



User Guide

Mobile App R-3.6

Contents

1. About This Guide	4
1.1. Document History	4
1.2. Overview	4
1.3. Target Audience	4
2. Introducing the BDB Mobile Apps	4
2.1. Introduction	4
2.2. Technical Pre-requisites.....	4
3. Getting Started with the BDB Mobile App.....	4
4. BDB Mobile Homepage	7
4.1. BDB Homepage Header	7
4.2. BDB Homepage Tabular Menu	9
5. Creating a New Folder	9
6. Creating a New Story	11
6.1. Create a New View	12
6.2. Use a Shared View.....	18
6.3. Applying Filters	19
6.3.1. Local/ View Specific Filter	19
6.3.2. Global Filter	22
6.4. NLQ based Voice Assistance	25
7. Options	28
7.1. Options for a Folder	28
7.1.1. Renaming a Folder	28
7.1.2. Deleting a Folder.....	29
7.1.3. Copying and Moving a Folder	30
7.1.4. Move To.....	31
7.2. Options for a Story	32
7.2.1. Renaming a Story Document	33
7.2.2. Deleting a Business Story	33
7.2.3. Copying and Moving a Business Story	34
7.2.4. Move To.....	35
7.2.5. Properties	36
7.3. Options for a Dashboard.....	39
7.3.1. Renaming a Dashboard	40
7.3.2. Deleting a Business Story	40
7.3.3. Copying and Moving a Business Story	41



7.3.4. Move To.....	42
7.3.5. Properties	43
8. Log Out	47

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 9 th , 2015	First Release of the document
BDB Mobile App 2.0	February 18 th , 2016	Updated document
BDB Mobile App 2.5	November 9 th , 2016	Updated document
BDB Mobile App 3.0	August 31 st , 2017	Updated document
BDB Mobile App 3.2	January 25 th , 2018	Updated document
BDB Mobile App 3.5	April 15 th , 2018	Updated document
BDB Mobile App 3.6	August 20 th , 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

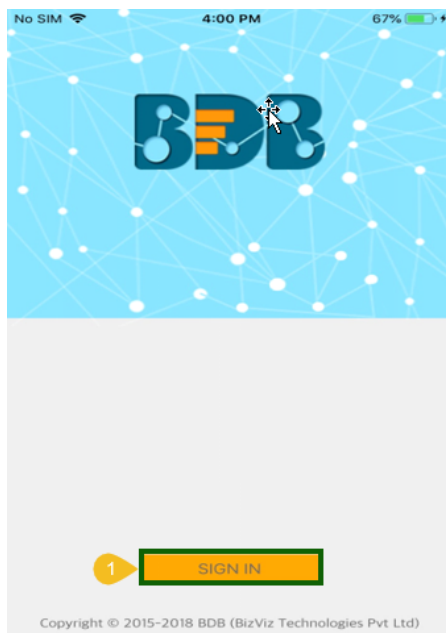
- Supported Devices: iPhone/iPad with iOS 9 and above
- Supported Android Mobile Devices: Android 5.1 and above
- Available in AppStore and Play Store

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 links:
 - a. Google Play link for Android Devices:
<https://play.google.com/store/apps/details?id=com.bdbizviz.Bizviz>

- b. 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

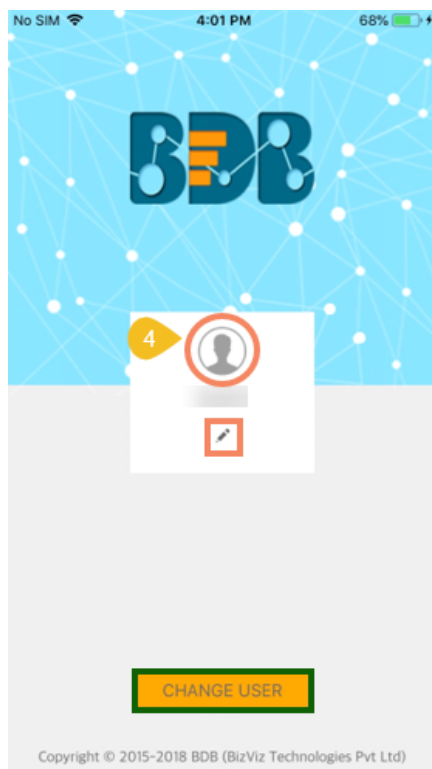


- iv) Configure the following user information
 - a. Full name
 - b. Email Id
 - c. Password
 - d. Server name
 - e. Server link
- v) Click 'Save'

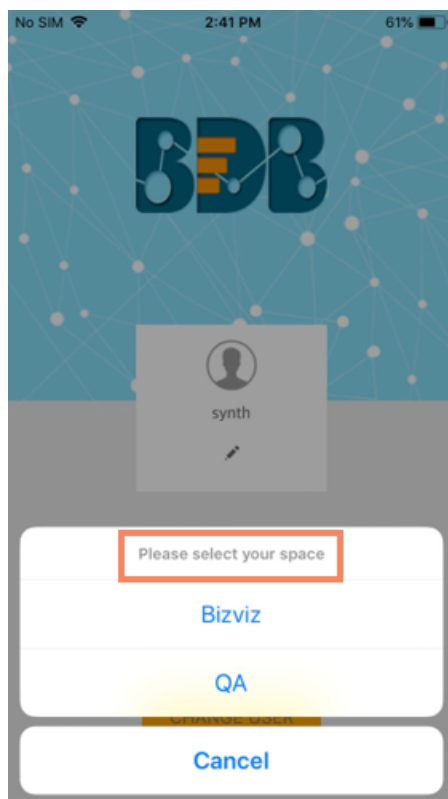


- vi) Users will be redirected to the following page
- vii) Click on the User icon to 'Login'

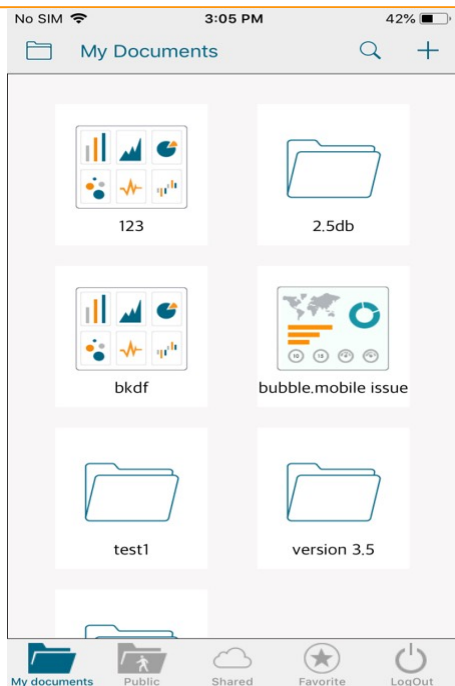
- a. Click on the 'Edit' icon to modify the user information
- b. Click the 'CHANGE USER' option if wish to change the user



- 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

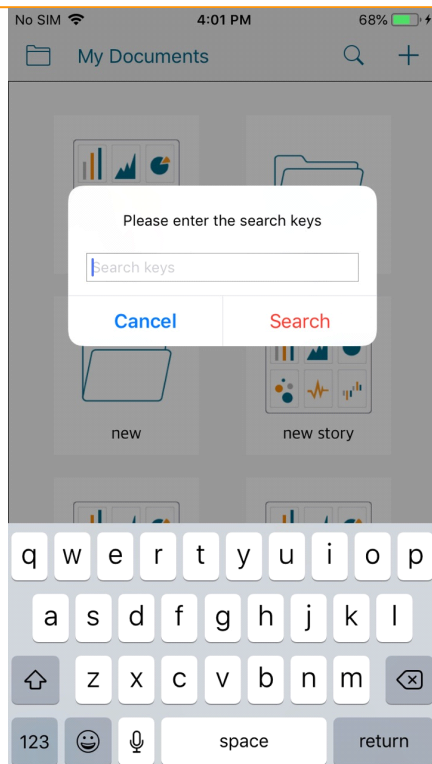
BDB mobile homepage displays all the existing folders and files of the logged in user together with Header and Tabular menus.

4.1. BDB Homepage Header

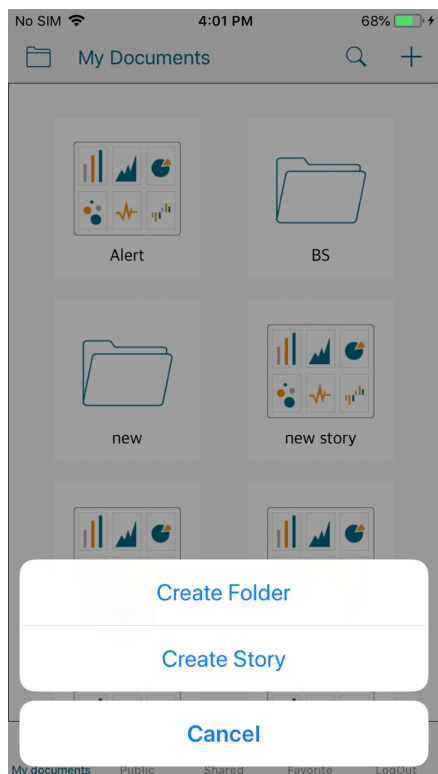
The following options can be accessed from the header of the BDB Mobile App.



- 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' and 'Create Story' options



3. By choosing an option, the users will be redirected to the consecutive page for the selected option

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



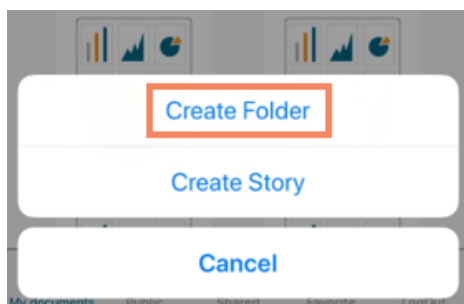
Note:

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

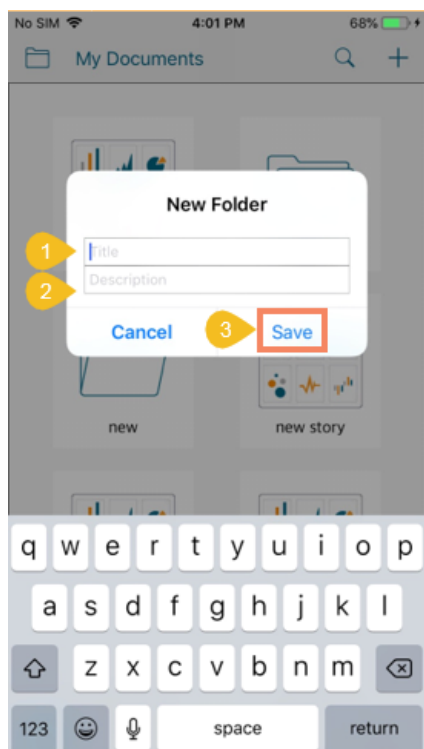
5. Creating a New Folder

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.

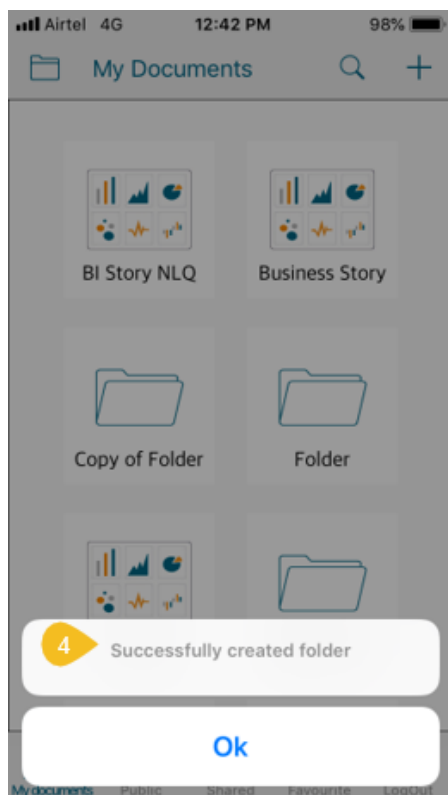
- Click the ‘Add’ icon from the homepage
- Users will be redirected to a new window
- Select the ‘Create Folder’ option



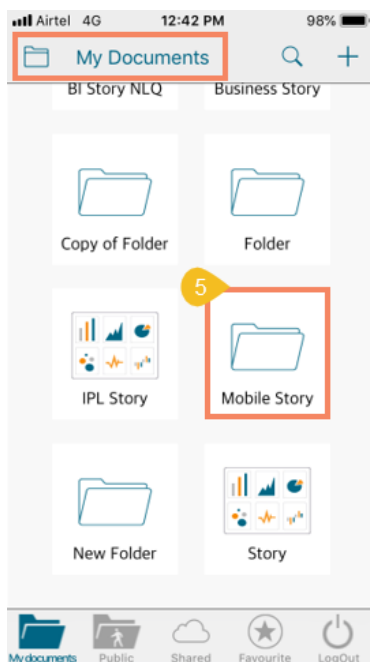
- Users will be redirected to a new window
 - Title: Enter a name for the New Folder
 - Description: Describe about the folder (optional)
 - Click ‘Save’



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



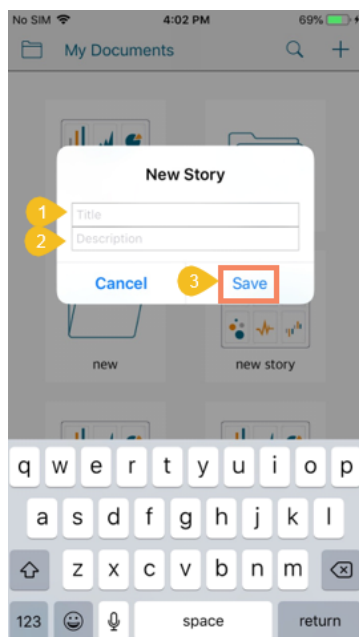
vi) The newly created folder will be saved to the 'My Documents'



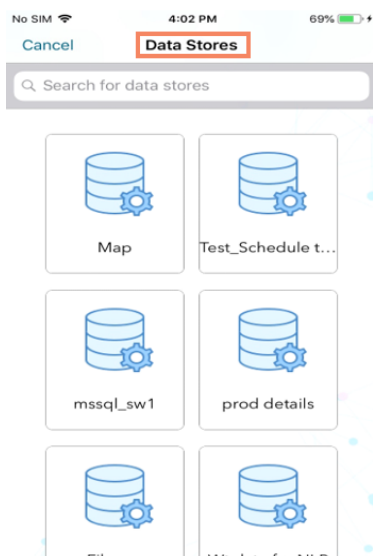
6. Creating a New Story

Users can create a new story a self-service dashboard based on their business data. They can modify or filter the look and feel of a created story.

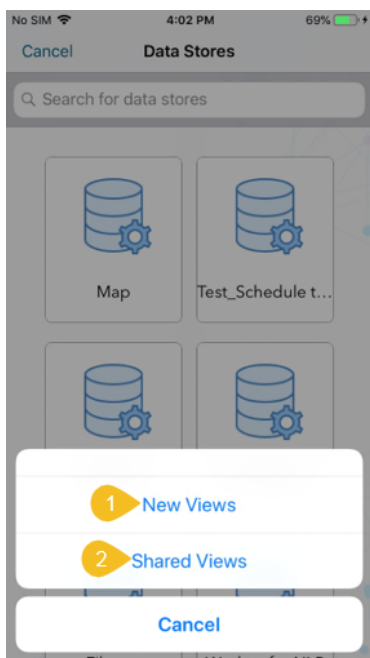
- i) Click the 'Add' icon from the homepage header
- ii) Users will be redirected to the following page
- iii) Select 'Create Story' option
- iv) Users will be redirected to a new window
 - a. Title: Enter a name for the new story
 - b. Description: Describe the story (Optional)
 - c. Click 'Save'



- v) Users will be redirected to the available datastore list
- vi) Select a datastore (Users can search for the desired data store using the search bar)



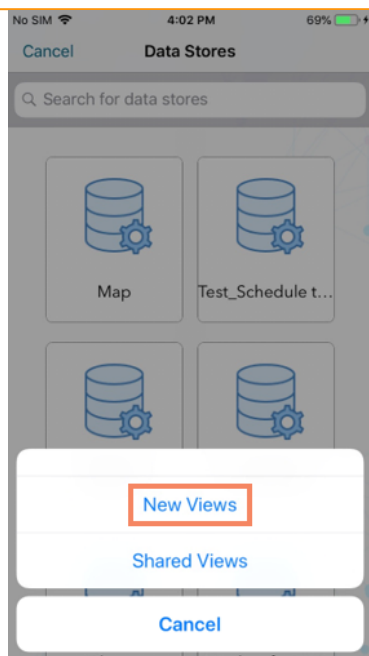
- vii) By selecting a datastore, users will be redirected to create or add views to the story
 - a. There are two options as displayed below:
 - i. New Views: Users can create a new view using this option
 - ii. Shared Views: Users can add the existing view by using this option



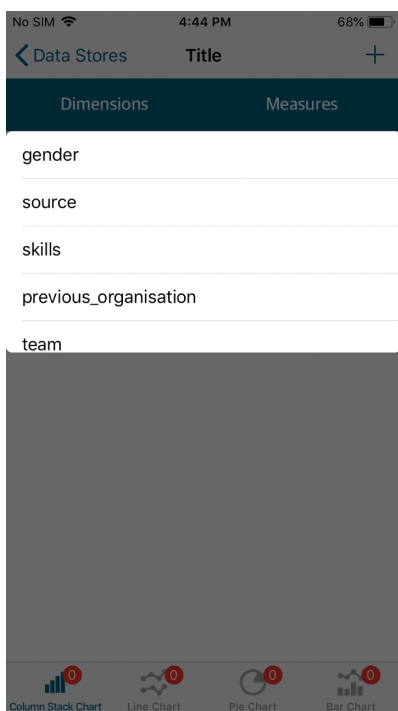
- viii) By selecting an option, users will be redirected to the consequent page

6.1. Create a New View

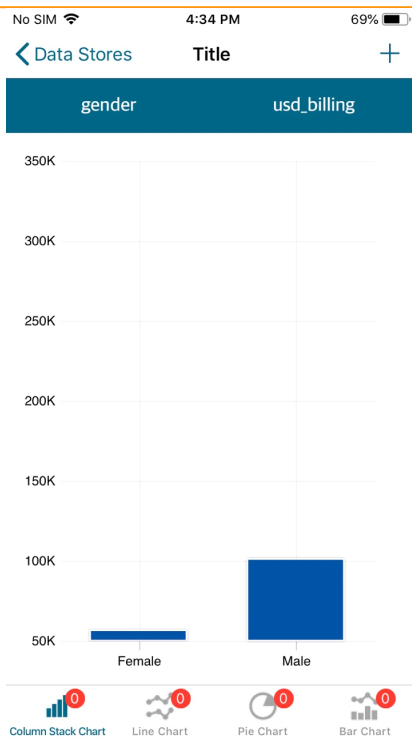
- i) Select 'New Views' option



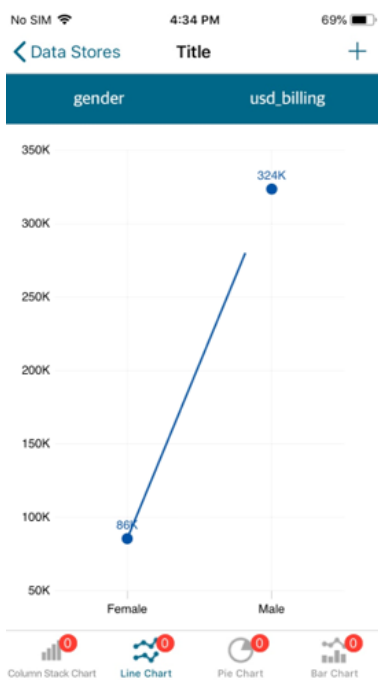
- ii) Users will get Dimensions and Measures options
- iii) Select 'Dimension' or 'Measure' option to list the available dimensions and measure fields



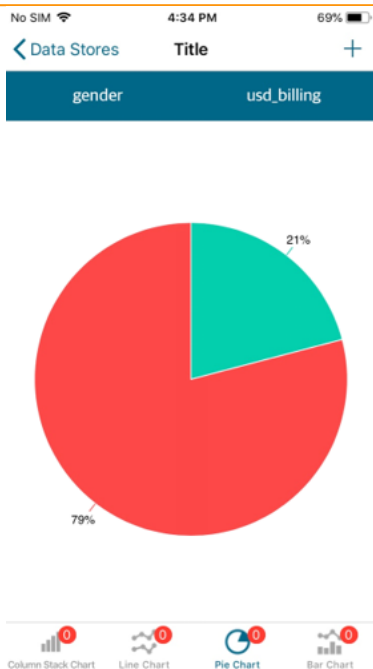
- iv) Users must select one dimension and one measure to create a visualization out of the selected data
- v) By default, data from the selected dimension and measure combination will be displayed through a chart. (E.g., the below given visualizations are achieved when 'gender' as a Dimension and 'usd_billing' as a Measure are selected from a datastore)
- vi) The BDB mobile app supports the following visualization options:
 - a. Column Stake Chart (it opens by default)



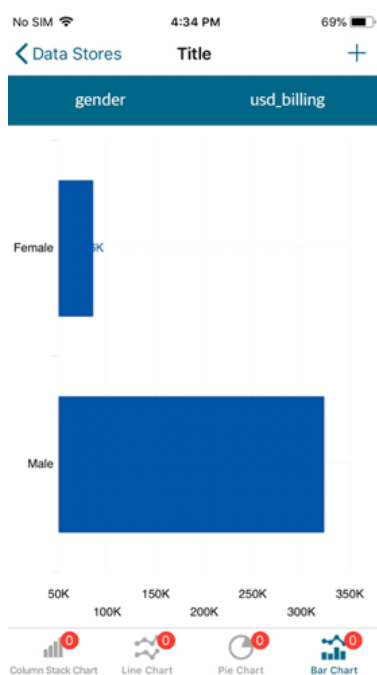
b. Line Chart



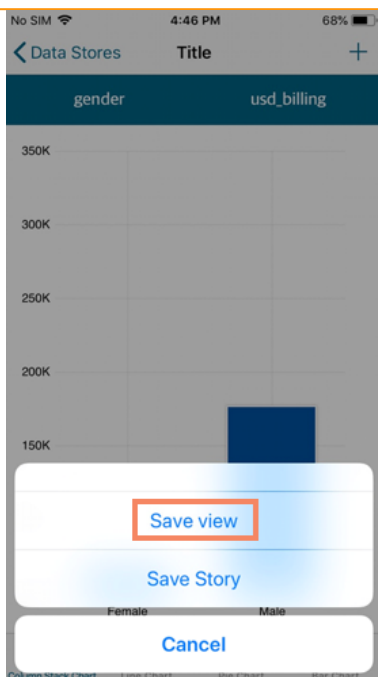
c. Pie Chart



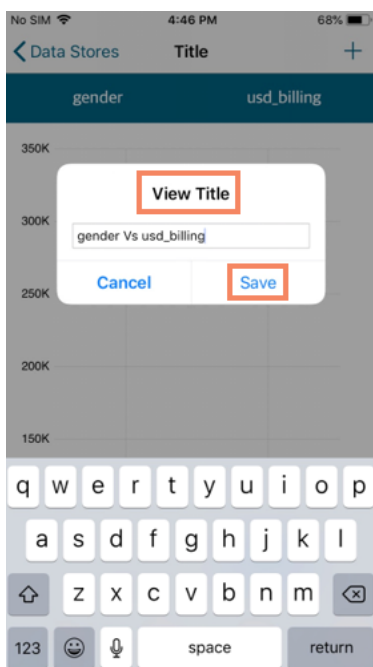
d. Bar Chart



- vii) Click the 'Add' icon from the header
- viii) A new window pops-up leading users to save a view (or a story)
- ix) Select 'Save View' option



- x) A new window will appear prompting users to give a view title
 - a. Enter the view title in the given space
 - b. Click 'Save'



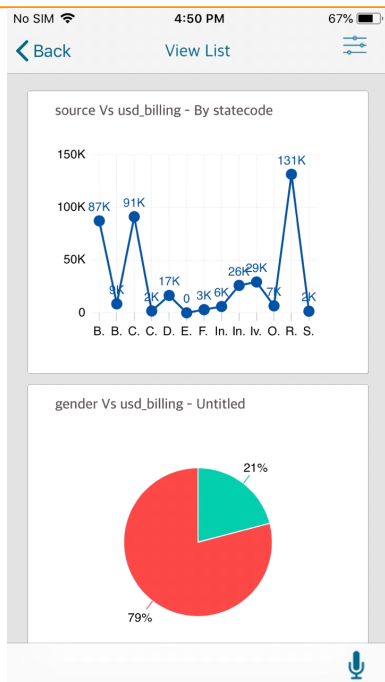
- xi) Users get notified by a message that the newly created view has been saved



- xii) The view title will be added to the View
- xiii) Select another combination of a dimension and measure to create another view following the steps mentioned above.
- xiv) Click the 'Add' + icon again to get the 'Save' pop-up window
- xv) Click 'Save Story' option to save the Story



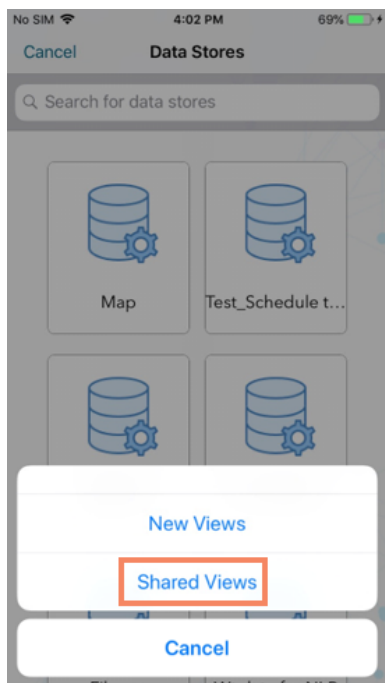
- xvi) Users will get the view list from the saved story



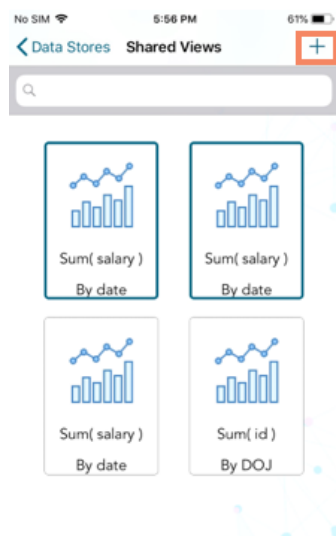
6.2. Use a Shared View

The present section will describe the steps to create a new story using the ‘Shared Views’

- i) Click the ‘Create Story’ option
- ii) Choose a datastore
- iii) Select the ‘Shared Views’ option



- iv) All the shared views for the selected datastore will be listed
- v) Select all the shared views that you want to add in the story
- vi) Click the ‘Add’ icon provided in the header



- vii) The selected shared views will be added to the story
- viii) The View List screen will appear for the same


Note: Users can add multiple views to a business story, before saving it. Once the ‘Save Story’ option is applied, no more views can be added to that story, except using the NLQ functionality.

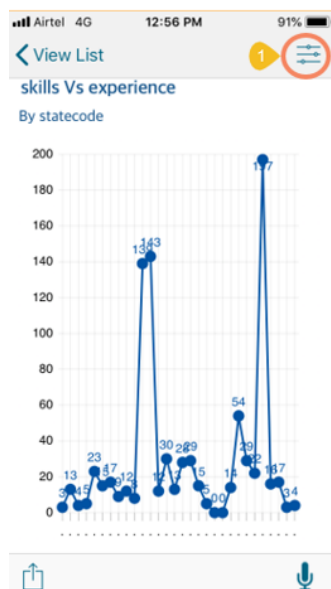
6.3. Applying Filters

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.

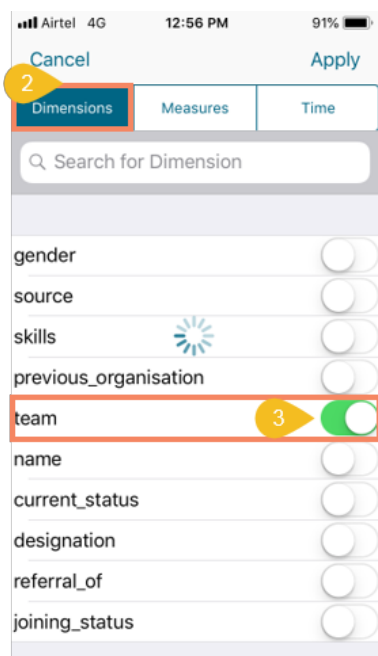
Users can apply Global and Local filters by using the Filter icon from the story view page (Global filter) and analyze mode page (Local filter).

6.3.1. Local/ View Specific Filter

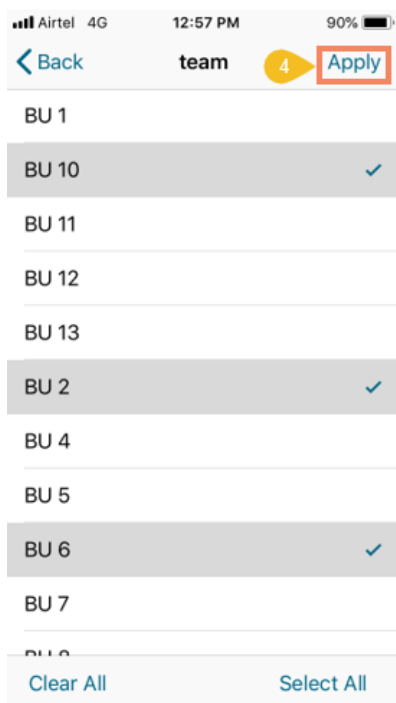
- i) Navigate to a saved view
- ii) Click the ‘Filter’  icon from the header panel



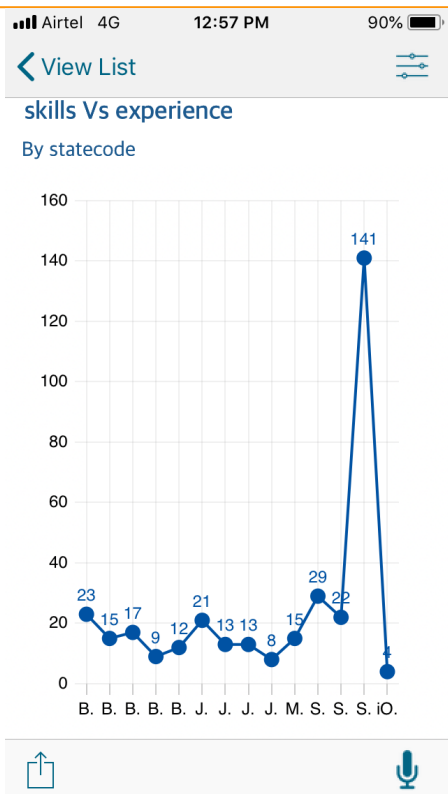
- iii) Users get a new page displaying the list of dimensions, measures, and time fields
- iv) By selecting Dimension as filter conditions, a list of corresponding dimensions appear
- v) Select one or more-dimension values as filter conditions using the enable/disable button



- 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'

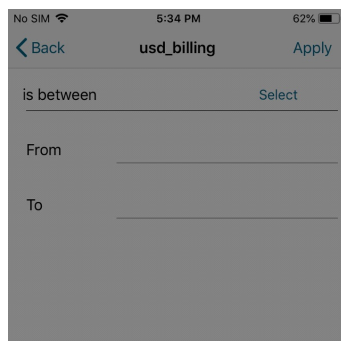


- ix) The view will be filtered as per the set filter conditions



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.

No SIM 5:34 PM 62%

< Back expected_joining_date Apply

From

Select Date Select

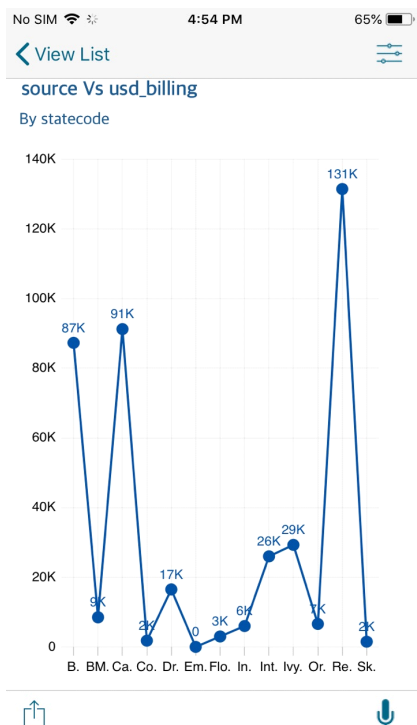
To

Select Date Select

Done

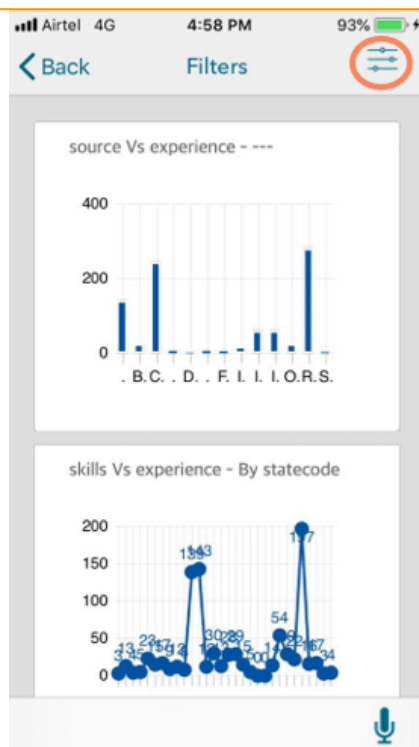
22	April	2015
23	May	2016
24	June	2017
25	July	2018
26	August	2019
27	September	2020
28	October	2021

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

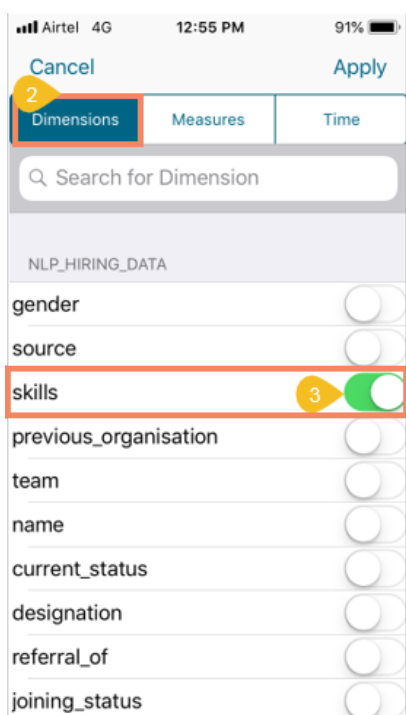


6.3.2. Global Filter

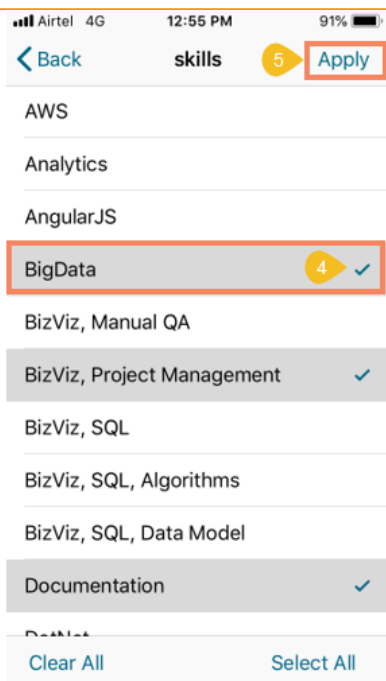
- i) Navigate to the View List of a story
- ii) Click the 'Filter' icon from the header panel



- 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'

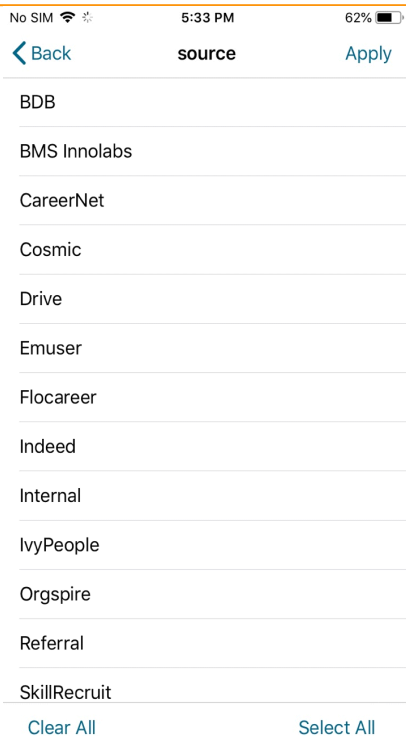


ix) The view will be filtered as per the set filter conditions



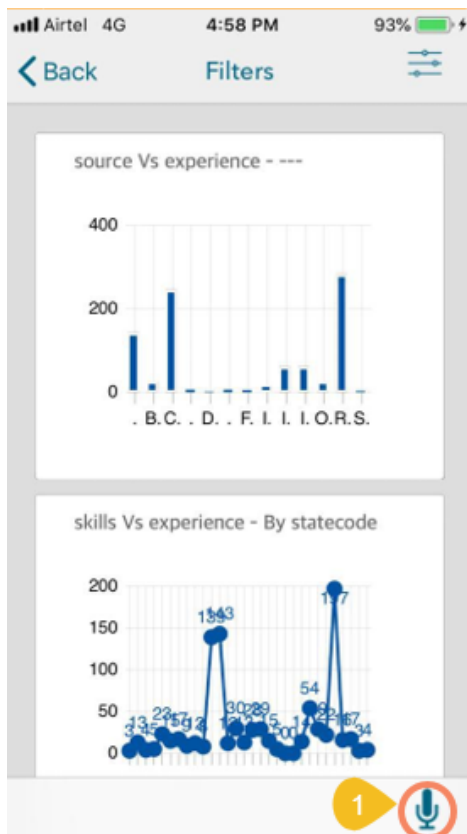
Note:

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

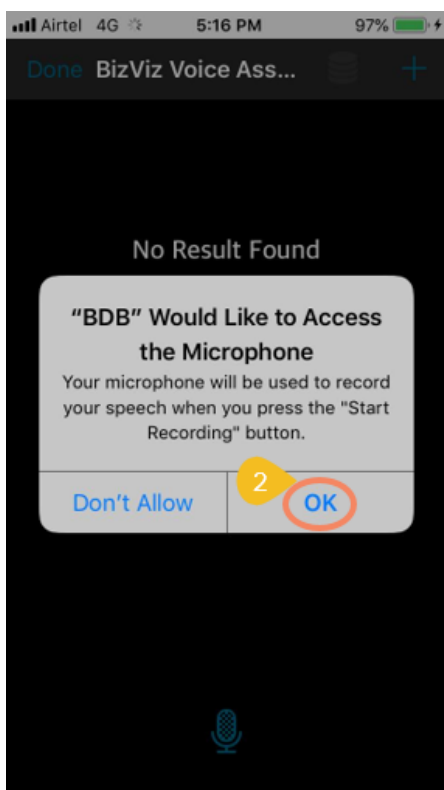


6.4. NLQ based Voice Assistance

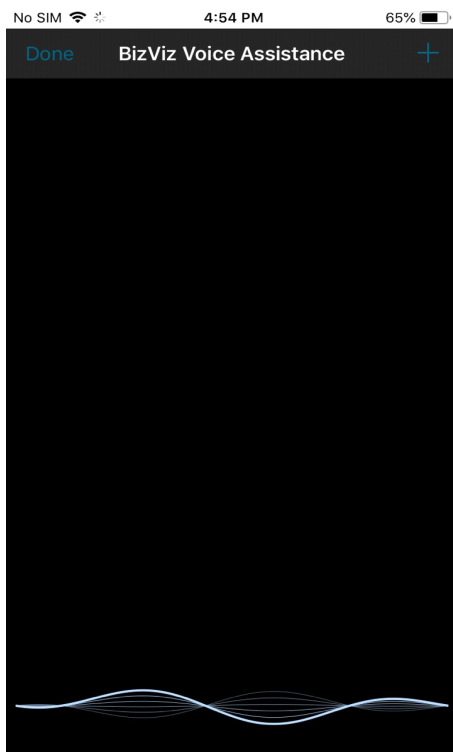
- i) Select a story document
- ii) A microphone icon appears at the bottom of the page
- iii) Click on the microphone icon



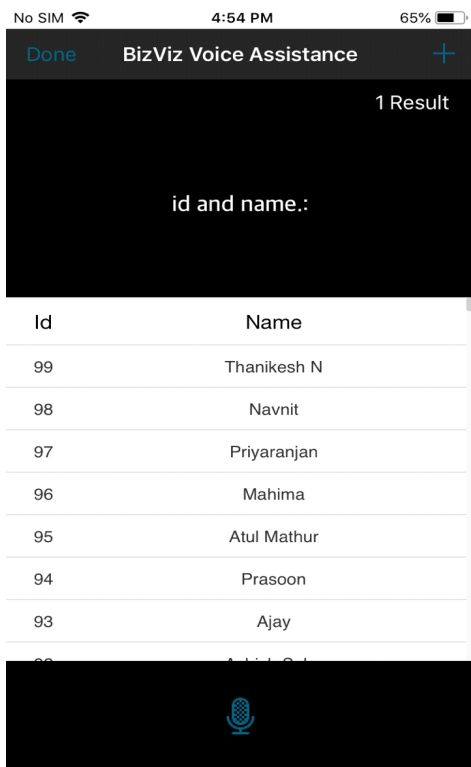
- iv) Users get directed on the BizViz Voice Assistance page with a message asking BDB to allow the microphone access
- v) Click 'OK' to provide the access



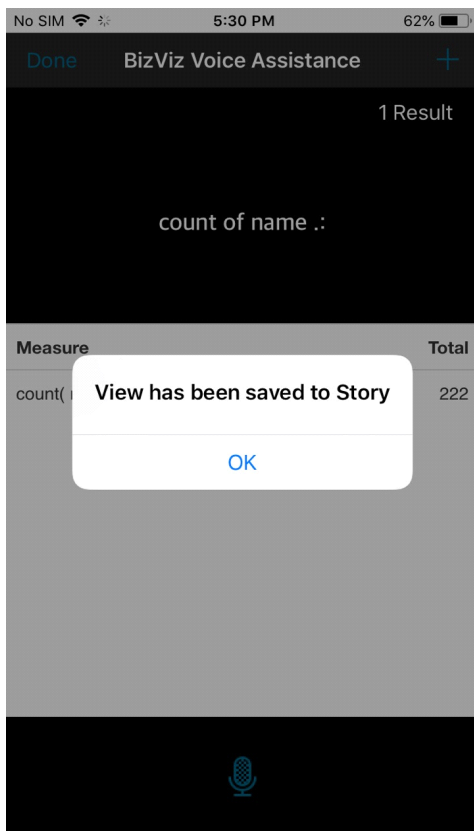
- vi) Press the Microphone icon displayed on the Voice Assistance page and use your voice command to search for specific data. It will create waves on the screen while you speak



- 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



7. Options

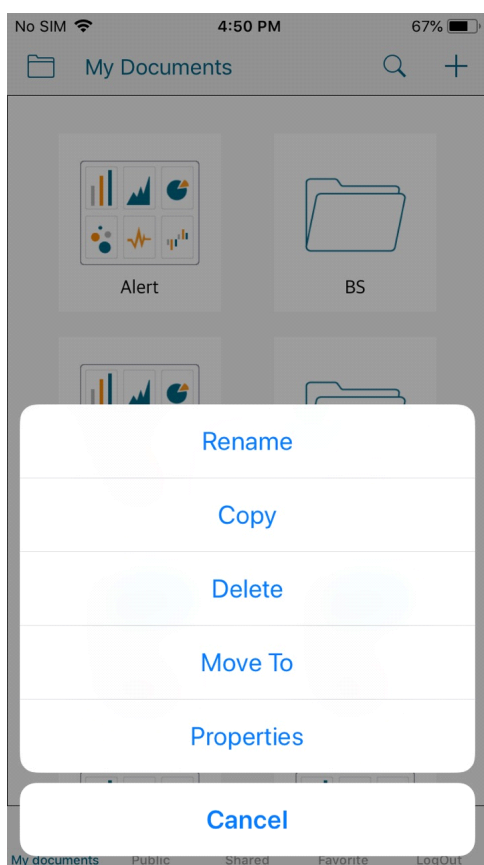
Folders and documents are credited with various options. This section describes all the options assigned to a folder, Story, and dashboard.

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

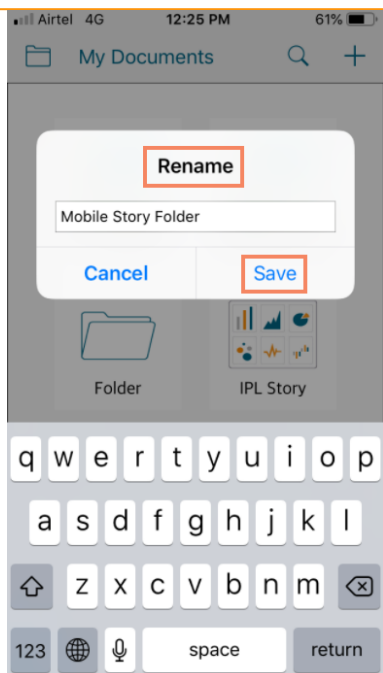
This section describes all the options assigned to a folder

- 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:

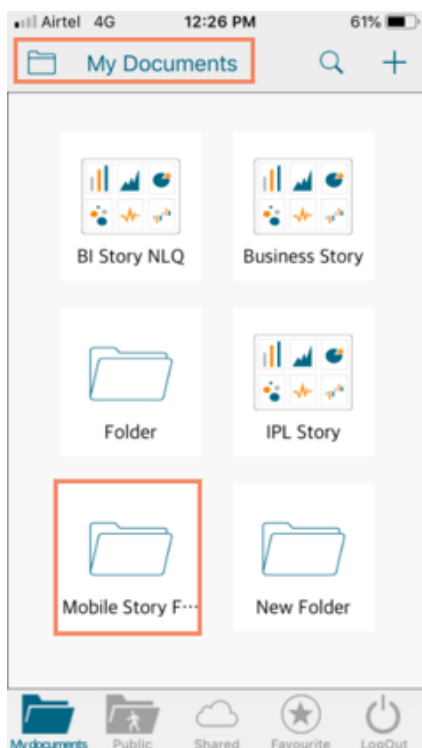


7.1.1. Renaming a Folder

- 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'**

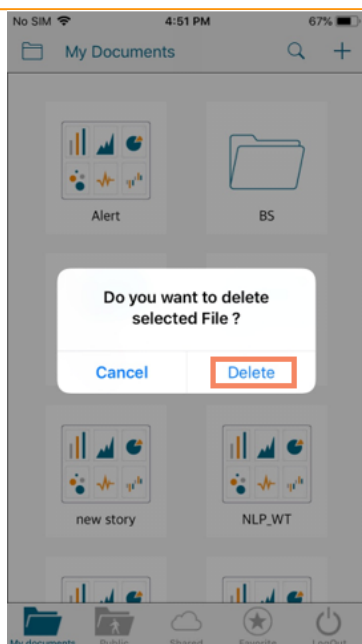


- v) A success message will be displayed
- vi) The folder gets renamed successfully



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'



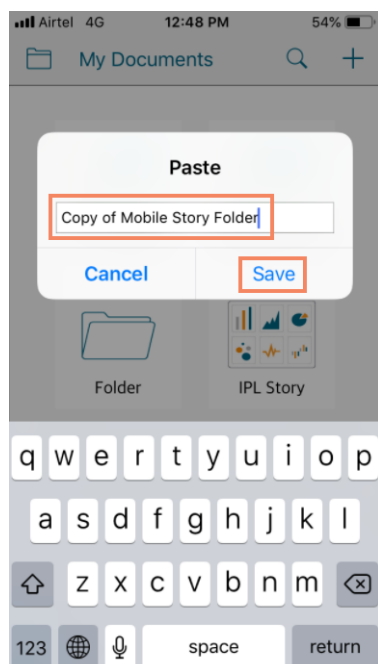
- iv) The selected folder gets removed from the platform

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

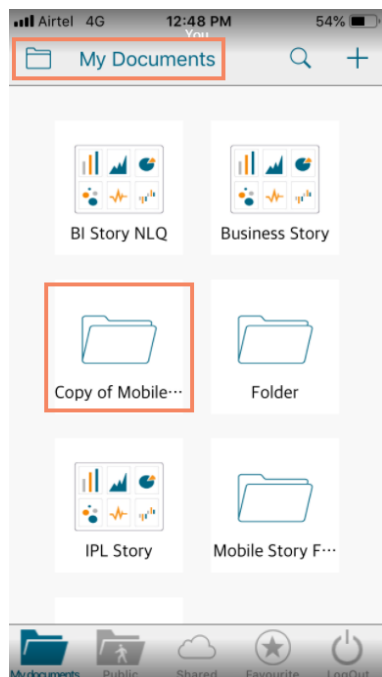
7.1.3. Copying and Moving a Folder

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’

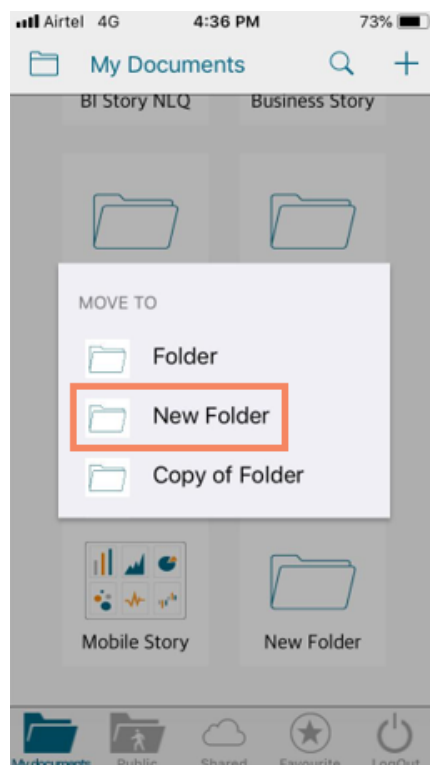


- viii) A message pops-up to assure that the copied folder has been pasted successfully with a different name.

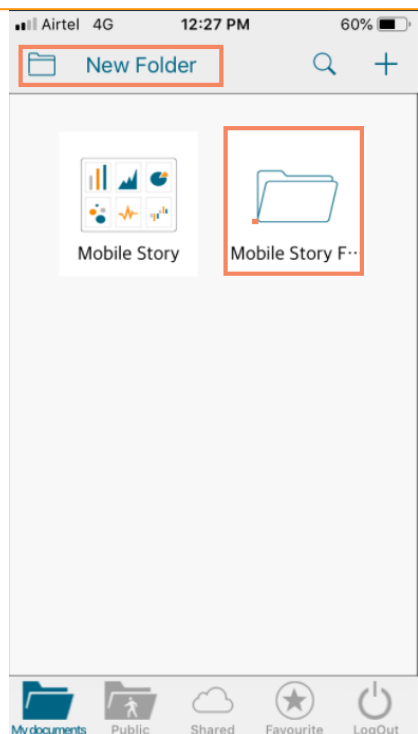


7.1.4. Move To

- 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



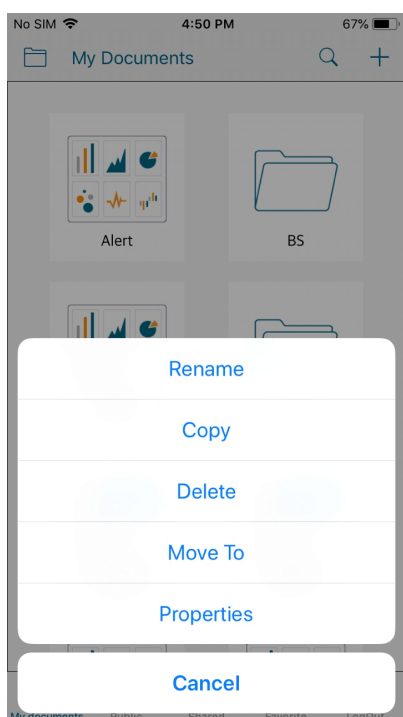
- iv) The folder gets moved to the recently selected folder as displayed below



7.2. Options for a Story

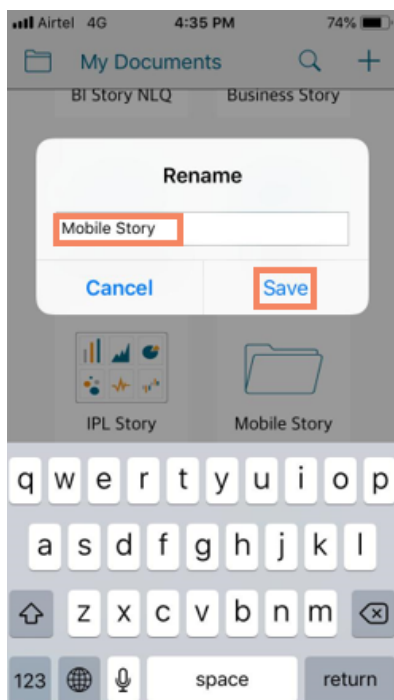
A story created under 'My Documents,' 'Public' or shared using the 'Copy To' option under the 'Shared' is credited with various options. This section describes all the options assigned to a story.

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

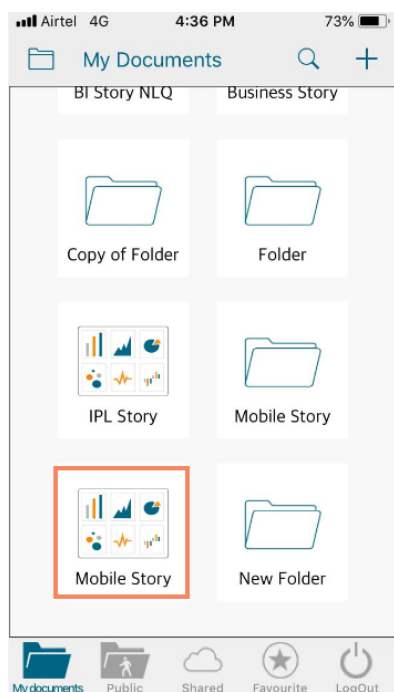


7.2.1. Renaming a Story Document

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

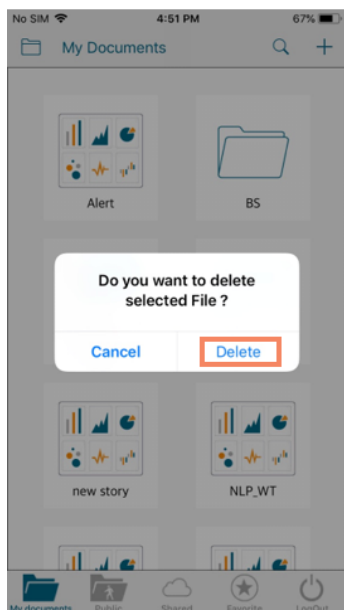


- v) A success message will be displayed
- vi) The story document name will be changed successfully



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'



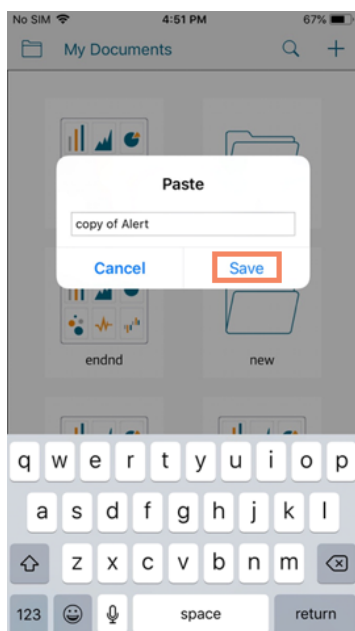
- iv) The selected story document will be removed.

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

7.2.3. Copying and Moving a Business Story

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

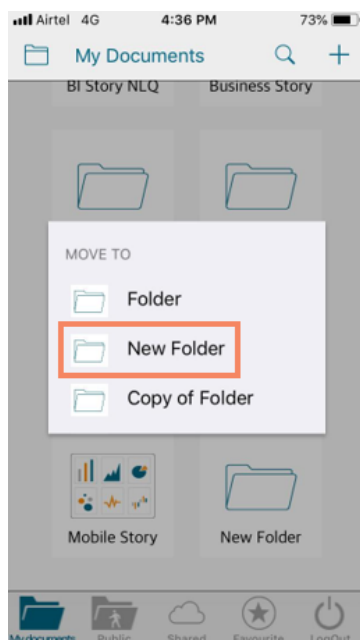
- i) Select **'Copy'** from the Options menu
- ii) Navigate to **'My Documents'** or **'Public Documents'** and right-click anywhere
- iii) A context menu will appear with the **'Paste'** option
- iv) Select **'Paste'**
- v) A new window pops-up
- vi) The Name mentioned in the pop-up window shows prefix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



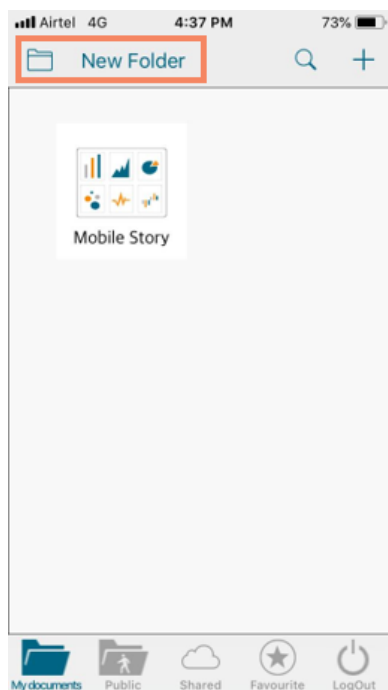
- viii) A message pops-up to assure that the copied story document has been pasted successfully with a different name.

7.2.4. Move To

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



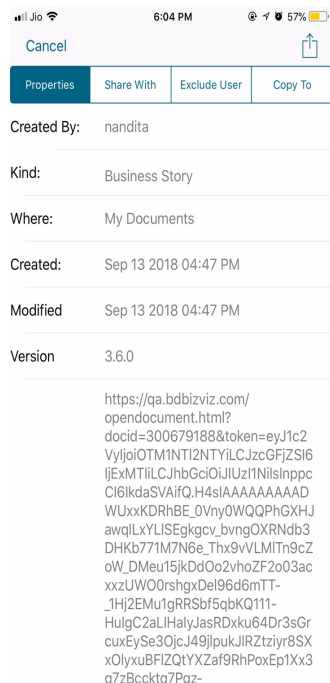
- iv) The story will be moved to the selected folder



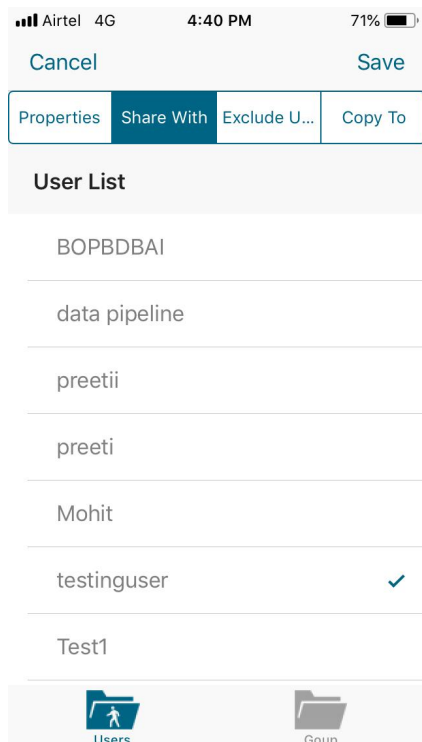
Note: The 'Move To' option is not provided to the story documents shared as the Public Documents or Shared Documents using 'Share With' option.

7.2.5. Properties

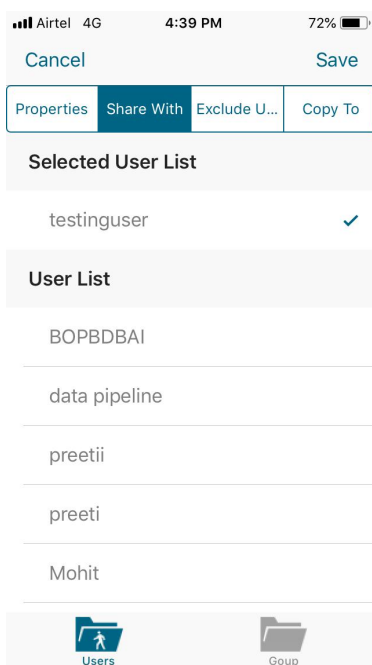
- i) Select **'Properties'** from the Options menu
- ii) A new screen pops-up with four options:
 - a. **Properties:** The basic report properties will be displayed.



- b. **Share With:** The story document 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'**



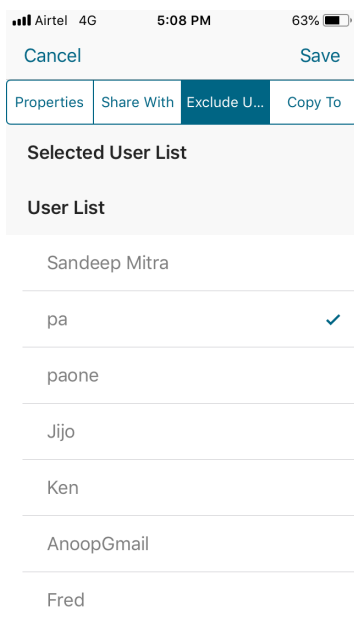
5. Move the selected user or group is displayed under the ‘Selected User List’ or ‘Selected Group List’



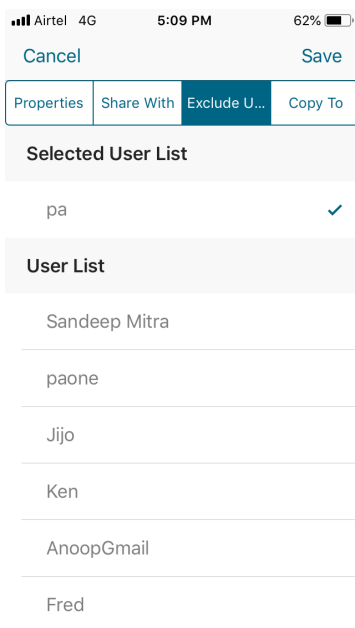
6. The story document will be shared with the selected user or the selected user group.

Note: If a story document 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 story document.
 1. Select ‘Exclude User’ on the Properties pop-up screen
 2. Select and move users from ‘User List’ to ‘Selected User List’ using the arrows
 3. Click ‘Save’

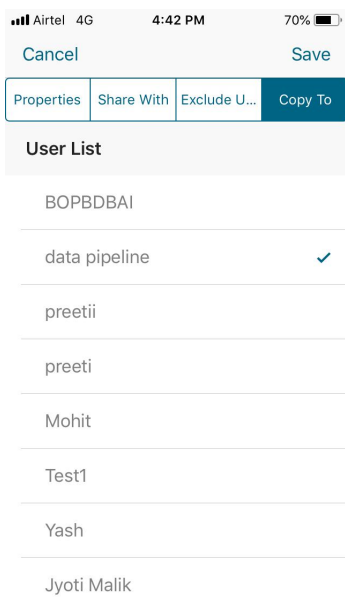


4. The selected user will list under ‘Selected User List’



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

- d. Copy To: A copy of the story document 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 story document will be shared with the selected user(s).

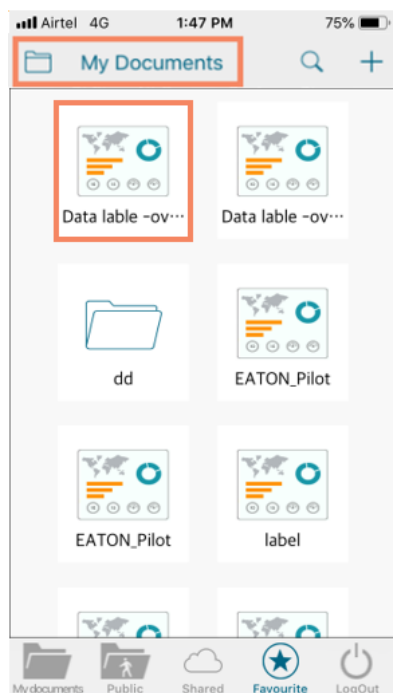
Note:

- a. If a story document is shared using this option, then the selected users will have rights to modify the received story.
- b. Users can login to the selected users with whom they have shared the story document via the ‘Copy To’ option.

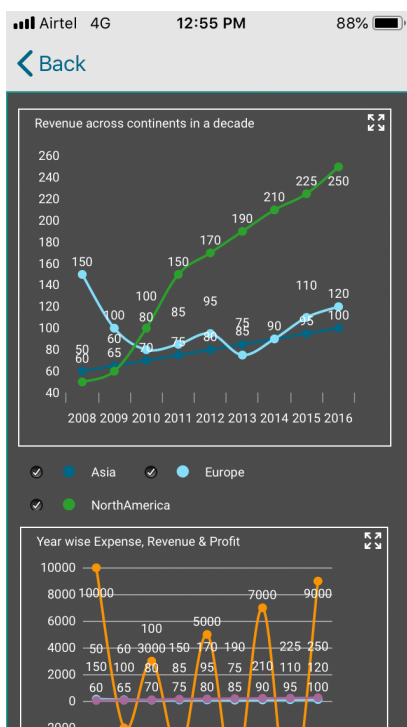
7.3. Options for a Dashboard

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.

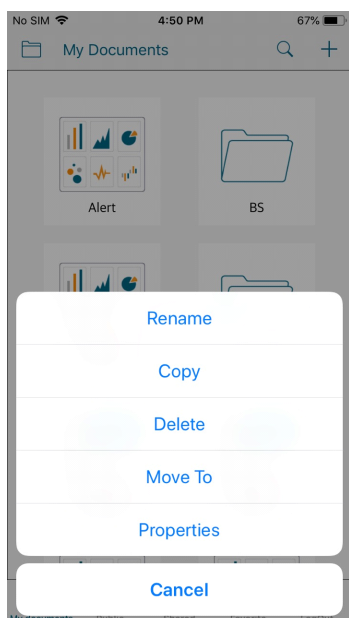
E.g., there is a dashboard titled ‘Data label-overlapping test,’ tap on the dashboard.



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

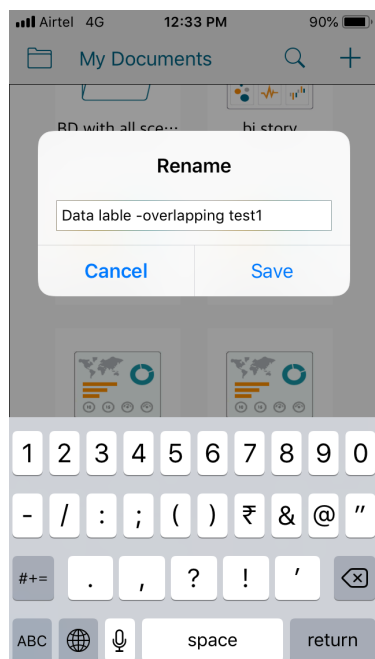


- i) Navigate to a dashboard using ‘My Documents’, ‘Public’ or ‘Shared’ places
- ii) Select a story document and hold the right-click on it
- iii) A context menu opens with the following options:



7.3.1. 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**'

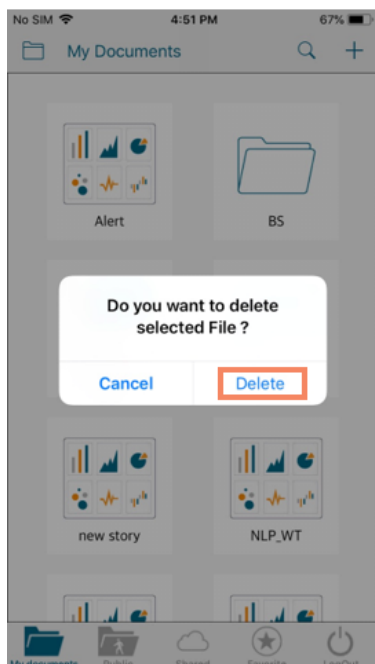


- v) A success message will be displayed
- vi) The dashboard name will be changed successfully

7.3.2. 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'**



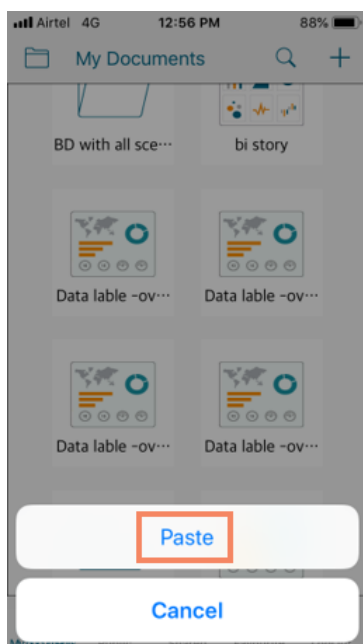
- iv) The selected dashboard will be removed.

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

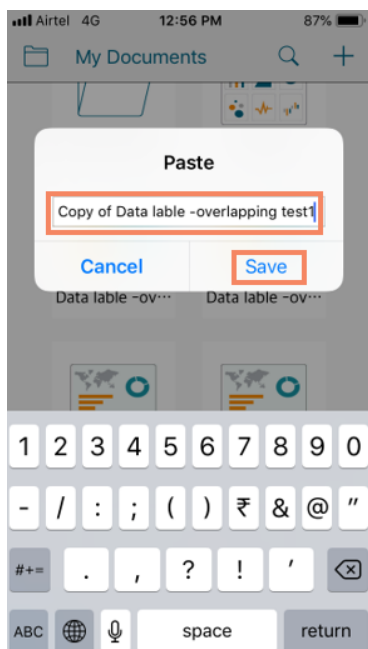
7.3.3. Copying and Moving a Business Story

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

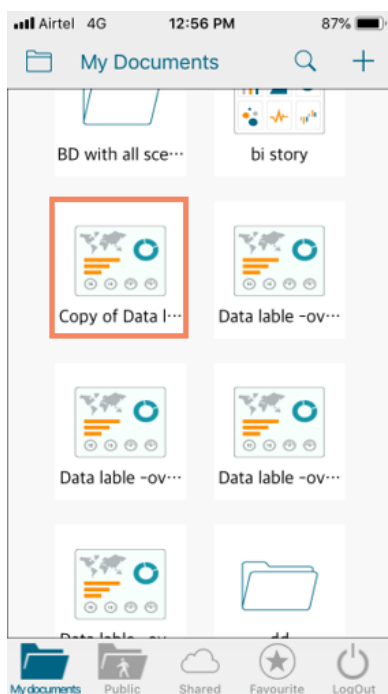
- i) Select **'Copy'** from the Options menu
- ii) Navigate to **'My Documents'** or **'Public Documents'** and right-click anywhere
- iii) A context menu will appear with the **'Paste'** option
- iv) Select **'Paste'**



- 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'

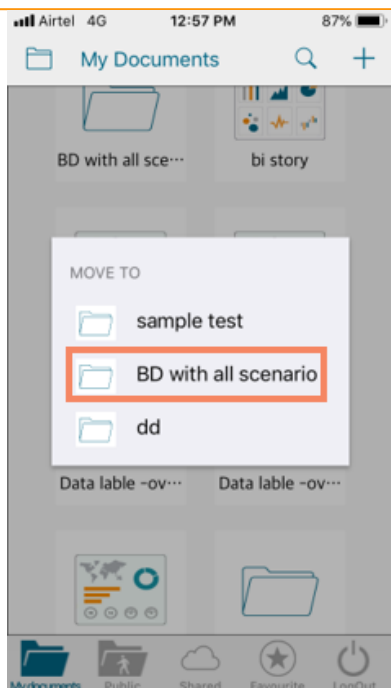


- viii) The copied dashboard has been pasted successfully with a different name.

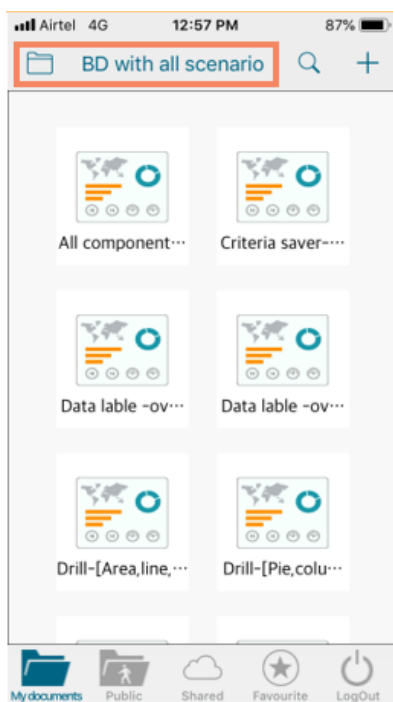


7.3.4. Move To

- 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



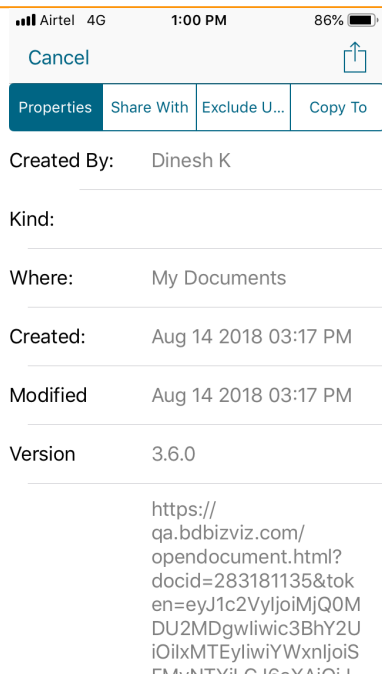
iv) The dashboard will be moved to the selected folder



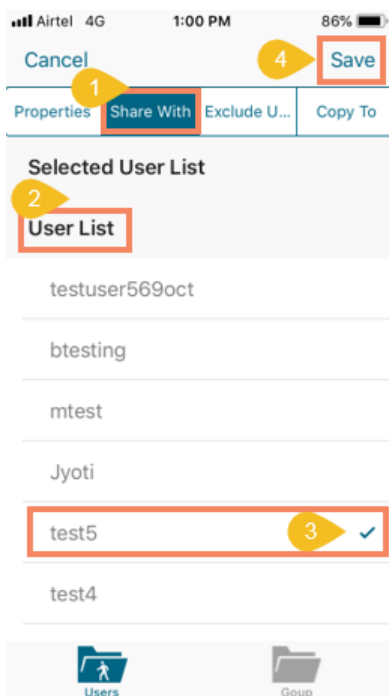
Note: The 'Move To' option is not provided to the story documents shared as the Public Documents or Shared Documents using 'Share With' option.

7.3.5. Properties

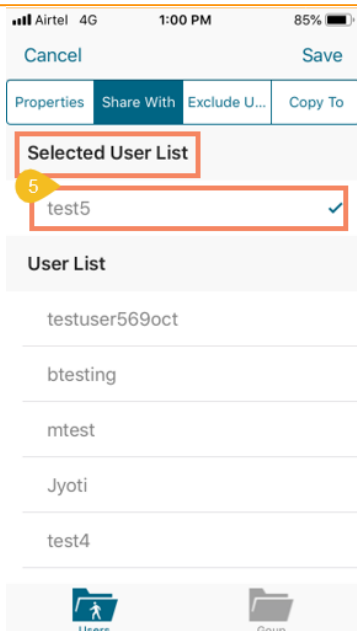
- i) Select 'Properties' from the Options menu
- ii) A new screen pops-up with four options:
 - a. Properties: The basic dashboard properties will be displayed.



- 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'**



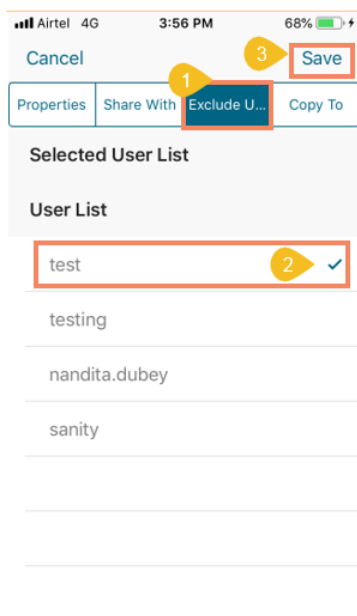
5. The selected user or group is displayed under the **'Selected User List'** or **'Selected Group List'** indicating that the dashboard has been shared with those user(s) or user group(s).



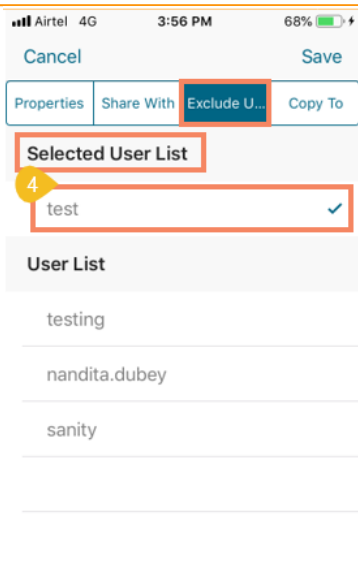
6. The dashboard will be shared with the selected user(s) or selected user group(s).

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'

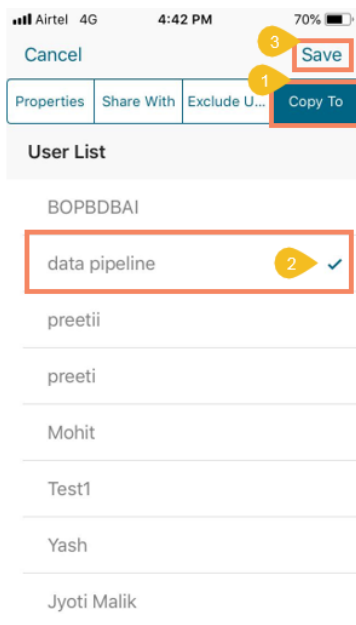


4. The user(s) list(s) under the 'Selected User List'



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).

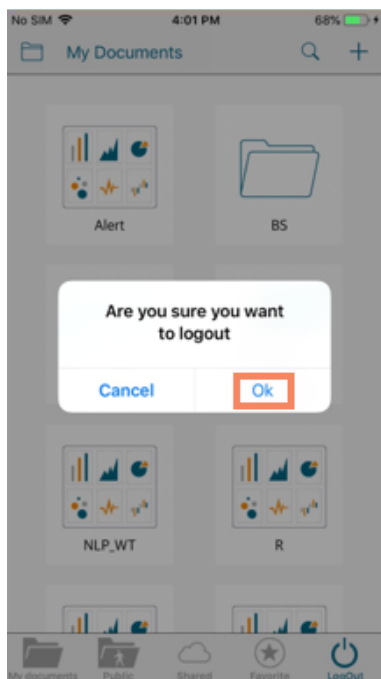
Note:

- 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.