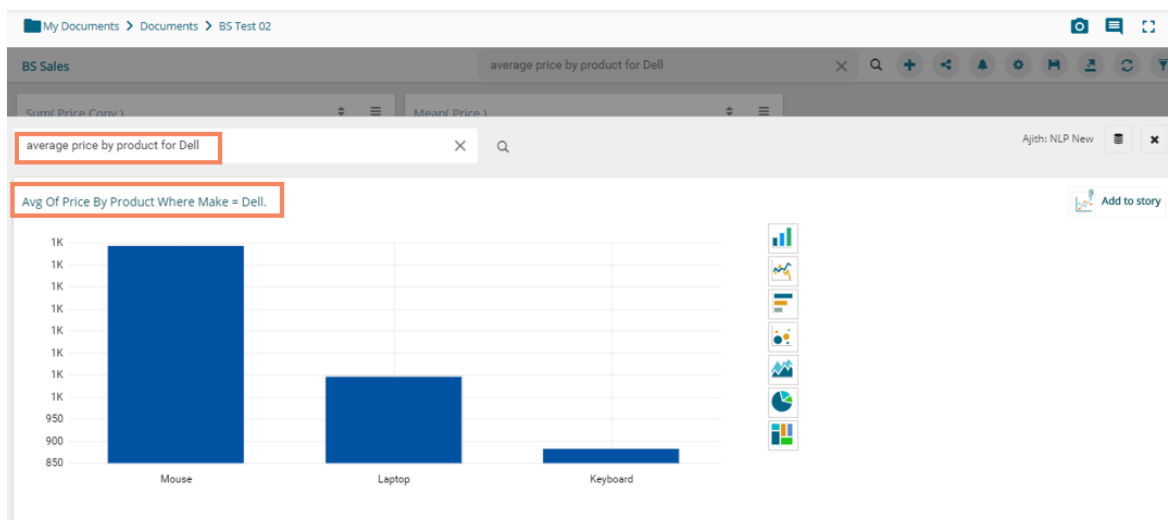
- iv) After typing your specific query click the 'Search' icon.
- v) The search result reflects beneath the search bar (In this case, a column chart displays the searched value *Avg of Price by Product*).
- vi) Click the 'Add to story' option to add the search view to the existing story.



- 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.



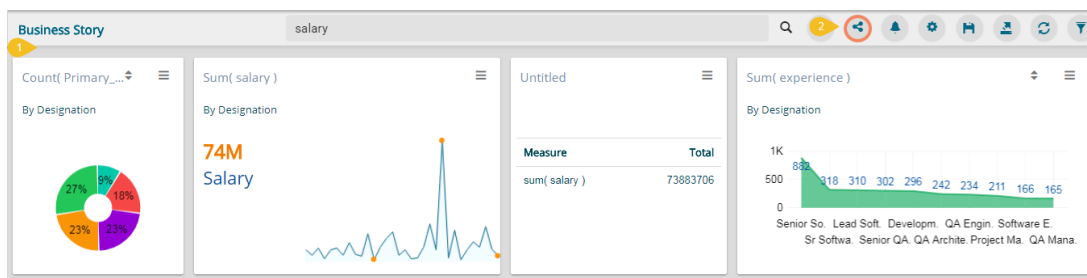
Note:

- 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.

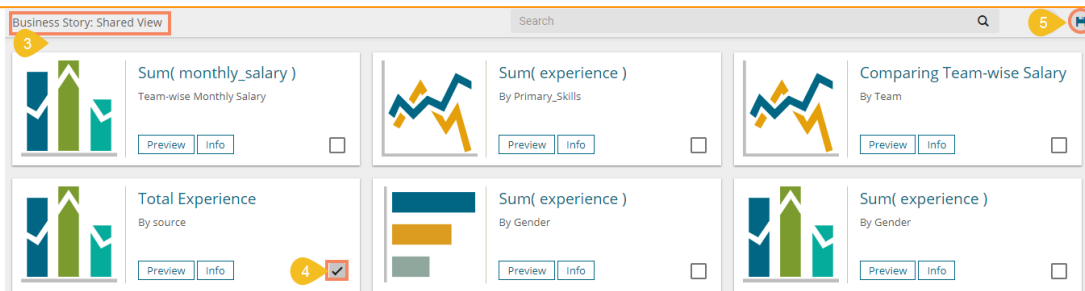
4.3.2. Shared Views

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

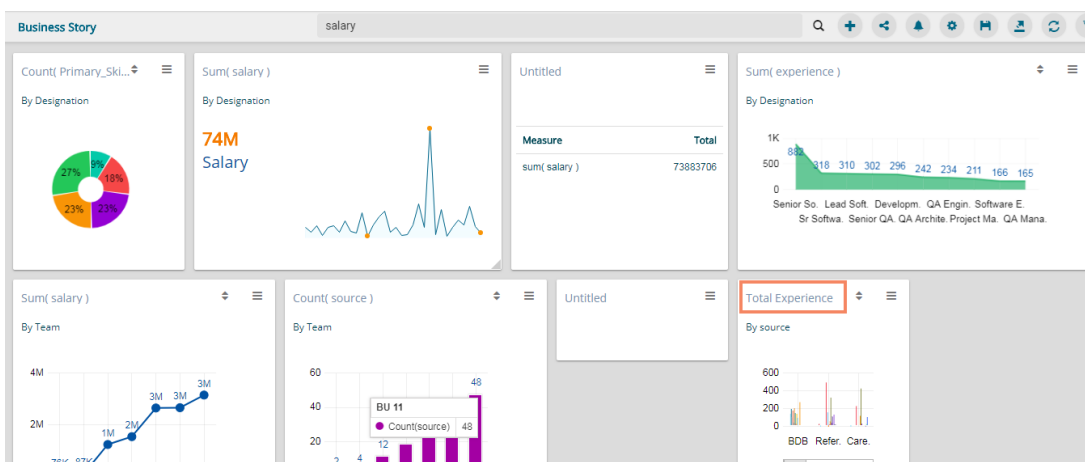
- i) Navigate to the storyboard.
- ii) Click the ‘Shared Views’ icon.



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



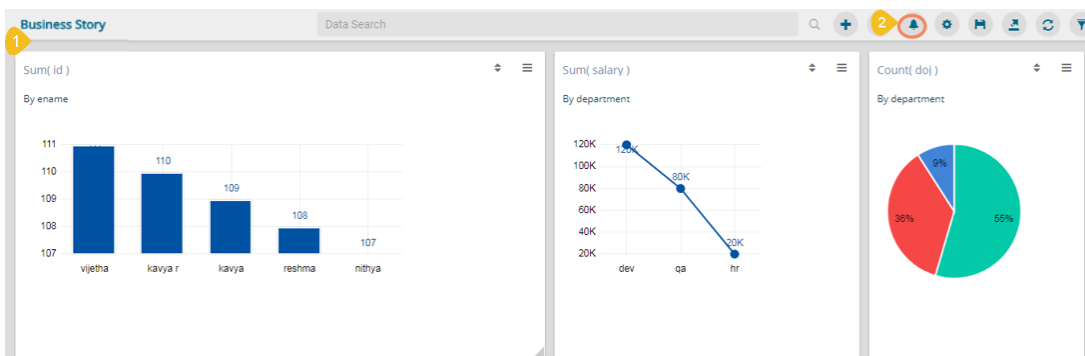
vi) The selected shared view gets added to the storyboard.



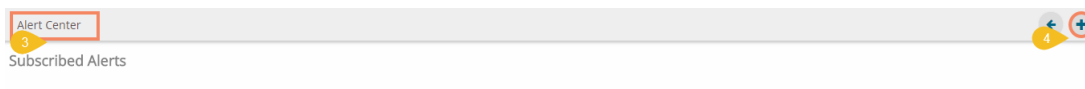
4.3.3. Alert Center

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

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

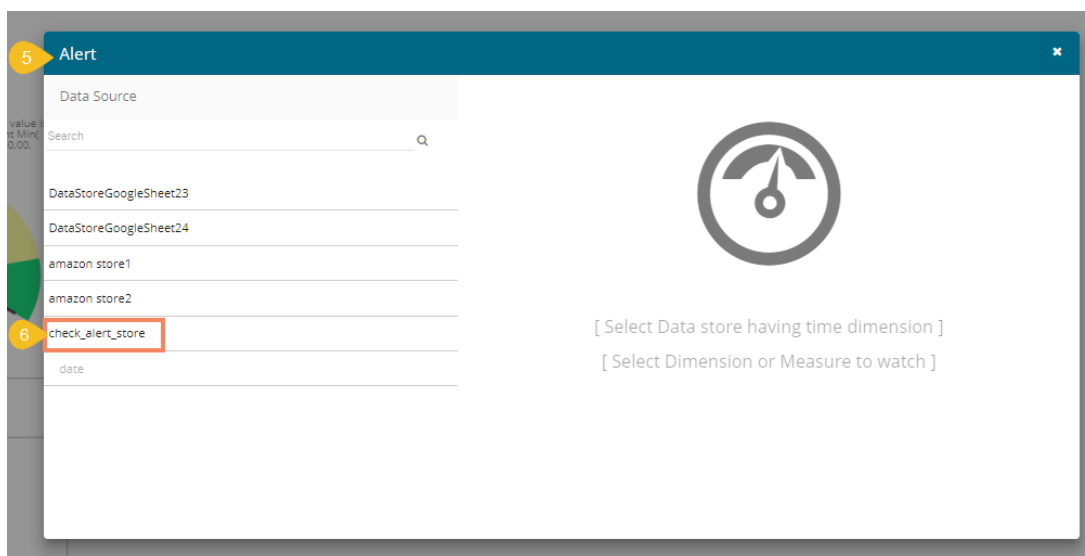



- iii) The users get redirected to the next page to subscribe alerts.
- iv) Click 'Create New Alert' option

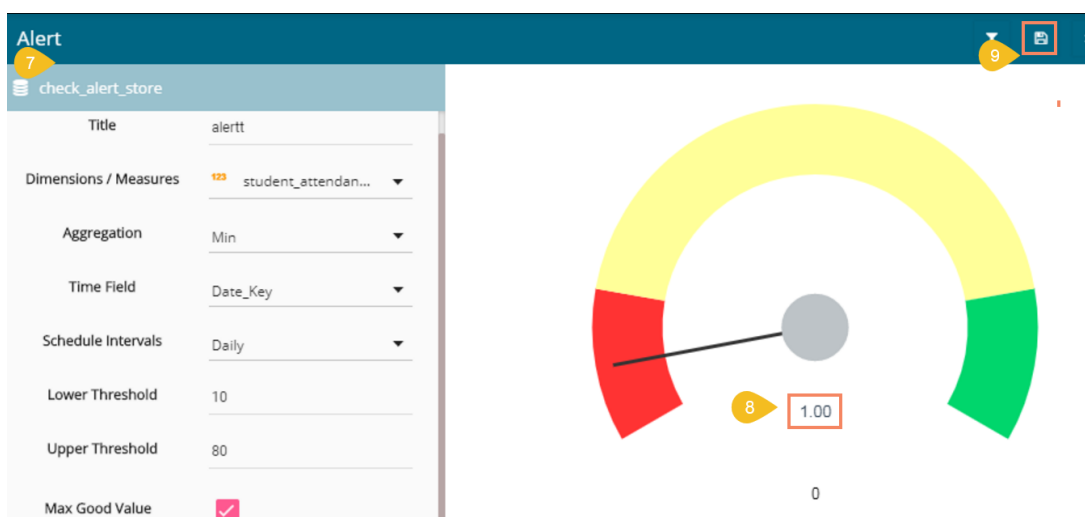


v) A new window will pop-up to display a list of the available data stores.

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



- vii) The following fields display to fill the required information when selecting a data store (data source):
- Title: Give a title to the created alert
 - Dimension/Measures: Select a dimension or measure from the drop-down list
 - Aggregation: Select an aggregation type from the drop-down list
 - Time Field: Select a time field from the drop-down menu
 - Schedule Intervals: Select a time range to schedule the refresh intervals using the drop-down menu
 - Lower Threshold: Set a value as a lower threshold (the default value for this field is 0)
 - Upper Threshold: Set a value as an upper threshold (the default value for this field is 100)
 - 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.



Note:

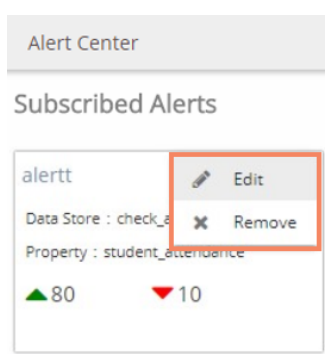
- If users select a dimension from the Dimensions/Measures field then, only 'Count' option can be accessed from the 'Aggregation' field.

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.'

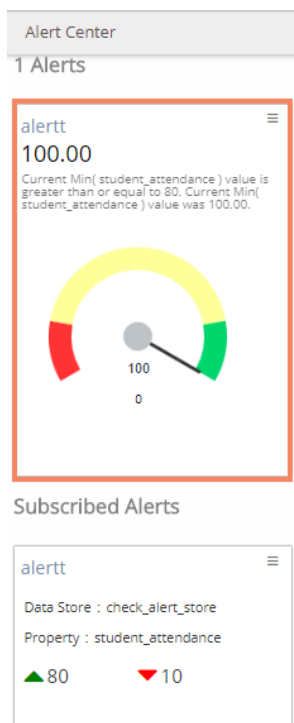
x) The newly created alert gets added to the Subscribed Alert page.



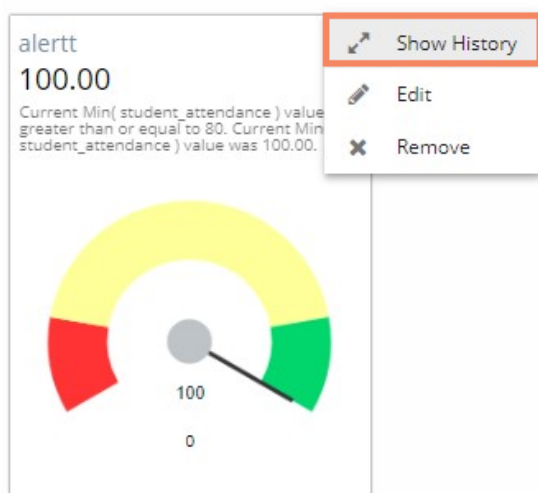
xi) Click the **'Options'** icon  to get **'Edit'** and **'Remove'** options as shown below:



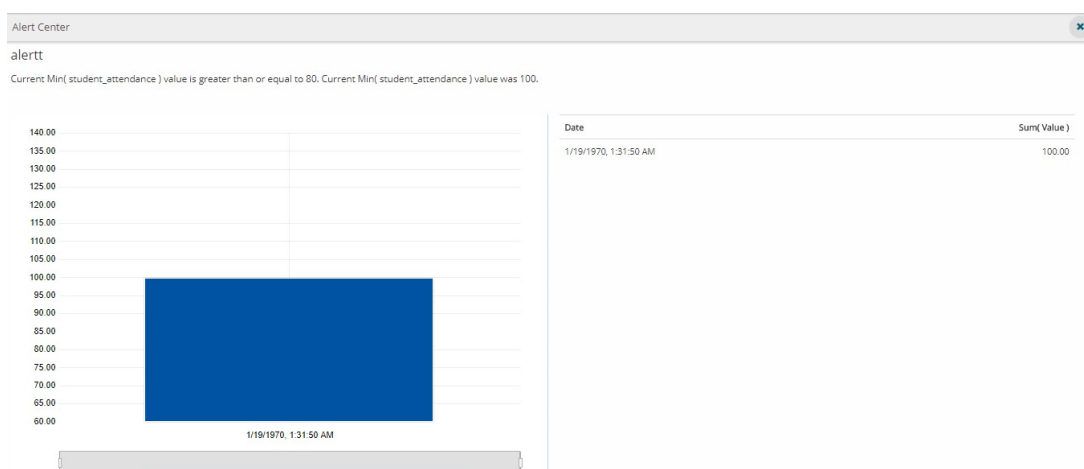
xii) The triggered alerts display under the **'Alert Center'** with a brief explanation of the change in the set alert thresholds.



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



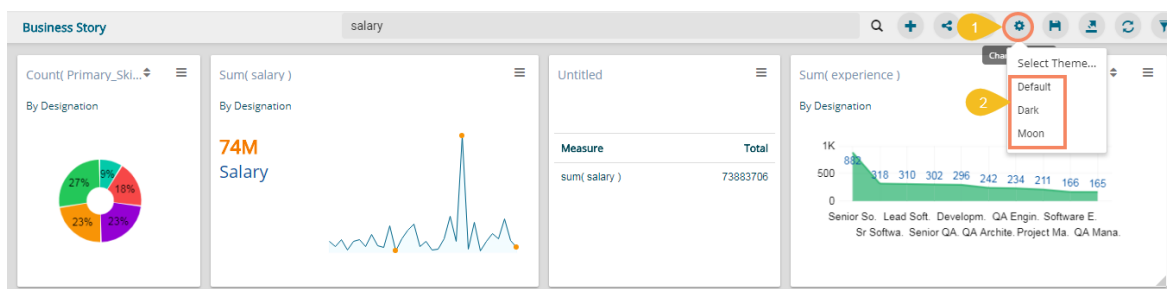
xiv) Users get redirected to the below given page displaying the Alert history.



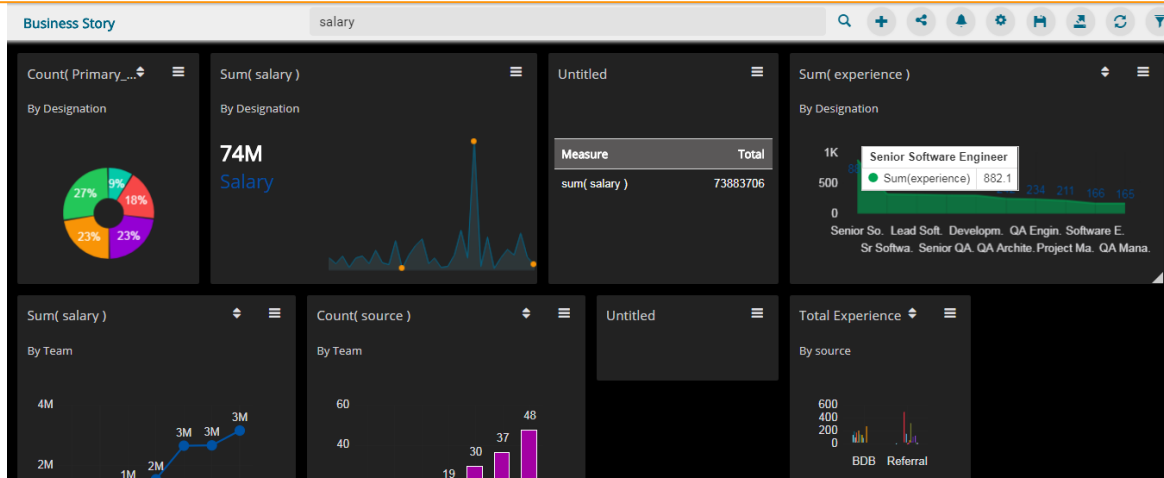
4.3.4. Change Theme

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

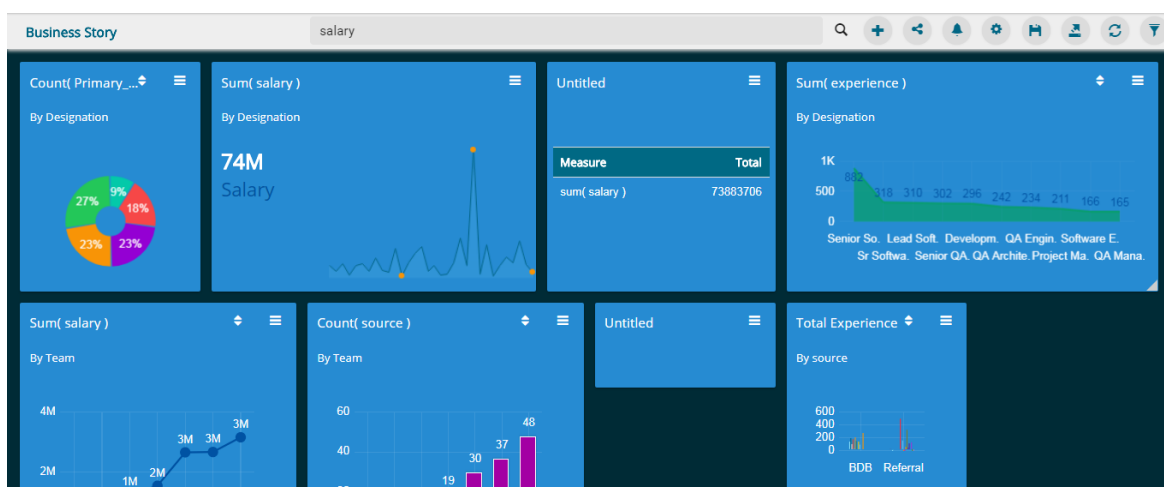
- Click the 'Change Theme' icon from the storyboard.
- A Context menu opens with the available themes for the story (The below image displays a Story in the Default theme).



- 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.



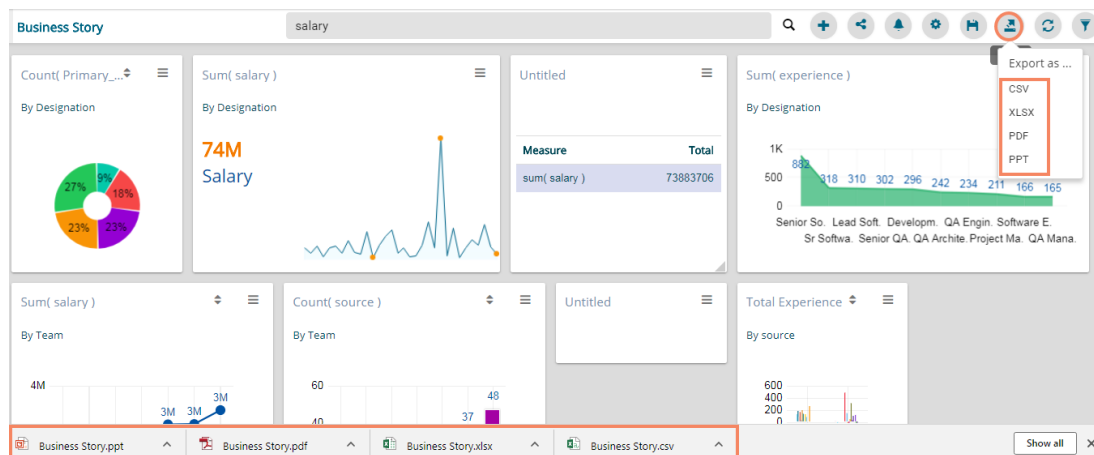
The following image displays the story in the 'Moon' theme:



4.3.5. Export

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

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

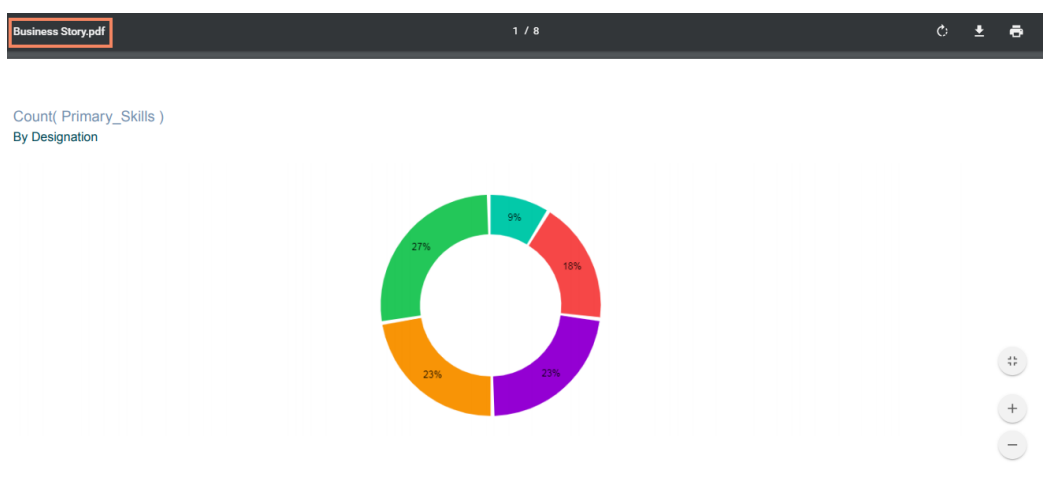


- iii) The story gets downloaded in the selected export option.
 - a. The story data gets saved in the excel format by clicking 'CSV' and 'XLSX' options.

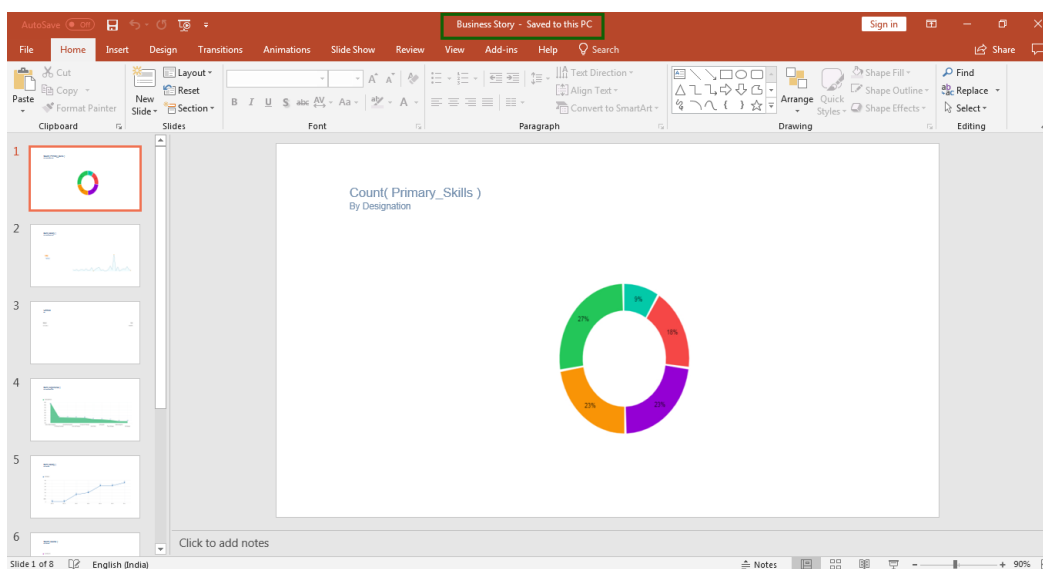
Business Story - Excel

Designation	Count	Primary Skills
Senior Arc	2	
QA Archi	4	
Solution S	5	
iOS Devel	5	
Big Data D	6	
Designati	sum_salary	
Analytics I	1560000	
Associate	850000	
Associate	1832474	
Big Data D	430000	
Data Archi	1560000	
Data Scier	1813200	
DevOps M	863633	
Developm	2552664	

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




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

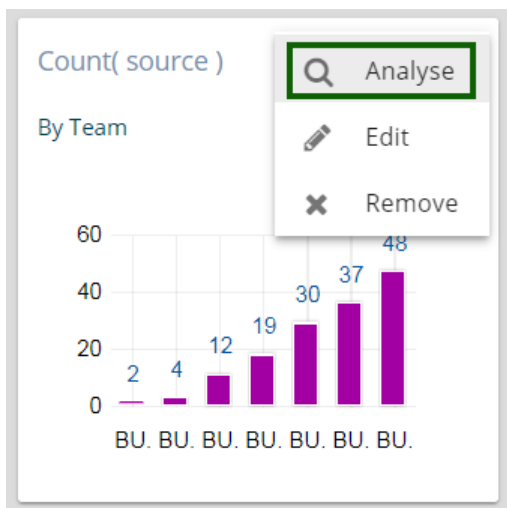


4.3.6. Options Assigned to a View

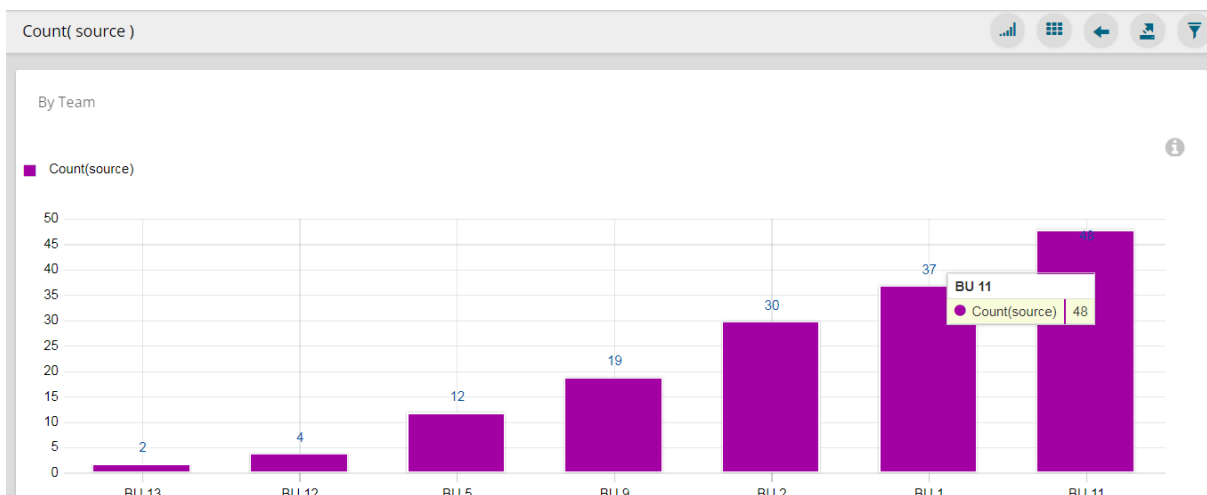
The following options supported by a view can be accessed from the Storyboard.

4.3.6.1. Analyze






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




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

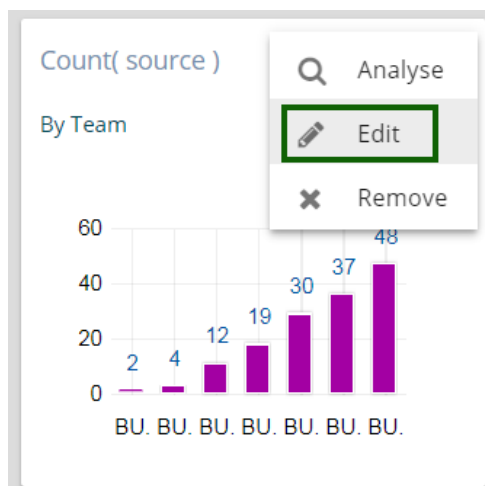


- vi) Users can select any of the following options to analyze a Business Story view:

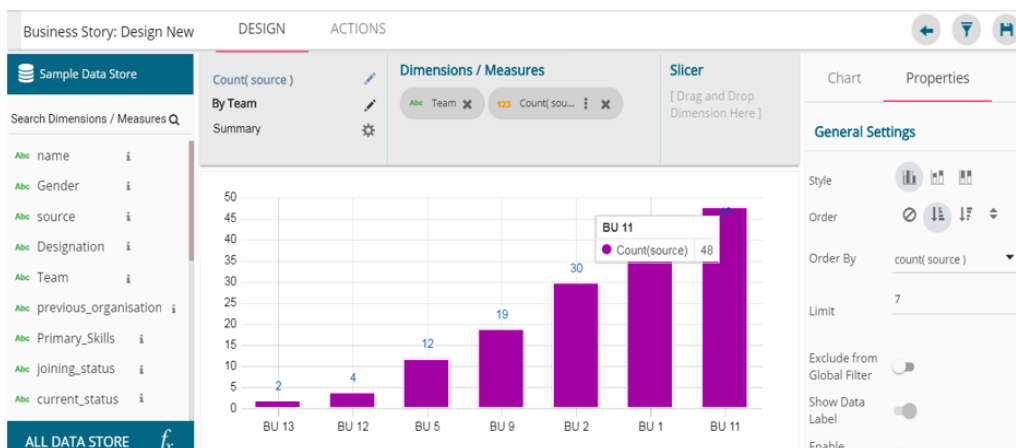
Option	Name	Description
	Chart	Displays data in a chart view
	Grid	Displays data in a grid view
	Back	Directs back to the Story Board
	Export	Exports the Story as CSV/XLSX/PDF/PPT file
	View Filter	Displays filter panel to apply or edit view specific filter conditions

4.3.6.2. Edit

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




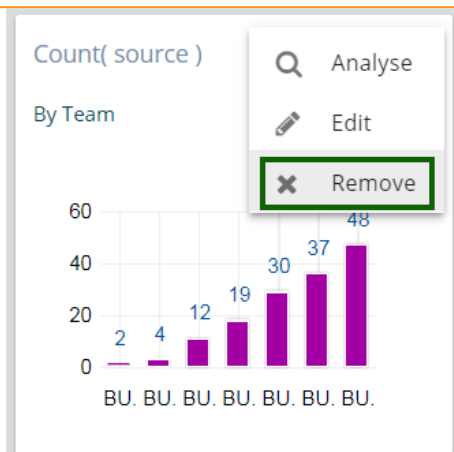
- iv) The Design New page opens.
- v) Edit the required details. (If required)
- vi) Click 'Save' option.



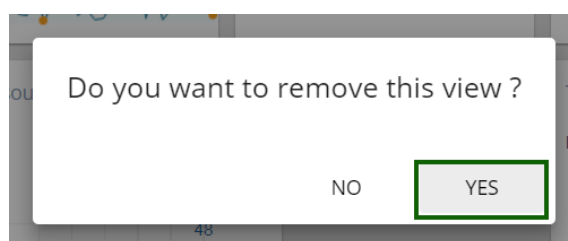
- vii) The modified View gets saved successfully to the Storyboard.

4.3.6.3. Remove

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



- vi) The selected View gets removed from the storyboard.

4.4. Data Interactions/Exploration

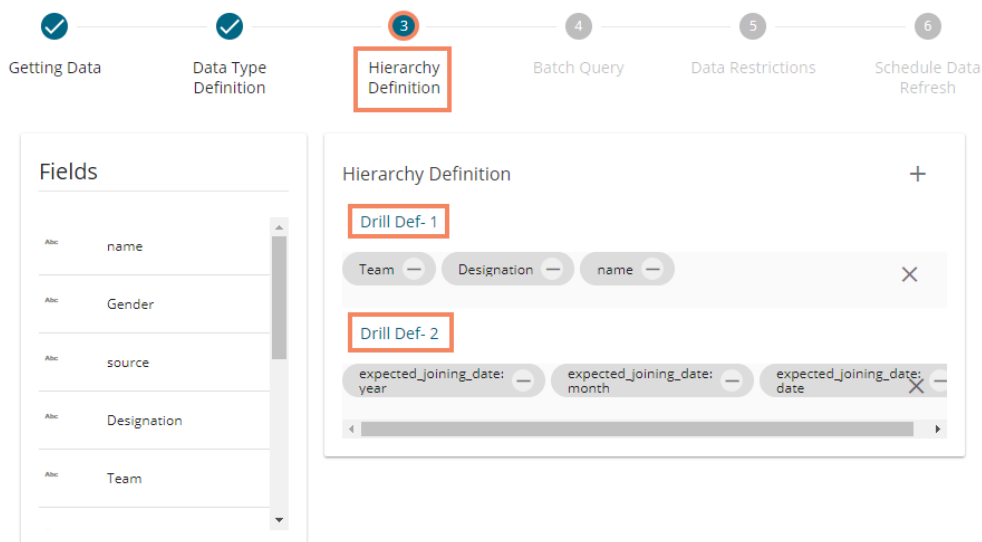
Views shared on the storyboard can display some interactions based on the applied functionalities. This section aims to describe 'Automatic Data Drill' and 'Actions.'

4.4.1. Automatic Data Drill

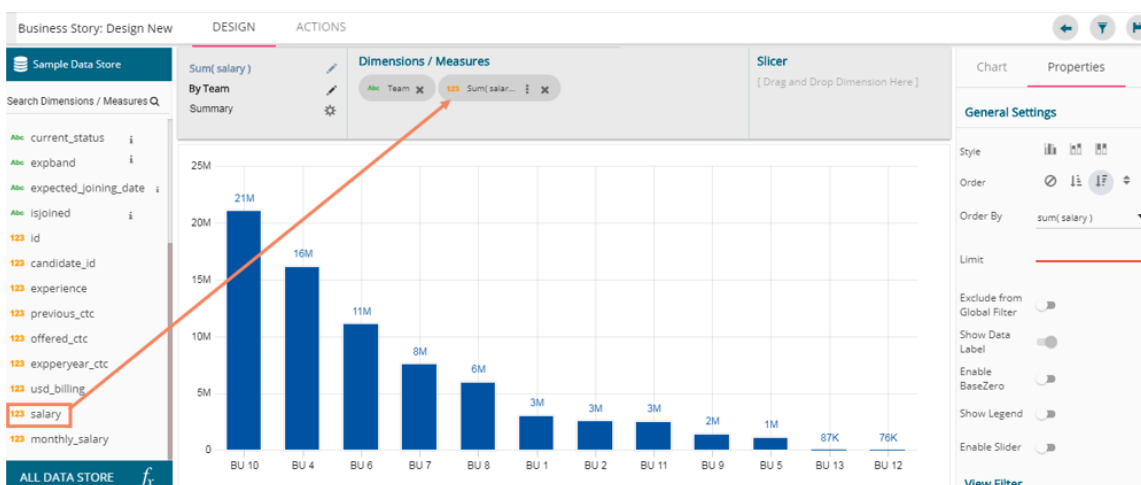
The Auto Data Drill allows users to drill down in the time values of a saved view on the storyboard of a Business Story.

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

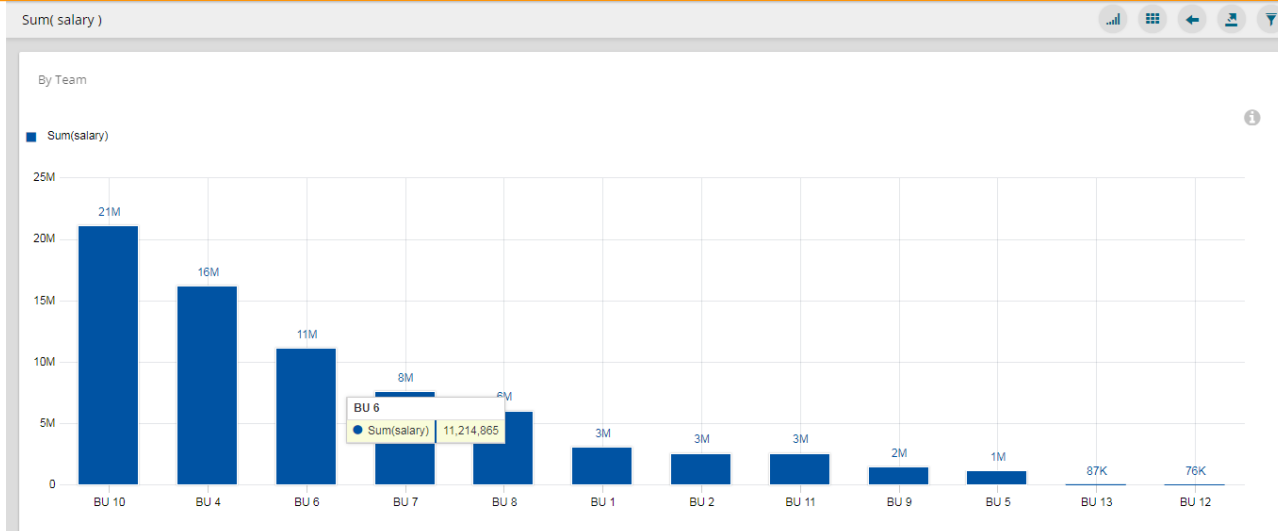
- i) Navigate to the 'Hierarchy Definition' tab (while creating a data store).
- ii) Drag and drop a time dimension into the 'Drill Def' box to configure the drill path.
- iii) The dragged time dimension splits into three granularities (E.g., Year>Month>Date)
- iv) Click the 'NEXT' option.
- v) Create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



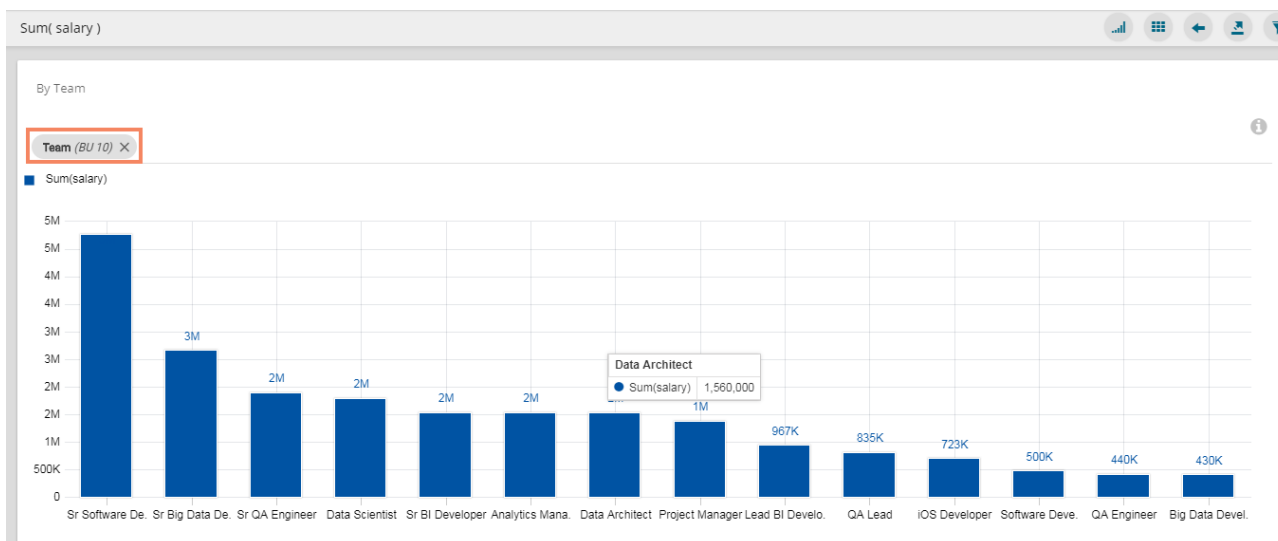
- vi) Select the data store with the defined drill path to create a new view.
- vii) Select the dimension for which the drill path has been defined and drag to create a view.
- viii) Click 'Save' option to save the view on the Storyboard.



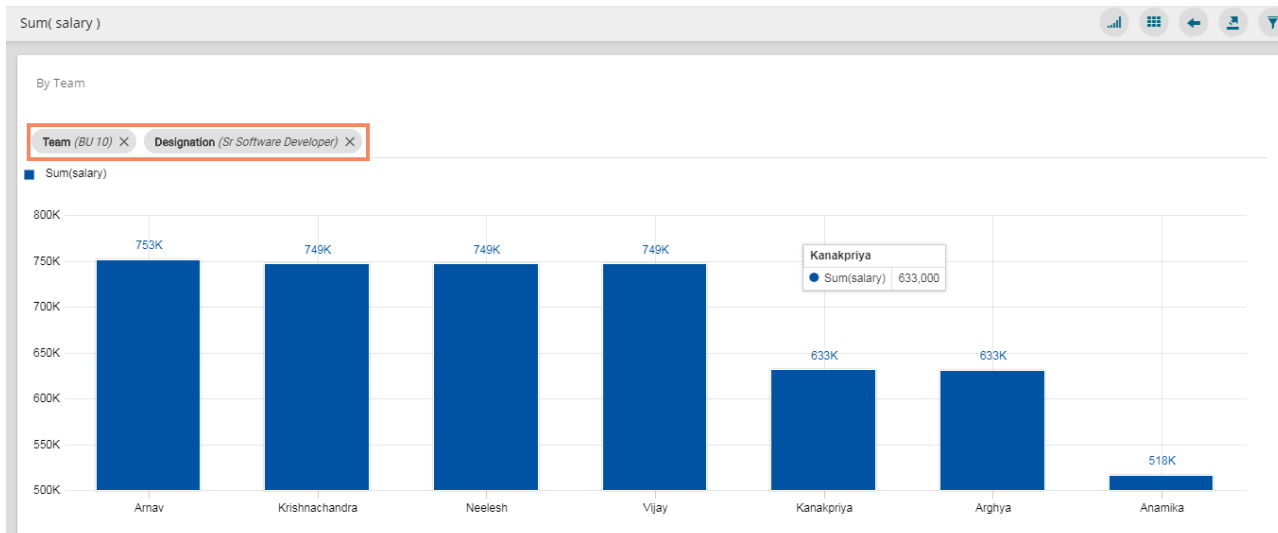
- ix) Access the saved view on the storyboard by double clicks on it.
- x) The Analyse window opens displaying team as the highest-level granularity of data drill.



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:

- 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.
- Users can also open a saved view via the ‘Analyze’ option.

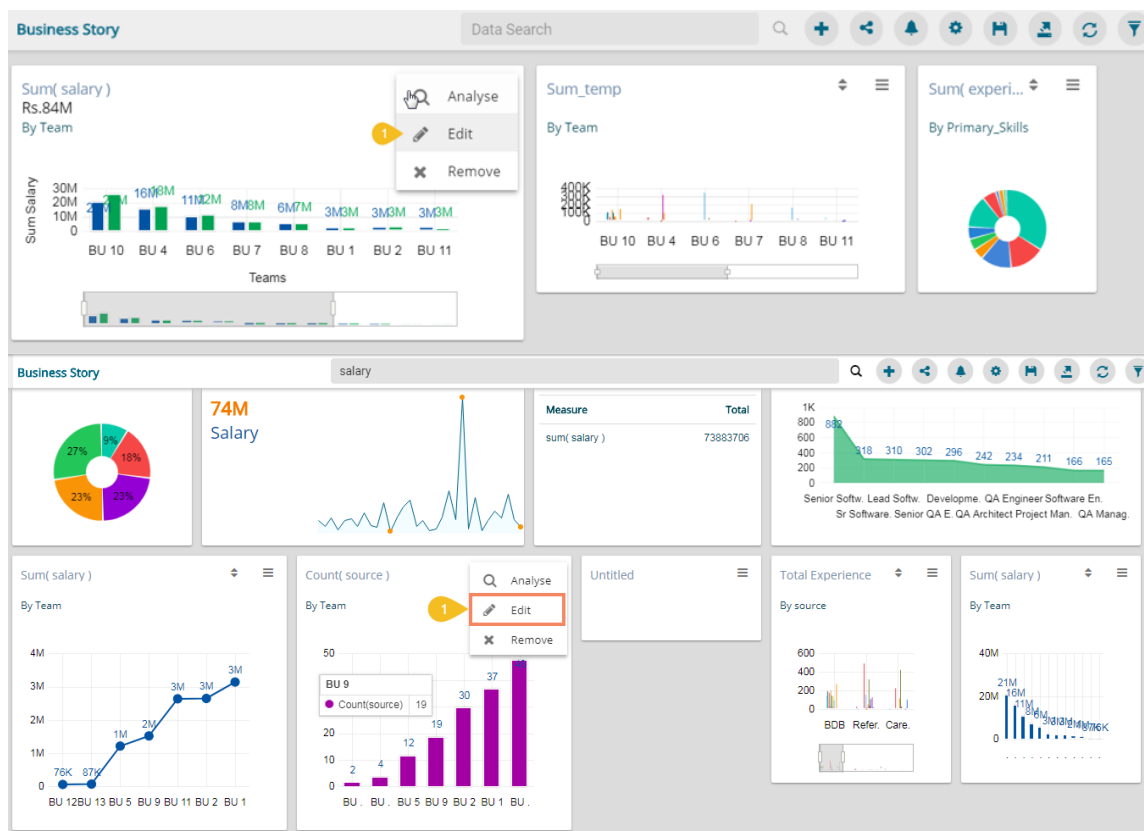
4.4.2. Actions

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

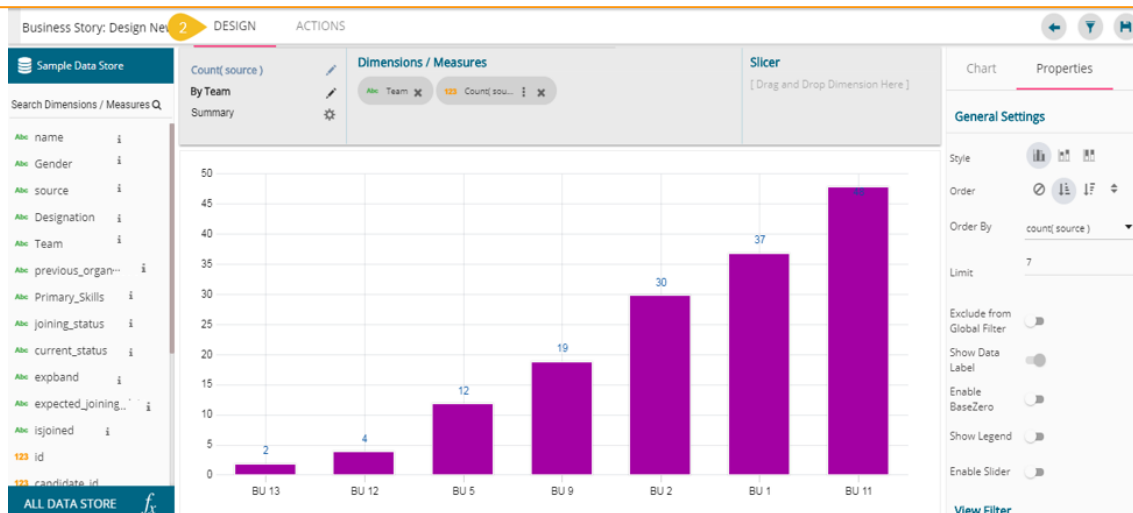
4.4.2.1. Interactions

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.

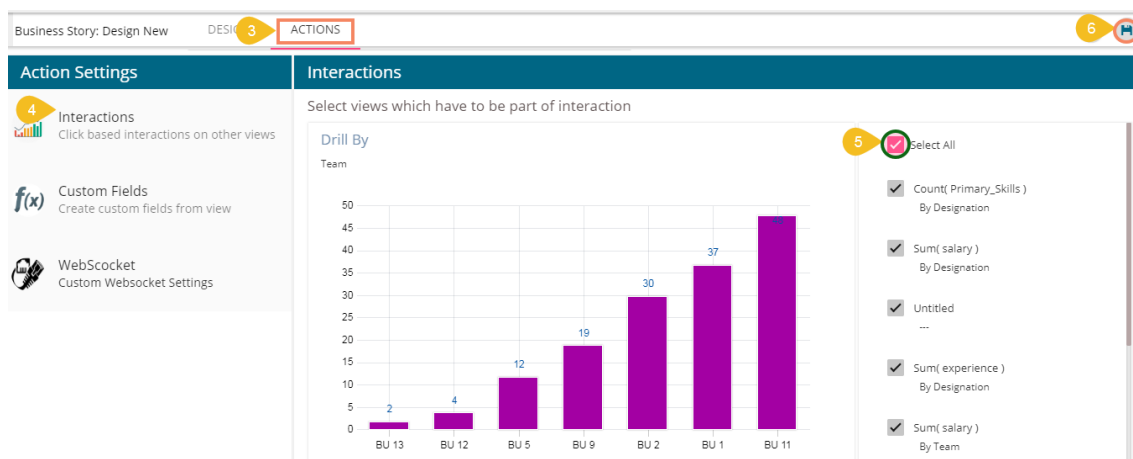
- Navigate to the Storyboard.
- Select ‘Edit’ view from the ‘Options’ menu.



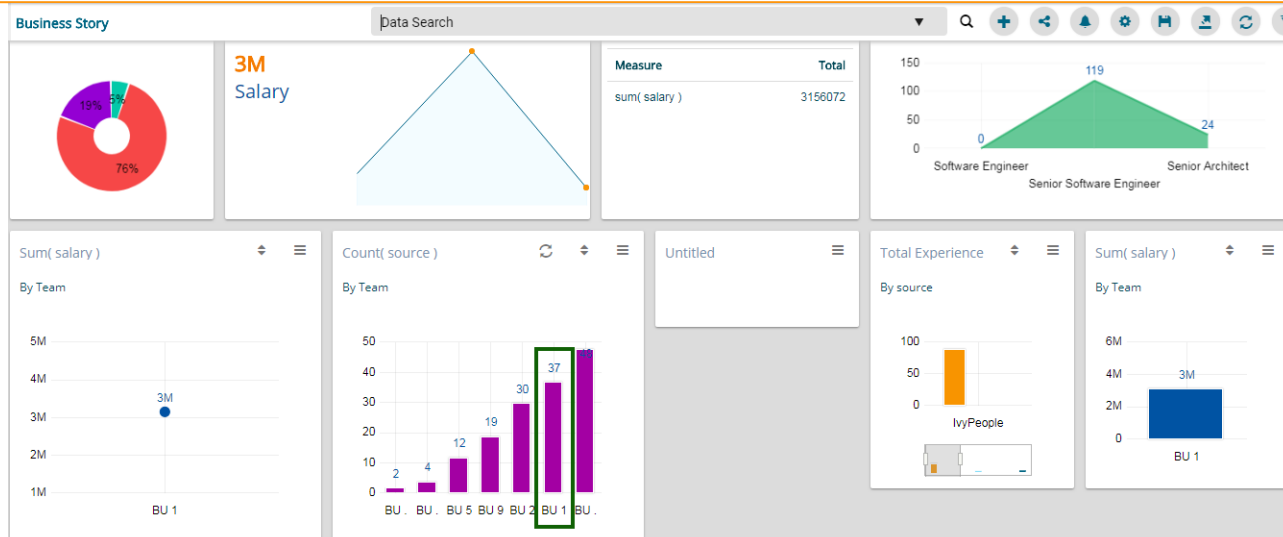
- The ‘Design’ tab opens by default for the selected view.



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



- viii) Users 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.

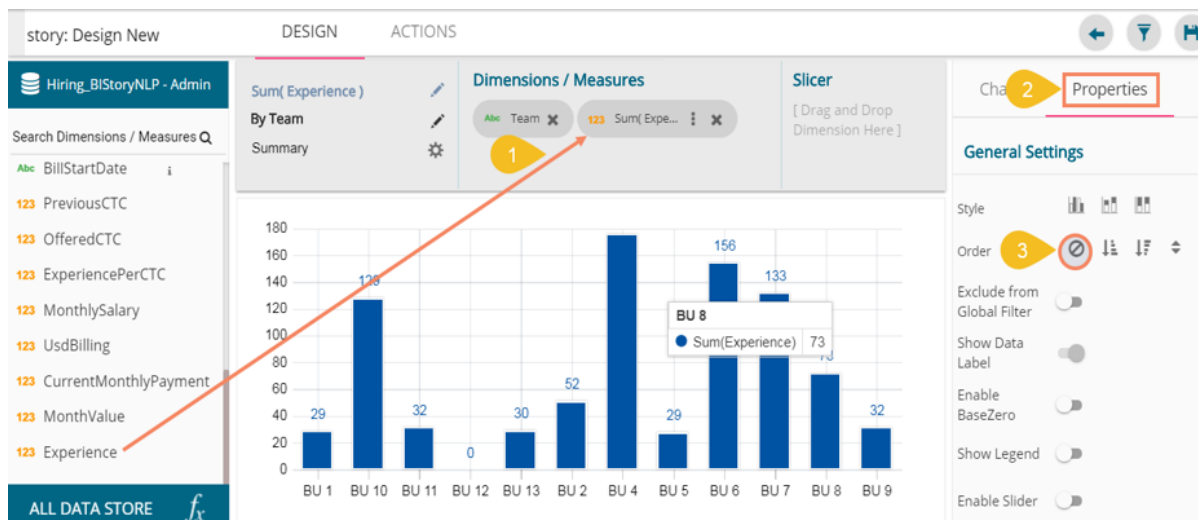
- v) The event triggers and the story gets refreshed data

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.

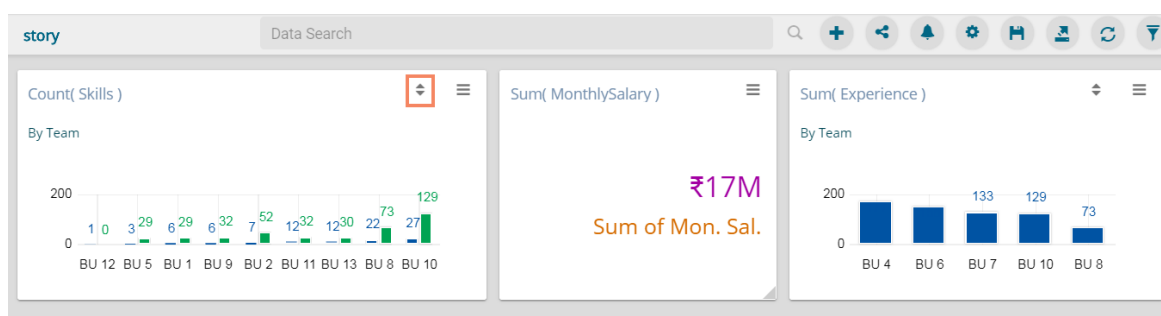


- vi) Select a dimension or measure value from the drop-down to display the data value in the selected order.
- vii) Insert a number to add a limit to the displayed values by using the 'Limit' option.
- viii) The chart displays data as per the set limit in the selected order.



Note:

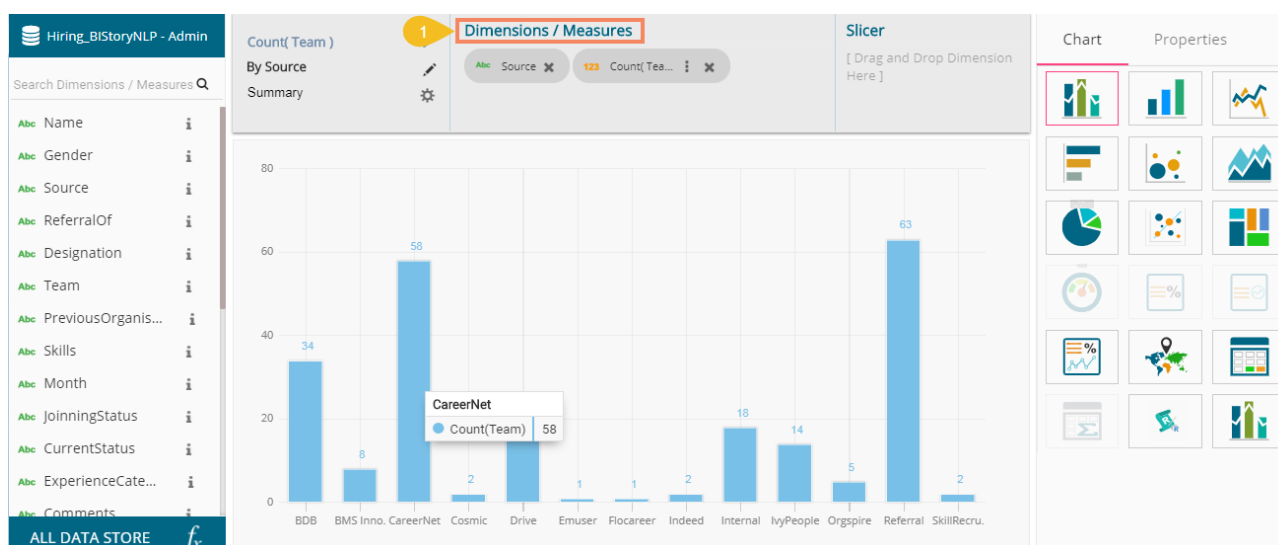
- This feature does not work for KPI tile, Semi Gauge, Map, TreeMap Chart, and Metric Summary.
- The view specific 'Sort By' option can be accessed from the storyboard.



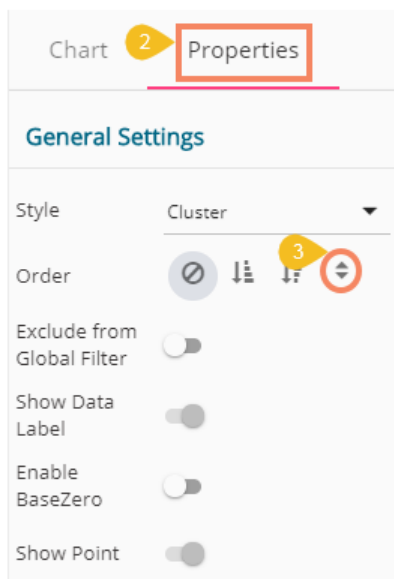
4.4.4. Manual Sort

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

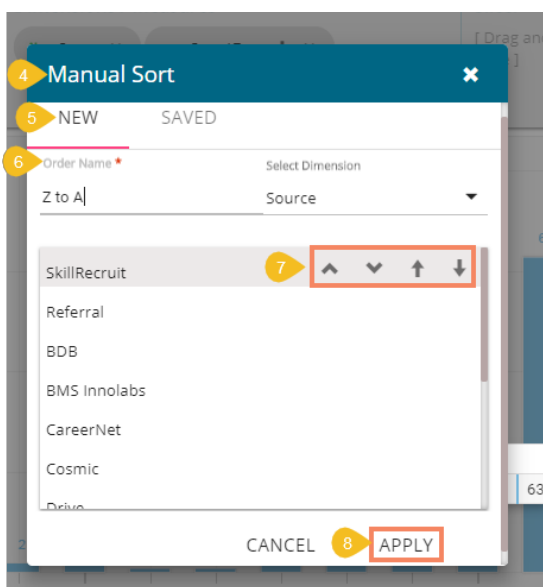
- Navigate to the Design new page
- Choose any combination of one Dimension and Measure
- A chart gets displayed in some order



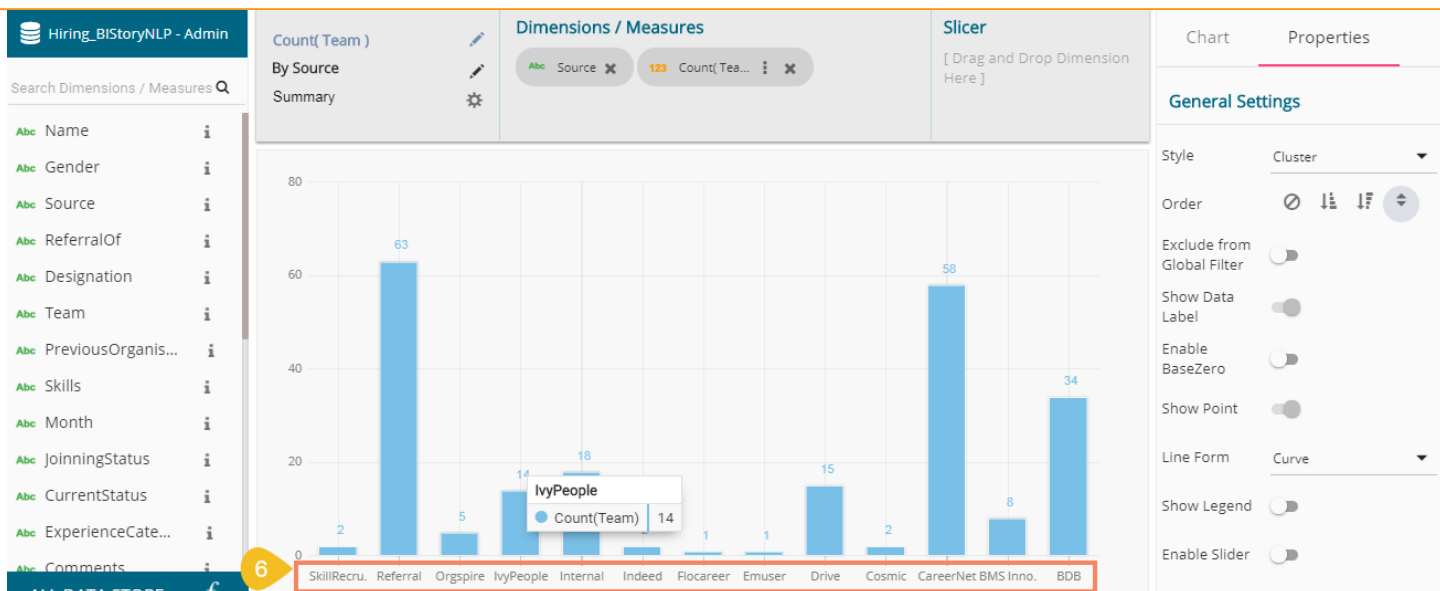
- iv) Open the chart properties
- v) Click the 'Manual Sort' option



- 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

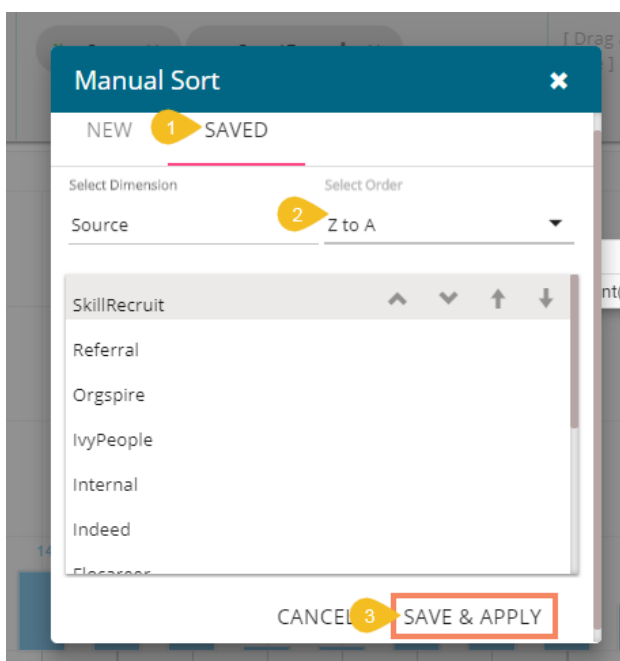


- xi) The View fields get displayed in the selected order



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



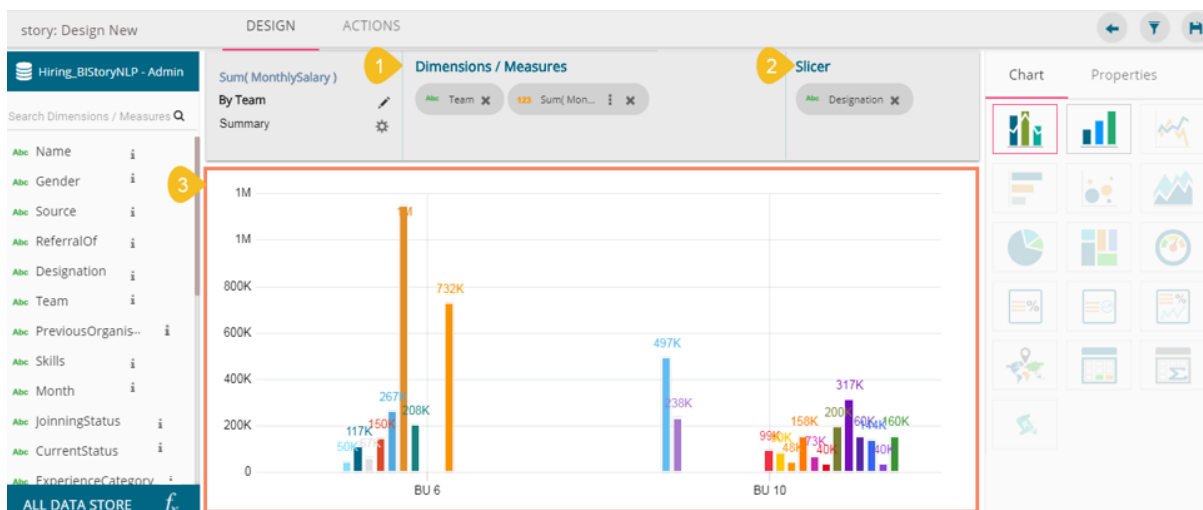
- iv) The selected saved order gets applied to the view

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.



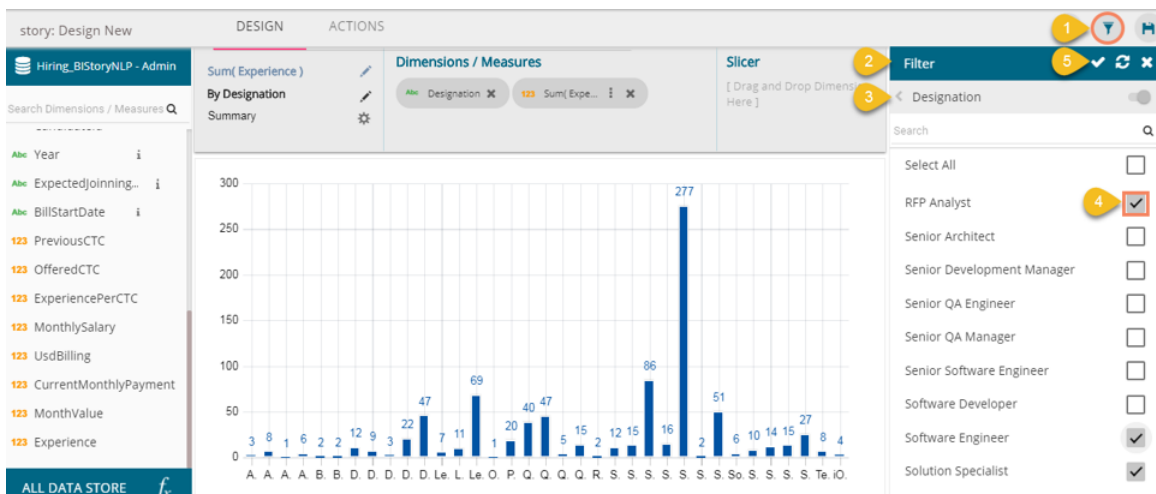
Note: The Slicer supports the selection of only one dimension and one measure in the 'Dimension/Measures' space. Another dimension should be added to the 'Slicer' space.

4.6. Applying Filters

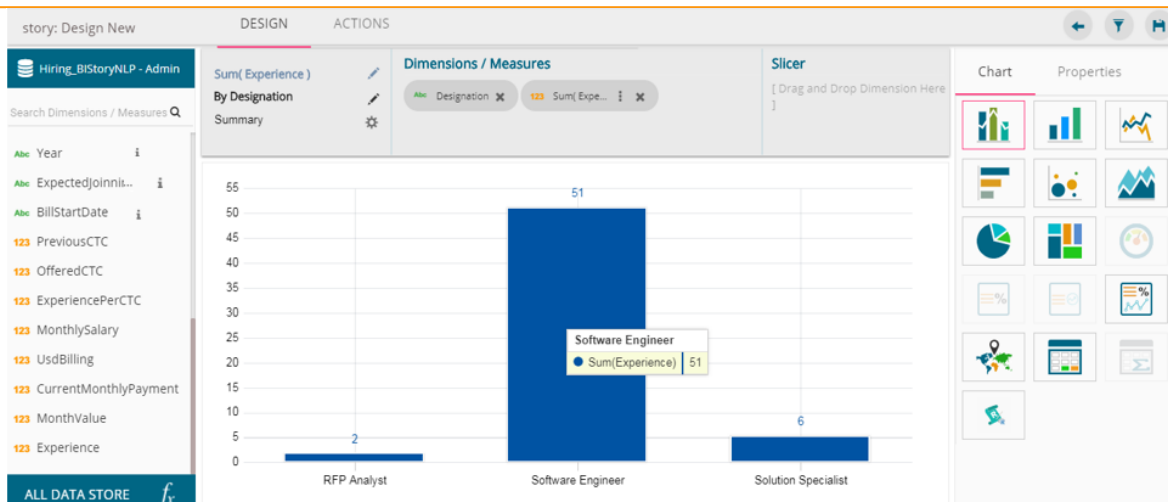
BDB Business Story offers a series of filters to customize your interactive visual report. The filters can be applied at the view level as well as to the entire business story.

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.

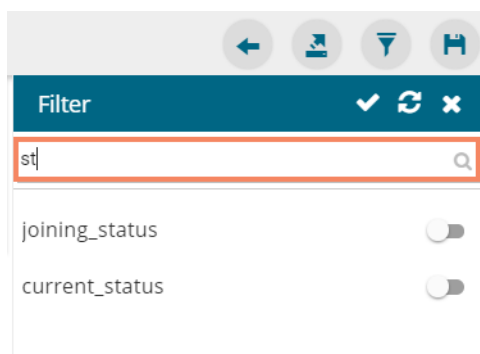


- vi) The selected filter values get applied to the concerned view.

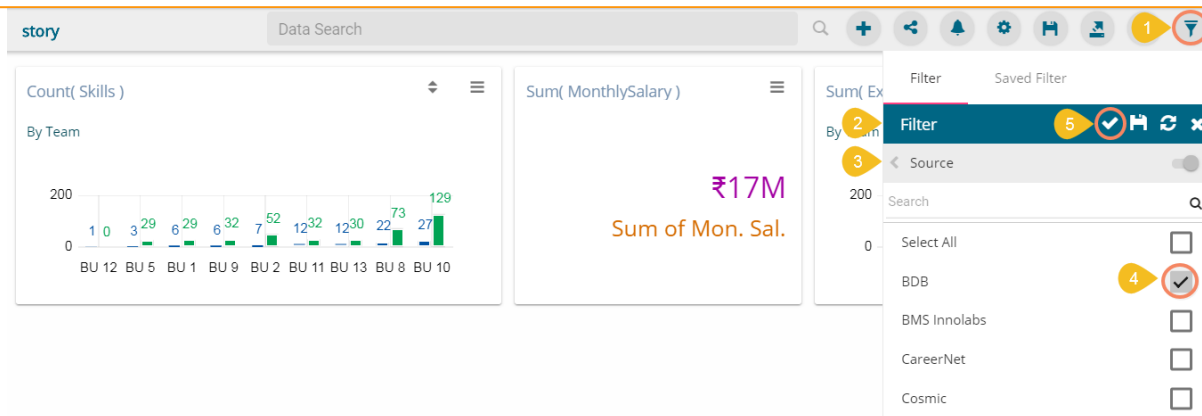


Note:

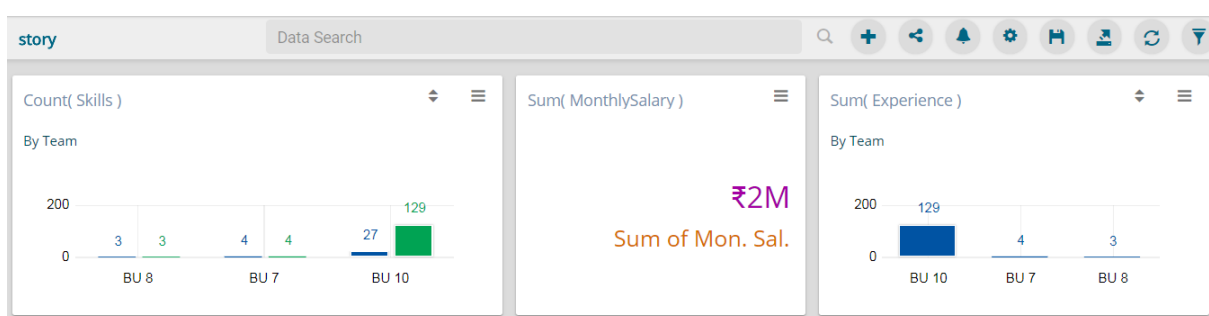
- a. A 'Search' bar has been provided for the View Filter panel to search a Dimensions, Measures, and Time value from the available list.



- b. Users need to click 'Apply' button while enabling or eliminating the view specific filter values to reflect the same in the displayed chart.
- c. Users can insert, modify, or remove a view specific filter via 'Analyse' option.
- d. The View Filter 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.

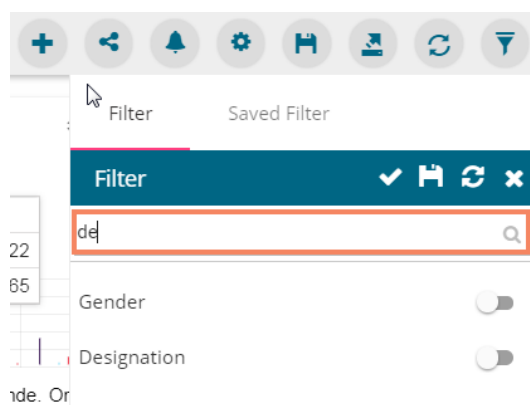


vi) The global filter gets applied to all the concerned views on a Storyboard.



Note:

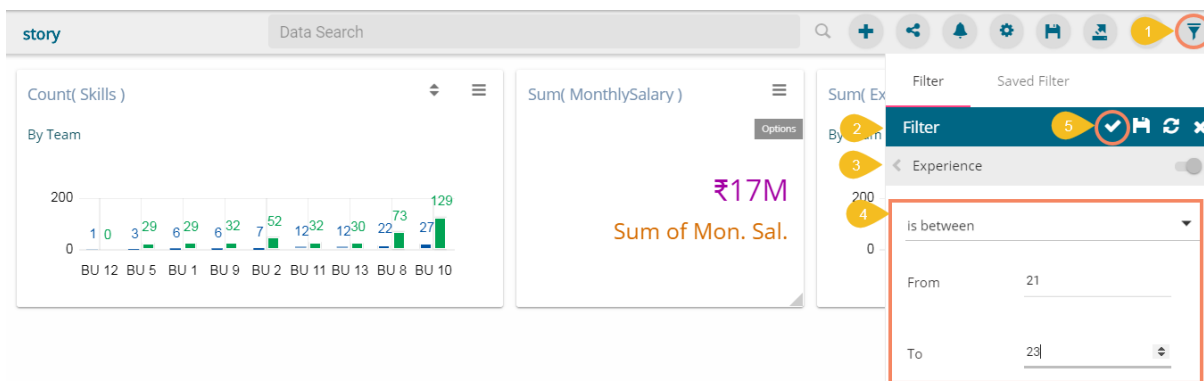
a. A 'Search' bar has been provided for the Global Filter panel to search the available Dimensions, Measures, and Time values.



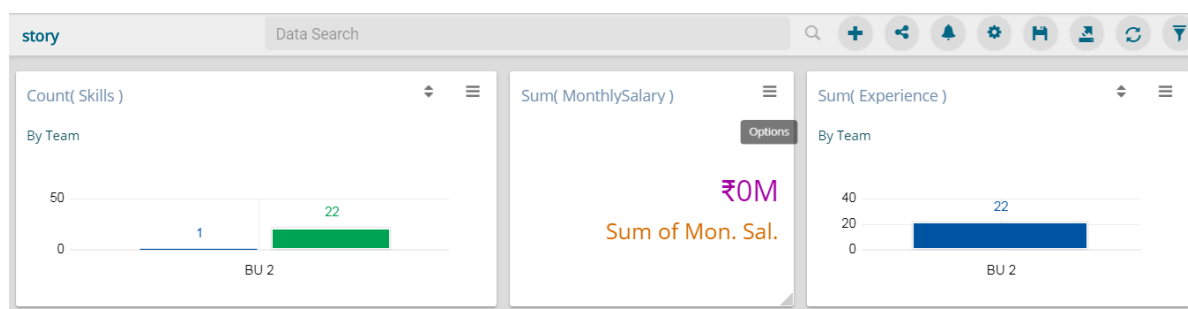
- b. The global filter can be applied only to those views on the storyboard where the filter values are used as dimensions.
- c. Global filter when applied to various views on a storyboard, subdues the view specific filter values.
- d. Users can insert views created via different data stores on one Story 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
- 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.



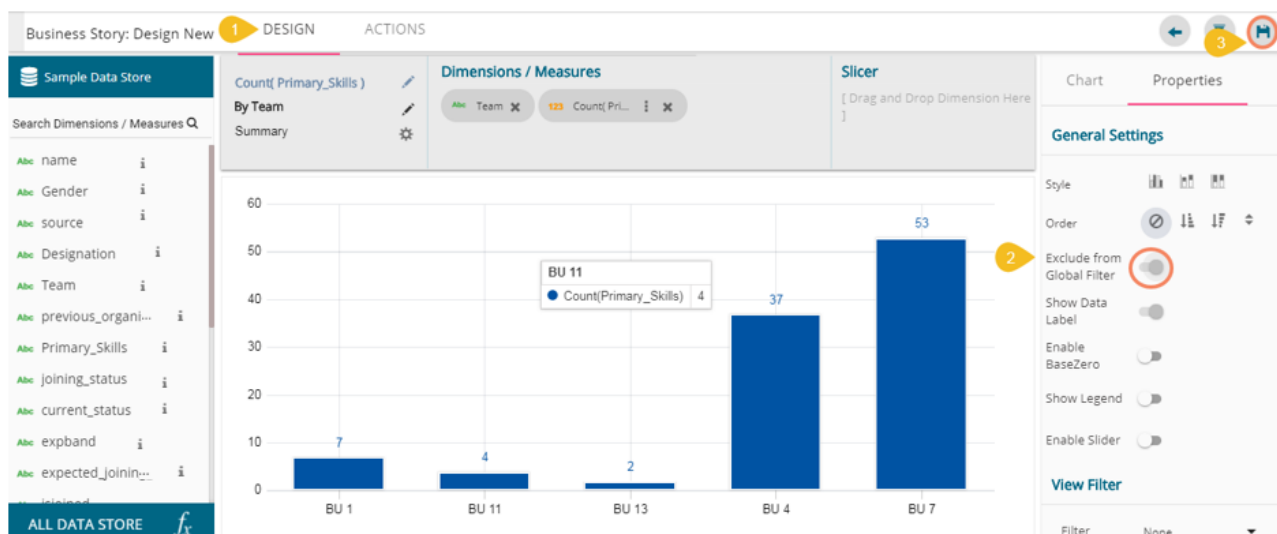
f. The selected filter value gets applied to all the saved views on the storyboard.



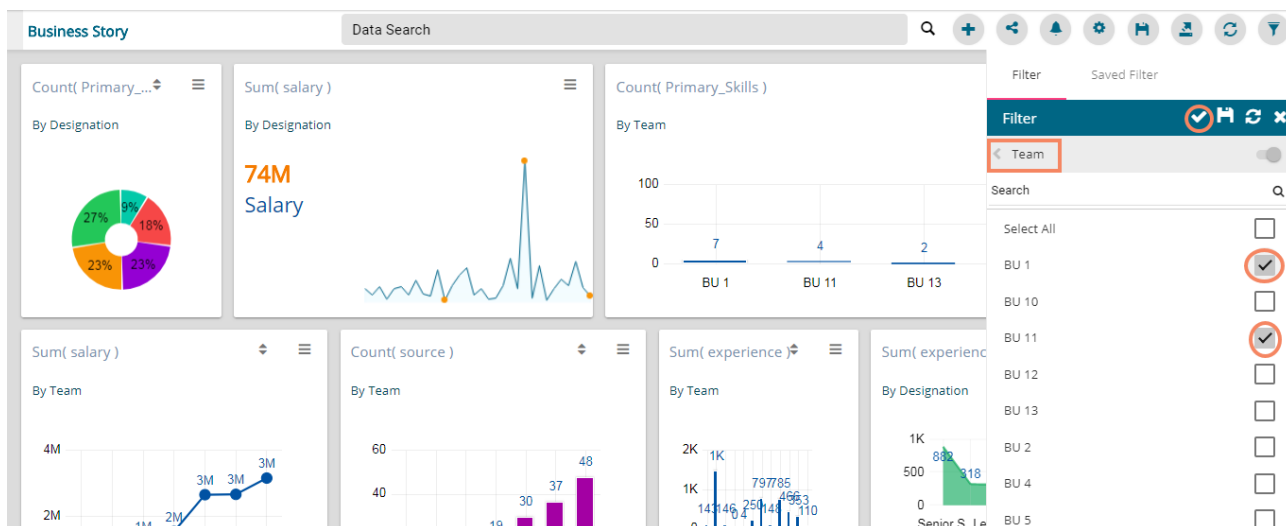
4.6.2.1. Exclude from the Global Filter

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

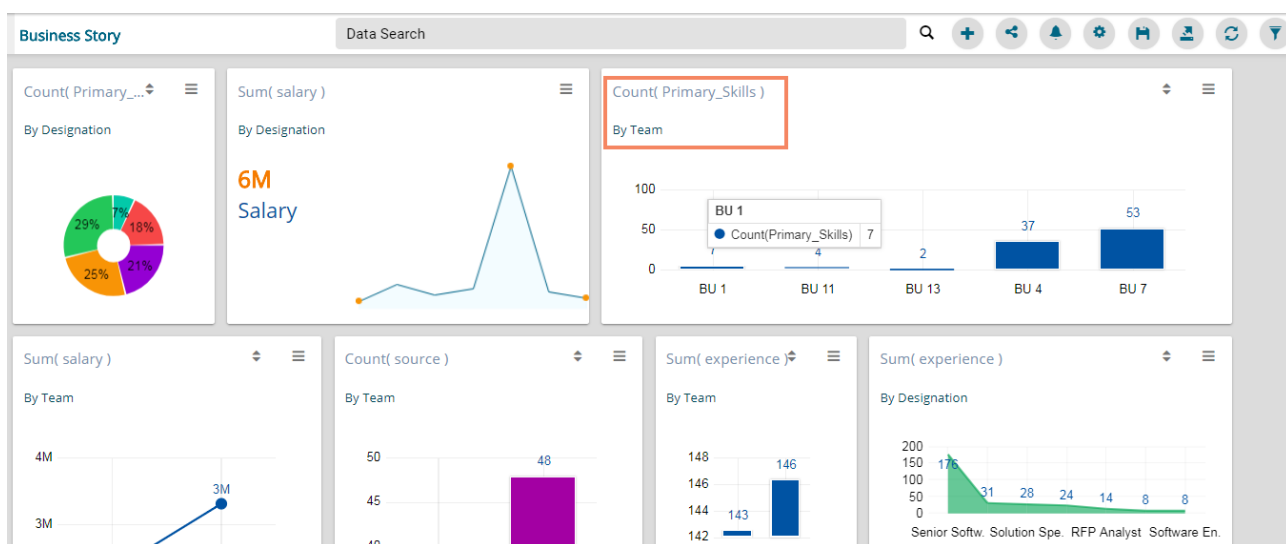
- i) Navigate to the 'Design' mode of a view that you wish to exclude from the Global filter effect
- ii) Enable the 'Exclude from Global Filter' option from the 'Properties' tab
- iii) Click the 'Save' option.



- 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.

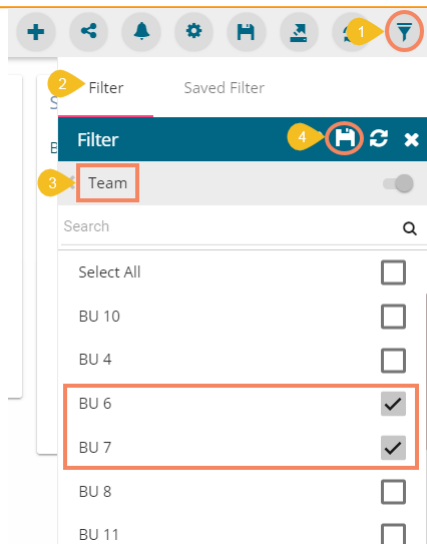


- vii) All the views get modified according to the Global filter, but the selected view gets excluded from the Global filter.

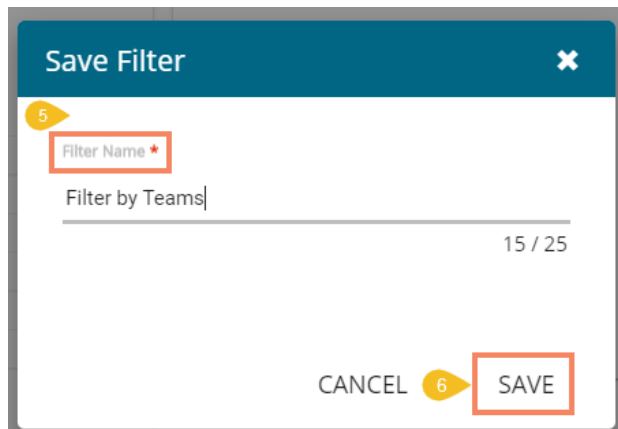


4.6.3. Saving a Global Filter

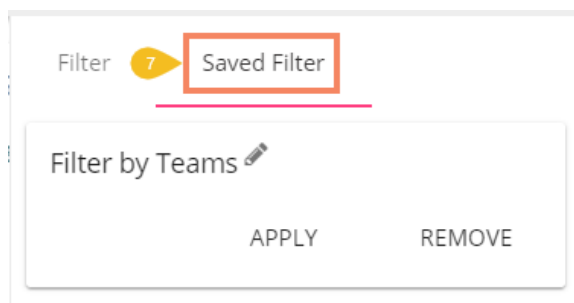
- i) Click 'Global Filter' option.
- ii) Select the 'Filter' tab.
- iii) Select a filter value by check marks. E.g. In this Case, team BU 6 and BU 7 are the selected filter values.
- iv) Click 'Save' option.



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



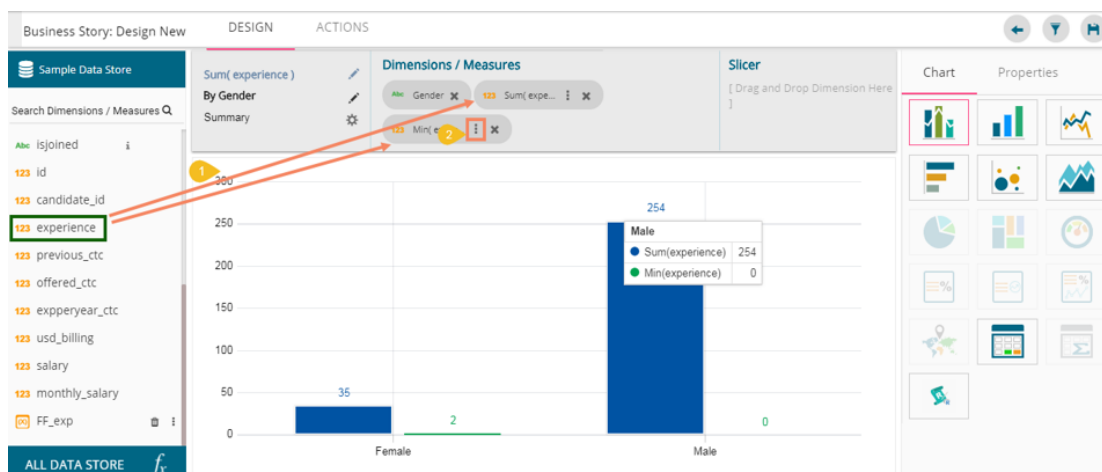
- vii) The filter gets stored under the 'Saved Filter' tab. (The same will be notified by a pop-up message.)



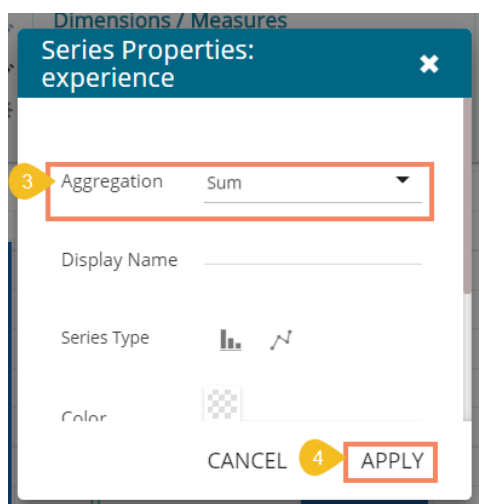
4.6.4. Measure Filter

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

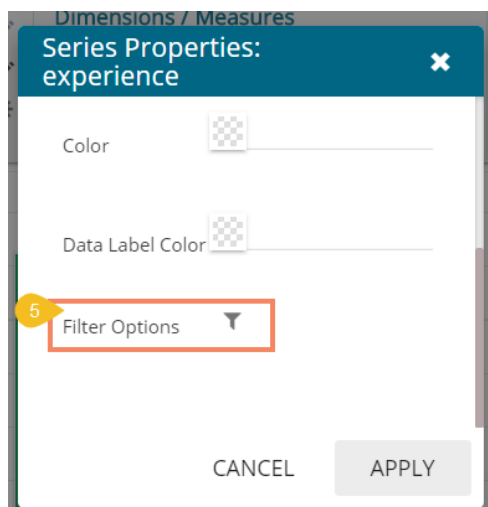
- i) Select one dimension and one Measure value from the list of the available Dimensions and measures. Drop the Measure value twice on the canvas.
- ii) Click the 'Series Properties' icon to open the measure specific Series Properties.



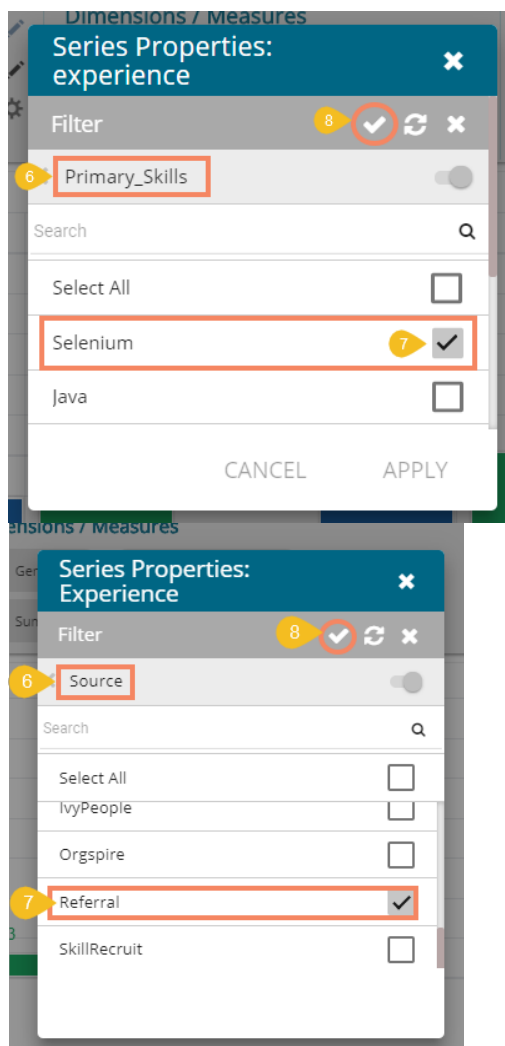
- iii) Make sure that the 'Aggregation' type is the same for both the selected measures.
- iv) Click the 'Apply' option to modify the aggregation values, if they were not exactly for the measures.



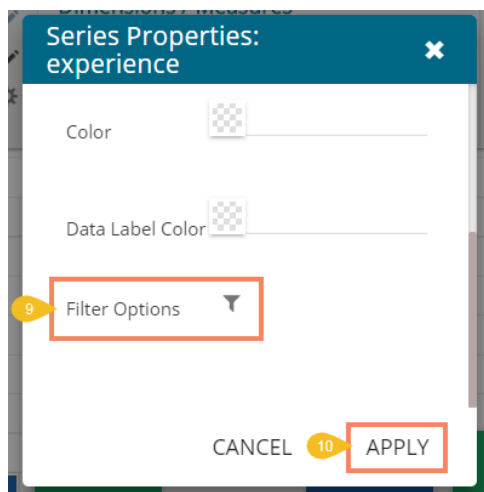
- v) Scroll down the Series Properties to get the 'Filter Options'
- vi) Click the 'Filter' icon to get all the available filter values.



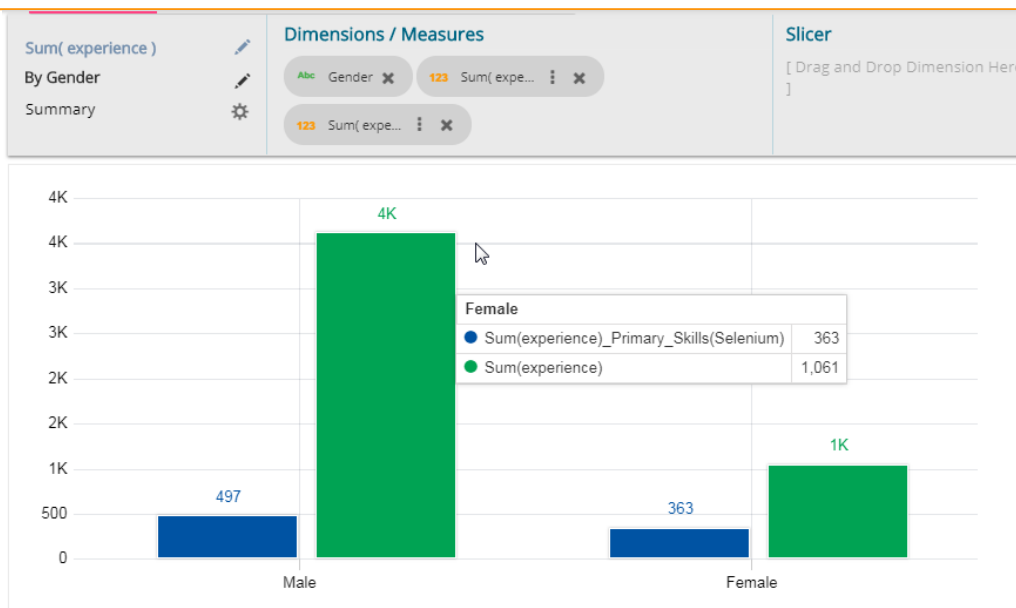
- vii) Select filter conditions using checkmarks in the given boxes. (E.g. In this case, 'Primary_Skills' is a broad filter condition under which 'Selenium' is a specific filter choice.)
- viii) Apply it using the 'Apply Filter' icon.



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



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



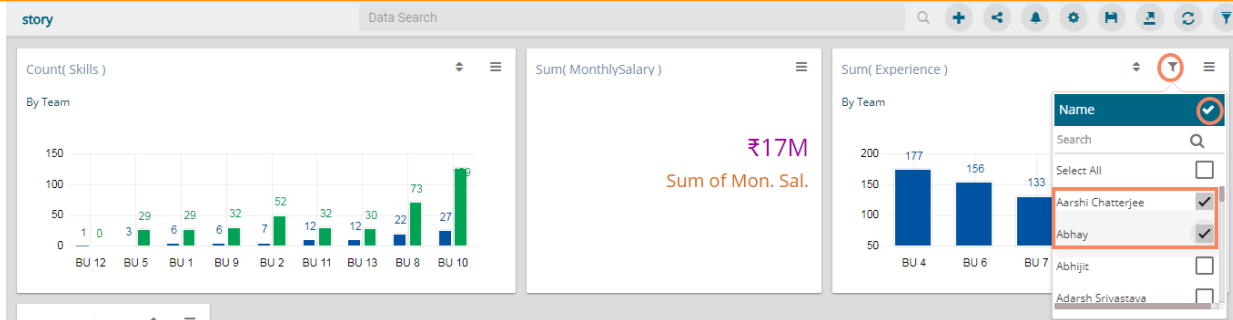
4.6.5. Custom View Filter

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

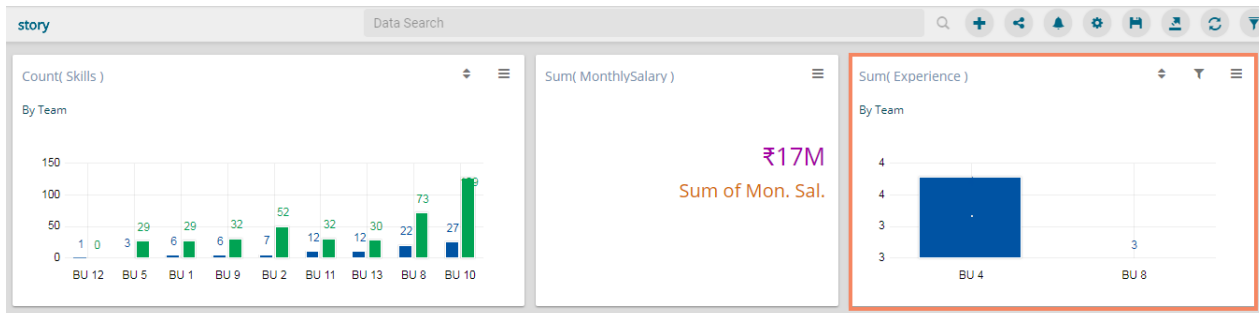
- i) Create a view by drag and drop of the desired dimension and measure to represent the selected data values through a chart. (By default, the Mixed Chart opens)
- ii) Open the 'Properties' tab.
- iii) Select the 'View Filter' option using the drop-down menu. (In this case, filter condition is 'employee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



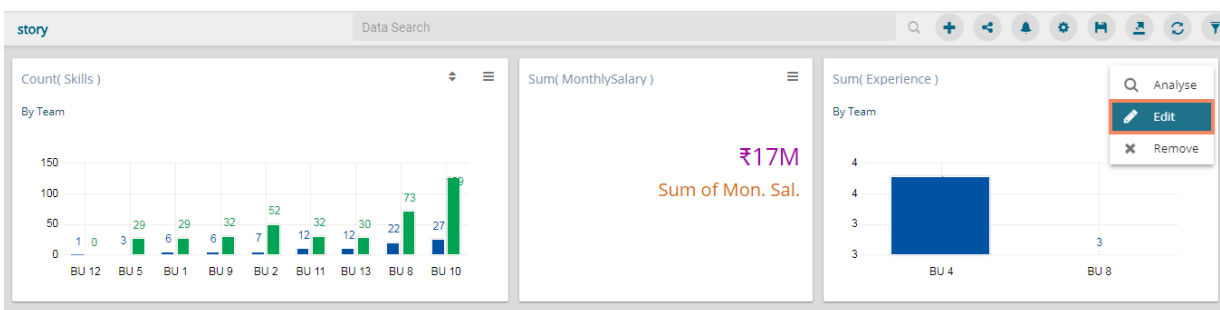
- v) Click the 'Filter' option.
- vi) Select a filter value.
- vii) Click the 'Apply' option.



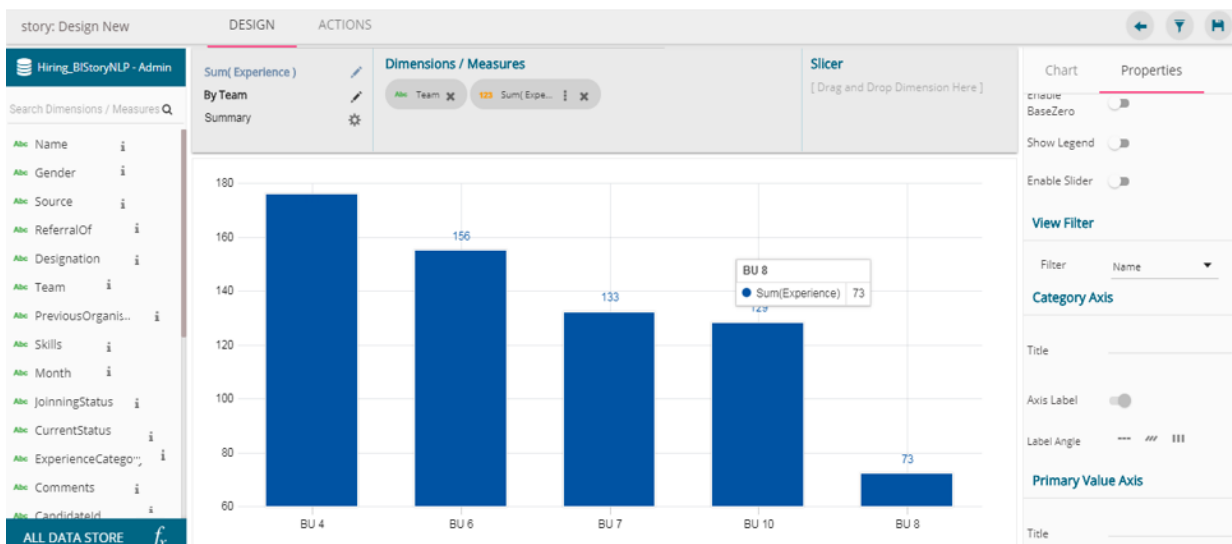
viii) The view gets customized as per the selected filter condition on the Storyboard.



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



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

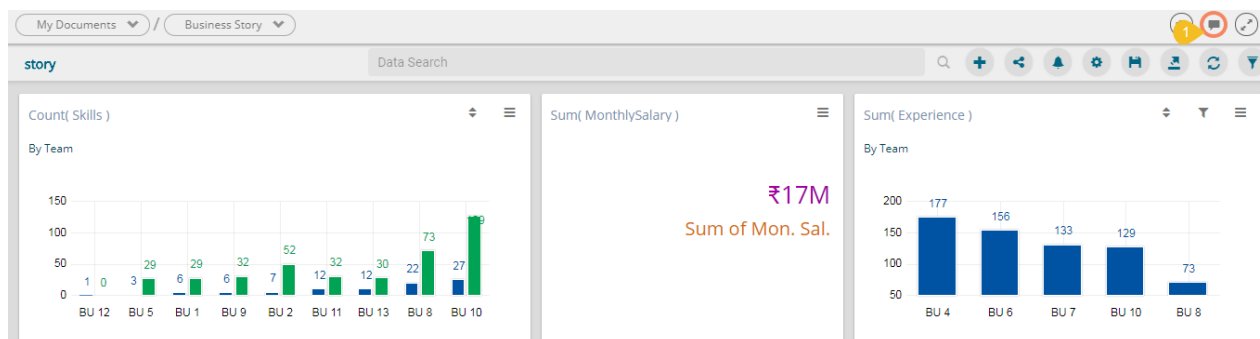



Note: The 'View Filter' choice is not available for the Semi Gauge chart, KPI Tile, KPI Comparative Tile, Matrix Summary.

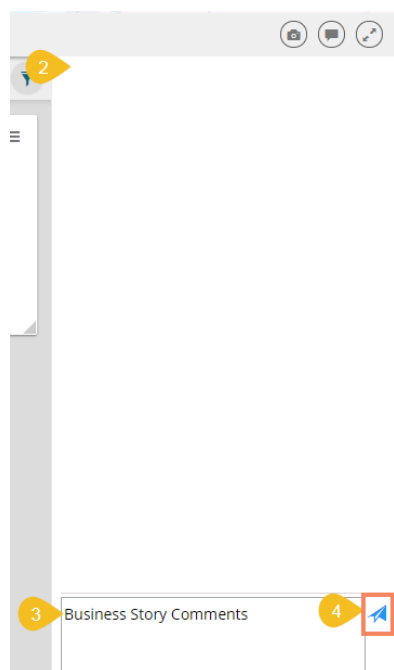
4.7. Comments

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

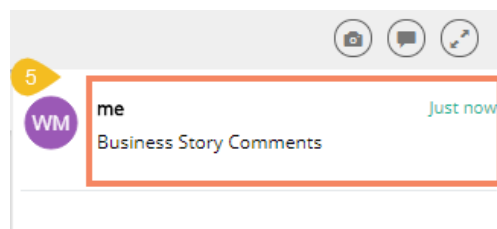
- i) Click the 'Comments' icon from the Header panel.



- 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

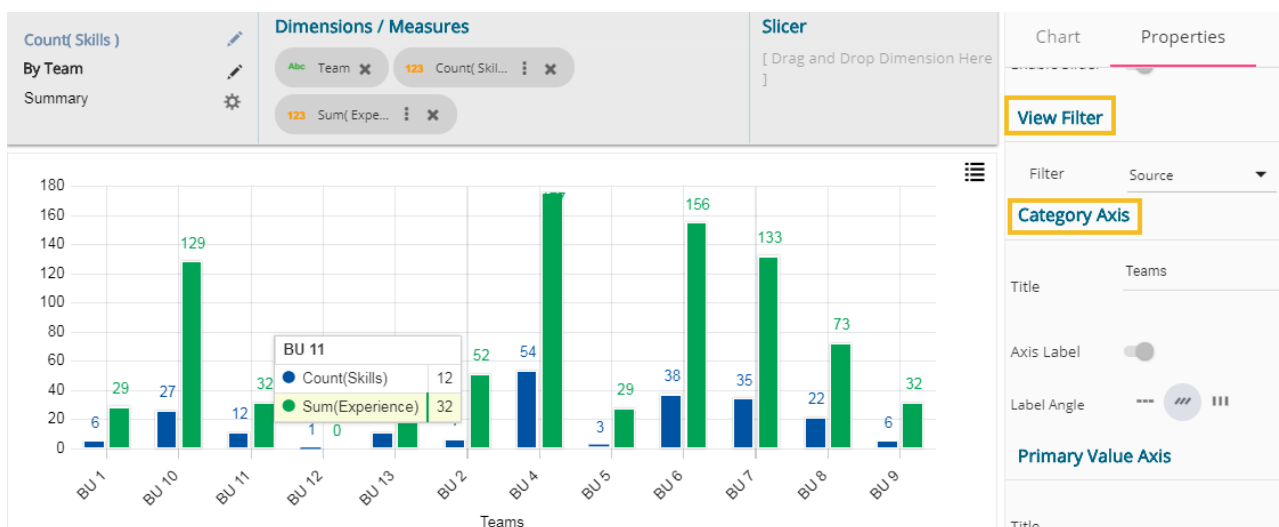


ii) View Filter

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

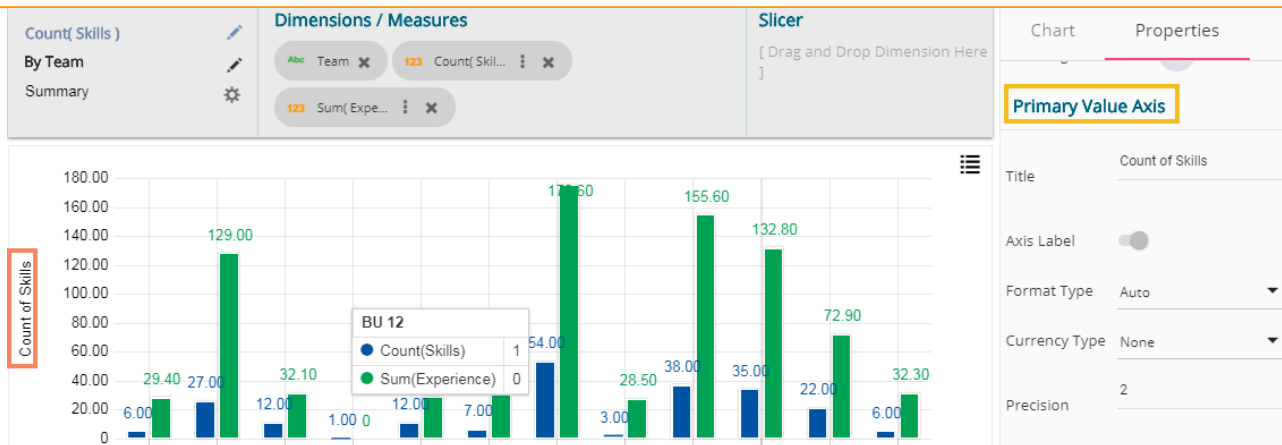
iii) Category Axis

- 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)

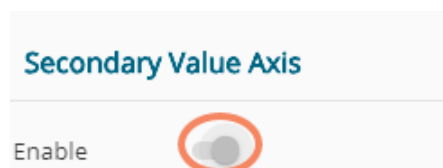


v) Secondary Value Axis

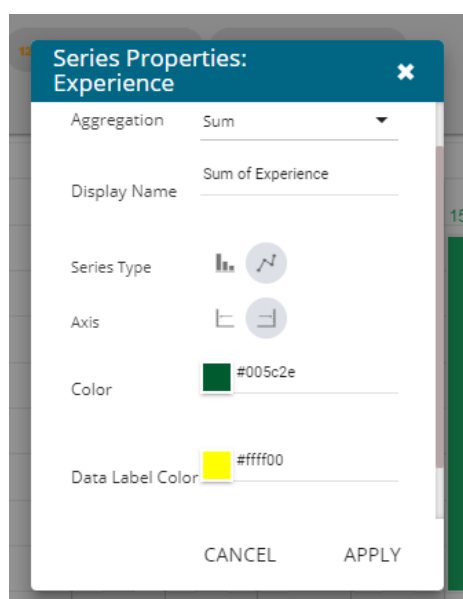
Properties for the Secondary Value Axis will be displayed when two measures are dragged on the canvas.

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

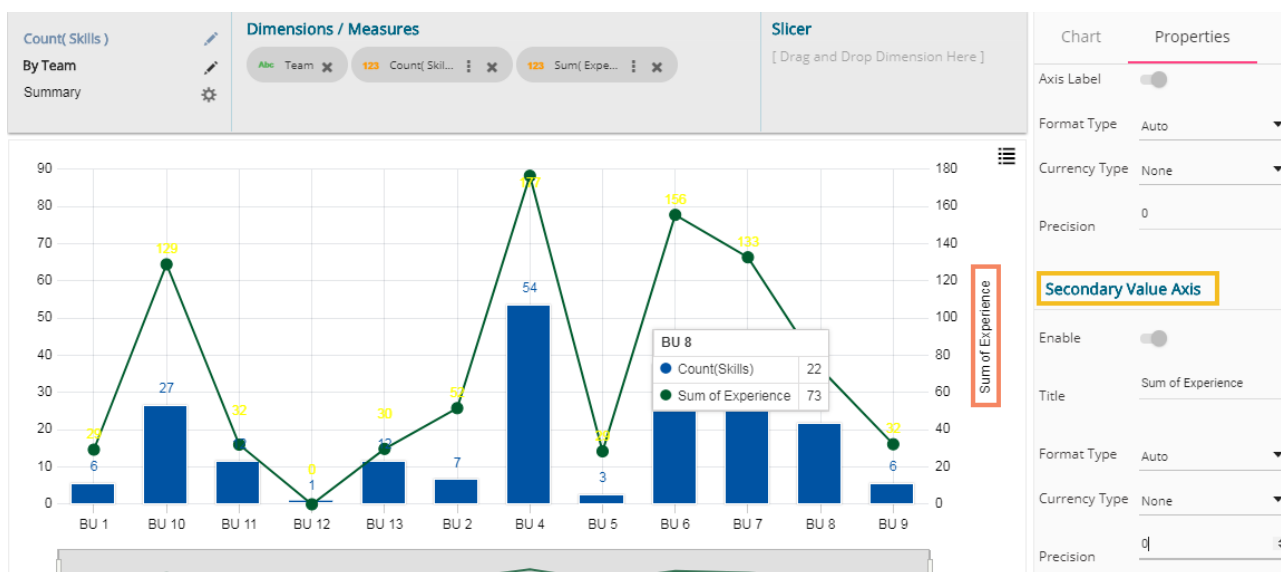
- a. Access Secondary Value Axis using the 'Properties' tab and enable it.



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



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



5.2. Column Stack Chart

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

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

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

Variations of this chart

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

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

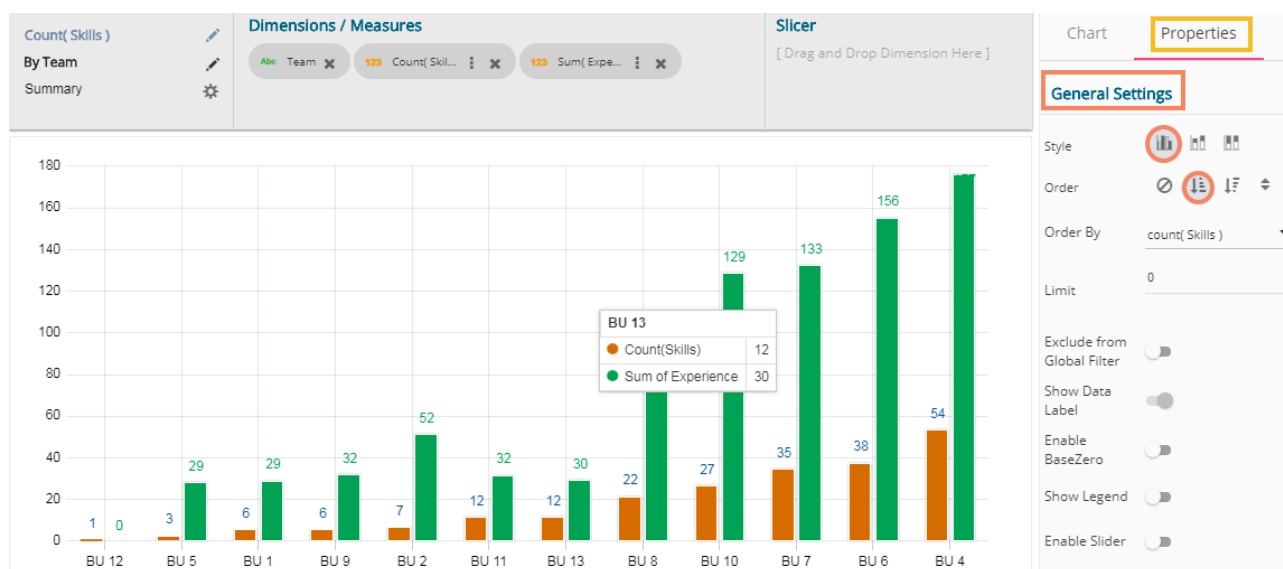
Add color for quick insight: Displaying the columns with colors helps users to pay immediate attention to the essential tasks.

Properties:

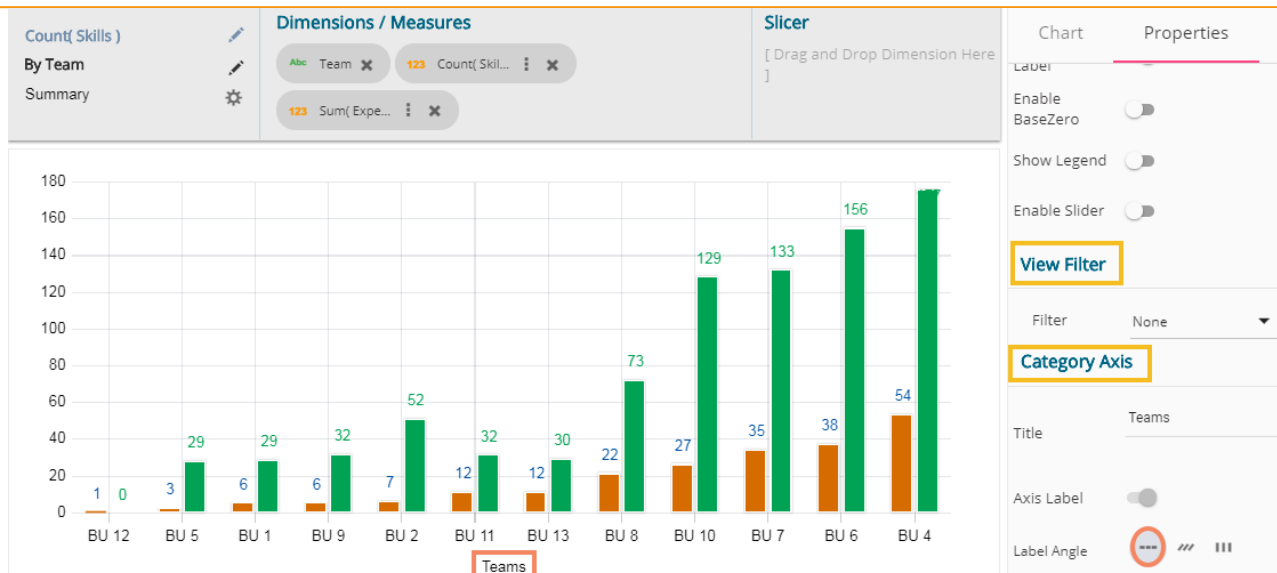
i) General Settings

- 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

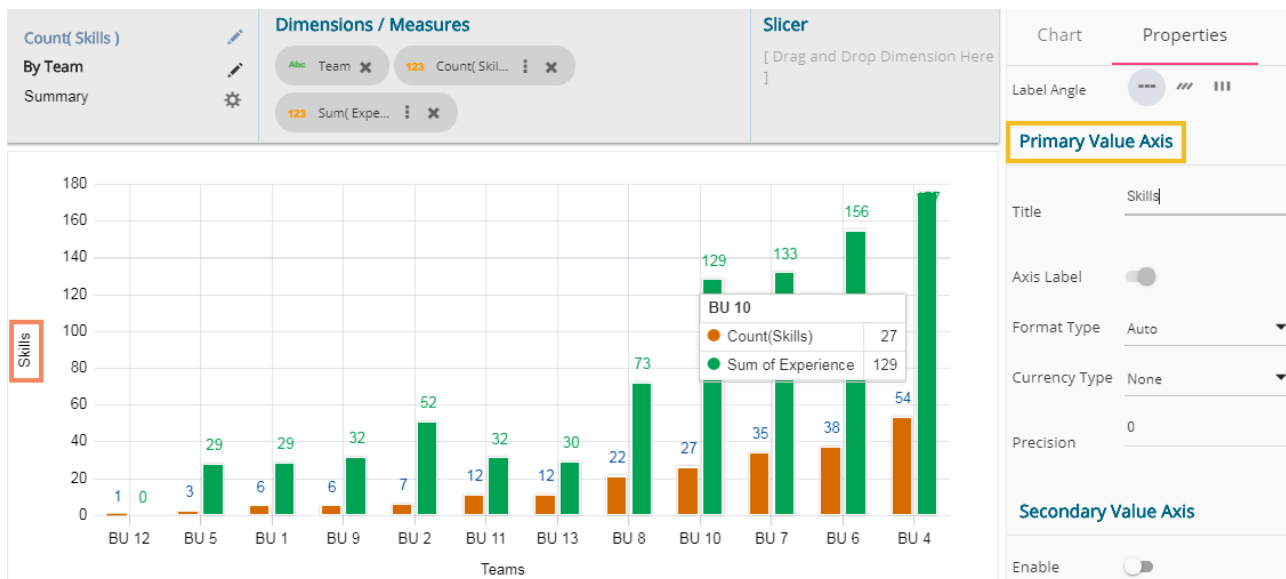


- ii) **View Filter**
 - a. Filter: Select a filter condition using the drop-down menu
 - iii) **Category Axis**
 - a. Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by turning on the radio button
 - c. Label Angle: Select a display angle for the axis label
- E.g.,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



iv) Primary Value Axis

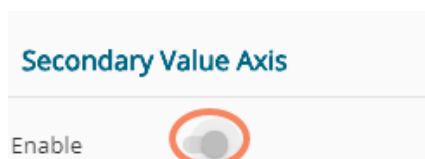
- f. Title: Provide a title for the Primary Value Axis
- g. Axis Label: Enable the Primary Value Axis label by turning on the radio button
- h. Format Type: Select a desired format type from the drop-down menu
- i. Currency Type: Select a currency symbol to be displayed in the view
- j. Precision: Set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



v) Secondary Value Axis

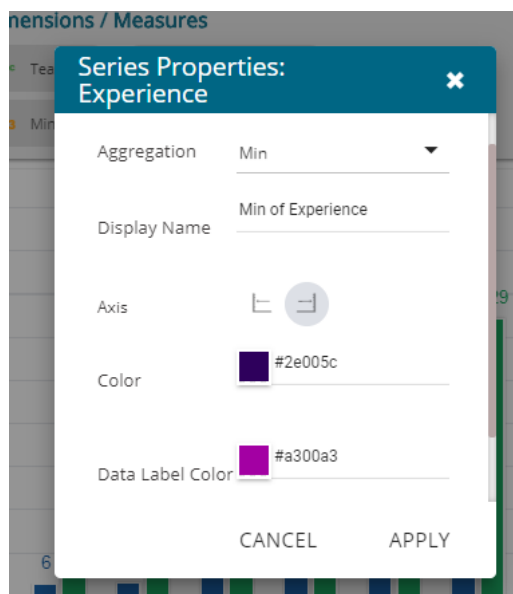
The Second Value Axis Properties gets displayed when two measures are dragged on the canvas. Users must configure the Series Properties of the dragged measure after enabling Secondary Value Axis to display same on the chart

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

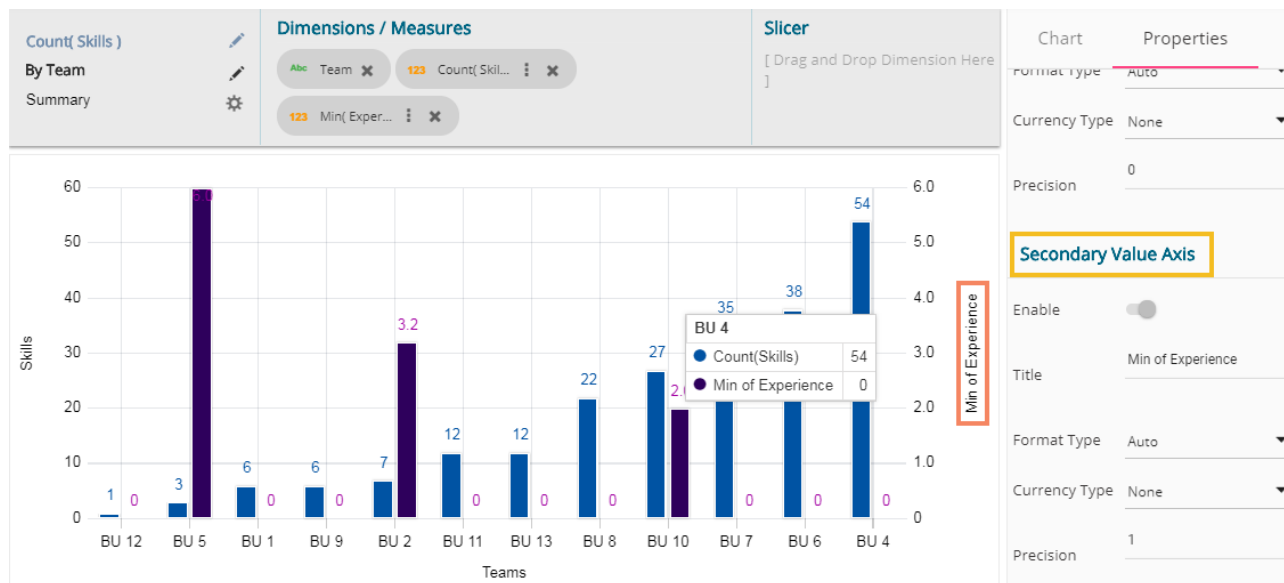


- b. Click 'Series Properties' provided next to the measure name

- c. A new window opens
- d. Configure the required details:
 - i. Aggregation-select an aggregation using the drop-down menu (By default, 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’



- 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 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

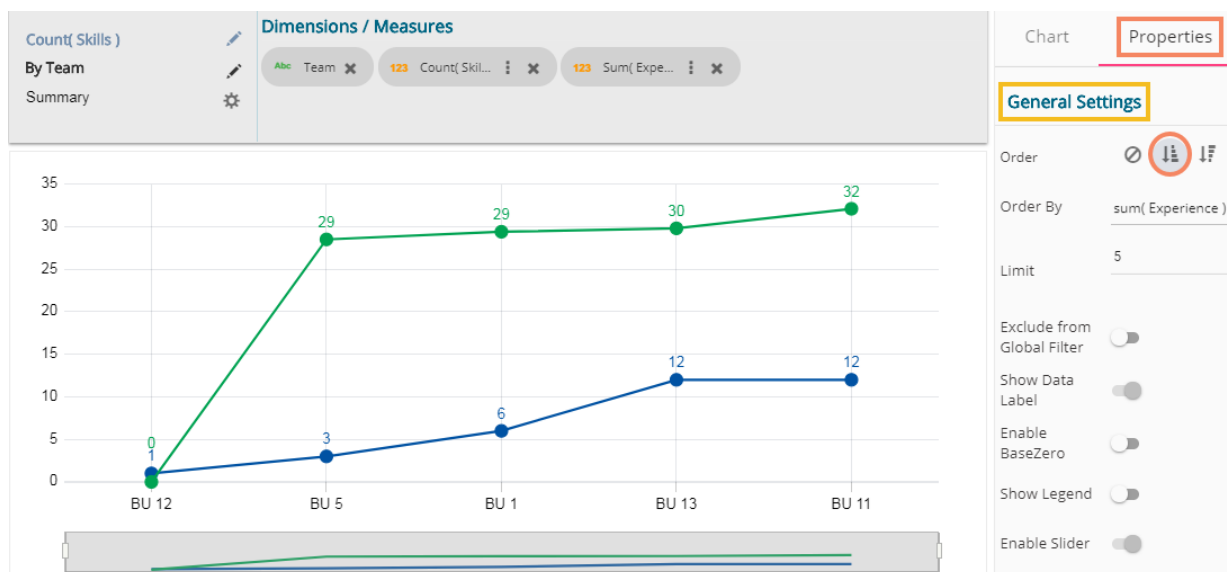
Mixed Chart- Combine a line graph with column charts to provide visual cues for further investigation

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 drop-down menu.
 1. Vertical
 2. Horizontal
- g. Enable Slider: Turn on the radio button to enable Slider

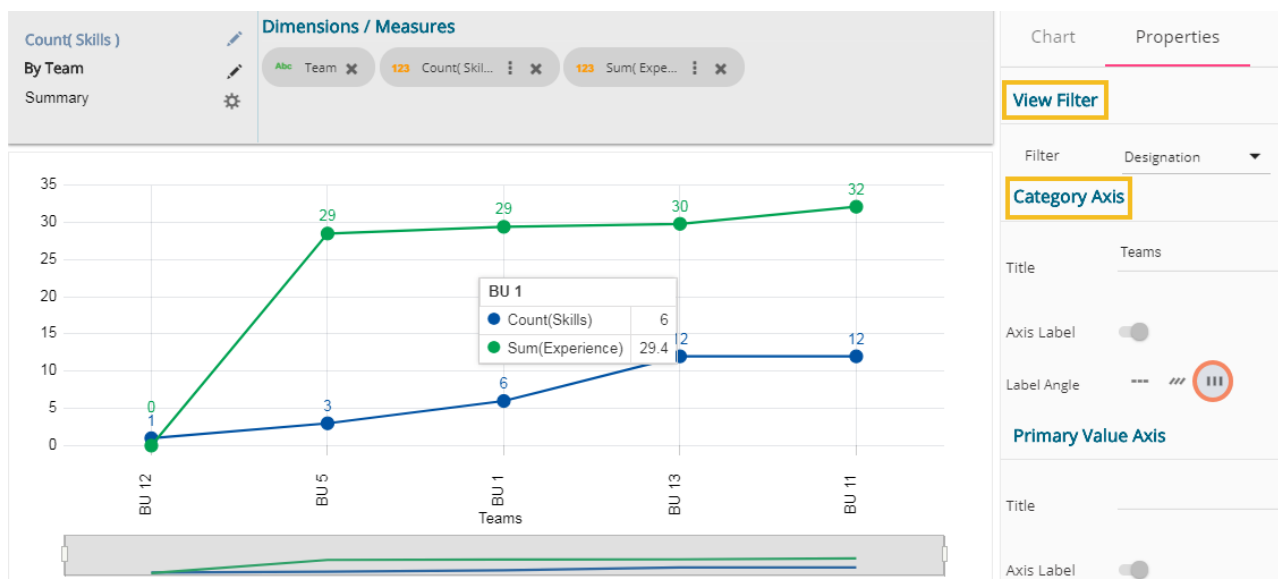


ii) View Filter

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

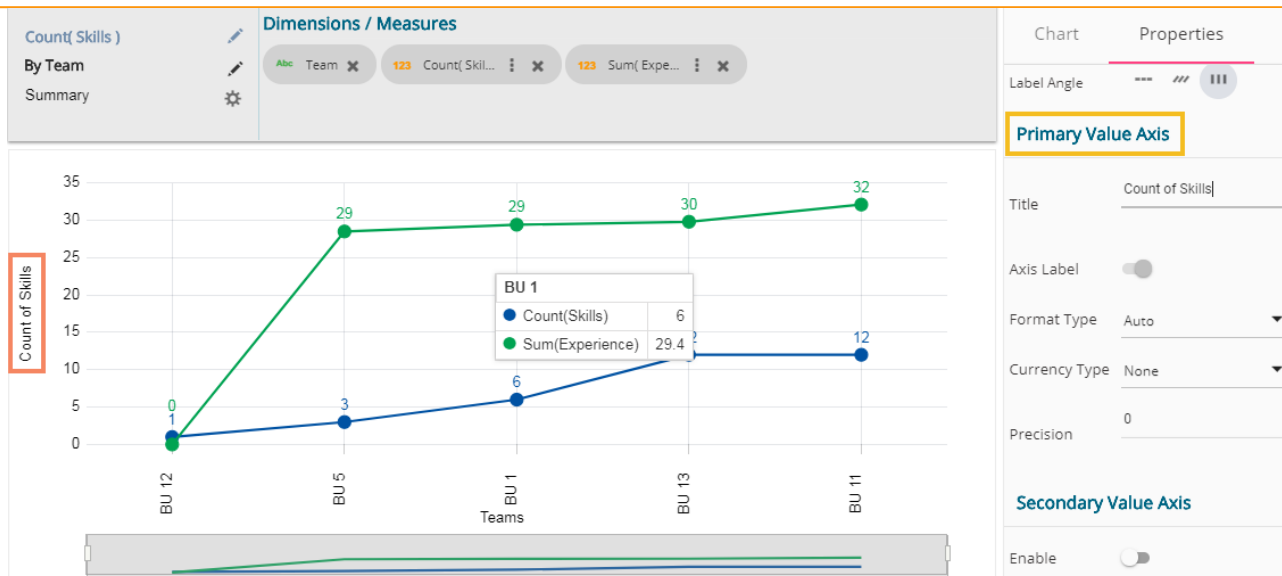
iii) Category Axis

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



iv) Primary Value Axis

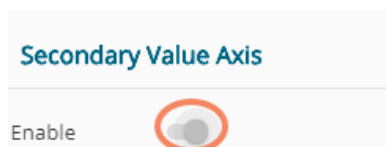
- Title: Provide a title for the Primary Value Axis
- Axis Label: Enable the Primary Value Axis label by turning on the radio button
- Format Type: Select a desired format type from the drop-down menu
- Currency Type: Select a currency symbol to be displayed in the view
- Precision: Set the after-decimal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



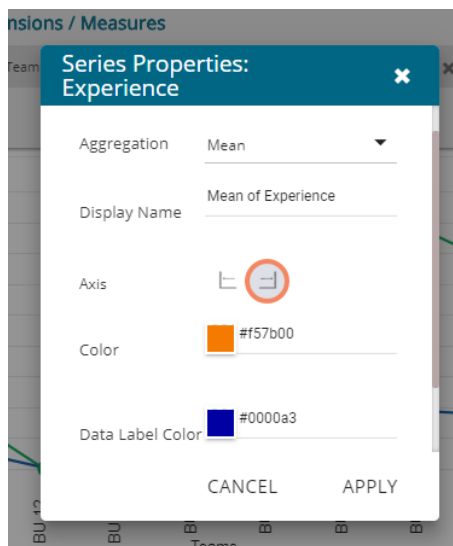
v) **Secondary Value Axis**

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

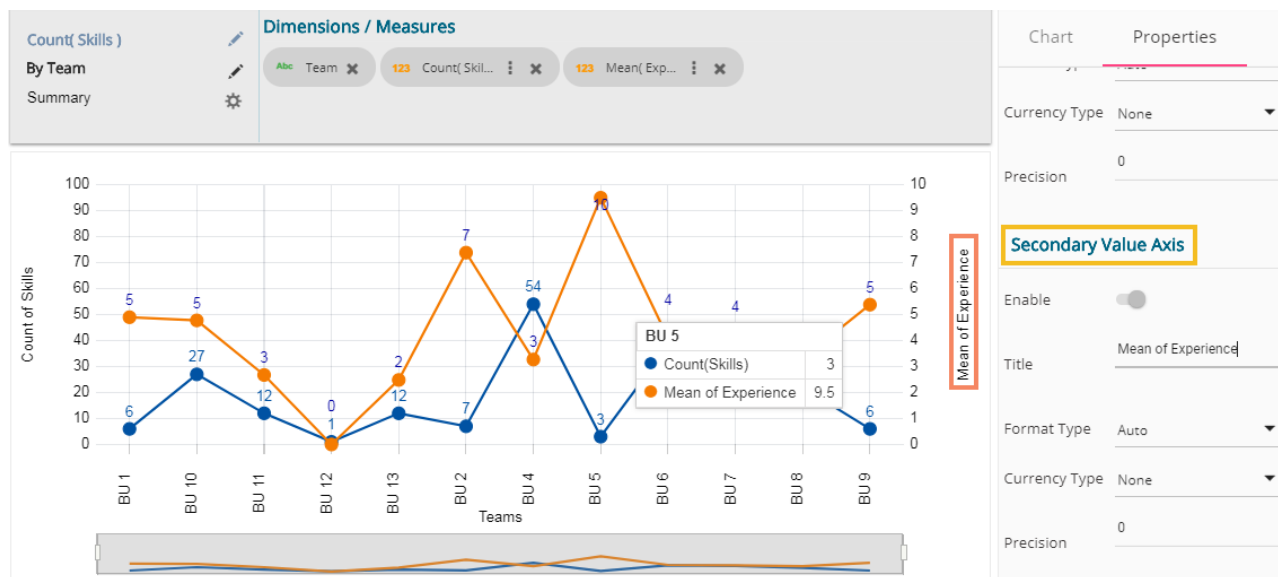
- a. Access Secondary Value Axis from the 'Properties' tab and enable it.



- 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'



- 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:

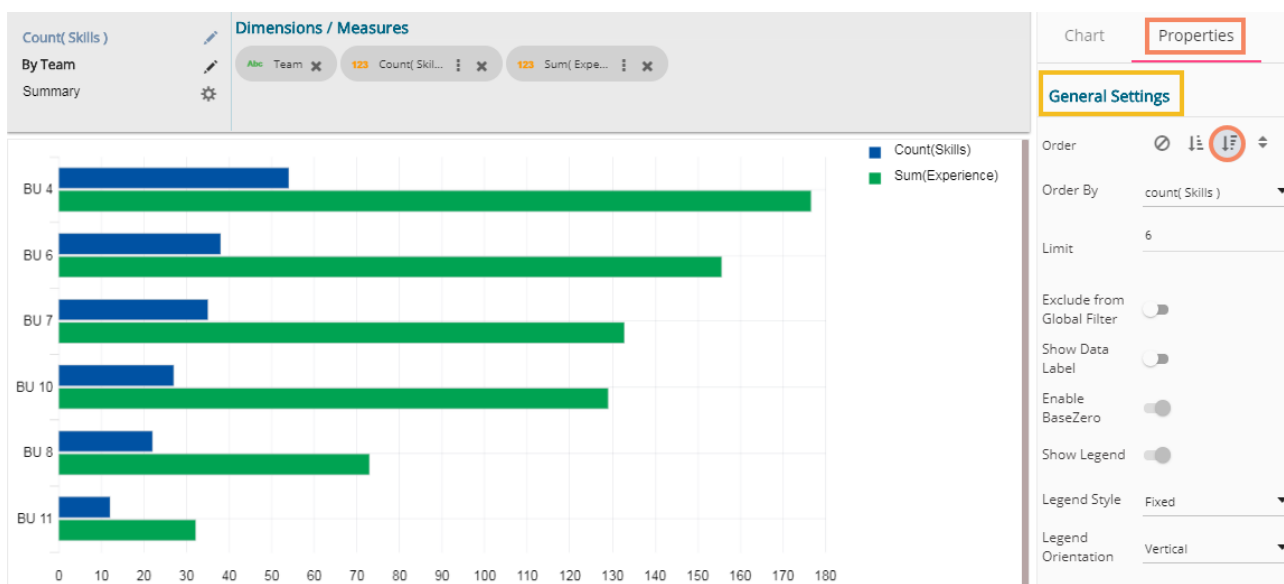
Add color for quick insight: Displaying the bars with colors helps users to pay immediate attention to the essential tasks.

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

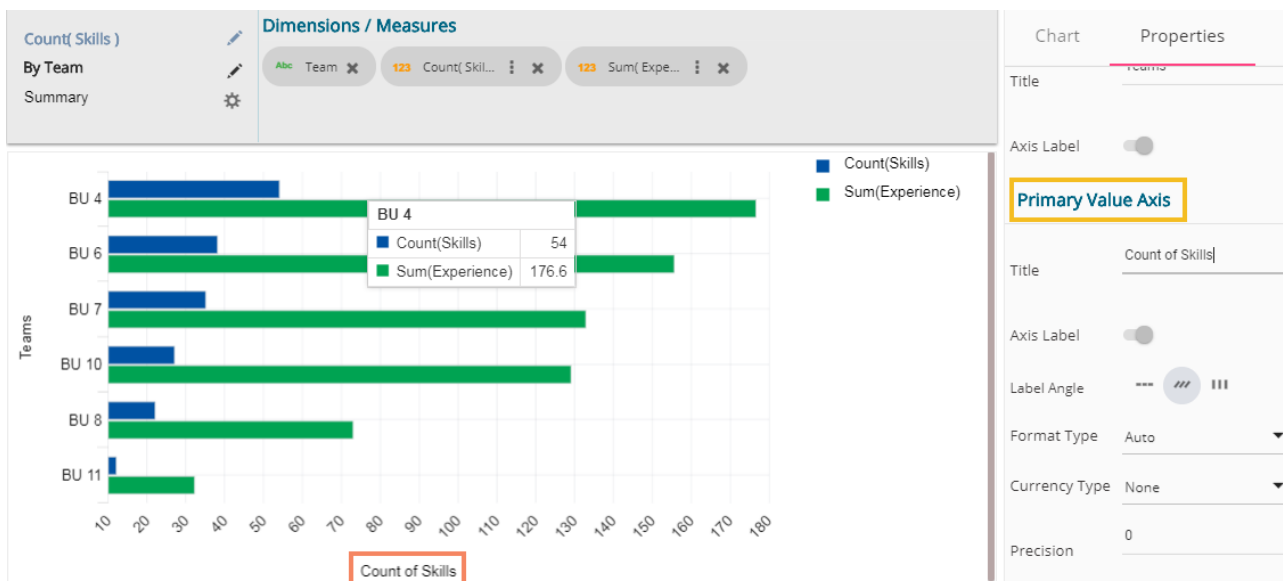


- ii) **View Filter**
 - a. Filter: Select a filter condition using the drop-down menu
- iii) **Category Axis**
 - a. Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by turning on the radio button
 - c. Label Angle: Select a display angle for the axis label
 E.g.,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



iv) Primary Value Axis

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



5.5. Bubble Chart

A Bubble chart visualizes data set in three or 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

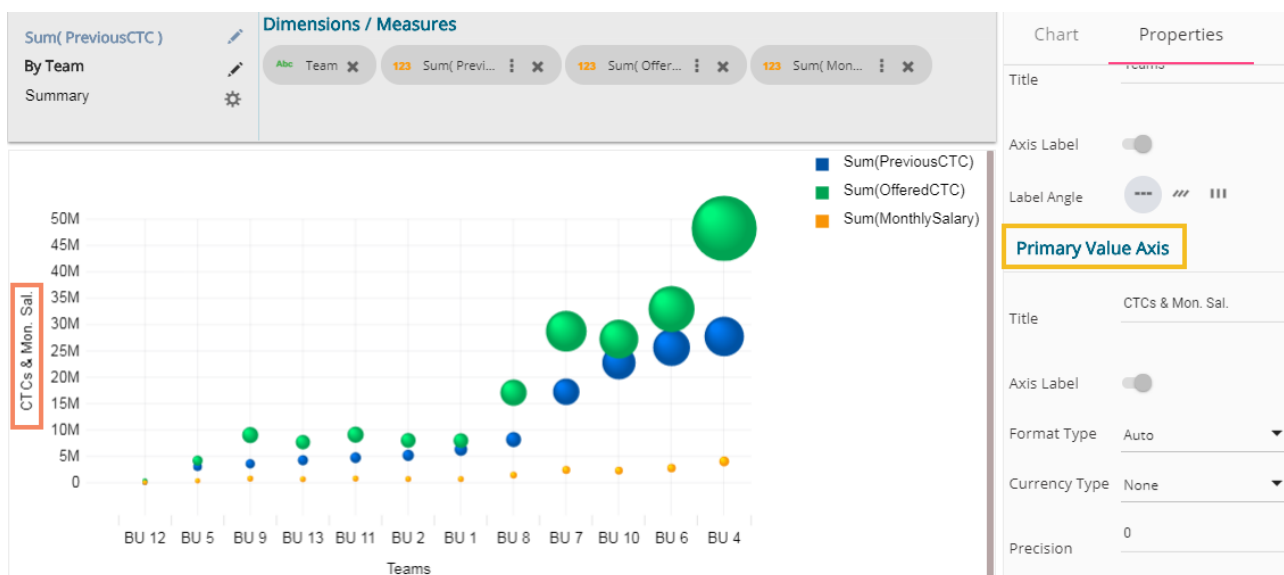
- a. Title: Provide a title for the axis
- b. Axis Label: Enable the category axis label by turning on the radio button
- c. Label Angle: Select a display angle for the axis label

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



iv) Primary Value Axis

- Title: Provide a title for the Primary Value Axis
- Axis Label: Enable the Primary Value Axis label by turning on the radio button
- Format Type: Select a desired format type from the drop-down menu
- 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)



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

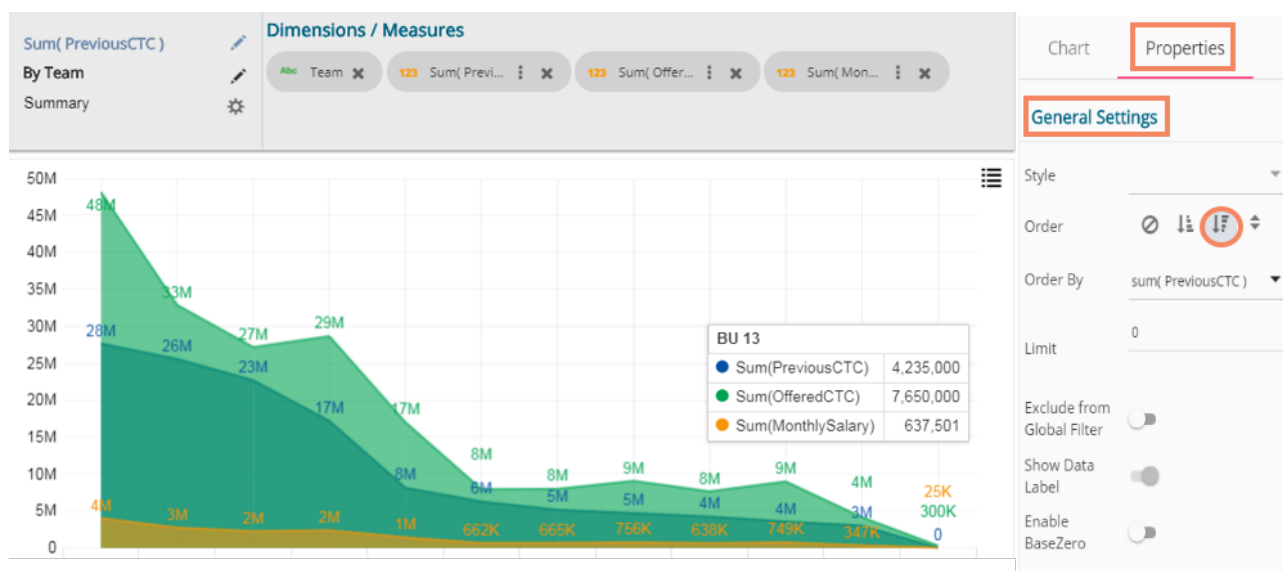
Properties:

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 drop-down menu.
 1. Vertical
 2. Horizontal

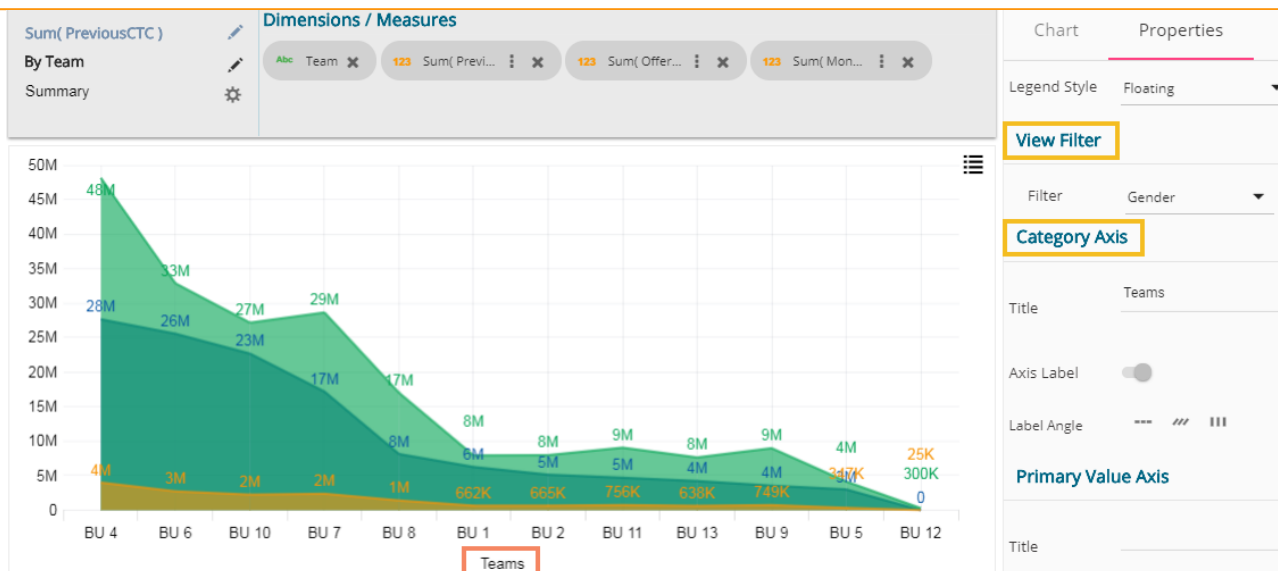


iii) View Filter

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

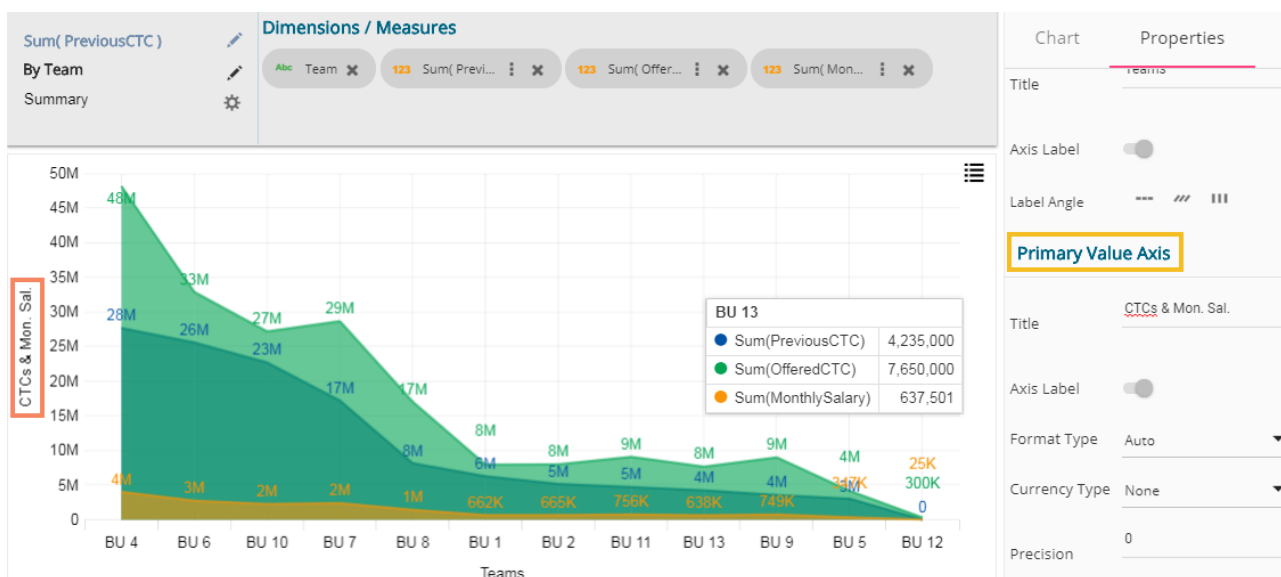
iv) Category Axis

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



v) Primary Value Axis

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



5.7. Pie Chart

The most widely used chart to show proportions, percentages and categorizes information is the Pie Chart. It is 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.

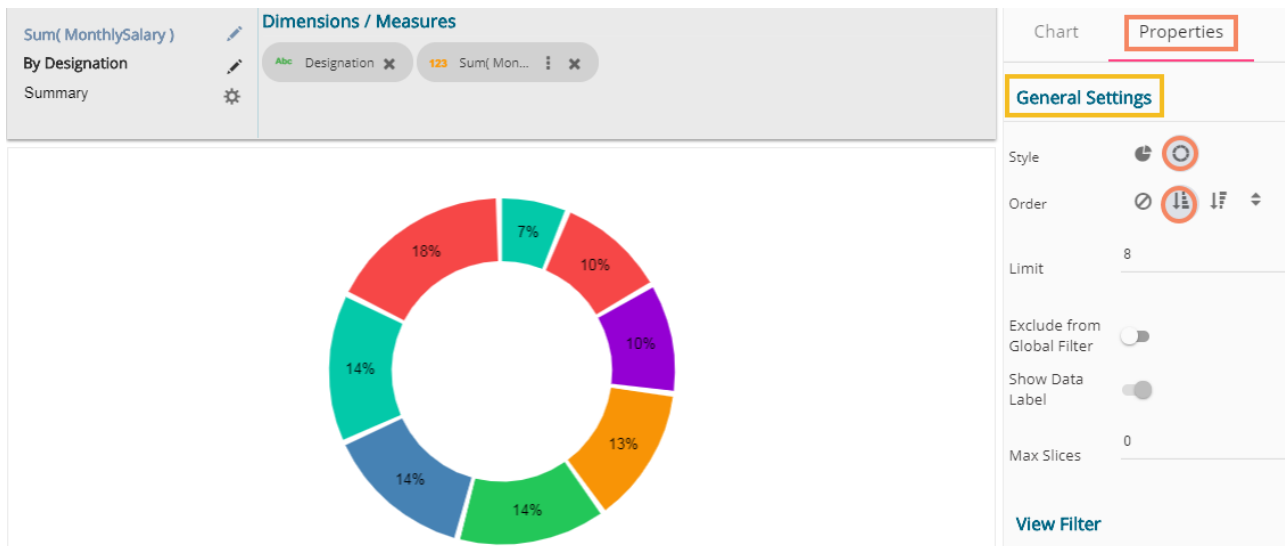
Variations of this chart:

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

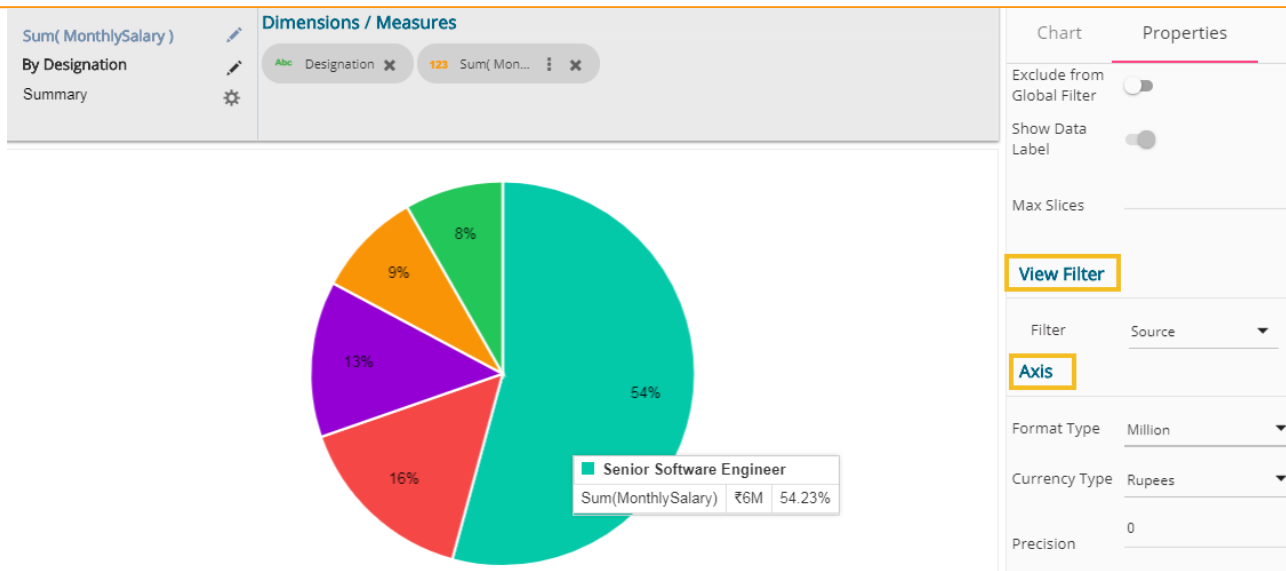


ii) View Filter

- 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.

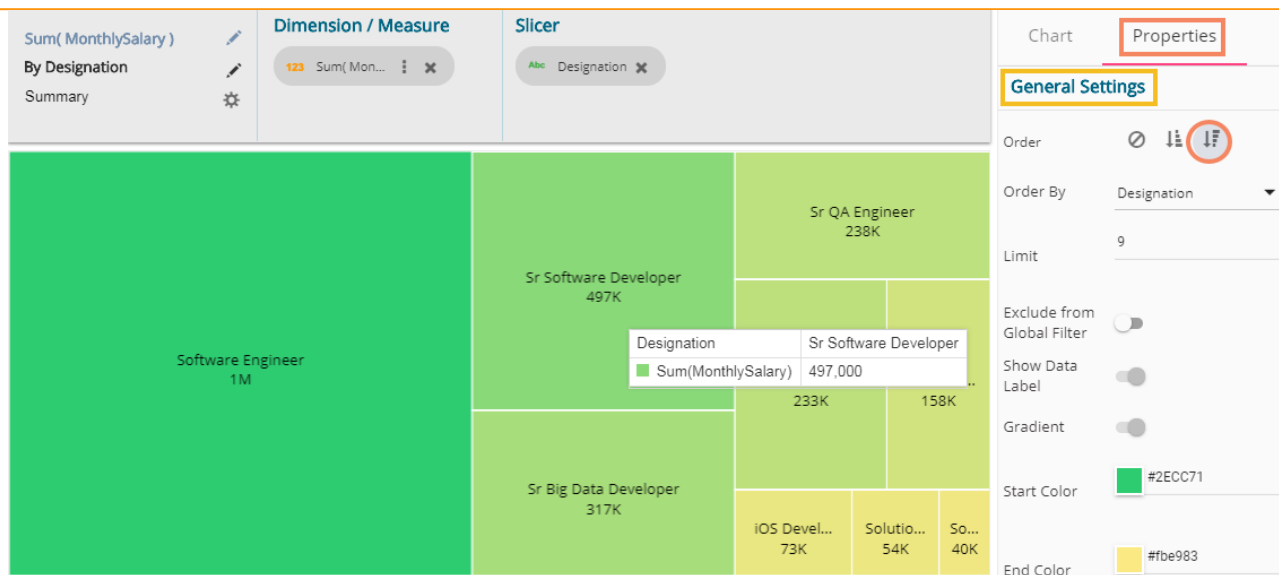
Variations of this chart:

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.

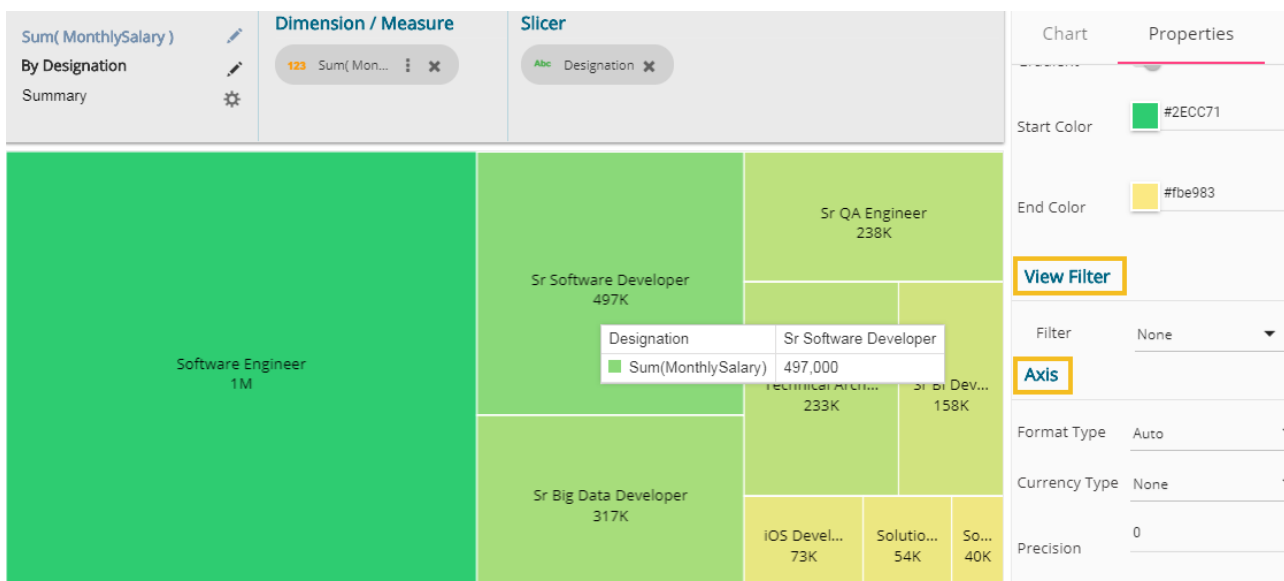


ii) **View Filter**

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

iii) **Axis**

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



5.9. Semi Gauge Chart

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

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

Best Situation to use Semi-Gauge:

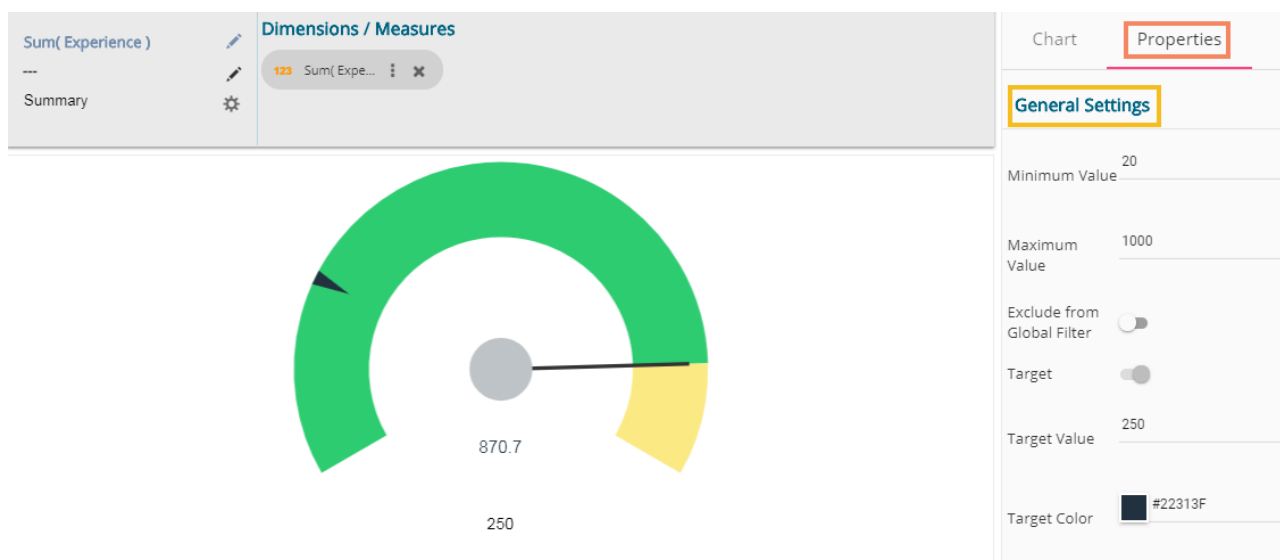
To monitor any performance that contains predefined ranges

Examples:

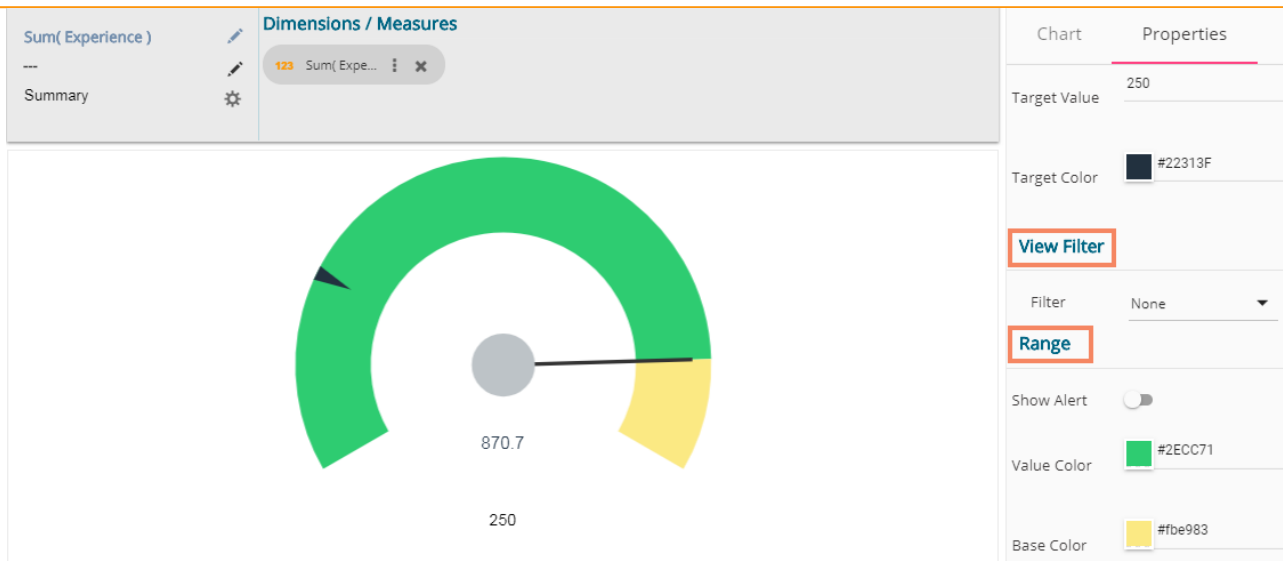
The overall performance of a student/class in an examination.

Properties:

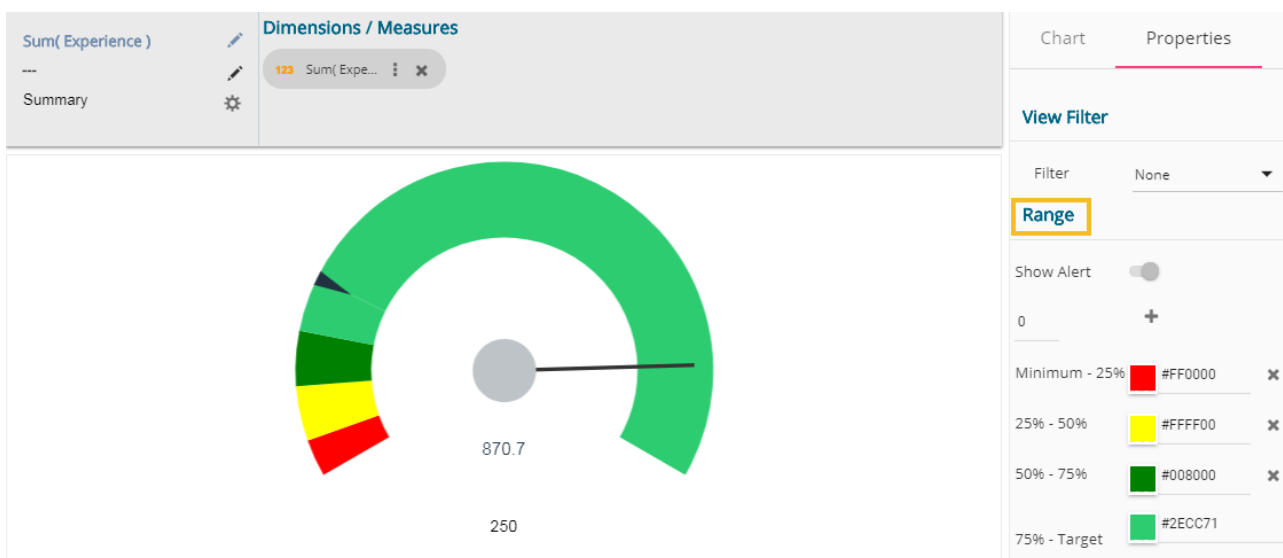
- i) General Settings
 - a. Minimum Value: Set a minimum value to be shown on the chart (It should be less than the maximum set value)
 - b. Maximum Value: Set a maximum value to be displayed on the chart (It should be more than the minimum set value)
 - c. Exclude from Global Filter: The view will be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



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



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



Note:

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

5.10. KPI Tile

The KPI Tile 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

The screenshot shows a Power BI workspace with a measure card for 'Sum of MonthlySalary'. The card displays a value of '17M' in purple and 'Sum of Mon. Sal.' in orange. The Properties pane is open to the 'General Settings' section, where the 'Exclude from Global Filter' toggle is turned on.

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.

The screenshot shows a Power BI workspace with a measure card for 'Sum of MonthlySalary'. The card displays a value of '₹17M' in purple and 'Sum of Mon. Sal.' in orange. The Properties pane is open to the 'View Filter' and 'Primary Value Axis' sections. The 'View Filter' section shows 'Filter' set to 'None'. The 'Primary Value Axis' section shows 'Format Type' set to 'Million', 'Currency Type' set to 'Rupees', and 'Precision' set to '0'.

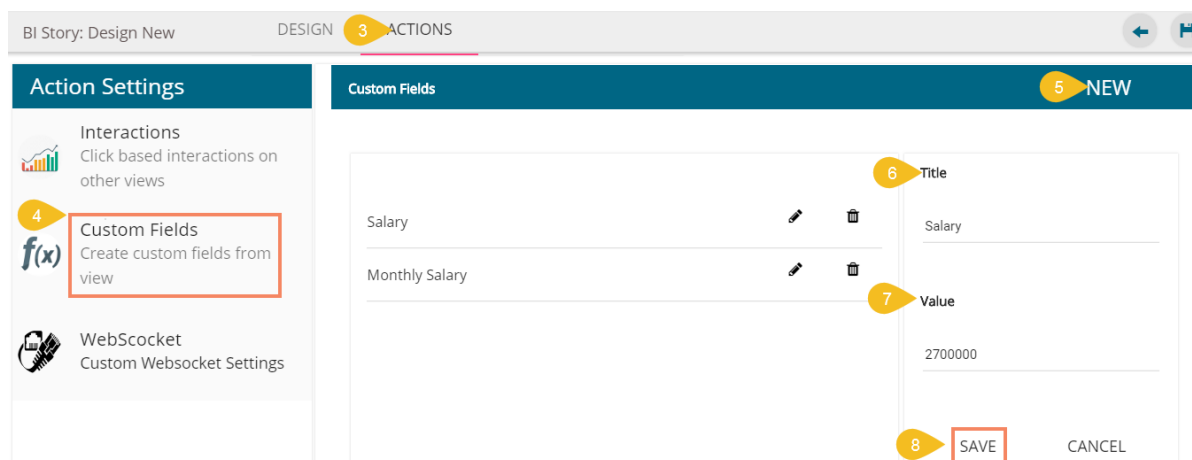
5.11. KPI Comparative Tile

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

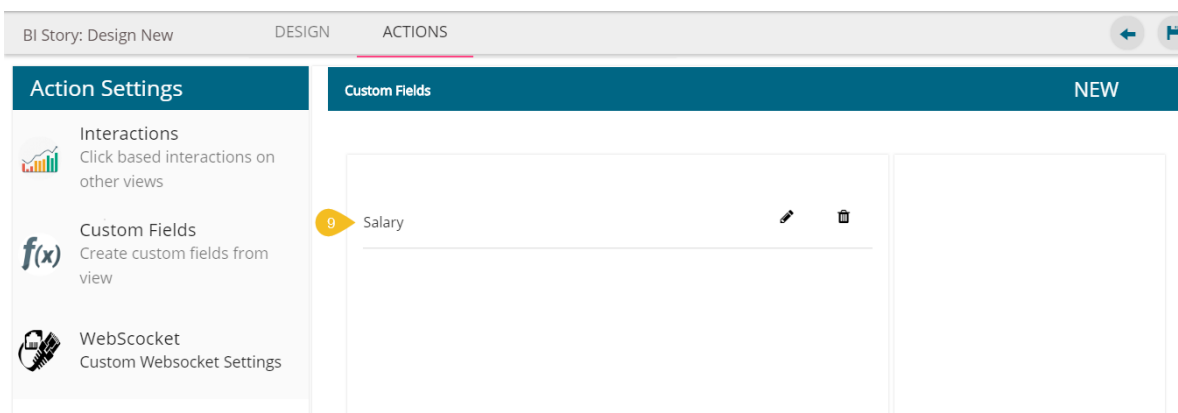
- i) Select the 'KPI Comparative Tile' component from the list of charts
- ii) Drag a Measure value to the workspace (A dimension is converted into the measure if dragged second time to the workspace)



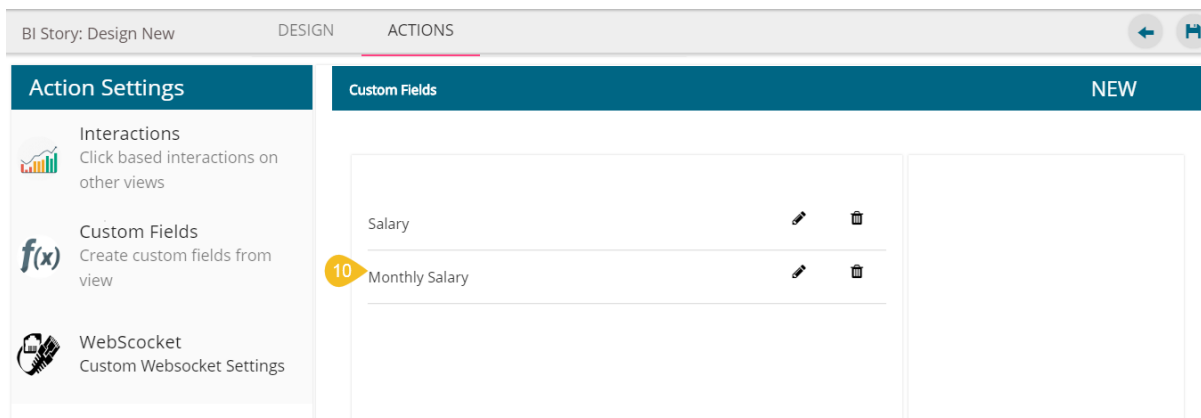
- iii) Navigate to the 'ACTIONS' tab.
- iv) Select the 'Custom Fields' option.
- v) Click the 'NEW' option.
- vi) Provide a Title.
- vii) Set Value by using the value indicators.
- viii) Click the 'SAVE' option.



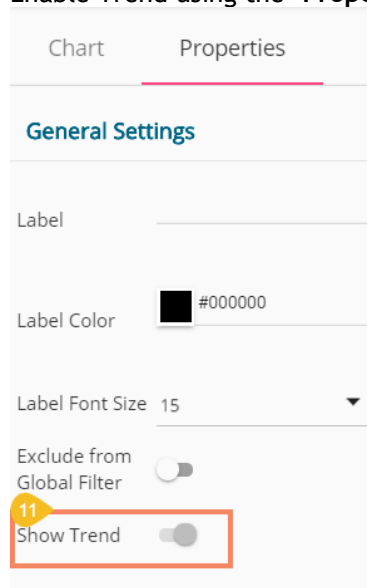
- ix) A new Custom Field gets created and added to the Custom Fields page.



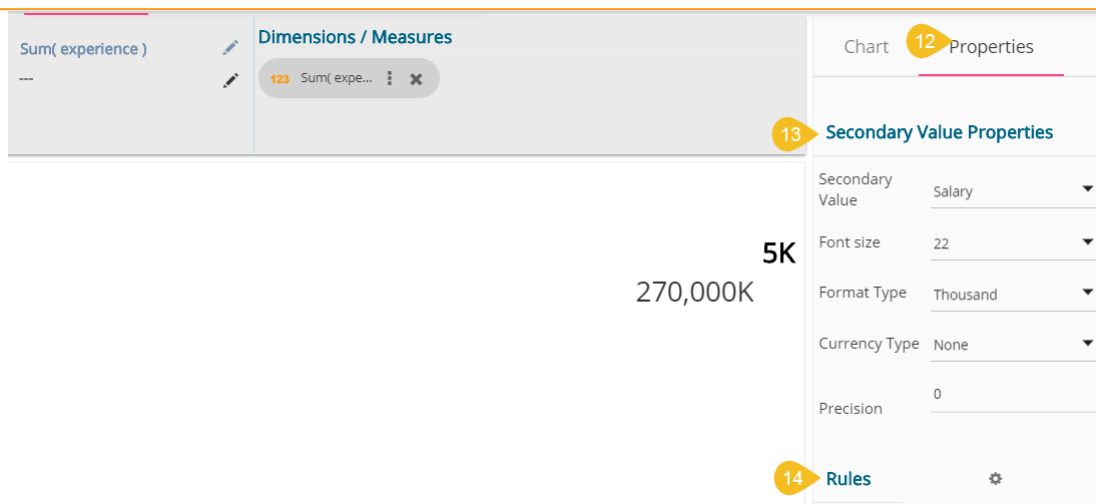
- x) Users can create multiple custom fields by following the above steps. (E.g. Monthly Salary is another custom field.)



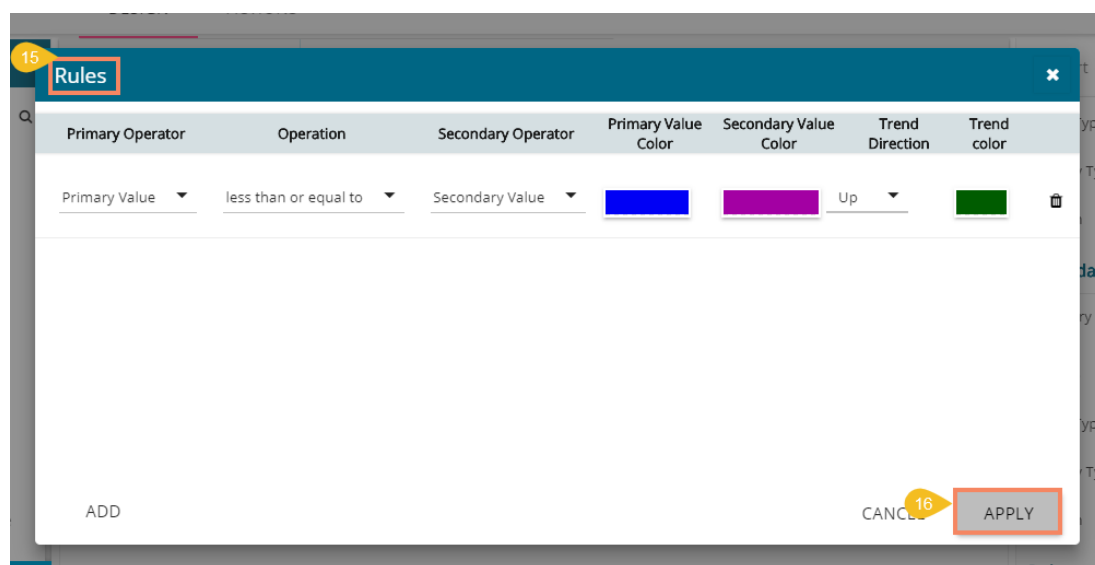
- xi) Navigate to the 'Properties' tab
 xii) Enable Trend using the 'Properties' tab



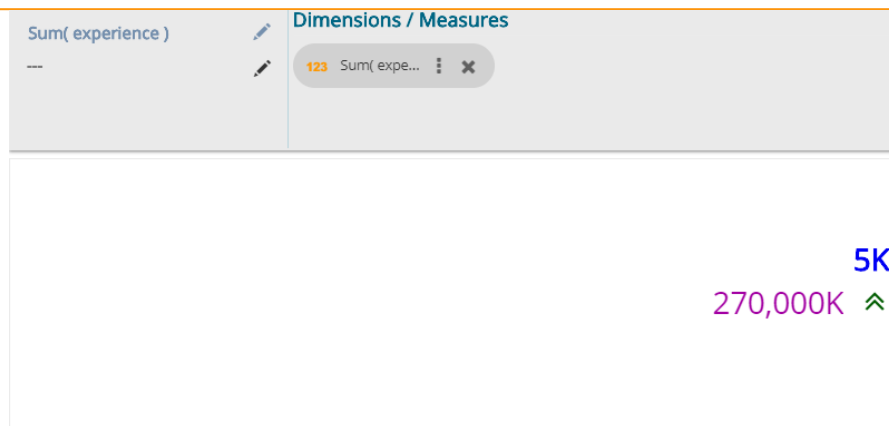
- xiii) Configure the required fields for the 'Secondary Value Properties'
- Secondary Value: Select a secondary value from the drop-down menu
 - Font Size: Set font size for the secondary value
 - Format Type: Select a Format type from the drop-down menu
 - Currency Type: Select a currency type from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



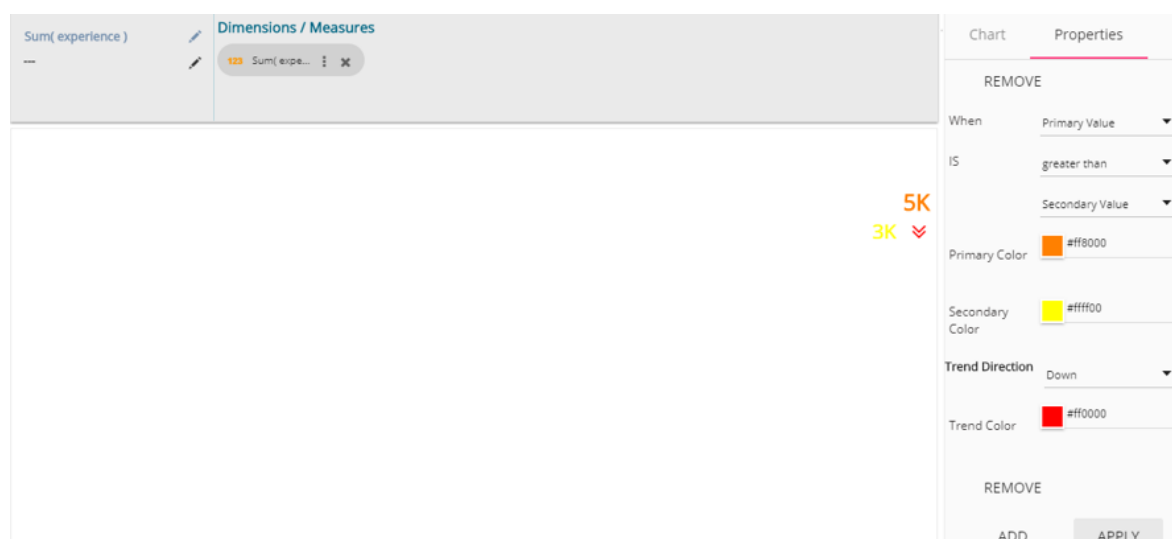
- xv) Configure the required ‘Rules’ fields as shown in the following image:
- Primary Operator: Select an option from the drop-down menu
 - Operation: Select an operation from the drop-down menu to be applied as a condition on the selected Primary Operator
 - Secondary Operator: Select an option from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



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



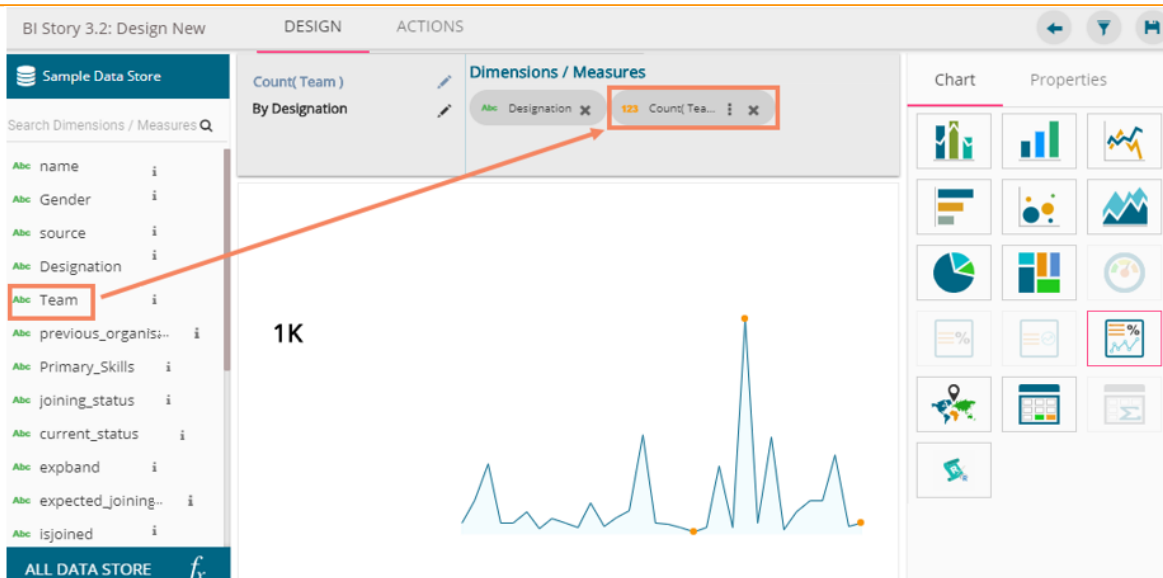
xviii) Users can set multiple ‘Rules’ by configuring the required fields as described above; the KPI Tile Visualization reflects the important changes as per the selected rule.



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.



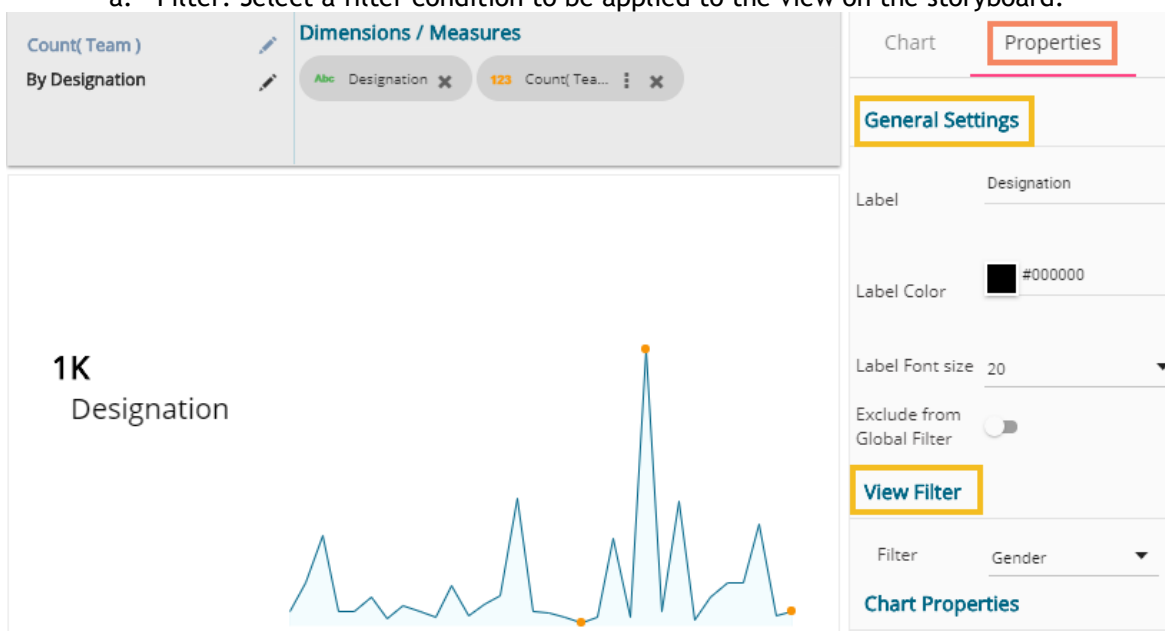
Properties:

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.



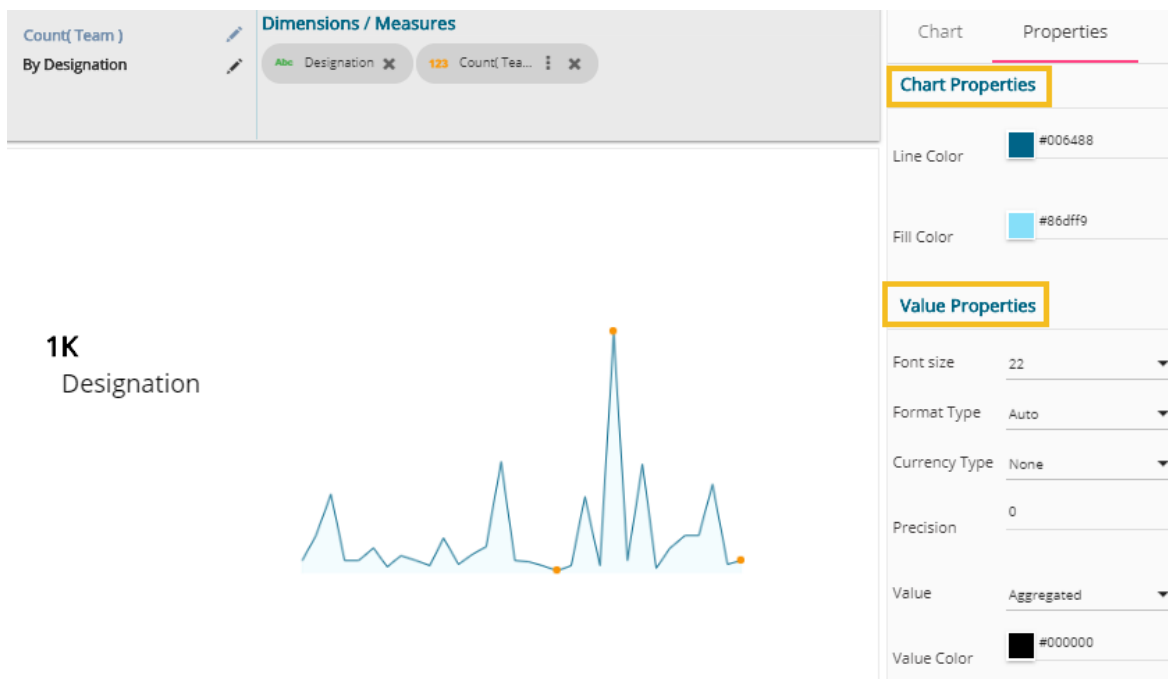
iii) Chart Properties:

- 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:

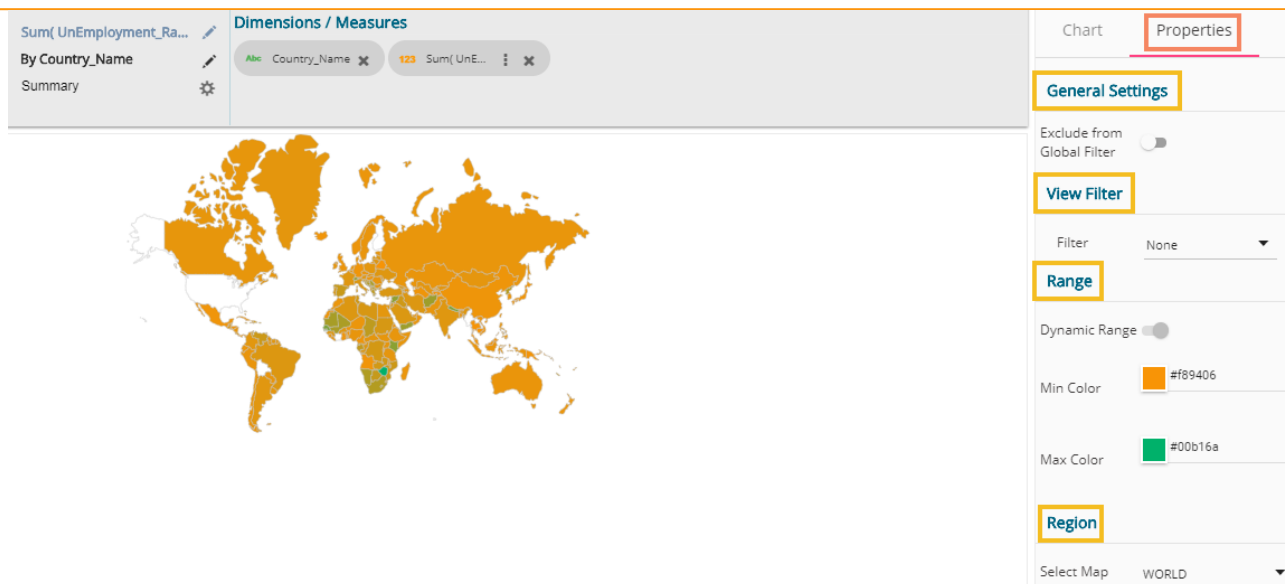
To represent any information in geographical context.

Examples:

The unemployment rate in the geographical context of Asia.

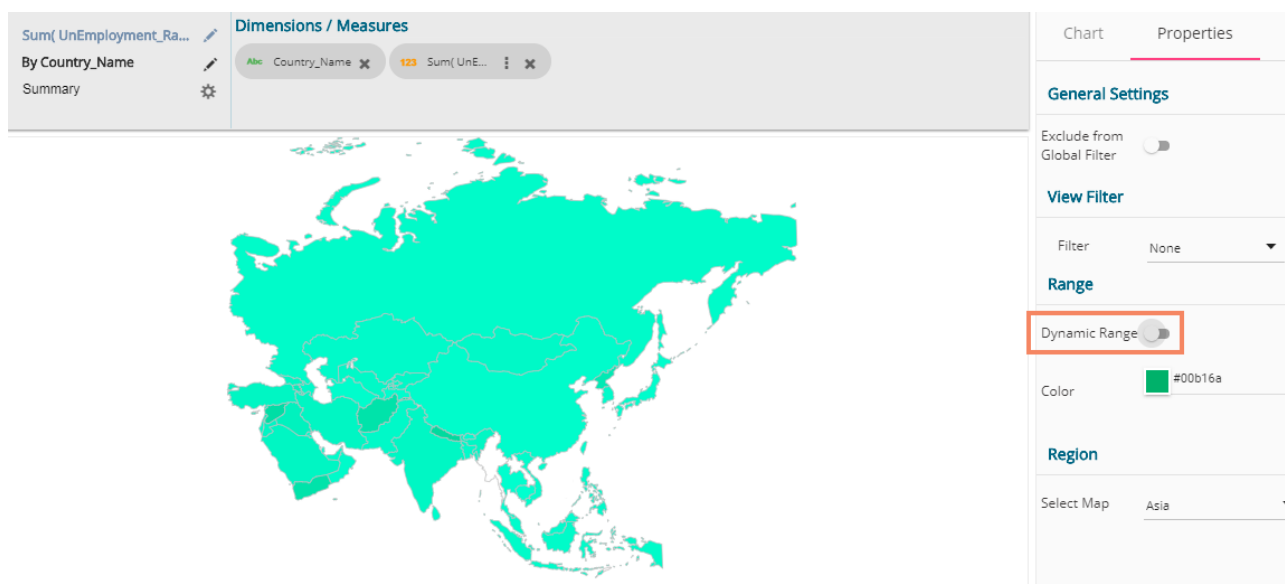
Chart Properties:

- 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.

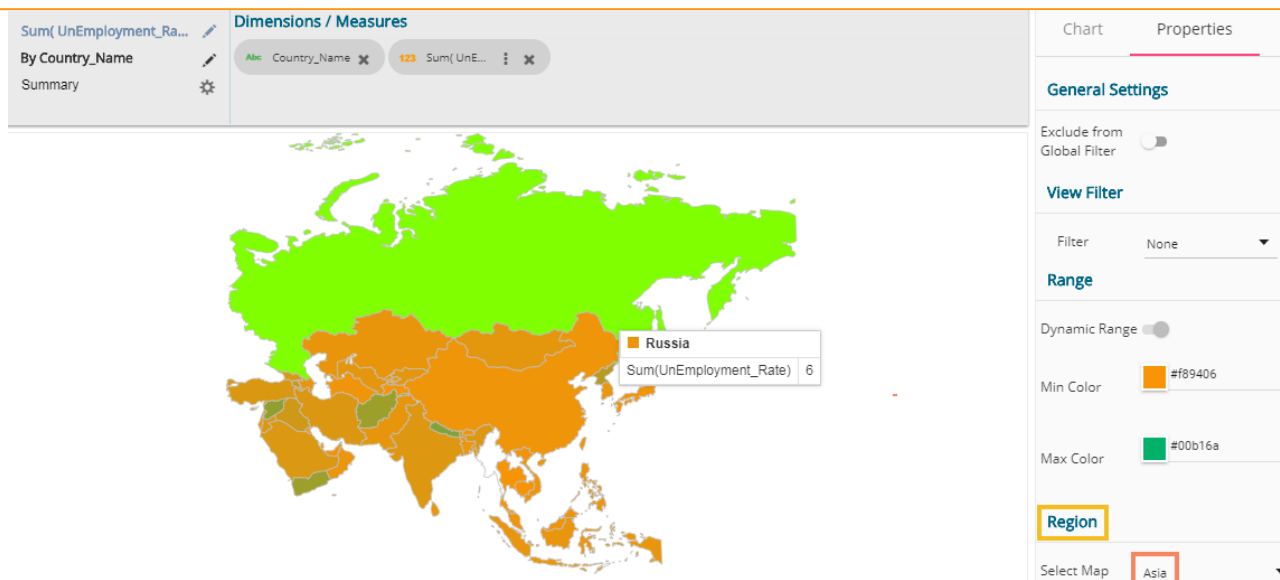


Note:

- 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)

By name

Summary

Dimensions / Measures

Abc name x Abc Gender x Abc Designation x Abc Team x 123 Sum(expe... x

123 Sum(mon... x 123 Sum(usd_... x

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

Chart **Properties**

General Settings

Order

Font Size

Font Style

Font Color

Background Color

Exclude from Global Filter

View Filter

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... x 123 Sum(mon... x 123 Sum(usd_... x

123 Count(Tea... x 123 Count(De... x 123 Count(sou... x

Measures	Summary
sum(experience)	4.70K
sum(monthly_salary)	84.00M
sum(usd_billing)	2.70M
count(Team)	12.00
count(Designation)	32.00
count(source)	12.00

Chart **Properties**

General Settings

Measure Description Measures

Summary Description Summary]

Exclude from Global Filter

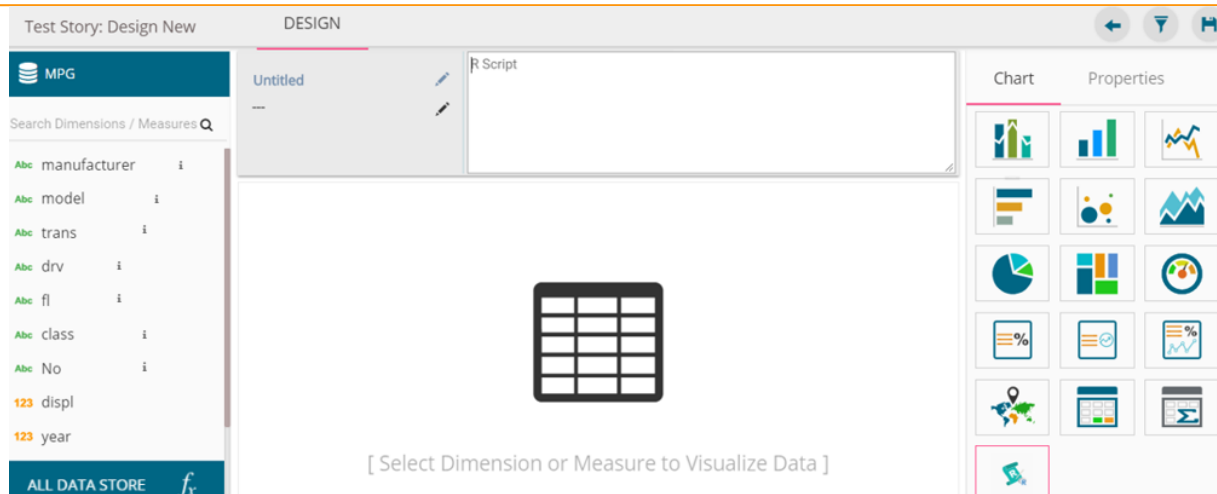
View Filter

Filter None

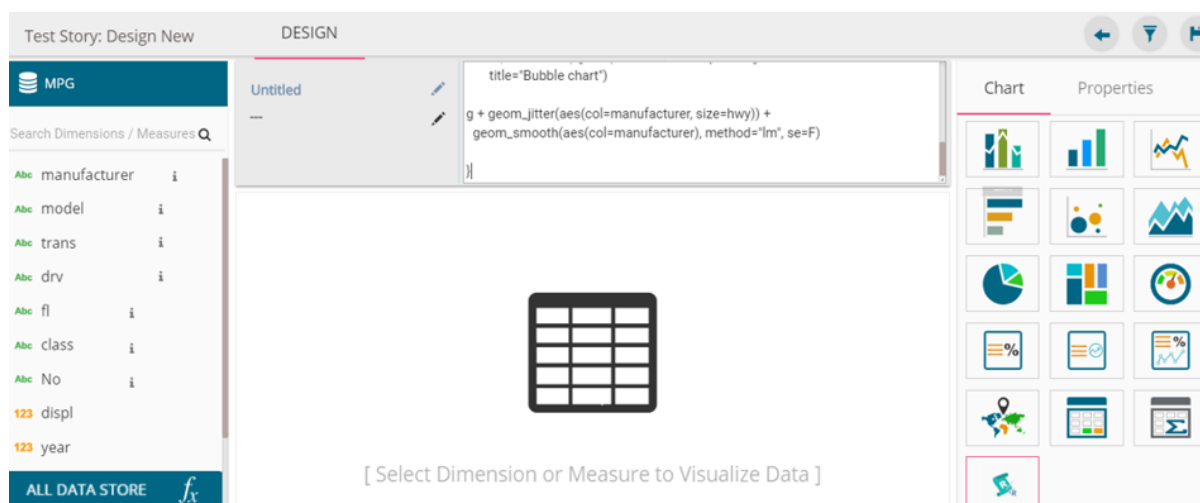
5.16. R

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

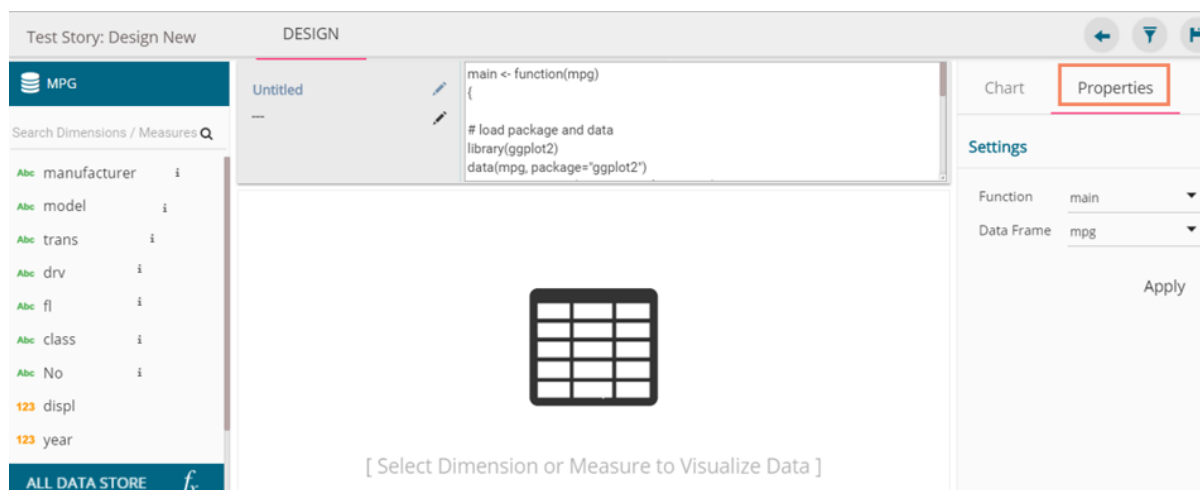
- i) Users need to select a datastore to navigate on the Design New page
- ii) Select R Server Visual component to visualize the data



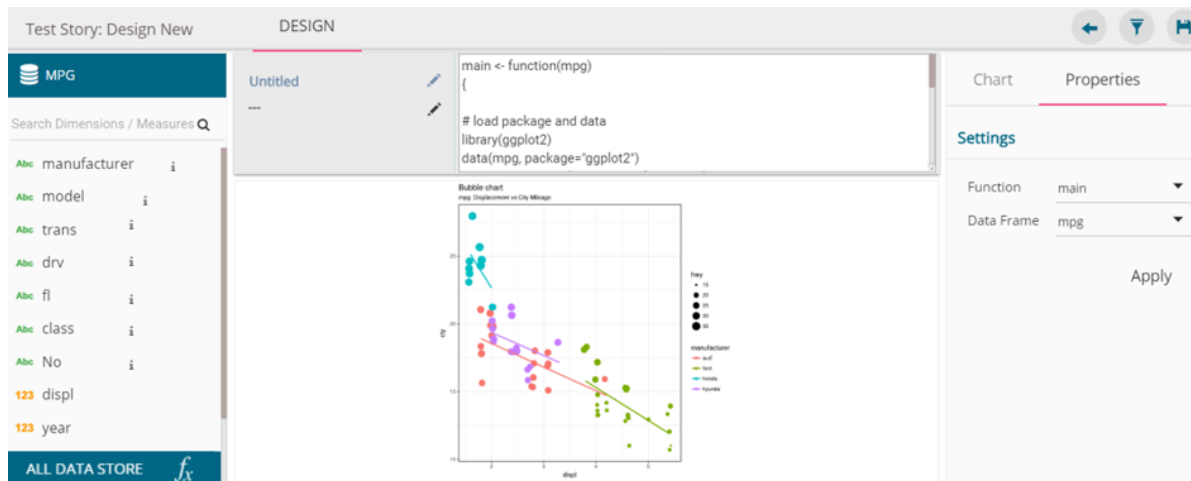
iii) Write a valid R script in the given space.



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



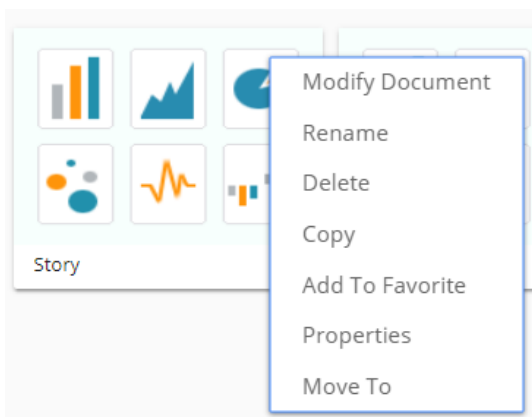
vii) The canvas displays visualization based on the inserted R script.



6. Options

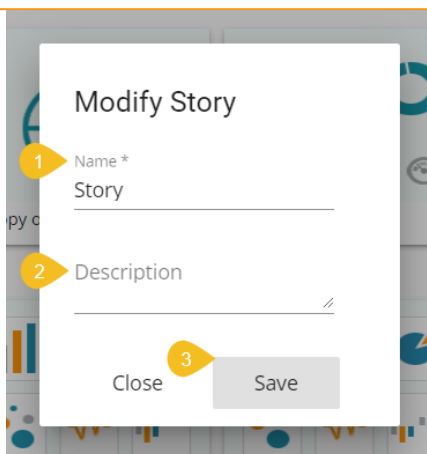
A story created under **'My Documents'** or **'Public Documents'** is credited with various options. This section describes all the options assigned to a Business Story document.

- 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

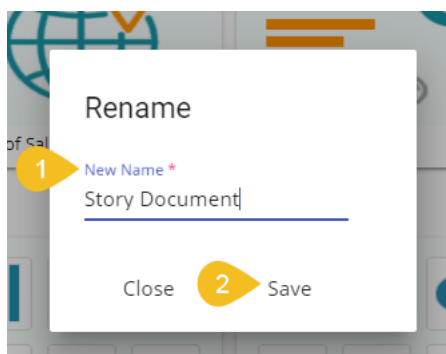
- i) Select **'Modify Document'** from the story options menu
- ii) A new window to modify the story details appears
- iii) Modify the following information:
 - a. Title: Enter a title for the Business Story
 - b. Description: Describe the story (Optional)
 - c. Click the **'Save'** option



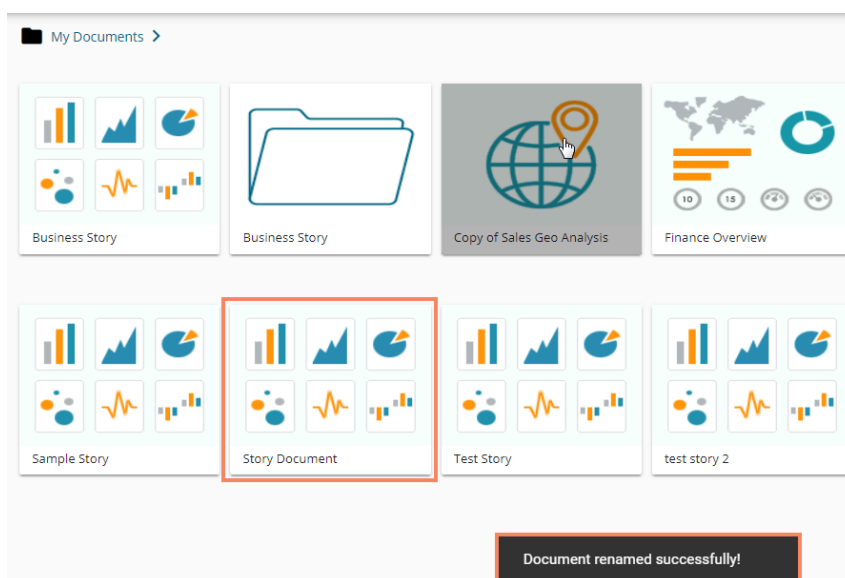
iv) The chosen information for the story document gets modified

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

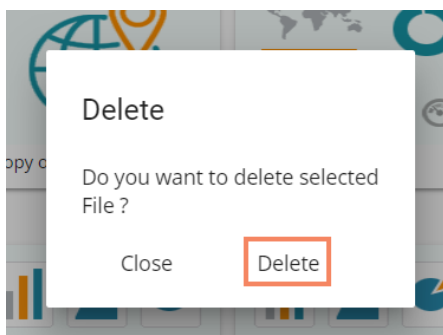


- iii) A success message appears
- iv) The story document gets renamed successfully



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'**




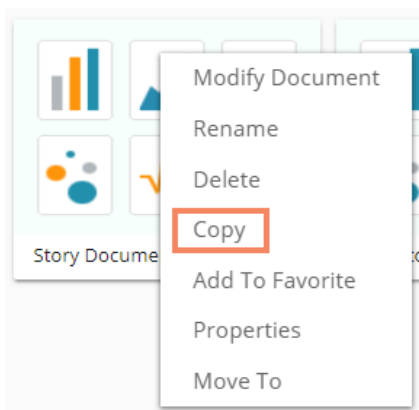
- vi) The selected story document gets removed.


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'**  for options.
- iii) Select **'Copy.'**

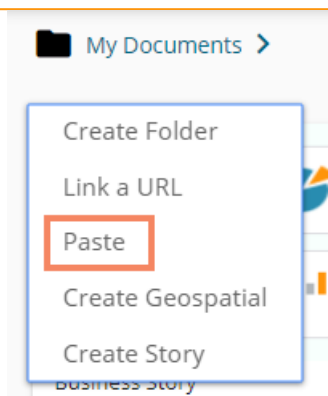


- iv) Select another folder and click the **'Settings'** icon 

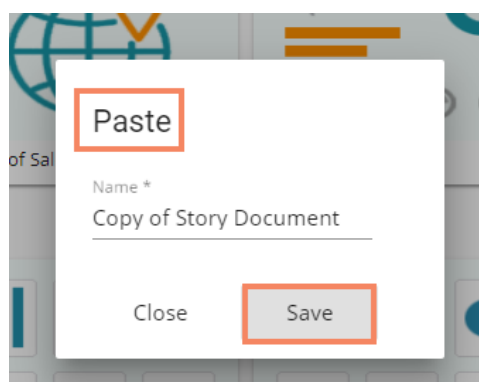
Or

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

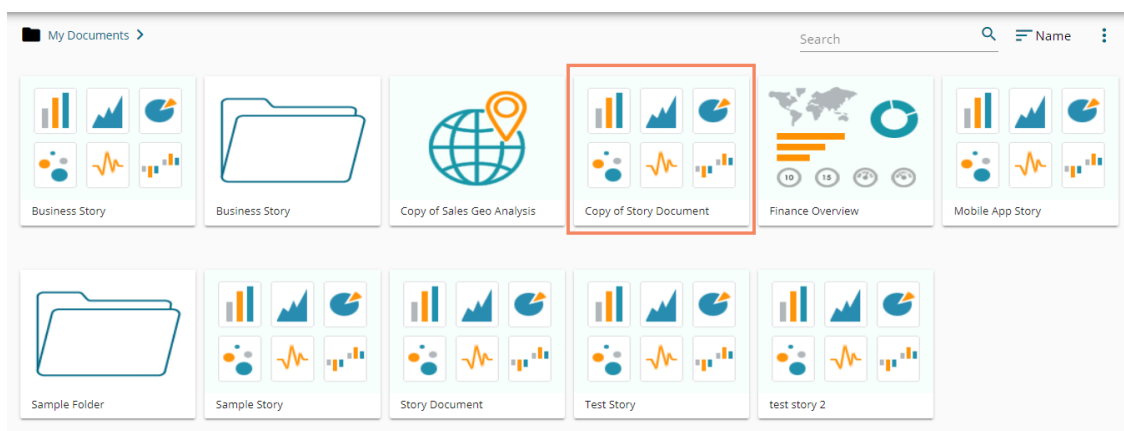
- v) A context menu appears with the **'Paste'** option.
- vi) Select the **'Paste'** option.



- 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.’



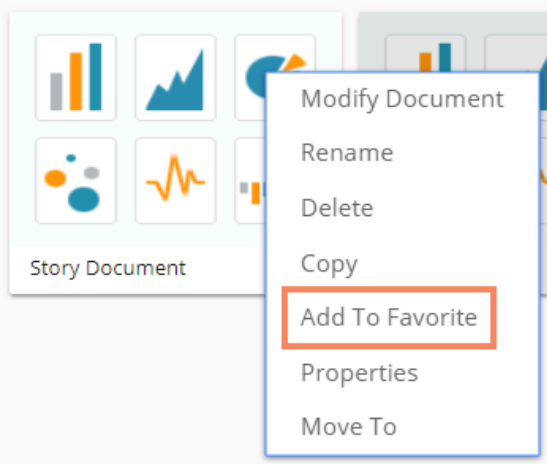
- x) A message pops-up to assure that the copied story document has been pasted successfully with a different name.
E.g., The following image shows that *Story Document* is named *Copy of Story Document* and has been pasted to the ‘My Documents’ space.



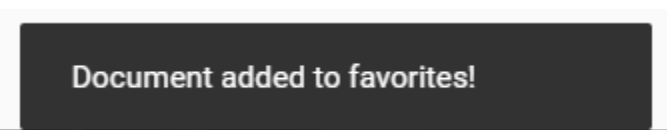
6.5. Adding/Removing a Story Document to/from Favorites

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

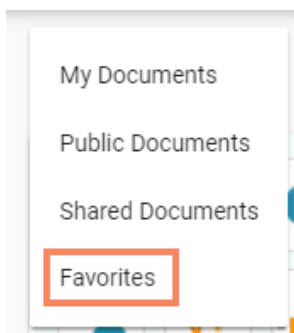
- i) Select a story document
- ii) Use the right-click to open the options menu
- iii) Select the ‘Add to Favorite’ option from the menu



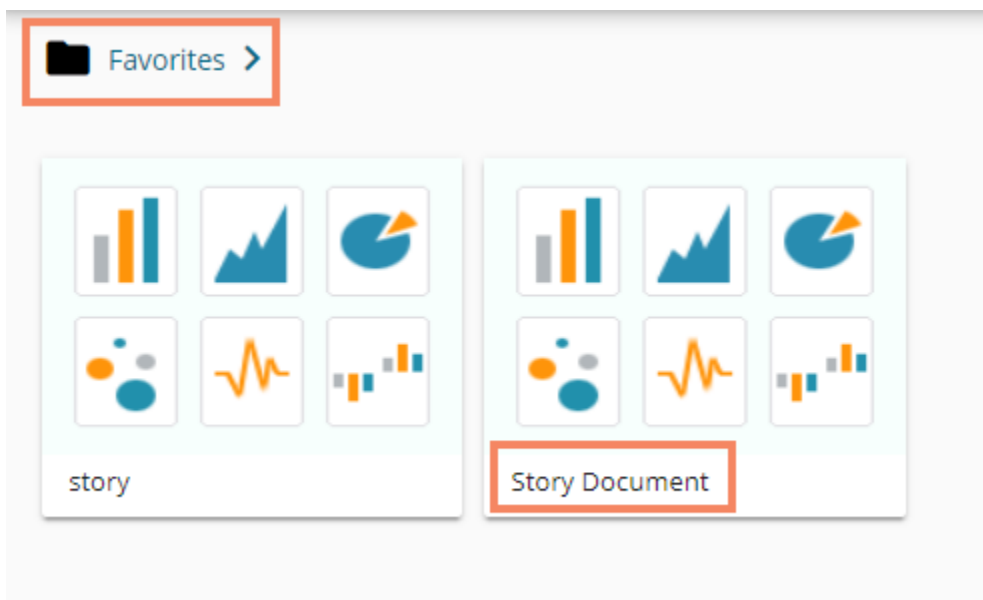
- iv) A new message pops-up, “Document added to Favorites!”



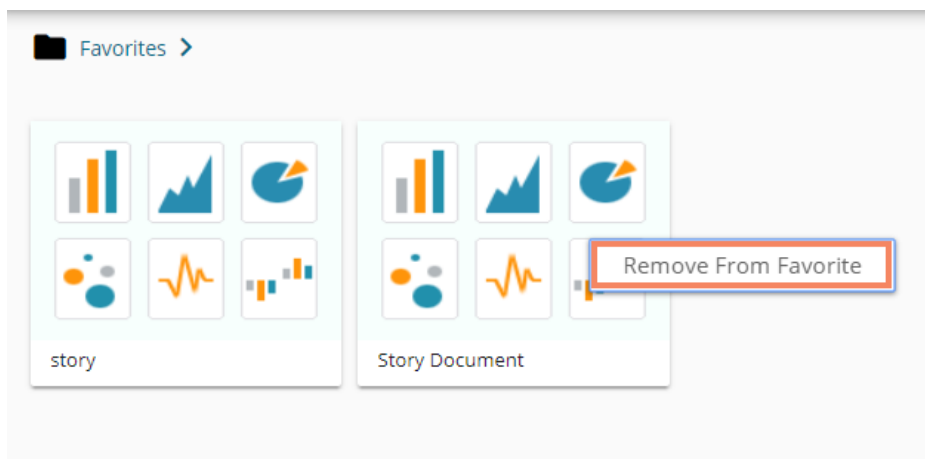
- v) Open ‘Favorites’ using the ‘My Document’ drop-down menu



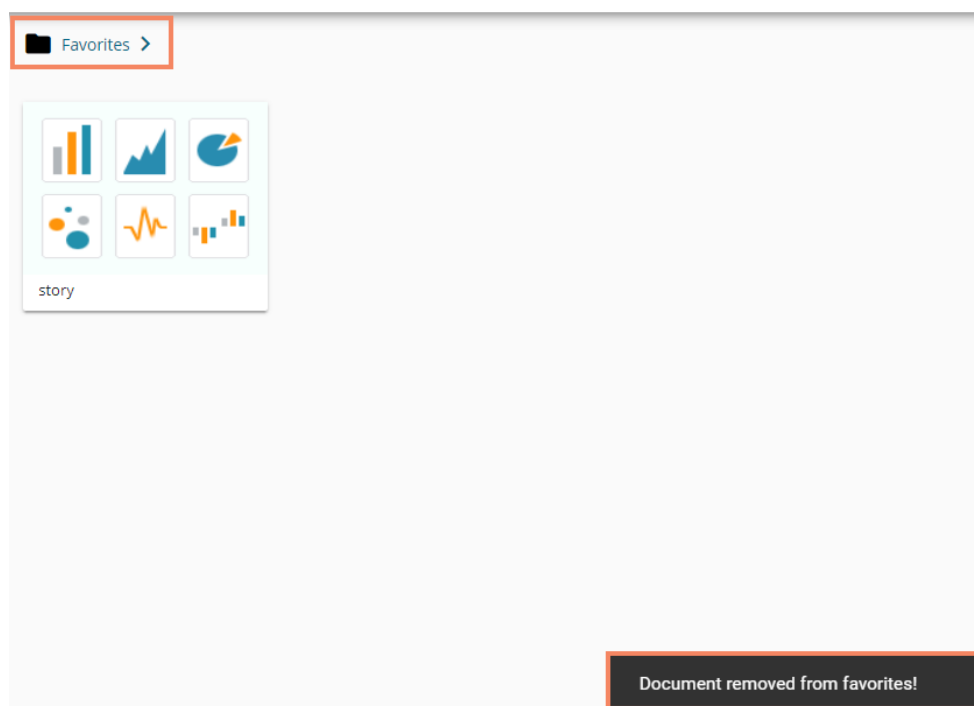
- vi) The selected story document gets added to the ‘Favorites’ space




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

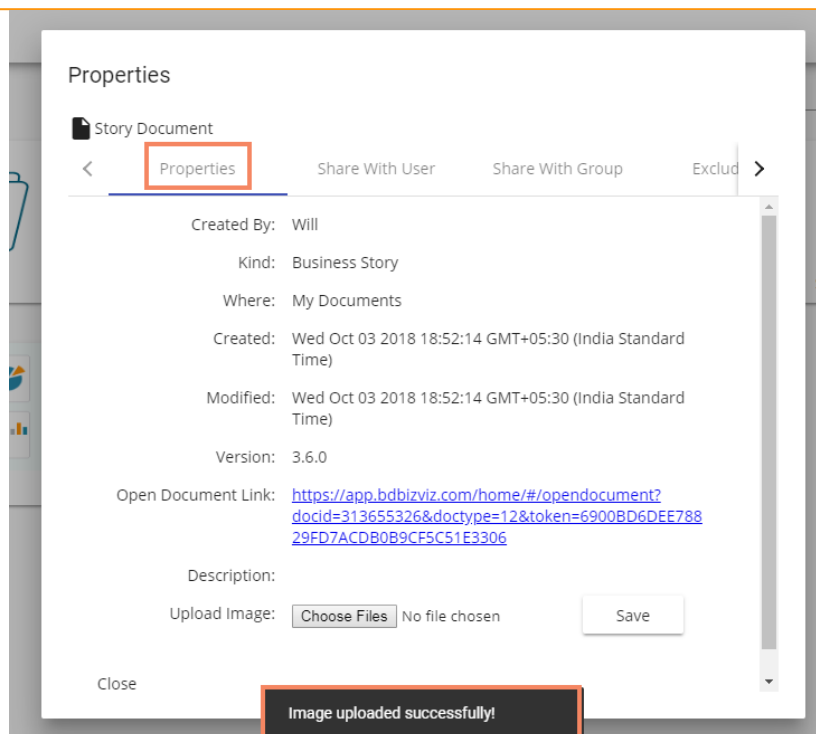


- viii) A new message pops-up, **"Document removed from Favorites!"**
- ix) The selected story document gets removed from **'Favorites.'**

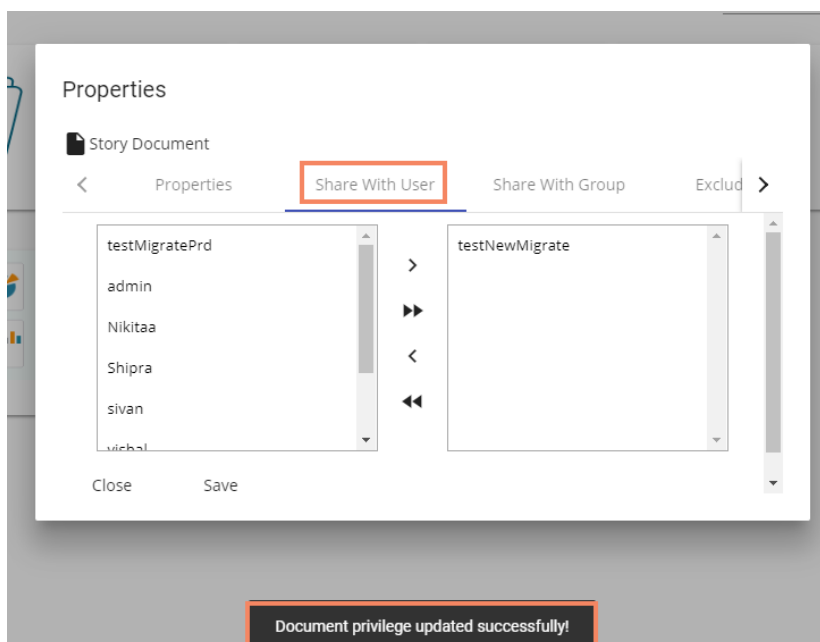


6.6. Properties

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



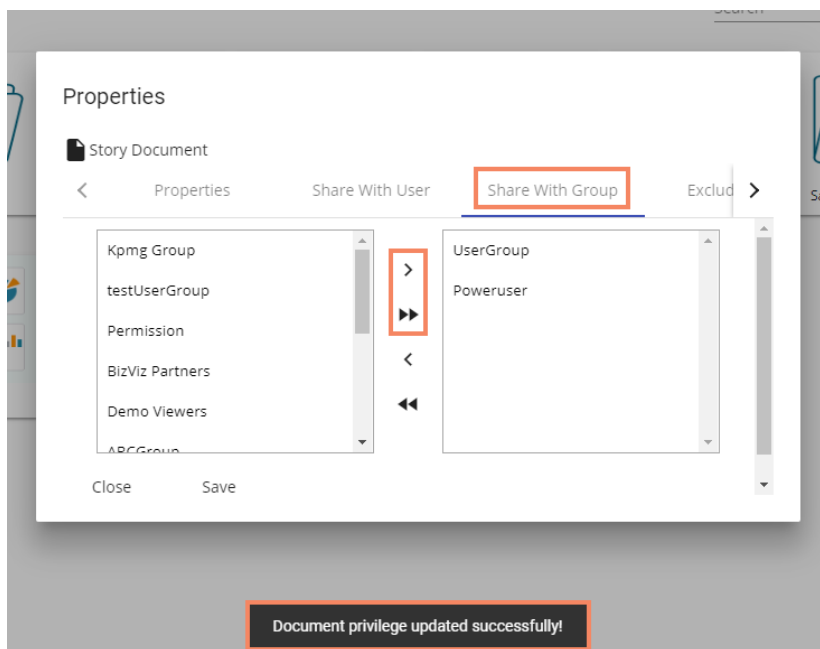
- b. **Share With User:** The story document gets shared with the selected user or users.
1. Select 'Share With' on the Properties pop-up screen.
 2. Select a user or multiple users from the User List that appears on the left side
 3. Move the selected user or users to the right-side box using the arrows.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



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

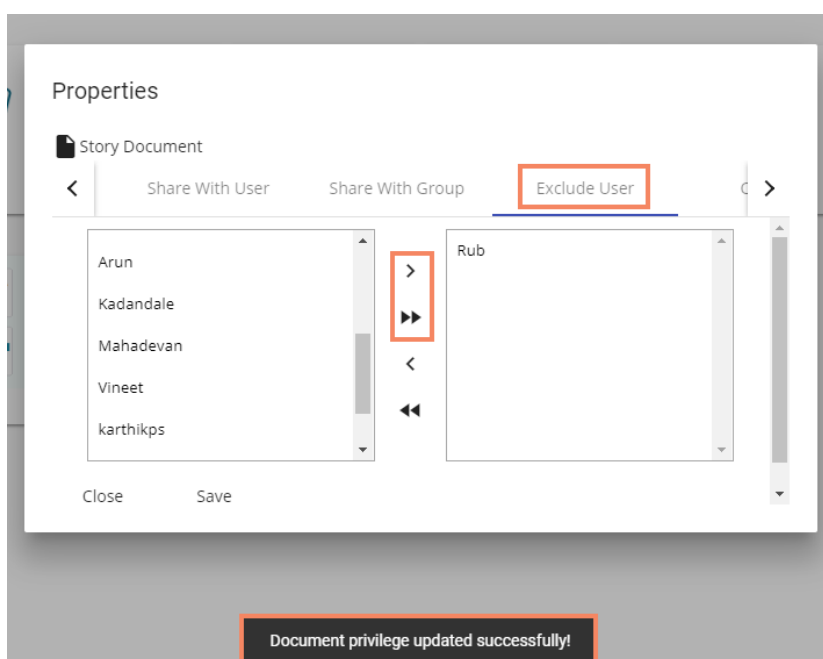
5. A success message appears stating, “Document privilege updated successfully!”



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

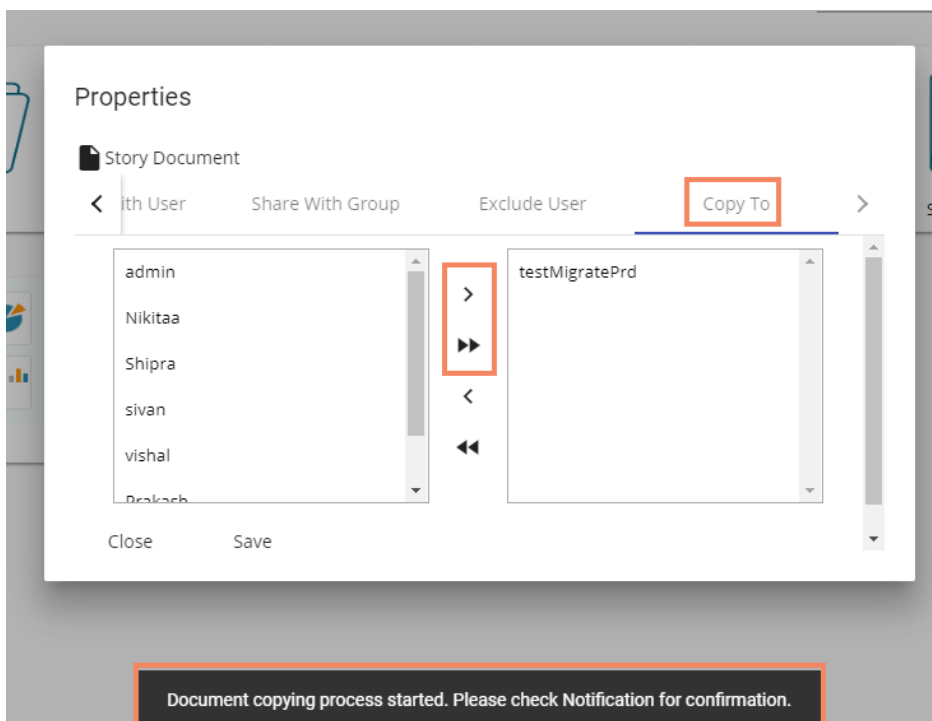
Note: If a story document is shared using this option, then the selected users or user groups will receive a view only copy. The shared story document gets added to the ‘**Shared Documents**’ space.

- 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!”

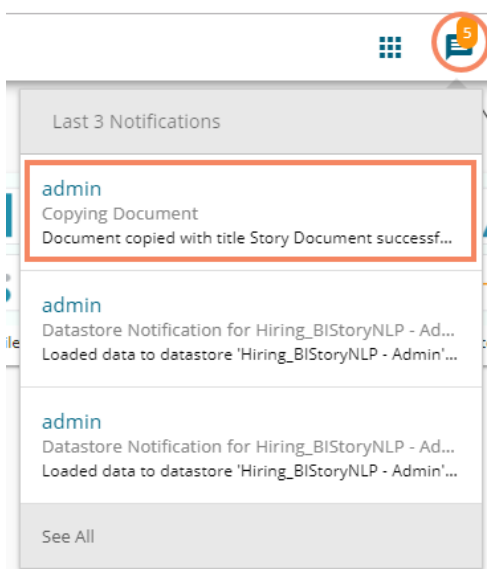


5. The selected user or users are unable to access the story document.

- 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."



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

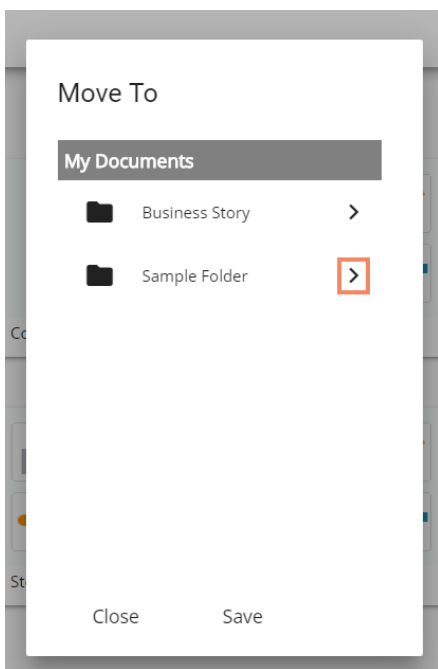


6. A copy of the story document gets shared with the selected user or users.

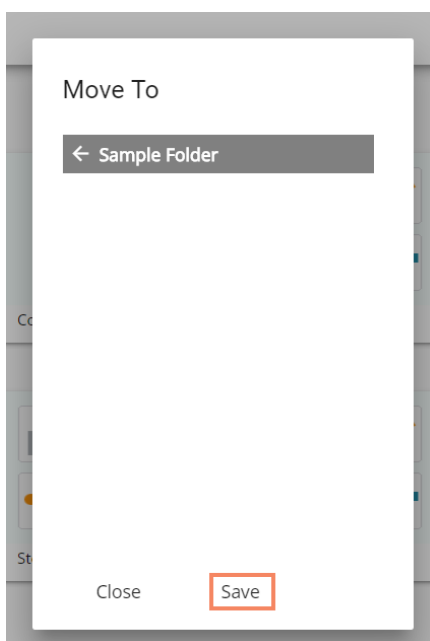
Note: If a story document is shared using this option, then the selected users have right to modify the received story. The copied story document can be accessed from the ‘Shared Documents’ space.

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

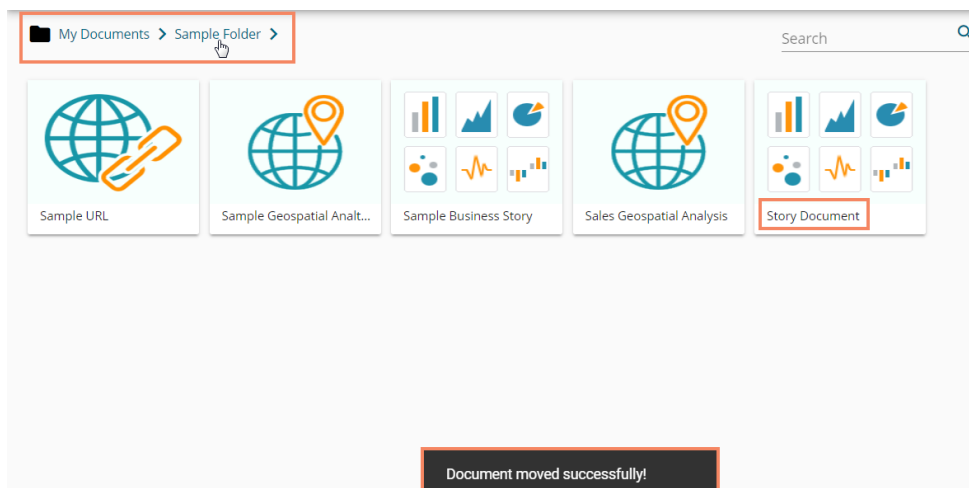


- vi) Users get redirected to the next screen
- vii) Click the ‘Save’ button



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

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



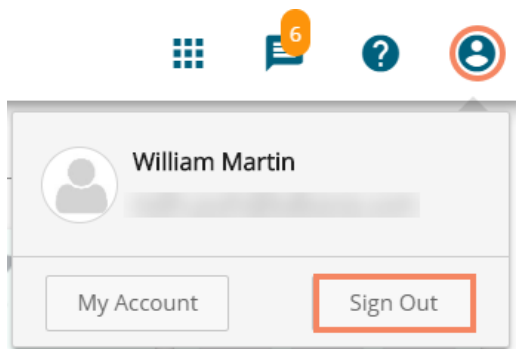
Note: 'Move To' option is not provided to the story documents shared as the Public Documents.

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  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.