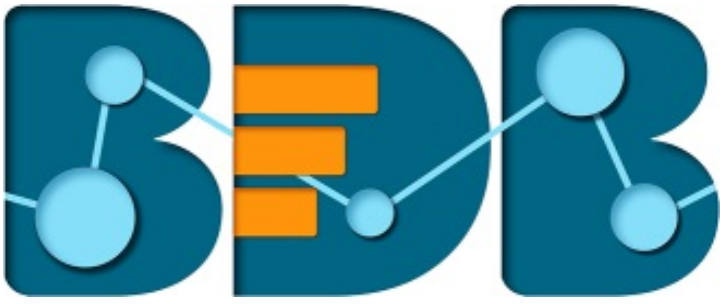

User Guide

Mobile App R-3.5

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1. About This Guide

1.1. Document History

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

Product Version	Date (Release date)	Description
BDB Mobile App 1.0 (for iPad)	June 9th, 2015	First Release of the document
BDB Mobile App 2.0	February 18th, 2016	Updated document
BDB Mobile App 2.5	November 9th, 2016	Updated document
BDB Mobile App 3.0	August 31st, 2017	Updated document
BBD Mobile App 3.2	January 25th, 2018	Updated document
BDB Mobile App 3.5	April 15th, 2018	Updated document

1.2. Overview

This guide covers steps to:

- Access the BDB Mobile App
- Technical Pre-requisites for the BDB Mobile App
- Features of the BDB Mobile App

1.3. Target Audience

This guide is aimed at business professionals, data analysts, and decision-makers who use BDB Mobile App to gain hidden insights from their analyzed business data.

2. Introducing the BDB Mobile Apps

2.1. Introduction

Users can avail mobile access of their data analytics via BDB Mobile App. This mobility can help them decide on the go with undisputed insights available to them all the time. Users can even share these insights with other users to make the entire decision-making procedure run comparatively faster.

2.2. Technical Pre-requisites

- Supported Devices: iPhone/iPad with iOS 9 and above
- Supported Android Mobile Devices: Android 5.1 and above
- Available in AppStore and Play Store

3. Getting Started with the BDB Mobile App

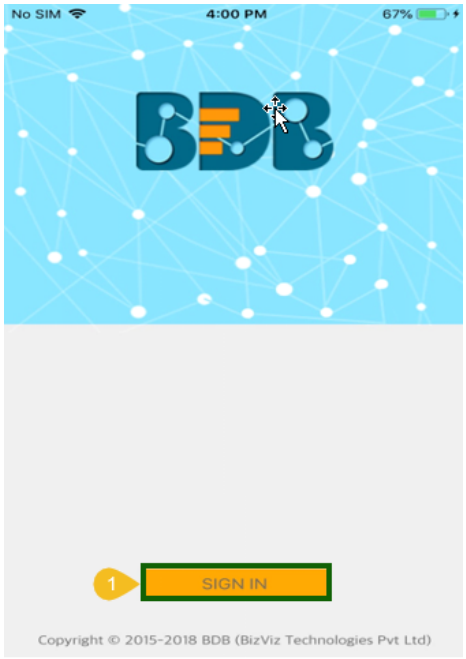
Users can follow the below given steps to download and use the BDB Mobile App

i) Download the BDB Mobile App link using either of the below given link:

App Store link for the iOS: https://itunes.apple.com/in/app/big-data-bizviz/id1296239394?mt=8

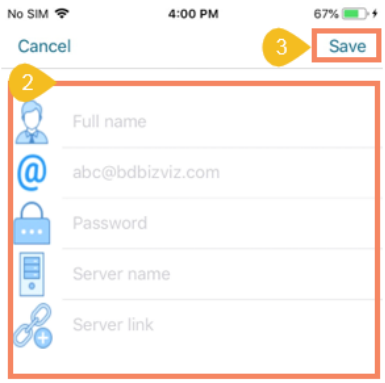
ii) Users will get the following page after downloading the BDB mobile app

iii) Click the '**SIGN IN**' option



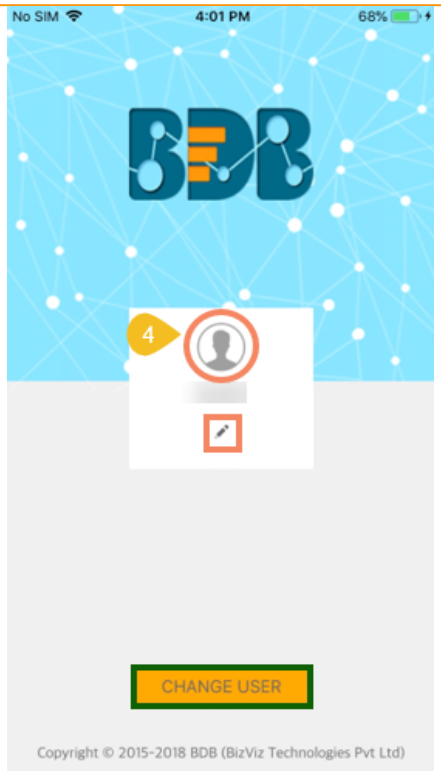
iv) Configure the following user information
   a. Full name
   b. Email Id
   c. Password
   d. Server name
   e. Server link

v) Click '**Save**'

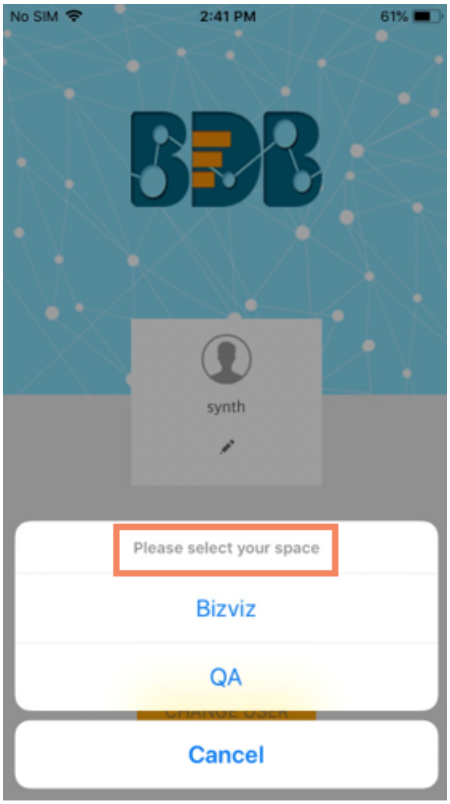


vi) Users will be redirected to the following page

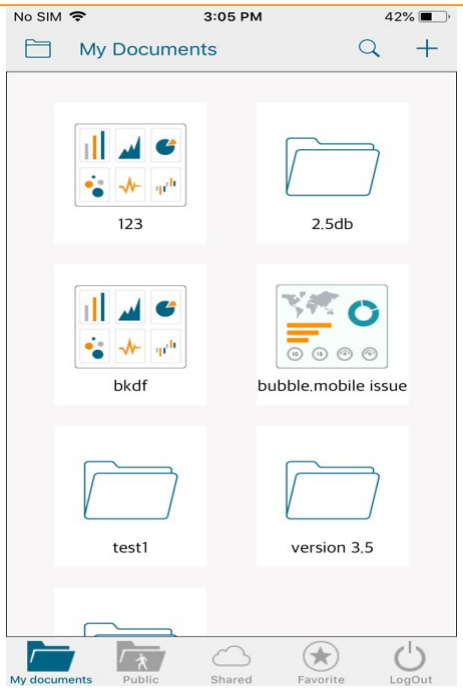
vii) Click on the User icon to '**Login**'
   a. Click on the '**Edit**' icon to modify the user information
   b. Click the '**CHANGE USER**' option if wish to change the user



viii) Users will be asked to choose a space (if multiple spaces exist)



ix) Users will be redirected to the homepage

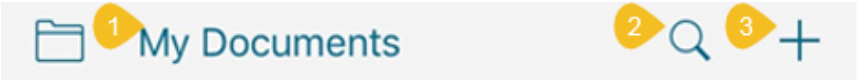


4. BDB Mobile Homepage

BDB mobile homepage displays all the existing folders and files of the logged in user together with Header and Tabular menus.

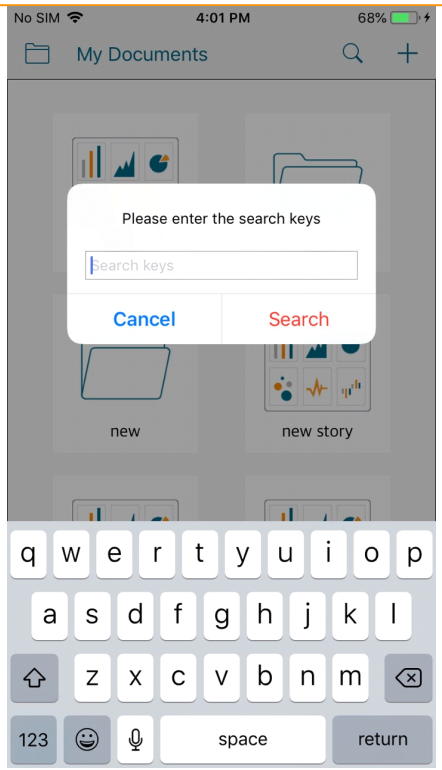
4.1. BDB Homepage Header

The following options can be accessed from the header of the BDB Mobile App.



i. User Documents- Name of the opened Documents will be displayed on the homepage (E.g., '**My Documents**' as displayed in the above image). Users can open the other documents from the tabular menu given at the bottom of the page.

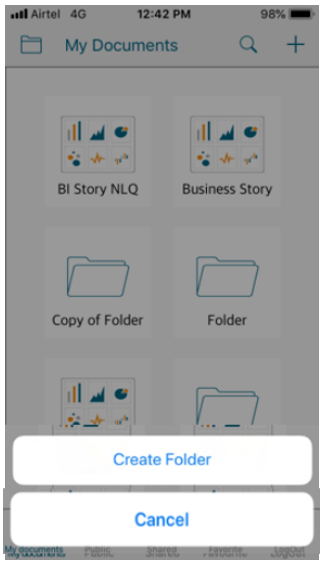
ii. Search- To search a specific folder or file in the opened document space
   1. Click the '**Search**' icon
   2. A new window will be opened to enter the search keys
      - Enter the search key in the given space
      - Click '**Search**' option



3. Users will be redirected to the searched folder or file

iii. Add + icon- To add a new folder or story

1. Click the **'Add'** icon
2. A new window will be opened with **'Create Folder'**option



3. By choosing the 'Create Folder' option, the users will be redirected to the consecutive page for to create a folder

4.2. BDB Homepage Tabular Menu

i. My Documents

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

ii. **Public**
- The documents available to all the users in the one space are listed under the '**Public**' option
- The user can view and modify documents which are publicly shared by other users
- Users cannot delete, copy, or move the publically shared documents unless they create them

iii. **Shared**
- The documents shared specifically with the logged in user will be part of the '**Shared**' option
- Users can not edit or delete the shared documents

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

v. **Logout**
- Users can log out from the BDB Mobile app using the '**LogOut**' option from the homepage BDB mobile app

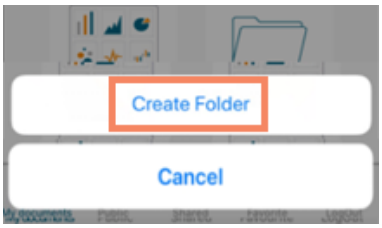
Note:

a. All the options provided to a folder or story list by holding the selected file or folder.
b. Users can go back to the homepage from any selected file (Story/Dashboard) and folder by clicking the parent folder icon
c. 'My Documents' will open by default while opening the BDB Platform homepage.

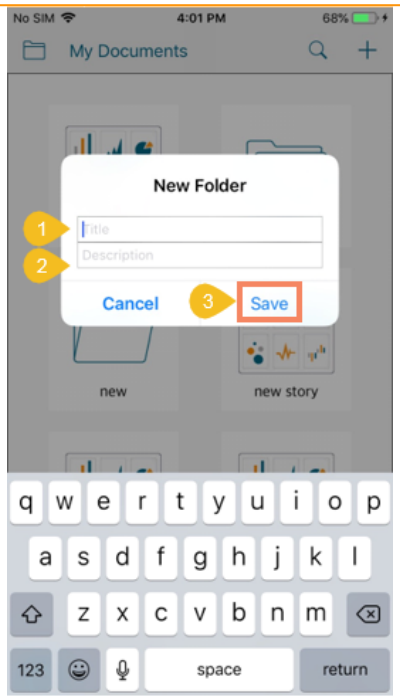
5. Creating a New Folder

Users can create a new folder using this option. The created folder will be displayed under the 'My Documents' space. Users can store multiple stories and dashboards inside a folder.

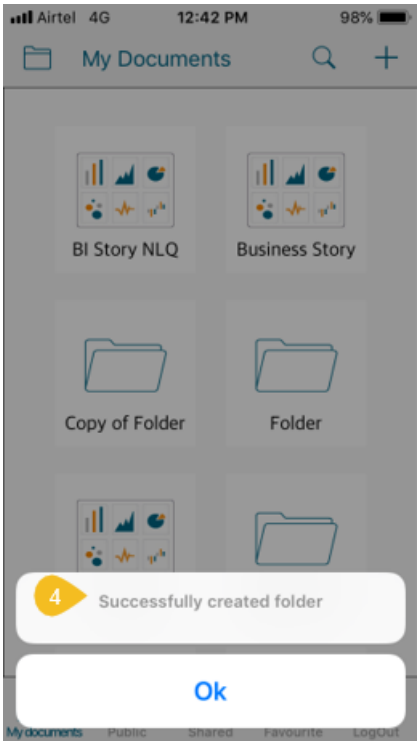
i) Click the '**Add**' icon from the homepage
ii) Users will be redirected to a new window
iii) Select the '**Create Folder**' option



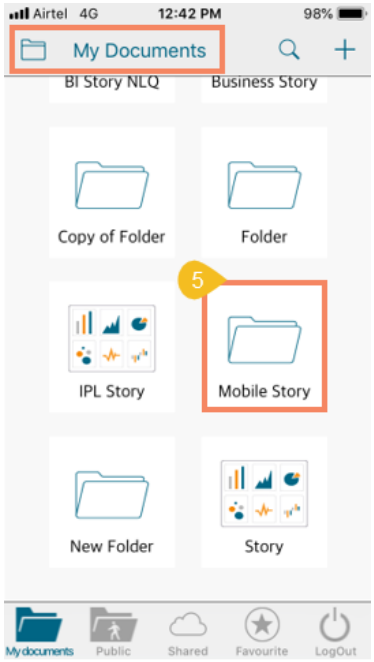
iv) Users will be redirected to a new window
   a. Title: Enter a name for the New Folder
   b. Description: Describe about the folder (optional)
   c. Click '**Save**'



v) Users get a notification message to confirm the action of folder creation



vi) The newly created folder will be saved to the '**My Documents**'


Airtel 4G
12:42 PM
98%
My Documents
BI Story NLQ
Business Story
Copy of Folder
Folder
5
IPL Story
Mobile Story
New Folder
Story
My documents
Public
Shared
Favourite
LogOut

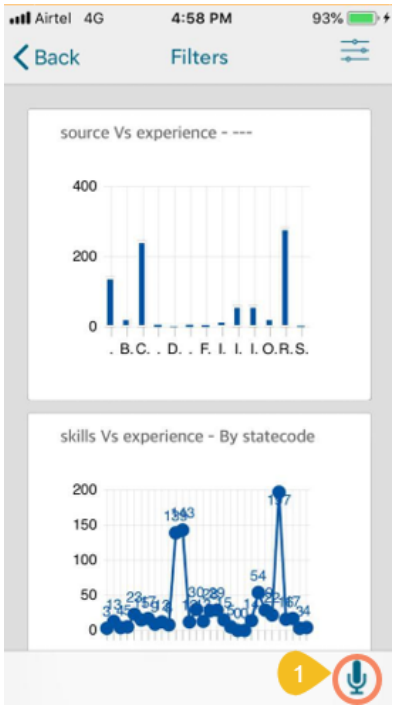
6. Modifying the Existing Story

User can access the stories created and saved under their BDB platform account via the mobile app. The NLQ based voice assistance and filters are provided to modify the story documents.

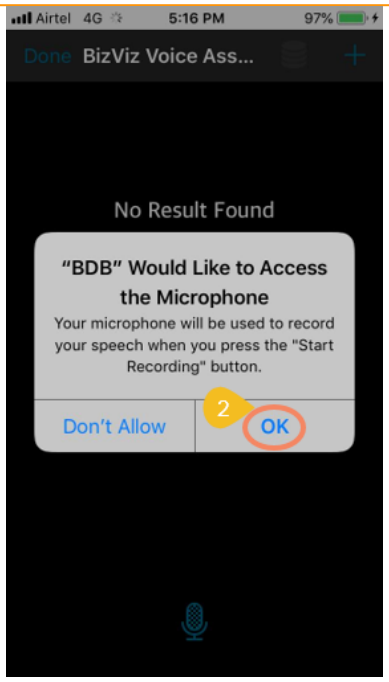
6.1. NLQ based Voice Assistance

NLQ based voice assistance is given to modify and add more views in an existing story using the mobile app.

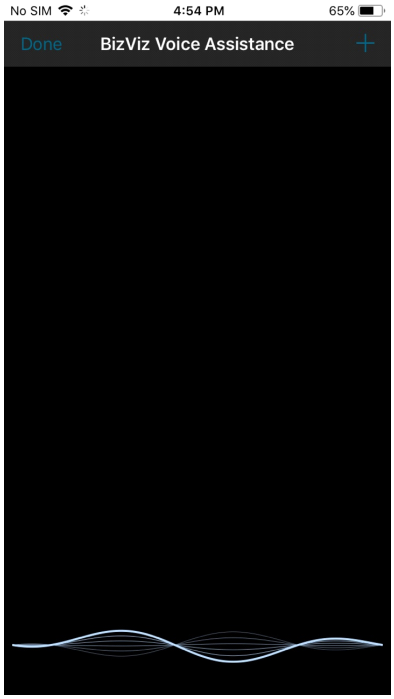
i) Select a story document
ii) A microphone icon appears at the bottom of the page
iii) Click on the microphone icon



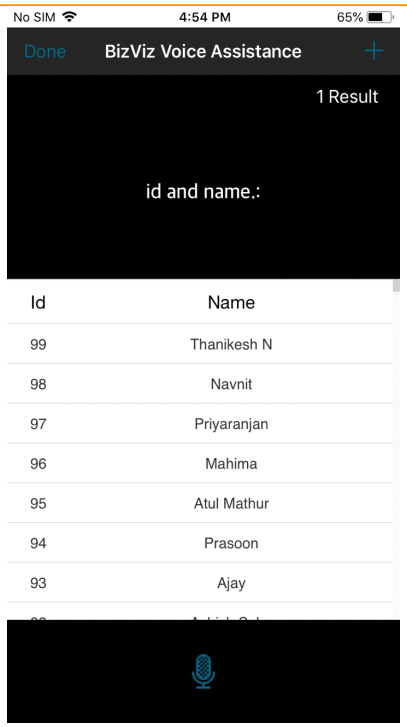
iv) Users get directed on the BizViz Voice Assistance page with a message asking BDB to allow the microphone access
v) Click **'OK'** to provide the access



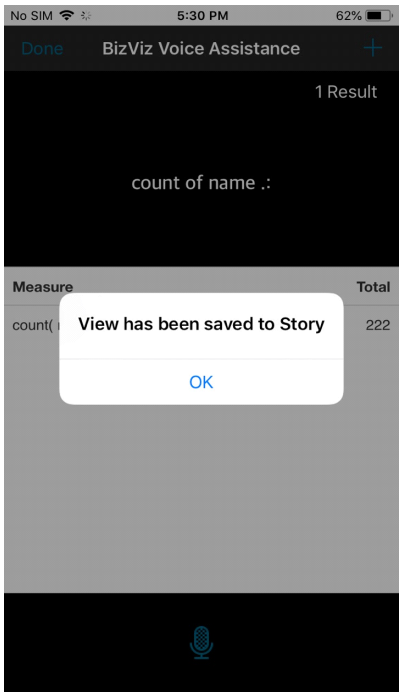
vi) Press the Microphone icon displayed on the Voice Assistance page and use your voice command to search for specific data. It will create waves on the screen while you speak



vii) After completing your voice query, you will receive a visual presentation of the searched data below (E.g., the data is displayed in the grid for the columns "id and name")



viii) Use the '**Add**' icon
ix) The search result gets saved to the existing story



Note: Users can add multiple views by using the NLP based interactive voice assistance.

6.2. Applying Filters

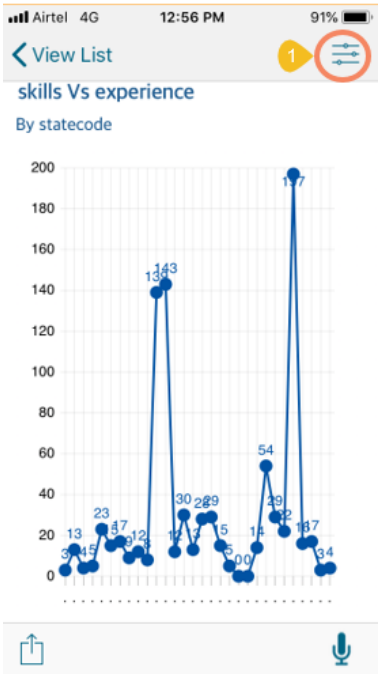
Users can apply various filter values to a report or the entire story to see customized data. Filters when applied to a story will customized all the views saved in the story while filter applied to a view only customizes the display of that view.

Users can apply Global and Local filters by using the Filter icon from the story view page (Global filter) and analyze mode page (Local filter).

6.2.1. Local/ View Specific Filter

i) Navigate to a saved view

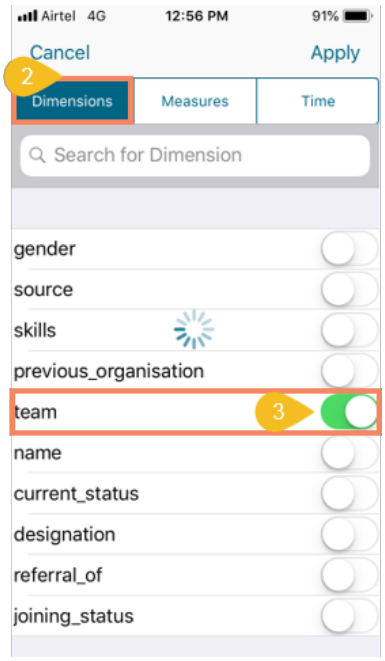
ii) Click the **'Filter'** icon from the header panel



iii) Users get a new page displaying the list of dimensions, measures, and time fields

iv) By selecting Dimension as filter conditions, a list of corresponding dimensions appear

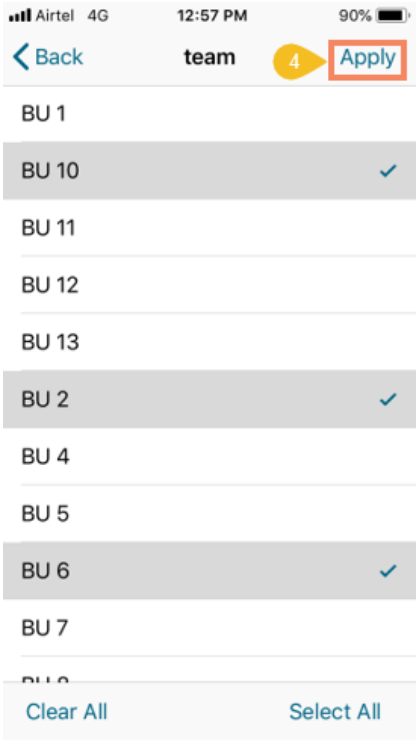
v) Select one or more-dimension values as filter conditions using the enable/disable button



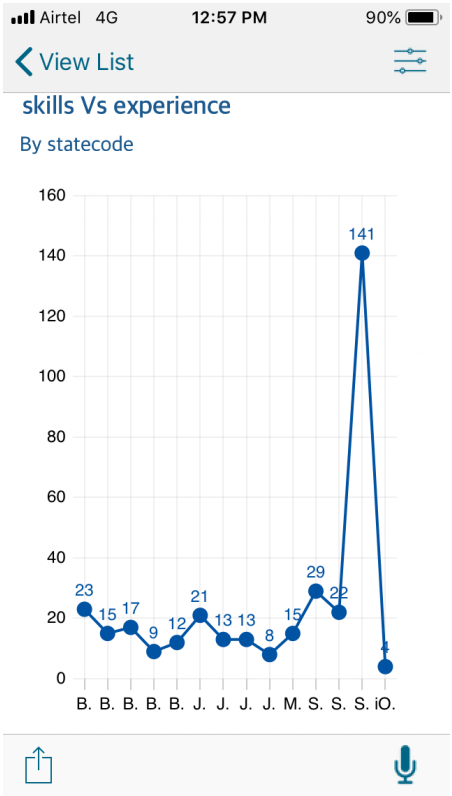
vi) Users get a list of sub-dimension values by selecting a dimension

vii) Select the specific filter values from the list

viii) Click **'Apply'**



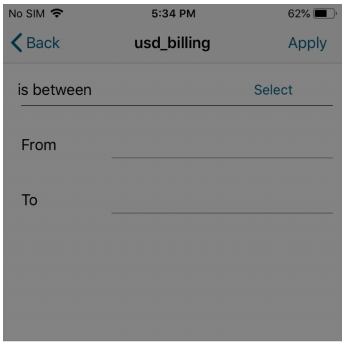
ix) The view will be filtered as per the set filter conditions



Note:

a. Users can select multiple dimensions and filter values using the corresponding facts of each dimension on one view.

b. Users can also apply filter condition on measure and time fields as explained below:
   1. Measure Fields as Filter Conditions: By selecting a measure fields as filter condition, users need to provide further values as given below:
      i. Select a filter condition from the drop-down list
      ii. Select ‘From’ and ‘To’ values



is less than

is less than or equal

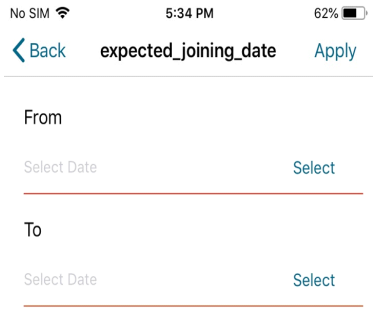
is greater than

is greater than or equal

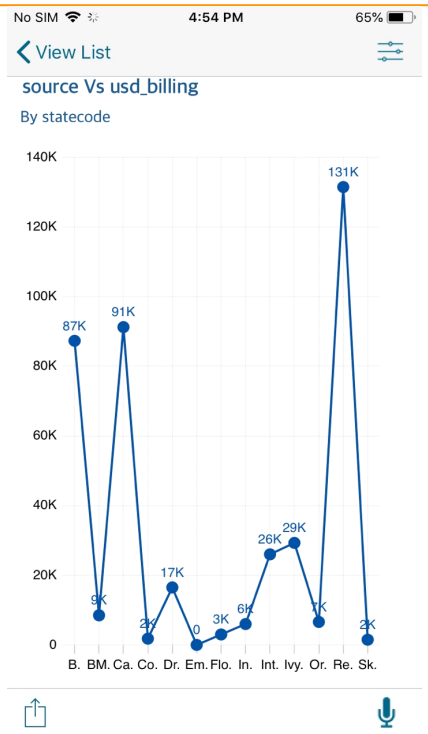
is

is between

   2. Time Fields as Filter Conditions: By selecting a date field type the following screen appears asking ‘From’ and ‘To’ timelines.



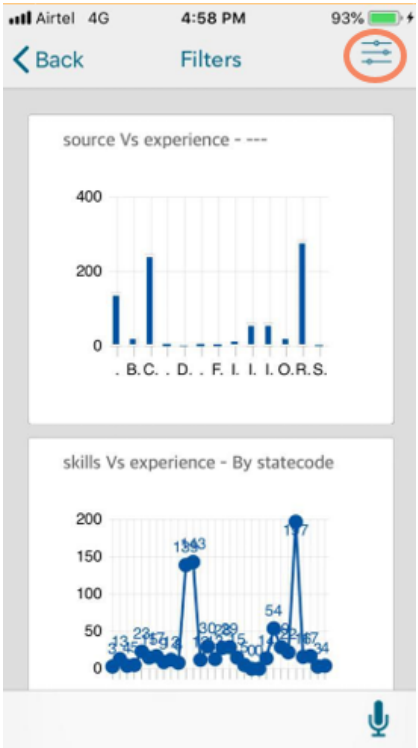
c. Users can analyze a view by clicking on it as displayed in the following image:



6.2.2. Global Filter

i) Navigate to the View List of a story

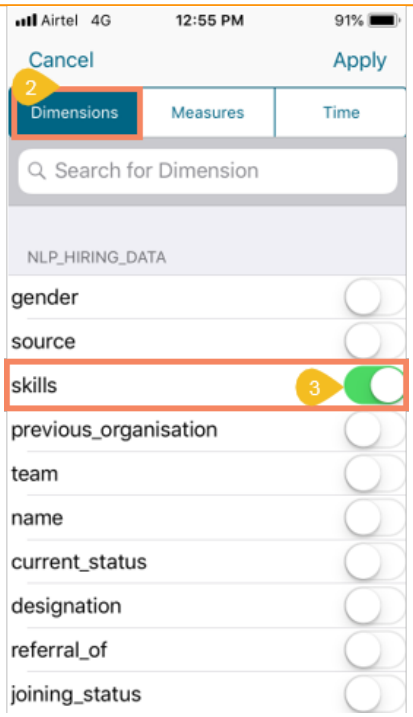
ii) Click the '**Filter**' icon from the header panel



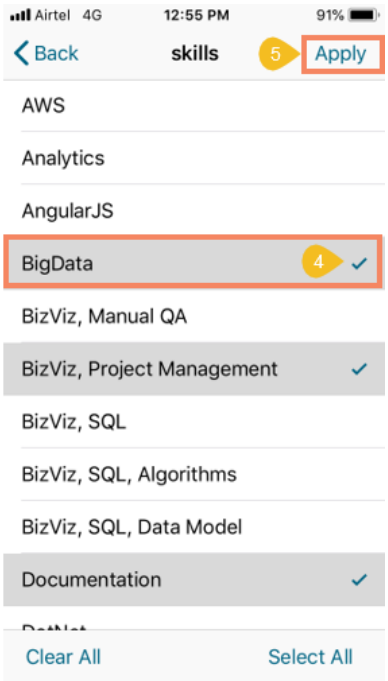
iii) Users get a new page displaying the list of dimensions, measures, and time fields

iv) By selecting Dimension as filter conditions, a list of corresponding dimensions appear

v) Select one or more-dimension values as filter conditions using the enable/disable button



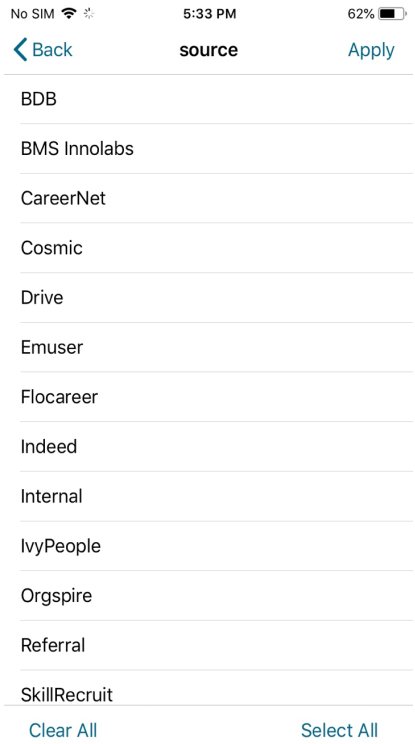
vi) Users get a list of sub-dimension values by selecting a dimension
vii) Select the specific filter values from the list
viii) Click 'Apply'



ix) The view will be filtered as per the set filter conditions

Note:

a. Users can select multiple dimensions and filter values using the corresponding facts of each dimension on one view.
b. Users can click the '**Back**' option to go back to an individual view.



7. Options

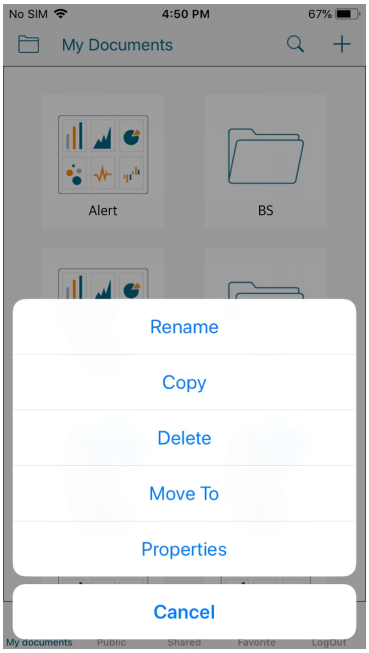
Folders and documents are credited with various options. This section describes all the options assigned to a folder, Story, and dashboard.

If a folder or document is created under '**My Documents**,' '**Public**' or shared via the '**Copy To**' option to the '**Shared**' space, it displays a similar set of options.

7.1. Options for a Folder

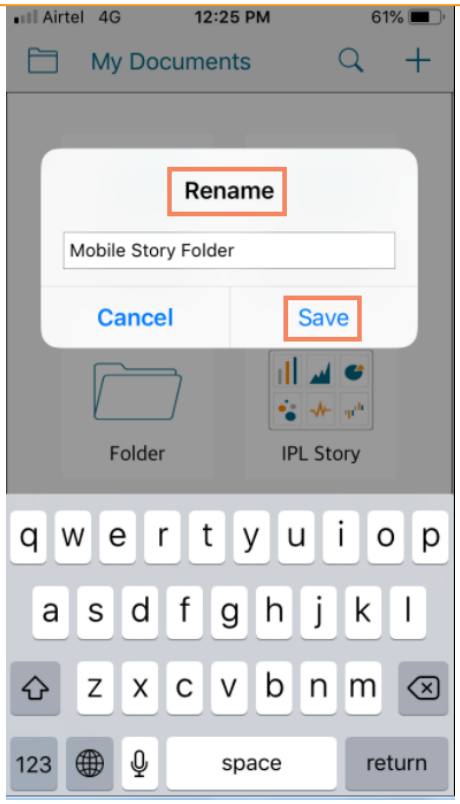
This section describes all the options assigned to a folder

i) Navigate to a folder (
ii) Select a folder and hold the right-click on it
iii) A context menu opens with the following options:

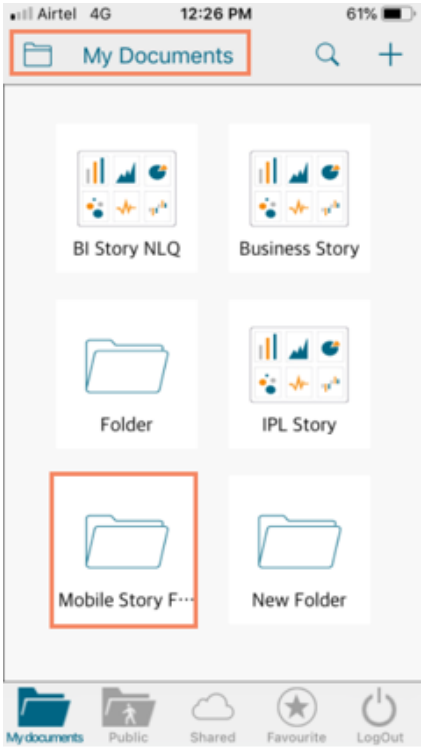


7.1.1. Renaming a Folder

i) Select '**Rename**' from the Options menu
ii) A new window will pop-up
iii) Enter a new name or modify the existing name for the folder
iv) Click '**Save**'

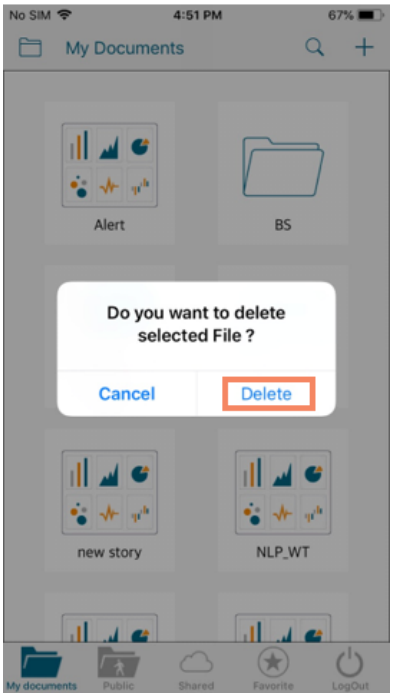


v) A success message will be displayed
vi) The folder gets renamed successfully



7.1.2. Deleting a Folder

i) Select '**Delete**' from the Options menu
ii) A new window will pop-up to assure the deletion
iii) Click '**Delete**'



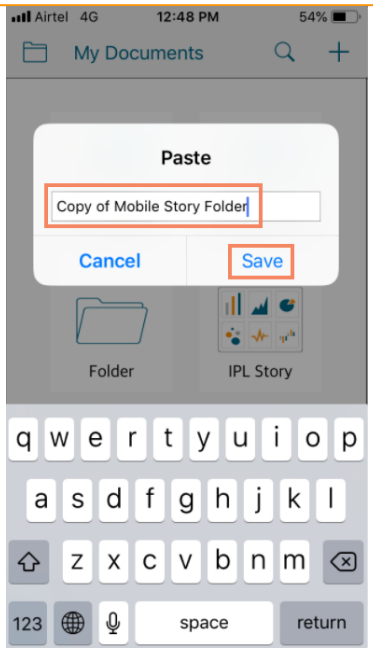
iv) The selected folder gets removed from the platform

Note: The '**Delete**' option is not provided to the story documents shared as the Public Documents or Shared Documents using the 'Share With' option.

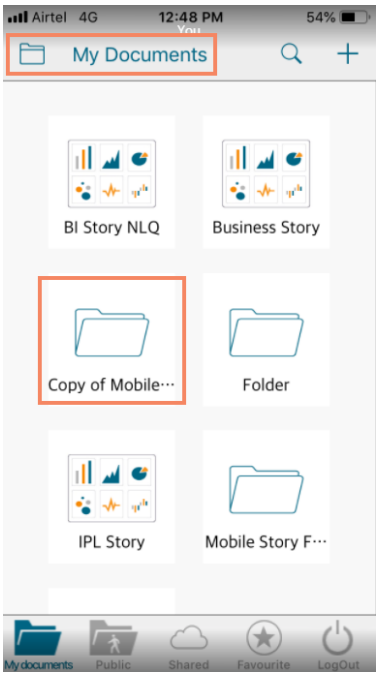
7.1.3. Copying and Moving a Folder

Users can copy a folder and paste it into the selected place from the BizViz Platform.

i) Select '**Copy**' from the Options menu
ii) Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere
iii) A context menu will appear with the '**Paste**' option
iv) Select '**Paste**'
v) A new window pops-up
vi) The Name mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the folder (E.g., *Mobile Story Folder* will have a new name *Copy of Mobile Story Folder*).
vii) Click '**Save**'

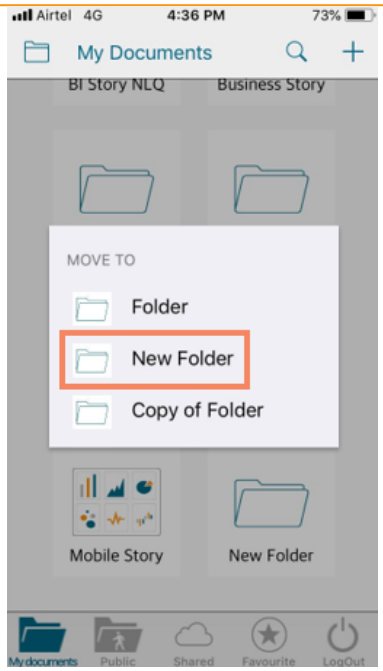


viii) A message pops-up to assure that the copied folder has been pasted successfully with a different name.

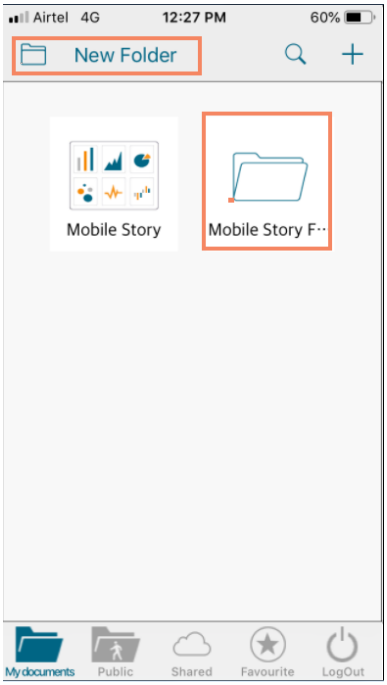


7.1.4. Move To

i) Select '**Move To**' from the Options menu
ii) A new screen pops-up with available folders where the selected folder can be moved
iii) Select a folder from the available options



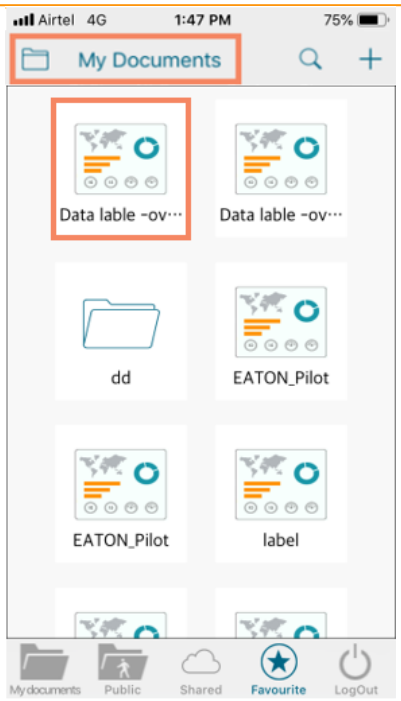
iv) The folder gets moved to the recently selected folder as displayed below



7.2. Options for a Dashboard

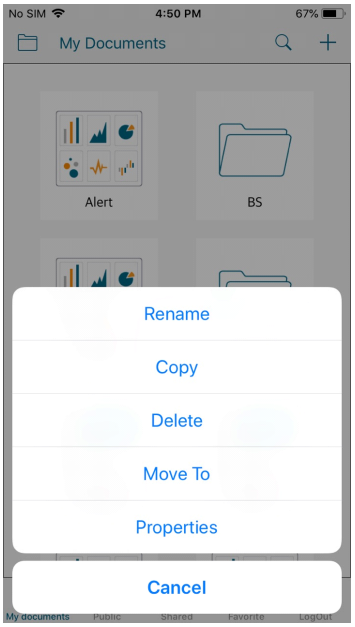
Users can also view their BDB Dashboards via the mobile app. Users can access their published dashboards through BDB Mobile apps for undisputed insight discovery all the time. Users can open a dashboard by a tap on it.

E.g., there is a dashboard titled 'Data label-overlapping test,' tap on the dashboard.



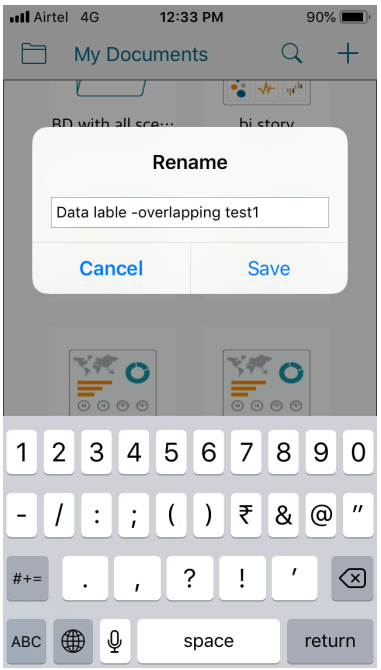
It opens to display the various charts as displayed in the following image:

i) Navigate to a dashboard using '**My Documents**', '**Public**' or '**Shared**' places
ii) Select a story document and hold the right-click on it
iii) A context menu opens with the following options:



7.2.1. Renaming a Dashboard

i) Select '**Rename**' from the Options menu
ii) A new window will pop-up
iii) Enter '**New Name**' in the dashboard
iv) Click '**Save**'

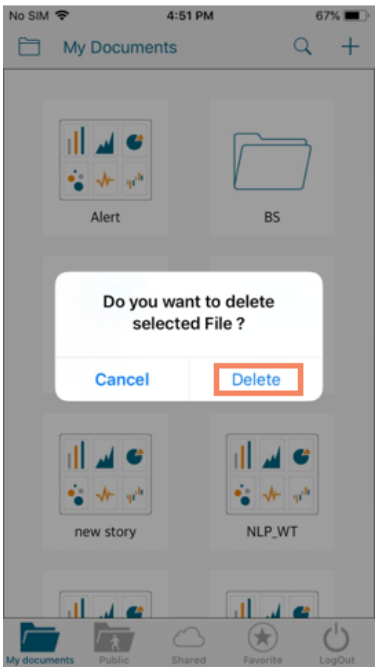


v) A success message will be displayed
vi) The dashboard name will be changed successfully

7.2.2. Deleting a Business Story

i) Select '**Delete**' from the Options menu

ii) A new window will pop-up to assure the deletion
iii) Click '**Delete**'

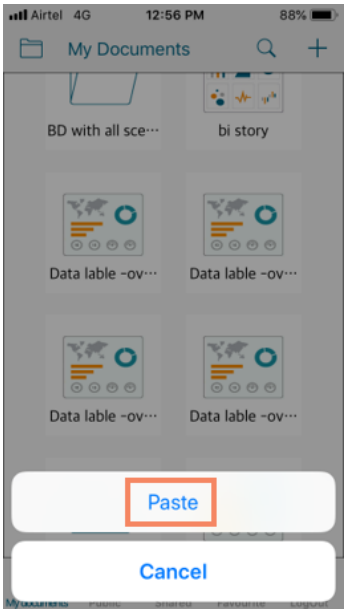


iv) The selected dashboard will be removed.

7.2.3. Copying and Moving a Business Story

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

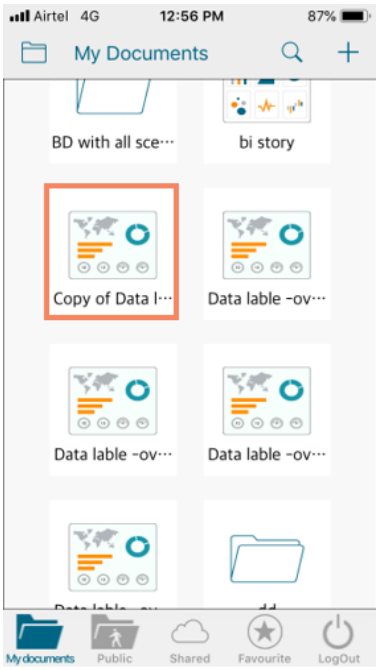
i) Select '**Copy**' from the Options menu
ii) Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere
iii) A context menu will appear with the '**Paste**' option
iv) Select '**Paste**'



v) A new window pops-up.
vi) The Name mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the dashboard (E.g., *Alert* will have a new name *Copy of Alert*).

vii) Click '**Save**'

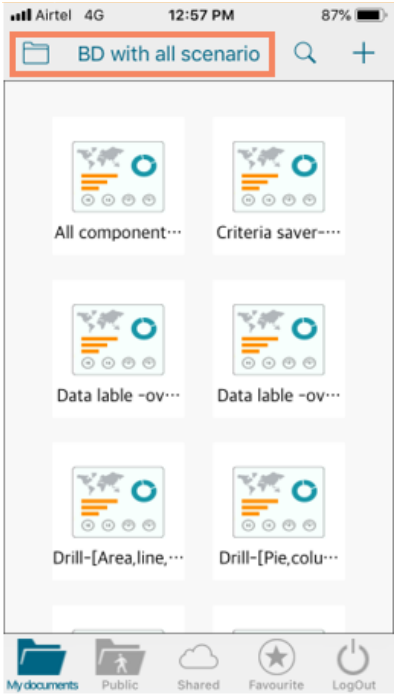
viii) The copied dashboard has been pasted successfully with a different name.



7.2.4. Move To

i) Select '**Move To**' from the Options menu
ii) A new screen pops-up with available folders where the dashboard can be moved
iii) Select a folder from the available options

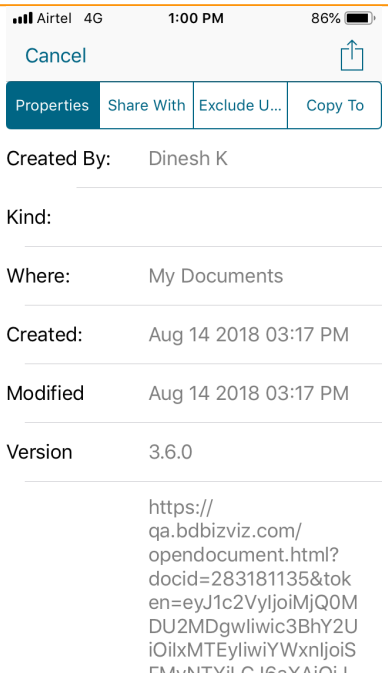
iv) The dashboard will be moved to the selected folder



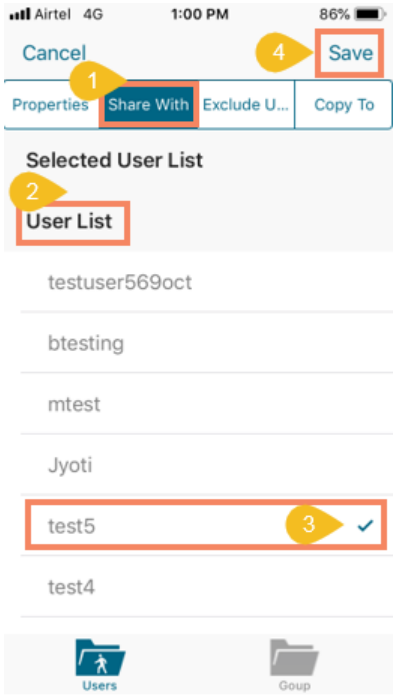
Note: The '**Move To**' option is not provided to the story documents shared as the Public Documents or Shared Documents using 'Share With' option.

7.2.5. Properties

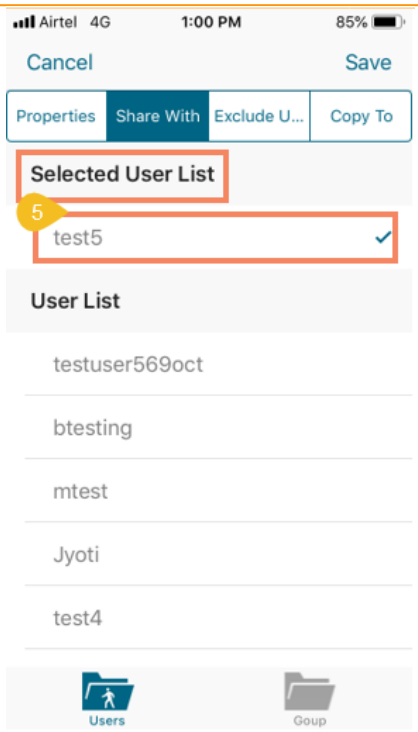
i) Select '**Properties**' from the Options menu
ii) A new screen pops-up with four options:
   a. Properties: The basic dashboard properties will be displayed.



b. Share With: The dashboard will be shared with the selected user or user group.
   1. Select '**Share With**' on the Properties pop-up screen
   2. Select '**Users**' or '**Group**' icon from the bottom of the screen
   3. Select the user(s) or group(s) from either the '**User List**' or '**Group List**'
   4. Click '**Save**'



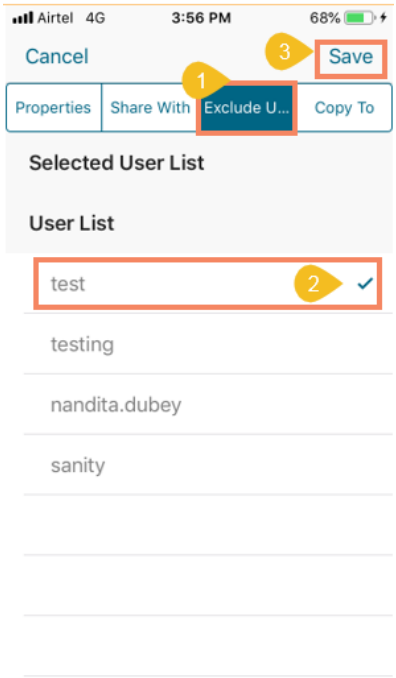
   5. The selected user or group is displayed under the '**Selected User List**' or '**Selected Group List**' indicating that the dashboard has been shared with those user(s) or user group(s).



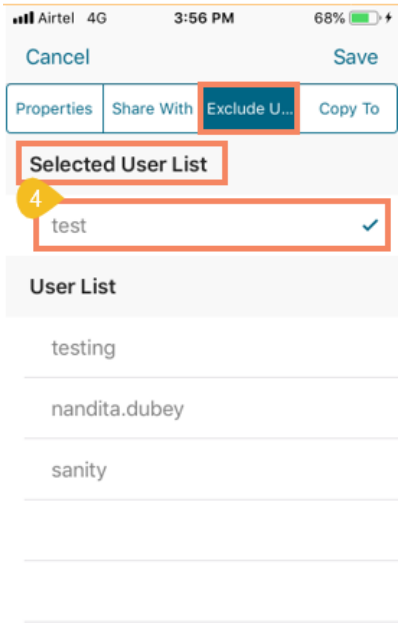
6. The dashboard will be shared with the selected user(s) or selected user group(s).

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

c. Exclude User: The selected user will not be able to access the dashboard.
   1. Select '**Exclude User**' on the Properties pop-up screen
   2. Select user(s) from '**User List.**'
   3. Click '**Save**'

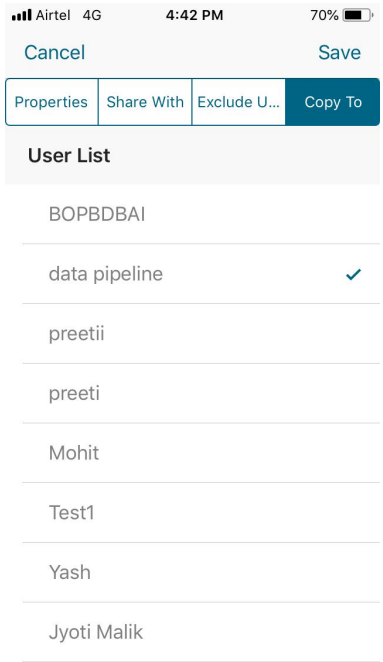


4. The user(s) list(s) under the **'Selected User List'**



5. The excluded user(s) will be unable to access the dashboard.

d. Copy To: A copy of the dashboard will be created and shared with the selected users.
   1. Select '**Copy To**' from the Properties pop-up screen.
   2. Select a user or multiple users from the displayed '**User List.**'
   3. Click '**Save**'



4. A copy of the dashboard will be shared with the selected user(s).

Note:

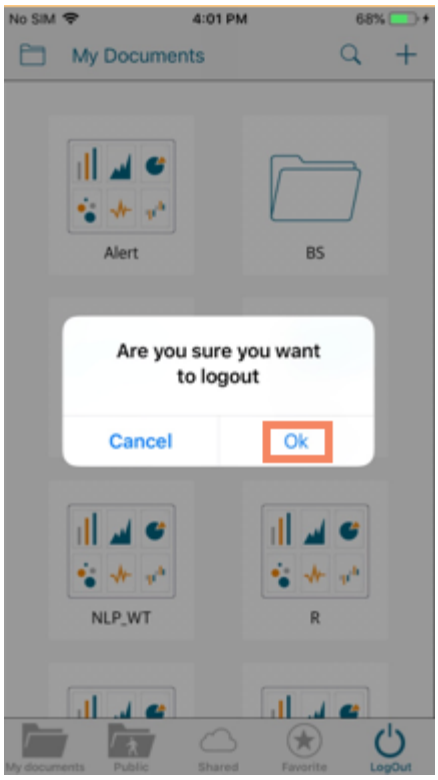
a. If a dashboard is shared using this option, then the selected users will have rights to modify the received dashboard.

b. Users can log in to the selected users with whom they have shared the story document via the '**Copy To**' option.

8. Log Out

Follow the below-given steps to log out from the BBD Mobile Apps.

i) Click the '**Logout**' icon from the tabular menu provided at the bottom of the homepage
ii) Users will be asked to confirm the action
iii) Click '**Ok**'



iv) Users will be successfully logged out of the app.

Note: Clicking on '**Log Out**' will redirect the user back to the '**Login**' page of the BBD Mobile App.