Administration Guide

Platform R-3.7

Contents

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 Platform 1.0	June 9th, 2015	First Release of the Document
BDB Platform 2.0	February 18th, 2016	Updated Document
BDB Platform 2.1	May 11th, 2016	Updated Document
BDB Platform 2.5	November 9th, 2016	Updated Document
BDB Platform 2.5.1	January 3rd, 2017	Updated Document
BDB Platform 2.5.3	March 16th, 2017	Updated Document
BDB Platform 3.0	August 31st, 2017	Updated Document
BDB Platform 3.0	October 31st, 2017	Modified Document
BDB Platform 3.2	February 2nd, 2018	Updated Document
BDB Platform 3.5	April 15th, 2018	Updated Document
BDB Platform 3.6	August 20th, 2018	Updated Document
BDB Platform 3.7	October 10th, 2018	Updated Document

1.2. Overview

This guide covers:

- Introduction and steps to use the Big Data BizViz Platform
- Configuration details for the Big Data BizViz Platform and its Plugins
- Administrative Tasks and Features

1.3. Target Audience

This guide is aimed at system administrators who manage the Big Data BizViz Business Intelligence Platform.

2. Introduction

2.1. Introducing the BDB Platform

BDB offers a unique BI platform that can give users better knowledge and insight into their business to make informed decisions. BDB Decision Platform has multiple Big Data connectors that makes it both an exclusive and interesting tool. It allows its users to create web services based on a verity of database connections. The integrated dashboard designer can then utilize the generated web service. Users are enabled to provide descriptive, diagnostic, predictive, and prescriptive analytics in the cloud, on mobile devices, and on-premise.

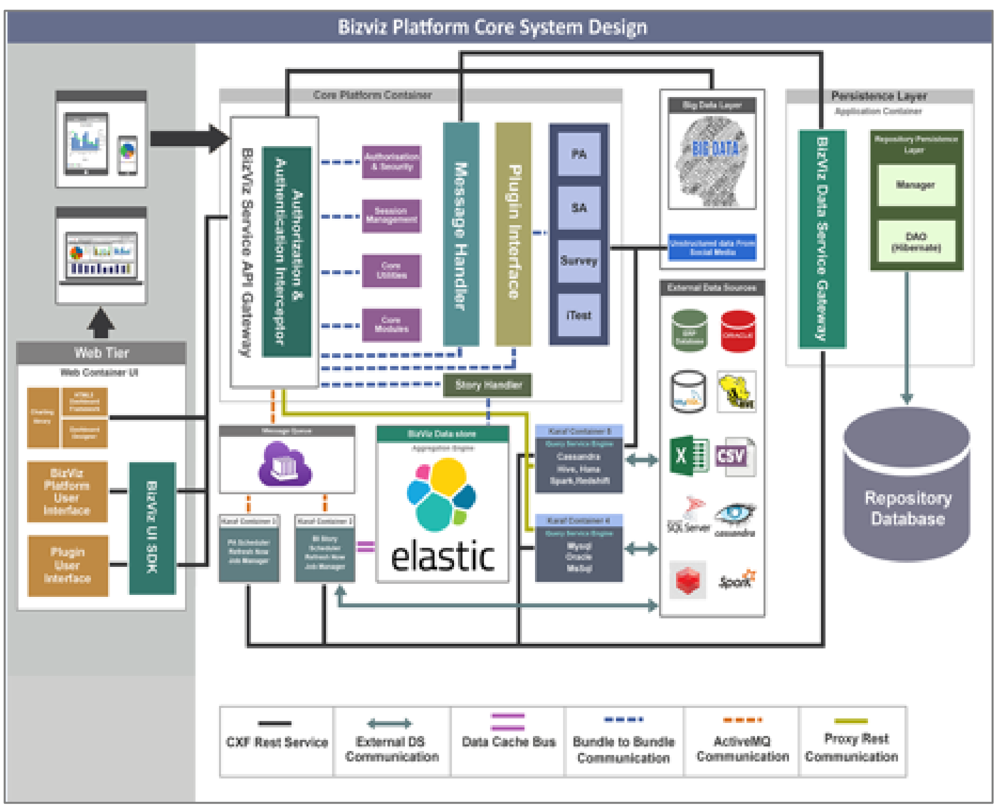
Customers having multiple branches can efficiently manage data by creating a single space for each branch within this platform. They can also view the information collected from multiple branches via dashboards and BI Stories. They can use Data Preparation and Predictive Analysis to prepare and organize their existing data to gain actionable insight into their business.

2.2. Prerequisites and Supported Devices

- A browser that supports HTML5
- Operating System: Windows 7
- Basic understanding of the BizViz Server

3. Architectural Overview

The BDB Platform has a highly scalable, n-tier client-server architecture that serves users via mobile devices, web browsers, and desktop client software.



4. Getting Started with the BDB Platform

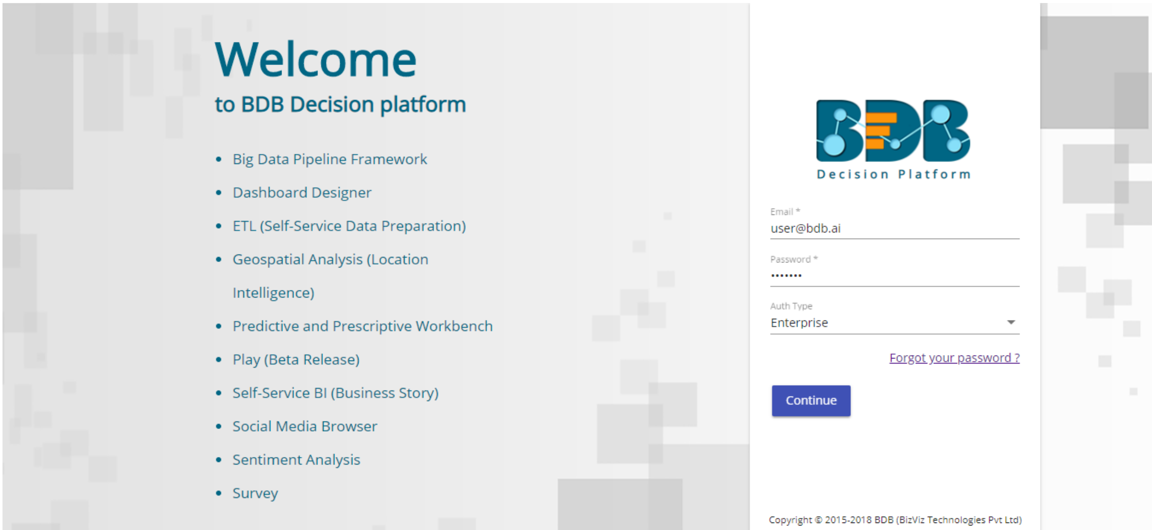
4.1. Accessing the BDB Platform

This section explains how to access the BDB Platform and a variety of plugins that it offers:

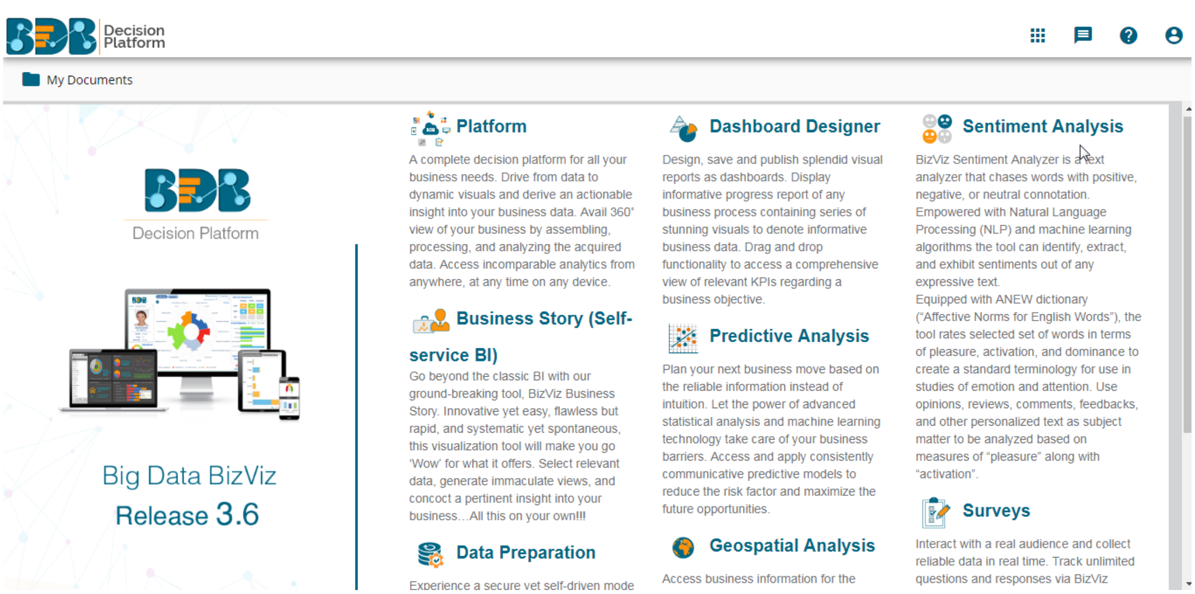
i) Open BDB Enterprise Platform Link: https://app.bdb.ai

ii) Enter your credentials to log in

iii) Click the '**Continue**' option



iv) Users get redirected to the BDB Platform homepage

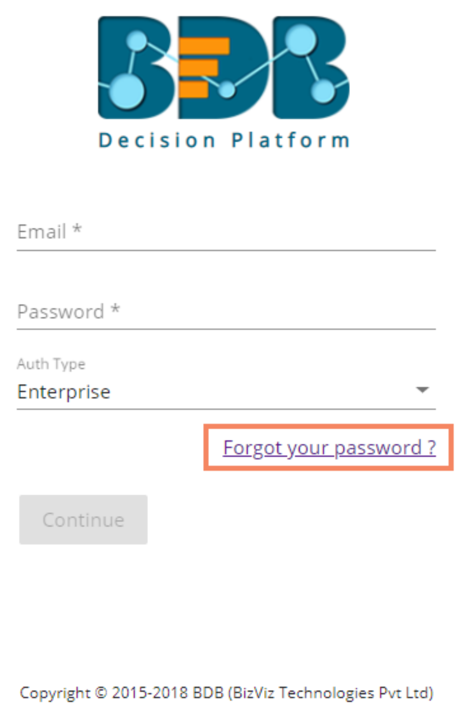


4.1.1. Forgot Password Option

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

i) Navigate to the Login page

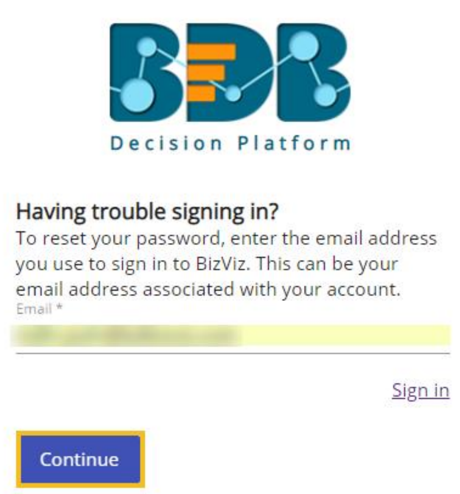
ii) Click ‘**Forgot your password?**’ option



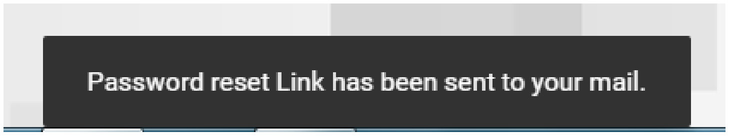
iii) A new window opens

iv) Provide the email id that is registered with BDB to send the reset password link

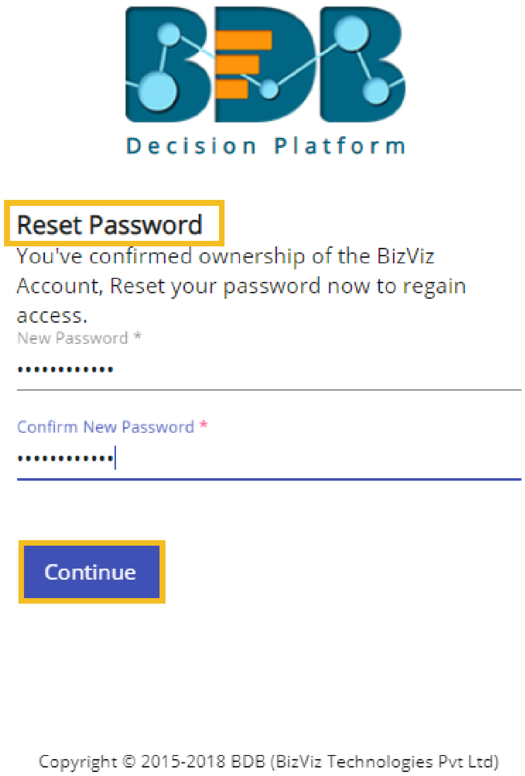
v) Click ‘**Continue**’ option



vi) Users may be redirected to select a space in case of multiple spaces under one server link(They need to select a space and click the 'Continue' option once again). If users do not have multiple spaces then, a message appears to notify the user that about the password reset link (The users receive the reset link via their registered email.)



vii) Click the link from your registered email
viii) Users get redirected to the 'Reset Password' page to set a new password
ix) Set a new password
x) Confirm the newly set password
xi) Click the '**Continue**' option



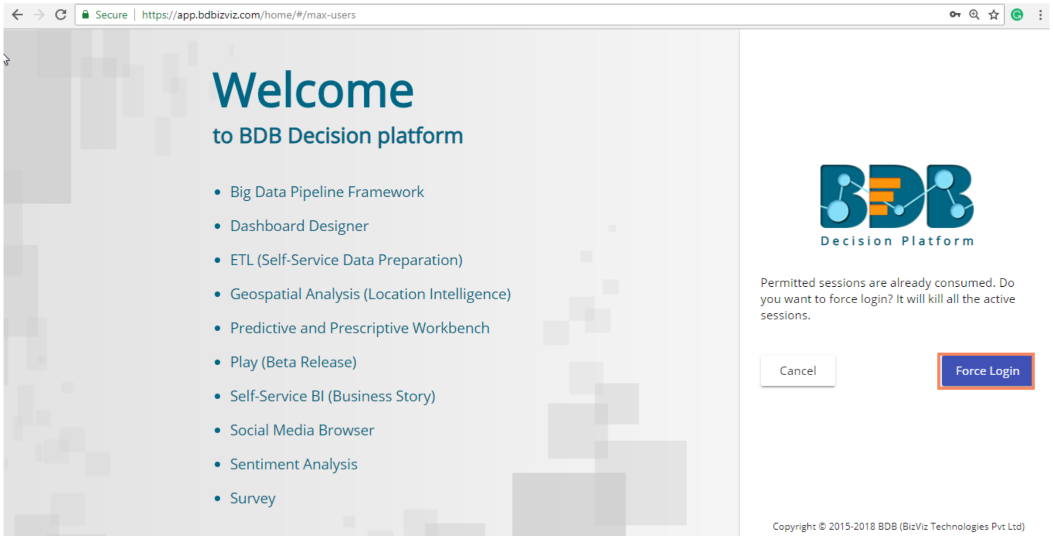
xii) The password for the selected BDB account gets reset

4.1.2. Force Login

The '**Force Login**' functionality controls the count of active sessions up to three at a time.

i) Users can access only 3 sessions at a time using different devices

ii) A warning message appears while accessing the 4th session to notify that the user has consumed all the permitted sessions and a click on the '**Force Login**' option would kill all those active sessions.



4.2. Platform Homepage

The BDB Platform homepage redirects users to access various applications and features within the platform. It also displays information about a user and the documents accessible to the user.

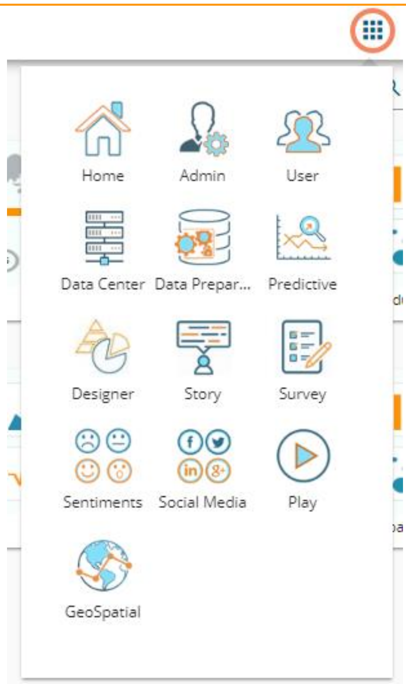
4.2.1. Apps Menu

The Apps Menu button displays all the available applications.

i) Navigate to the Platform homepage

ii) Click the '**Apps**' icon

iii) All the available plugin applications are displayed



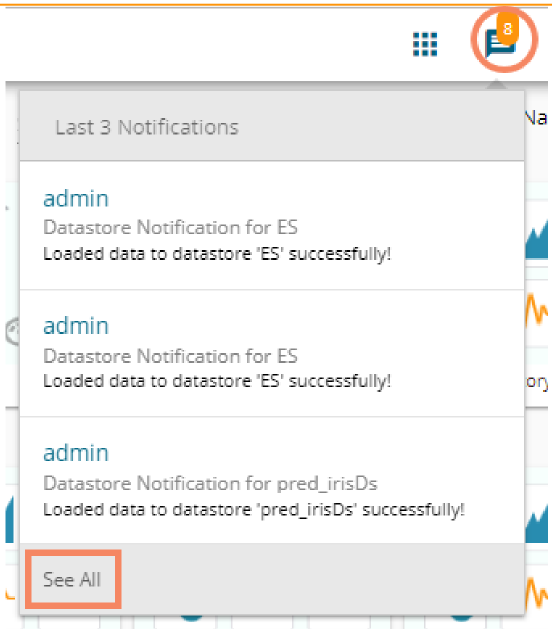
Note: Users can select and open various applications by using the specific App icon provided under the ‘**Apps**’ menu window.

4.2.2. Notification Option

The Notification feature is a way to send and receive messages between people and from processes to people.

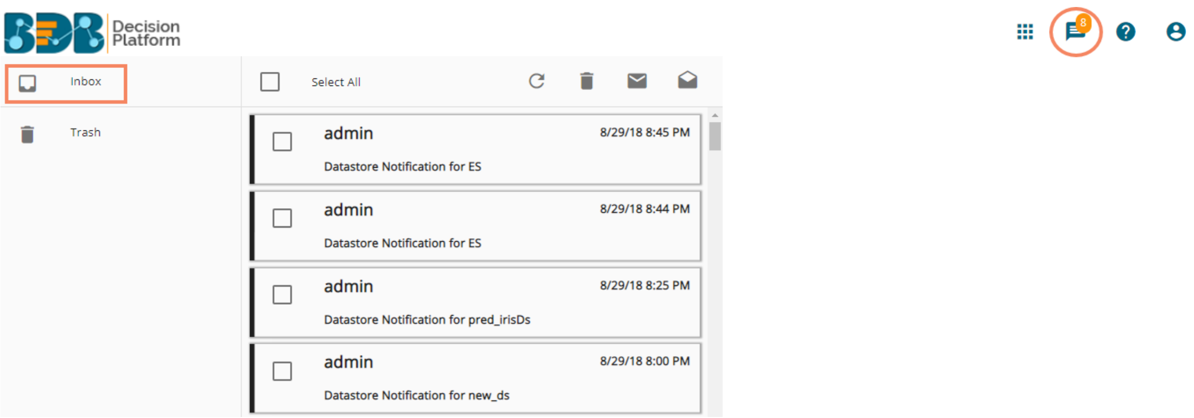
By default, Inbox and Trash folders are provided.

i) Navigate to the Platform home page
ii) Click the ‘**Notification**’ option
iii) A window opens with recent notifications
iv) Click the ‘**See All**’ option

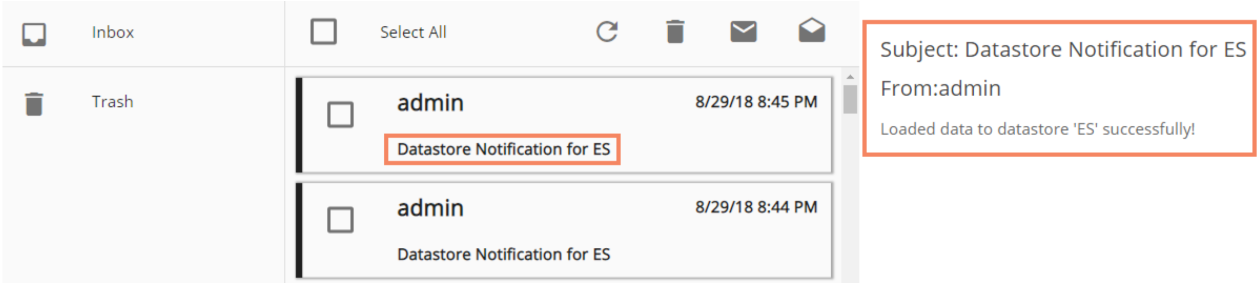


v) Users get redirected to the notification '**Inbox**' page (by default)

(Unread Notifications are indicated using numbers on the Platform homepage on the Notification icon.)



vi) Click on a notification message from the 'Inbox' folder to get the details of the selected message



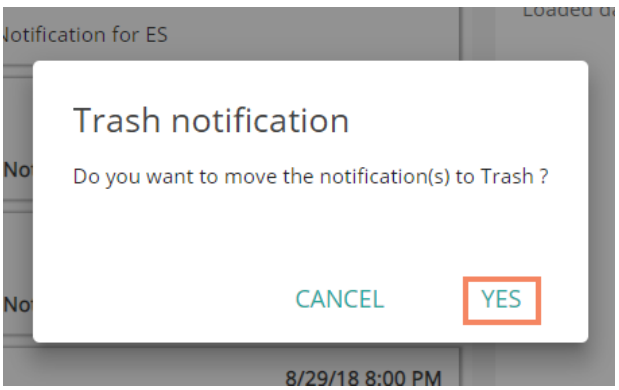
Icons provided on the inbox window:

Icons	Name	Task Assigned
	Trash	Displays messages in a list of all the deleted messages
	Refresh	Receives the latest messages
	Trash Message	Moves the selected messages into the Trash folder
	Unread	Marks messages status as ‘**unread**’
	Read	Marks messages status as ‘**read**’

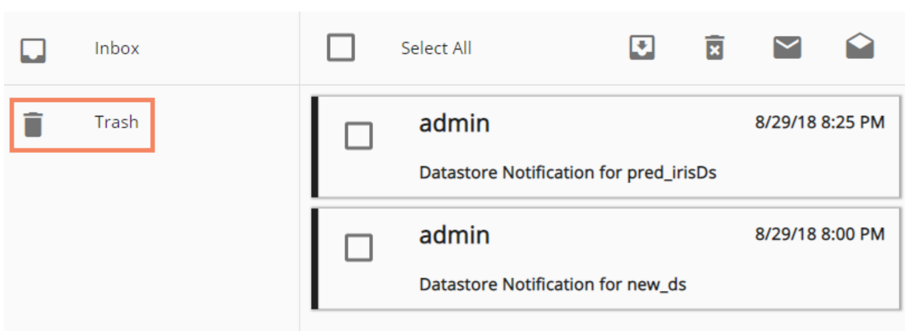
vii) Click the ‘**Trash**’ icon from the header panel of the notification inbox

viii) A message window appears to confirm the action of moving the selected notification to Trash.

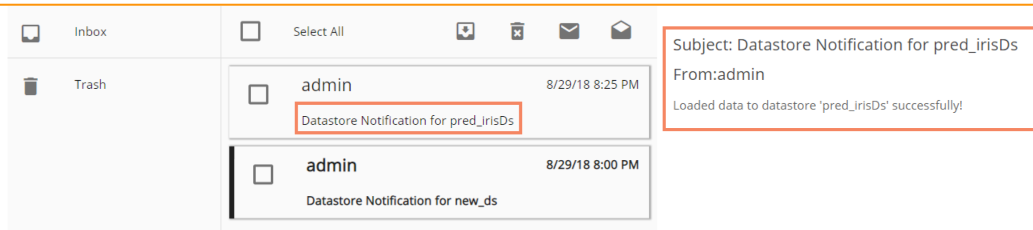
ix) Click ‘**YES**’ to move the notification(s) to Trash.



x) Click to open the list of messages from the ‘**Trash**’ folder



xi) A click on a notification message from the ‘**Trash**’ folder opens the message details



Icons provided on the Trash-box window:

Icons	Name	Task Assigned
	Trash	Displays messages in a list of all the deleted messages
	Move to Inbox	Moves the selected messages to the inbox
	Delete Forever	Removes the selected messages permanently
	Unread	Marks messages status as '**unread**'
	Read	Marks messages status as '**read**'

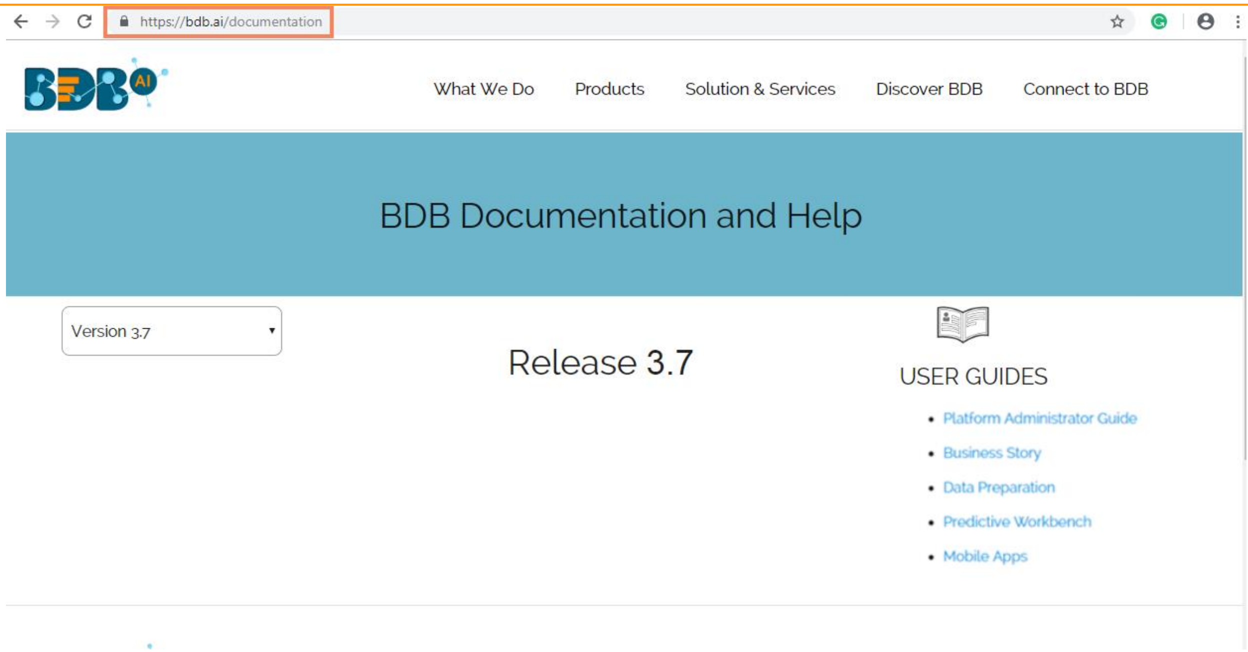
Note: Alert messages display while performing the following actions:

a. Moving messages from inbox to trash
b. Recovering them from trash to inbox
c. Marking messages status as '**read**' in the Inbox/Trash
d. Marking messages status as '**unread**' Inbox/Trash

4.2.3. Help Menu

Users can access the help documents via this menu.

i) Navigate to the Platform home page
ii) Click the '**Help'** icon from the header panel
iii) Users get directed to the 'BDB Documentation and Help' page of the BDB website



4.2.4. User Menu

The administrator can edit basic information, set preferences, change the password, set API token access, and deregister the mobile device by using the '**User**' option provided on the Platform homepage.

i) Navigate to the Platform homepage

ii) Click the '**User**' option

iii) Displays the following options:

  a. **My Account**: Displays account details of the logged in user

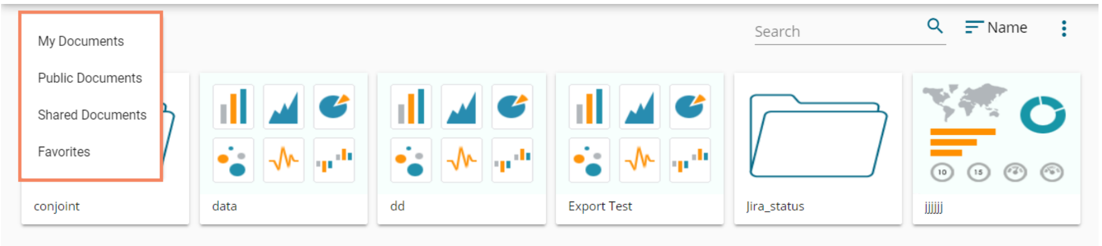
  b. **Sign Out**: Helps to sign out from the Platform

Note: '**My Account**' and '**Sign Out**' options are explained under topic no.9 and 11 of this document. Please refer the same to get more information on these options.

4.2.5. Available Documents

The Home page displays the following documents by clicking on the icon:

1. My Documents
2. Public Documents
3. Shared Documents
4. Favorites



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

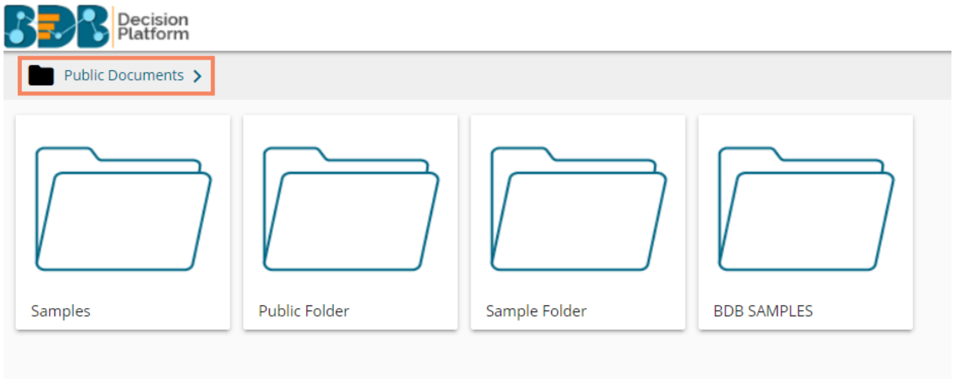
- **Public Documents**
    - The ‘**Public Documents**’ folder is available to all users
    - Users can view documents shared by others

- **Shared Documents**
    - The documents shared by users can be part of the ‘**Shared Documents**’
    - Users can not edit or delete the shared documents

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

Note:

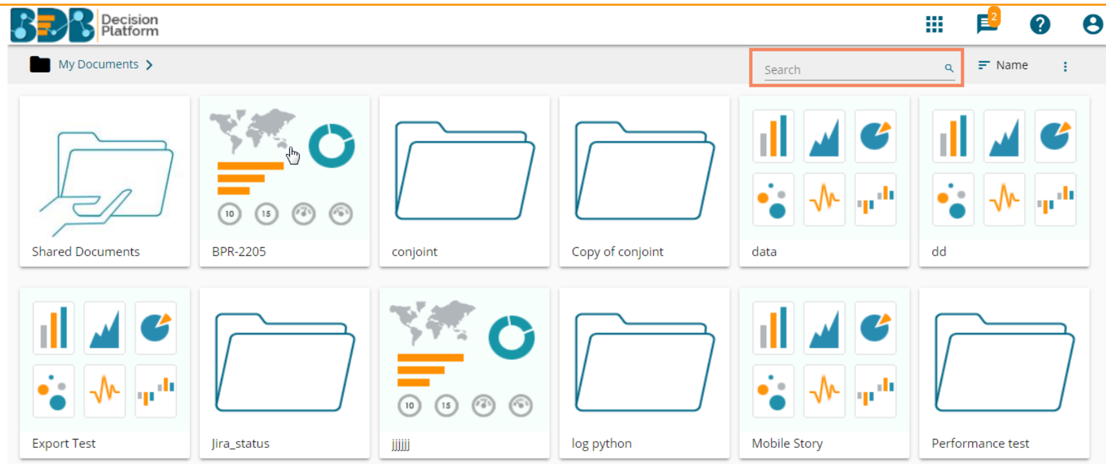
a. The ‘**My Documents**’ space opens by default while opening the BDB Platform homepage.
b. The users are provided with some sample folders and documents by default. E.g., the following image displays the sampled folders available in the Public Documents.



4.2.6. Navigation Bar

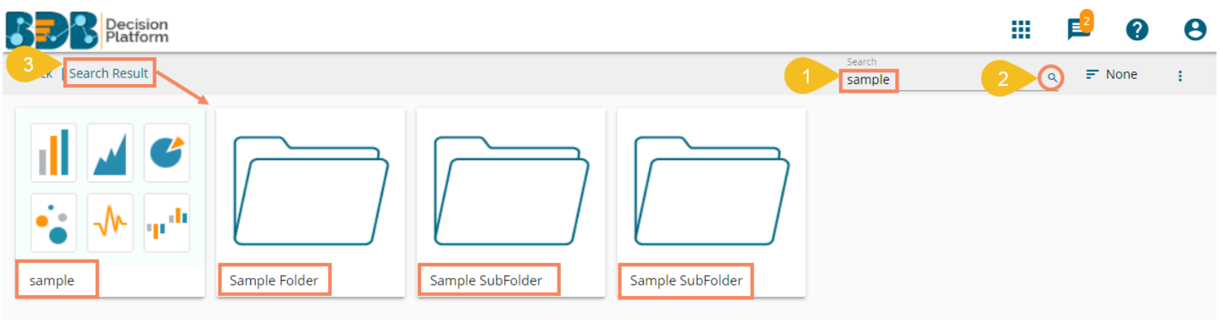
Users can search for a specific document by typing the title of the document in the Navigation bar.

i) Users get a navigation bar/ search bar on the platform homepage



ii) Insert the title of the document you want to search in the given space
iii) Click the 'Search' icon
iv) All the available documents with the matching search term display as 'Search Result.'

E.g., The following image displays all the documents containing the word "**Sample"** in the title:



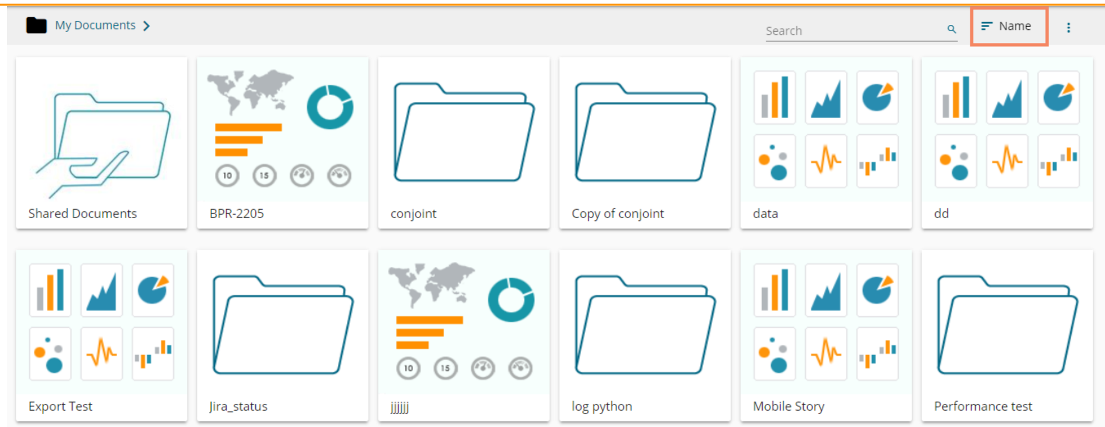
4.2.7. Ordering Documents

This feature allows users to sort documents by selecting a specific order on the platform homepage.

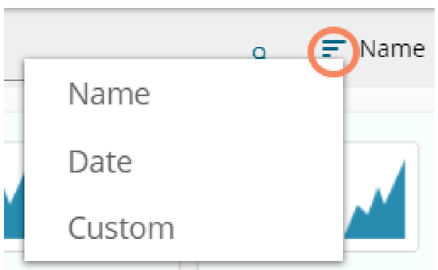
The following options are provided to display the available documents on the platform homepage:

1. **Alphabetical/Name (Ascending and Descending)**
2. **Date (Ascending and Descending)**
3. **Custom**

i) Click the '**Order By**' icon on the platform homepage



ii) A context menu opens with the following sorting options:
   a. Name: Sort documents by their name in ascending or descending order (Ascending is the default order)
   b. Date: Sort documents by date by using this option
   c. Custom: Manually drag and change the order of documents



iii) Select an option from the context menu

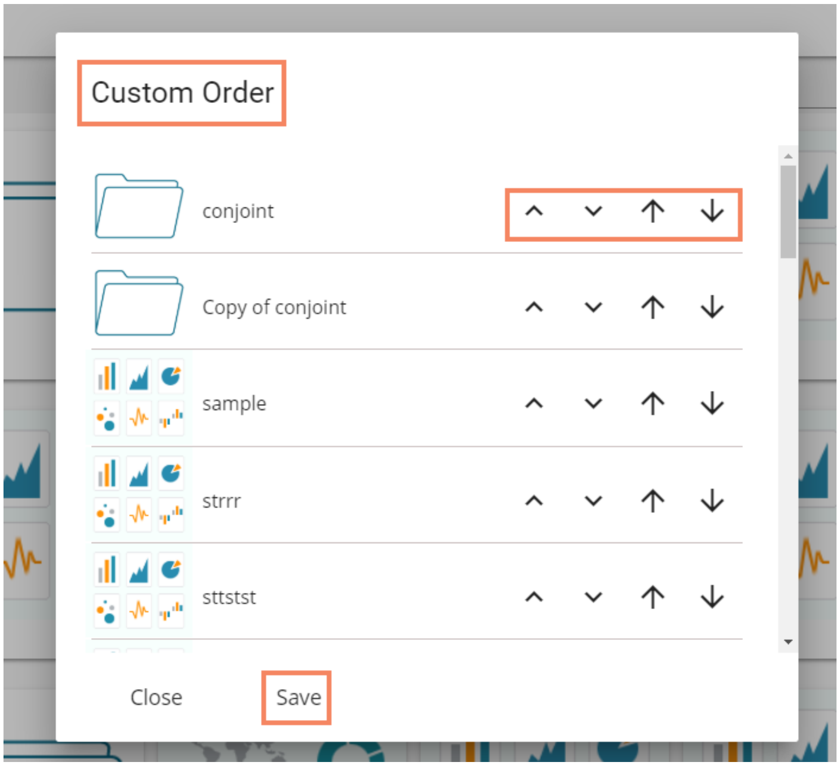
iv) The platform documents get sorted as per the selected order, E.g., The following image shows documents ordered by date

v) Users can set a customized order of the document by choosing the 'Custom' order option

vi) By selecting the '**Custom**' option, the user gets directed to a new window

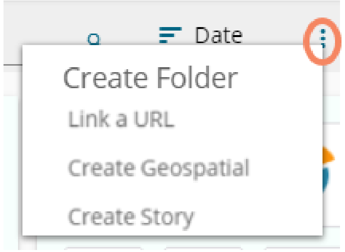
vii) Set a customized order of displaying the available documents or folders by using the given arrows

viii) Click the 'Save' option to save your selected order of display



Note:

- **a.** Platform homepage displays the saved documents as **'My Documents'** by default.
- **b.** A '**Search Bar**' has been provided on the Platform homepage to search the specific folders and files.
- **c.** Documents can be sorted in ascending order by default; users need to click on the 'Name' option again to sort the documents in the descending order.
- **d.** Users can get the Options menu for the selected document space by clicking the 'Options' icon on the platform homepage.



5. Administration

The Administrator manage the entire BDB Platofrm through this module. It controls all the general and user-specific configuration settings for various plugin applications provided in the platform.

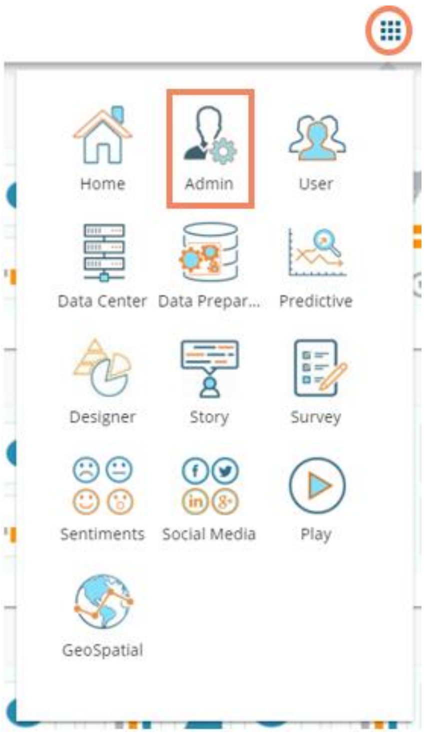
5.1. Accessing the Administration Module

i) Navigate to the Platform home page

ii) Click the '**Apps**' icon

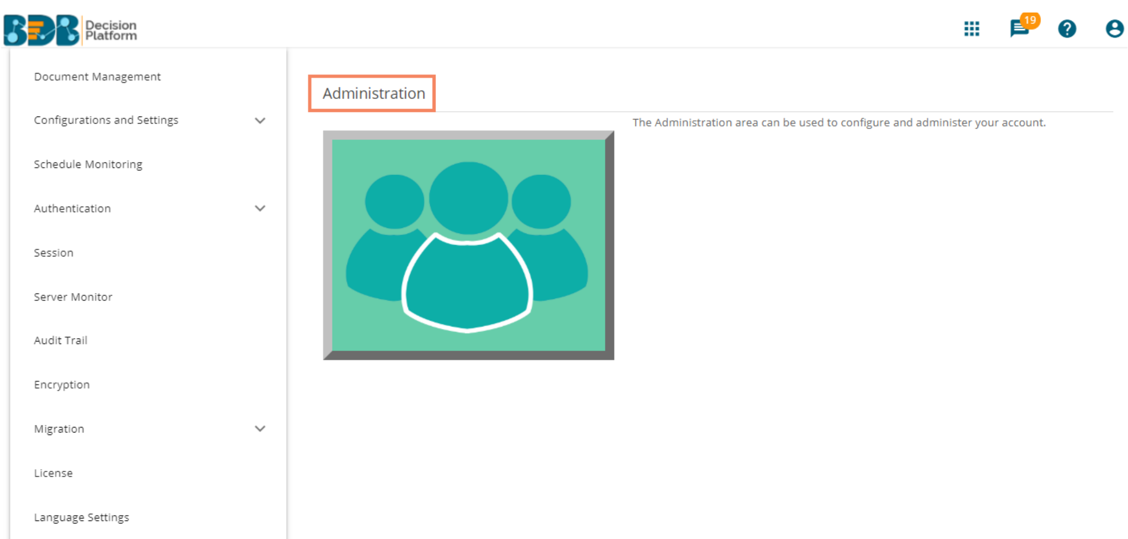
iii) A menu containing all the plugins appears

iv) Select and click the '**Admin**' plugin

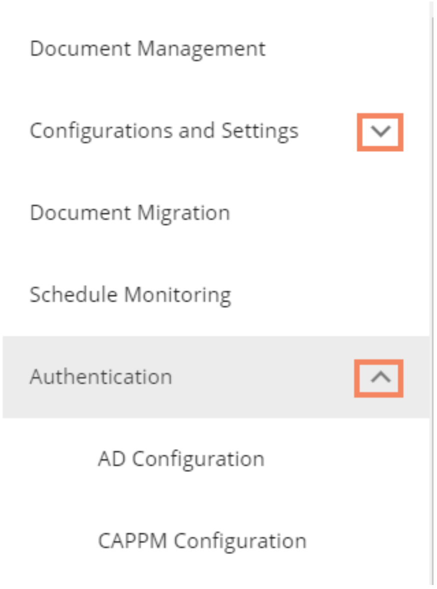


v) Users get directed to the '**Administration**' page

vi) A panel containing various administration options displays on the left side of the page



vii) Click the drop-down sign provided next to the concerned admin option to display the sub-categories for the same. By clicking the drop-down sign, it gets changed into the upward sign as displayed in the below given image:



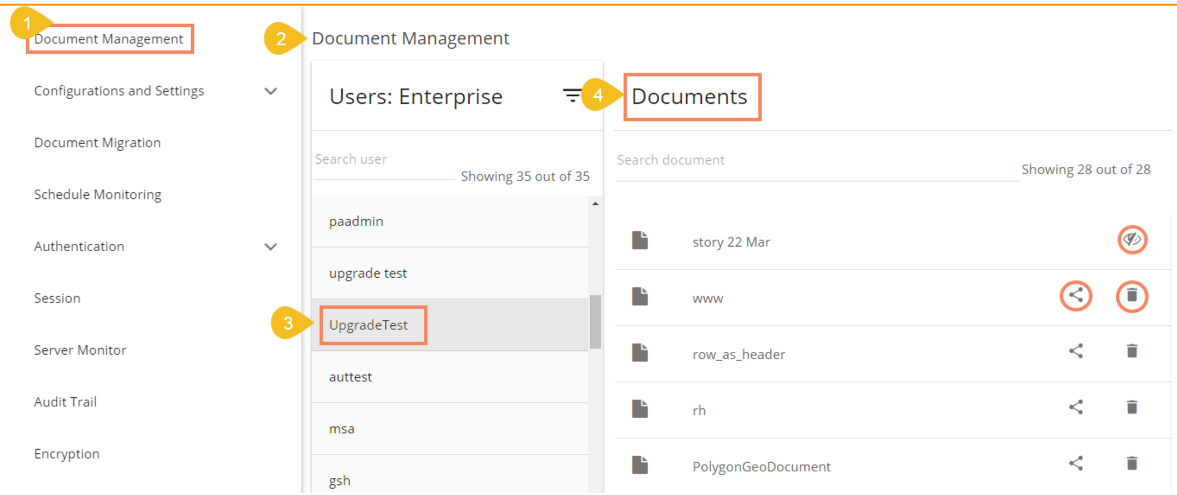
5.2. Administration Options

Configuration settings for the various platform plugins are covered under this section.

5.2.1. Document Management

This feature allows an administrator to view all the documents created by a specific user. The user specific documents can be shared or deleted by the administrator via this module. The Document Management tile appears in the Administration module.

i) Click '**Document Management**' option from the Administration Page
ii) Users get directed to the '**Document Management**' window
iii) Select a user from the '**Users**' list
iv) Displays a list of documents created by that user



Icon	Name	Description
	Share Document/ Exclude User	Redirects the user to share the selected document using '**Share With**' option provided under Properties (When a document is not shared)
	Delete Document	Removes the document from the list
	Exclude from This Document	Excludes the user from the right to access the document (in case if a document is shared with user/s)

Note:

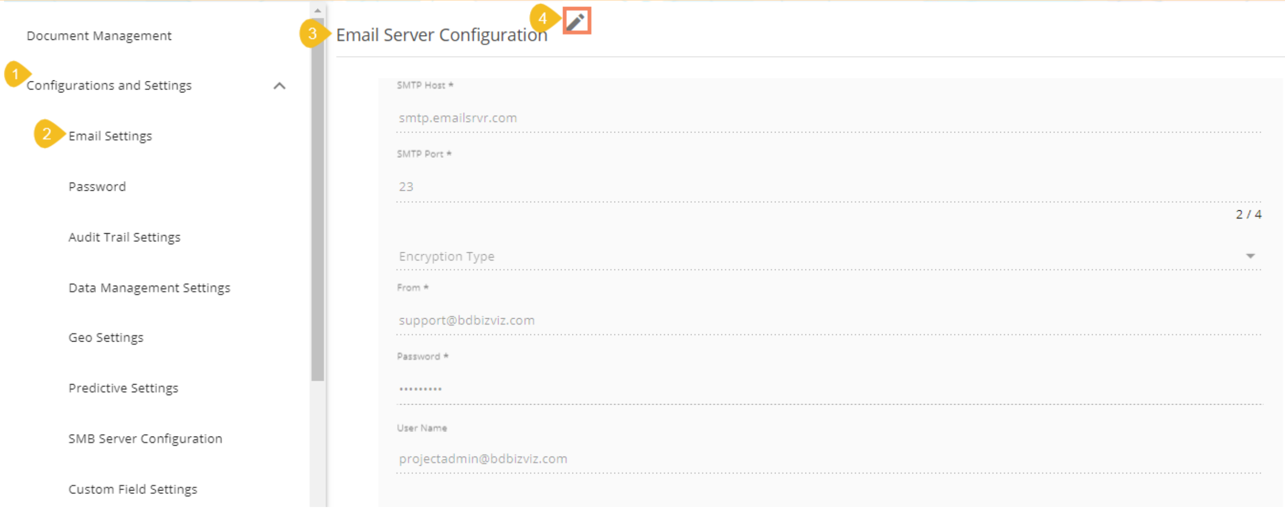
a. The administrator must exclude users from a shared document before deleting the document.
b. Share/Exclude options can be applied only to the files, the folders available under the '**Document Management**' module do not support these actions.

5.2.2. Configurations and Settings

This section covers configuration details for various platform plugins.

5.2.2.1. Email Settings

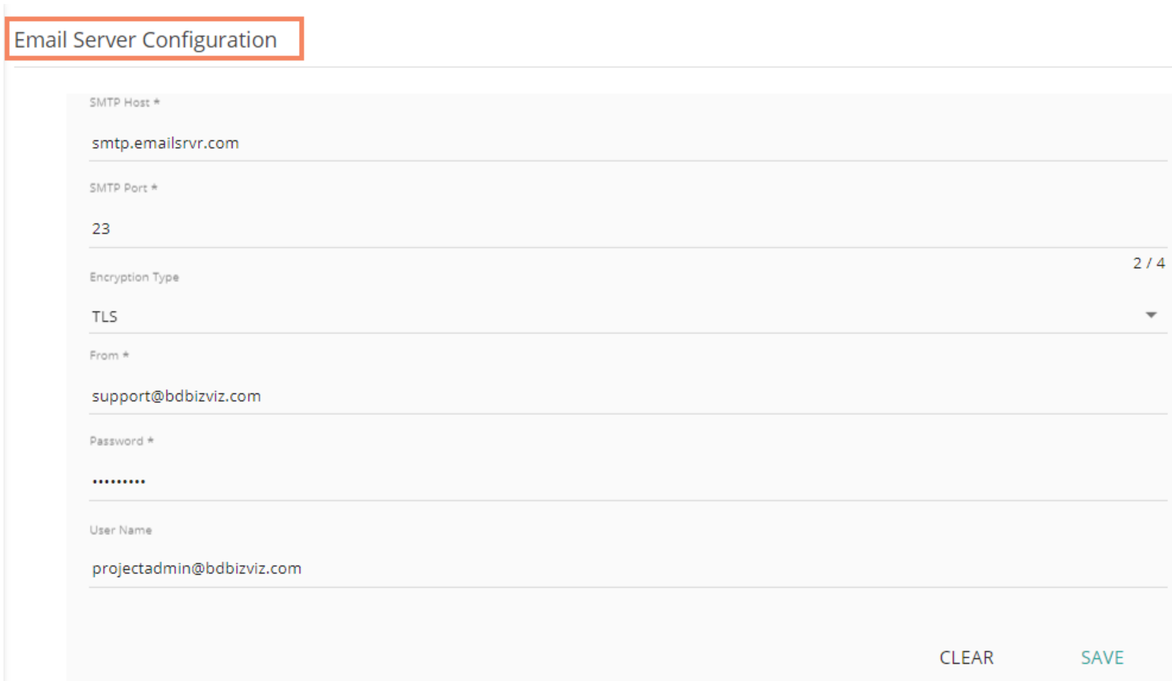
i) Click '**Configuration and Settings**' from the Admin options list
ii) Click '**Email Settings**' from the list of configuration options available inside the 'Configuration and Settings' option
iii) The '**Email Server Configuration**' window gets displayed
iv) Click the '**Edit Configuration**' option to modify the email settings details



v) By clicking the '**Edit Configuration**' option users are allowed to fill in the following information:
- **SMTP Host**: SMTP host address
- **SMTP Port**: Port number of SMTP
- **Encryption Type**: Select an encryption type from the drop-down menu
- **From**: Enter authenticated credentials of the sender
- **Password:** Provide the password
- **User Name**: Name that gets displayed to the receivers

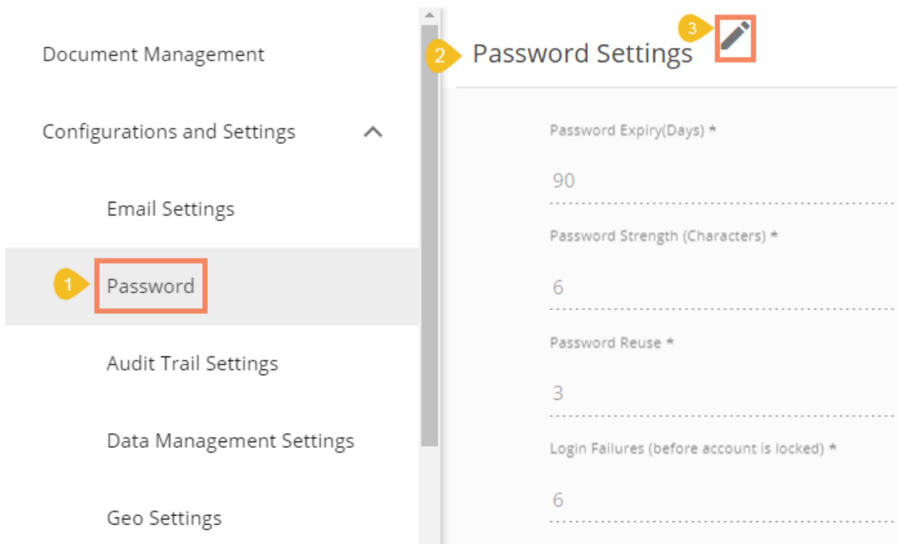
vi) Click '**SAVE**' to save the configuration details

vii) Click '**CLEAR**' to erase the entered configuration details



5.2.2.2. Password

a. Click '**Password**' from the '**Configuration and Settings**' sub-menu
b. The '**Password Settings**' page appears
c. Click the '**Edit Configuration**' option



d. By clicking the '**Edit Configuration**' option users are enabled to fill in the following information:
   - **Password Expiry:** Set password validity (in days)
   - **Password Strength:** Set password length (6 to 16)
   - **Password Reuse:** Set a limit to restrict the user from using an old password (last 3 passwords cannot be reused)
   - **Login Failures (No. of User Login Failure):** Set the number of chances provided to the user for logging in with wrong passwords (Maximum login chances provided to the user are 3. The user account gets blocked, if a user enters the wrong password more than 3 times.)

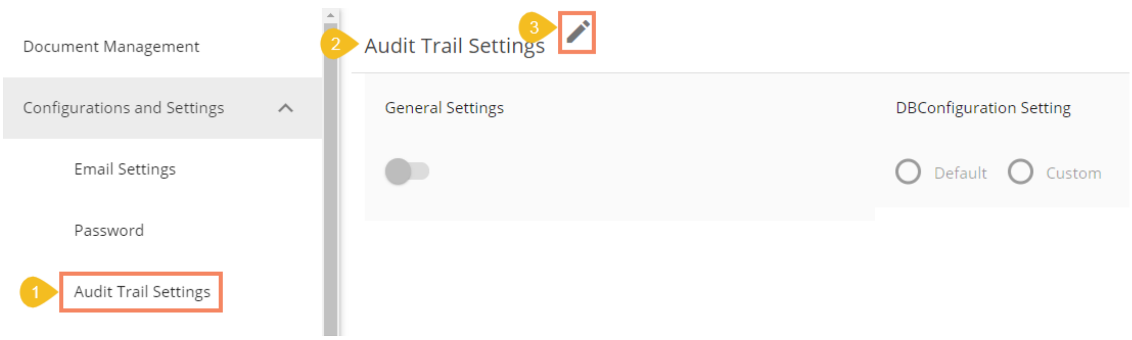
e. Click '**SAVE**' to save the settings
f. Click '**CLEAR**' to erase the entered configuration details

Note:

a. The administrator can block any user who fails to enter the correct password for 3 times.
b. A user can log in with the same password only when the administrator enables the user again.
   (The password must be a combination of alphabetical letters, numerical figure, and a unique character. **E.g.,** Admin1@)

5.2.2.3. Audit Trail Settings

Audit Trail enables the administrator to keep a record of significant events on servers and applications. It provides information regarding what is being accessed, how it is being obtained or changed and, who is performing these operations. Users can configure the Audit Trail Settings by clicking the '**Edit**' option.

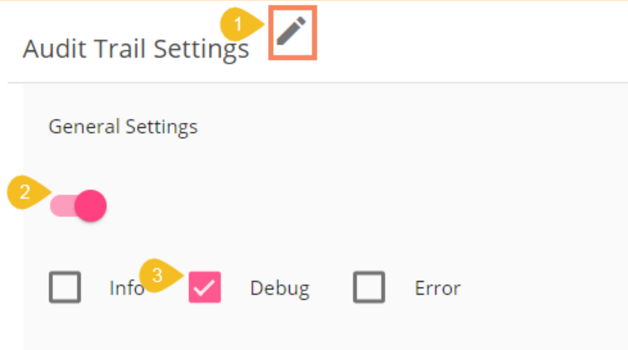


This section contains two options:

- **General Settings**

  This option is provided to enable or disable Audit Trail settings. Users can access this option from the list of '**Configurations and Settings**' provided under admin options.

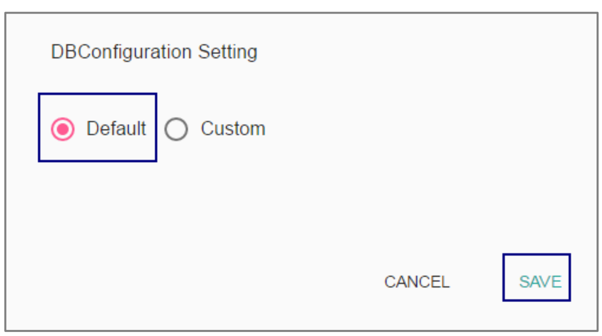
  a. Enable '**General Settings**' settings
  b. Select any one option out of the following:
     i. **Info**: It captures information about all the events
     ii. **Debug**: It enables the admin to debug the errors
     iii. **Error**: It helps admin to identify the errors so that they can be fixed



c. Click ‘**SAVE**’

Note: There is a single ‘**SAVE**’ button provided for both the Audit Trail options.

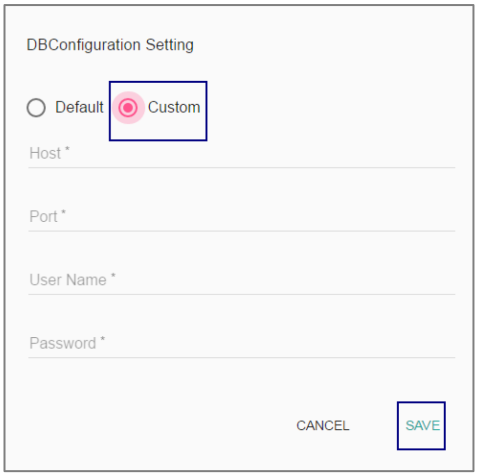
- **DB Configuration Settings**
  This section is provided to configure the Database/ BizViz Repo Database settings.
  There are 2 ways to configure database settings:
  a. **Default**
     i. Select ‘**Default**’
     ii. Click ‘**SAVE**’



     iii. The metadata gets stored in the default database (MySQL Enterprise 5.6)

  b. **Custom**
     i. Select ‘**Custom**’
     ii. Fill in the following information:
        - Host
        - Port
        - User Name
        - Password

iii. Click '**SAVE**'



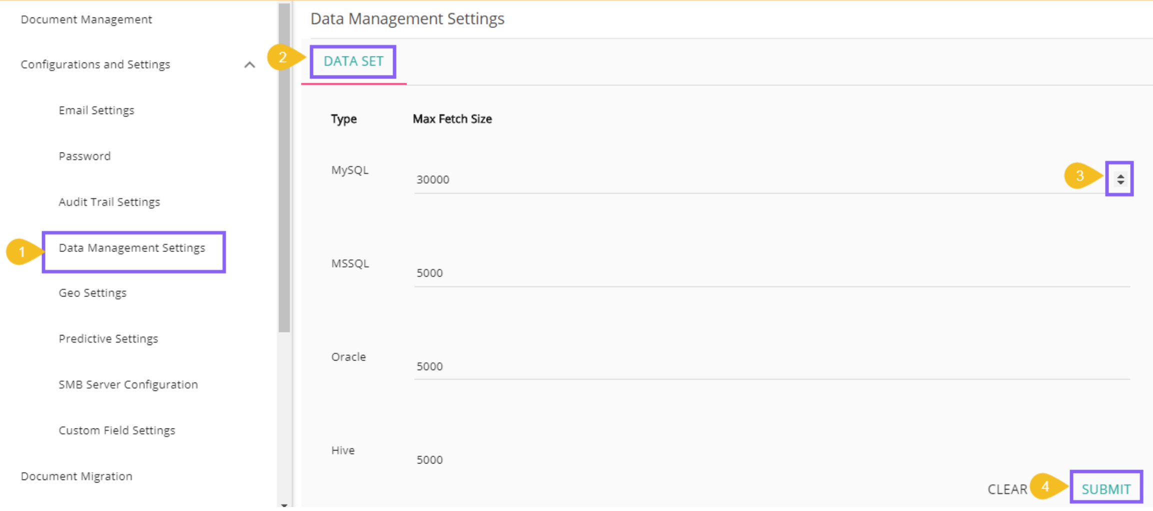
iv. The metadata gets stored in the configured database

Note: Click **'CANCEL'** to undo the audit trail settings**.**

5.2.2.4. Data Management Settings

The '**Data Management Settings**' helps users set the Maximum Fetch Size of the Data Connectors used for Data Sets.

a. Select '**Data Management Settings**' from the list of admin options provided under '**Configuration and Settings**'
b. Displays the Data Management Settings for Data Set on the right side of the screen
c. Set/Re-set maximum fetch size of the data connectors used for Data Sets manually. Alternatively, use the increase and decrease option
d. Click '**SUBMIT**' to save the selections



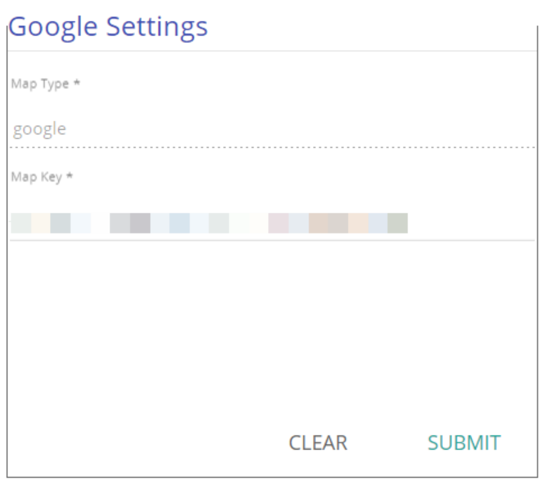
Note: Click ‘**CLEAR**’ to undo the selected values.

5.2.2.5. Geo Settings

This section explains the steps to configure the Geospatial plugin. Two types of Map settings are provided here:

i) Google Settings
ii) Leaflet Settings

- **Google Settings**
  a. Fill in the following information:
     i. **Map Type**: Displays a pre-selected map type
     ii. **Map Key**: Enter the map key that has been provided by Google (To be purchased from Google).
     iii. Click ‘**SUBMIT**’



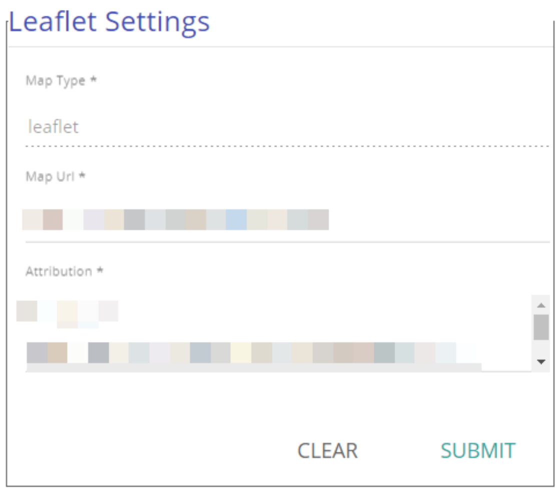
- **Leaflet Settings**
  a. Fill in the following information:

i. **Map Type:** Displays the preselected map type

ii. **Map Url:** URL of the selected map (provided by the open-source vendors)

iii. **Attribution:** Configuration parameters for the map (provided by the open-source vendor)

iv. Click '**SUBMIT**'



- **Uploading a Geo Shape File**

a. Click '**Add**' button provided next to the '**Upload a Geoshape File**' option

b. **The 'Upload Geo Shape File**' fields appear

c. Enter the following information:

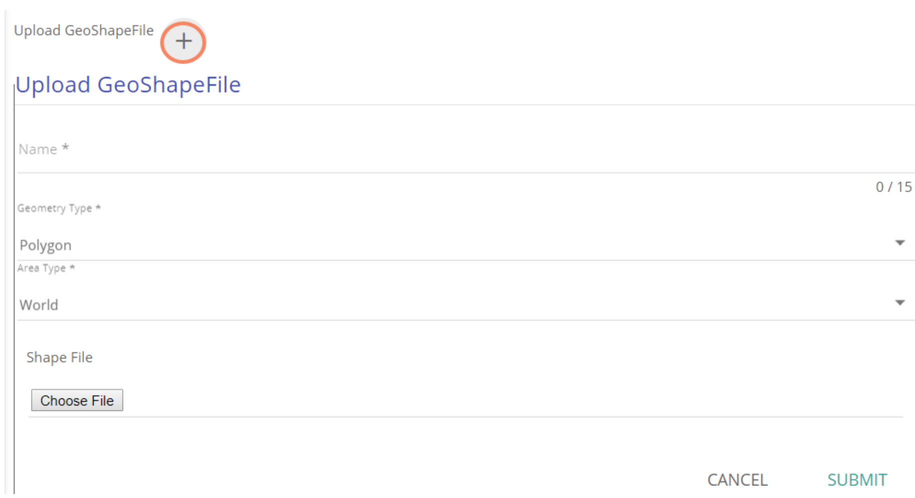
i. **Name**: Title of the map

ii. **Geometry Type**: Select anyone Geometry type from the drop-down menu (out of '**Polygon**' or '**Line**')

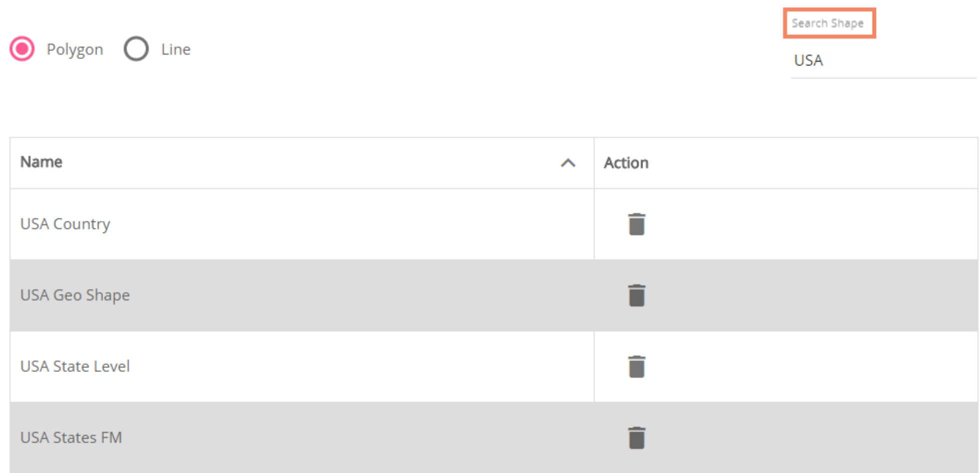
iii. **Area Type**: Select an area type using the drop-down menu

iv. **Shape File**: Browse a shapefile from the system and upload (Only '**json** 'and '**js**' formats are supported)

d. Click '**SUBMIT**'



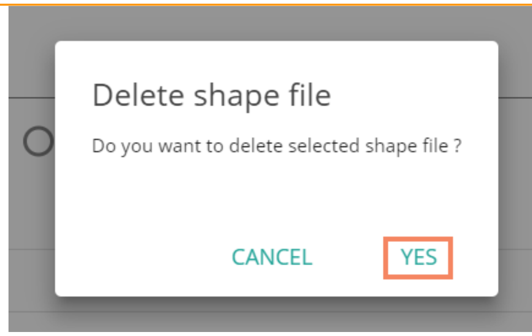
e. A message will pop-up to assure that the file has been uploaded
f. Displays all the uploaded Geo Shapefiles in the list format
g. Select a Geometry Type using the check-box
   i. Polygon
   ii. Line
h. Use '**Search Shape**' space to search a Geo Shapefile



- **Deleting a Geo Shape File**

  a. Select an uploaded Geo Shapefile from the list (as displayed at the bottom of the window)
  b. Click the '**Delete**' icon provided next to a Geo Shape File

  c. A new window will pop-up to confirm the deletion
  d. Select '**YES**'



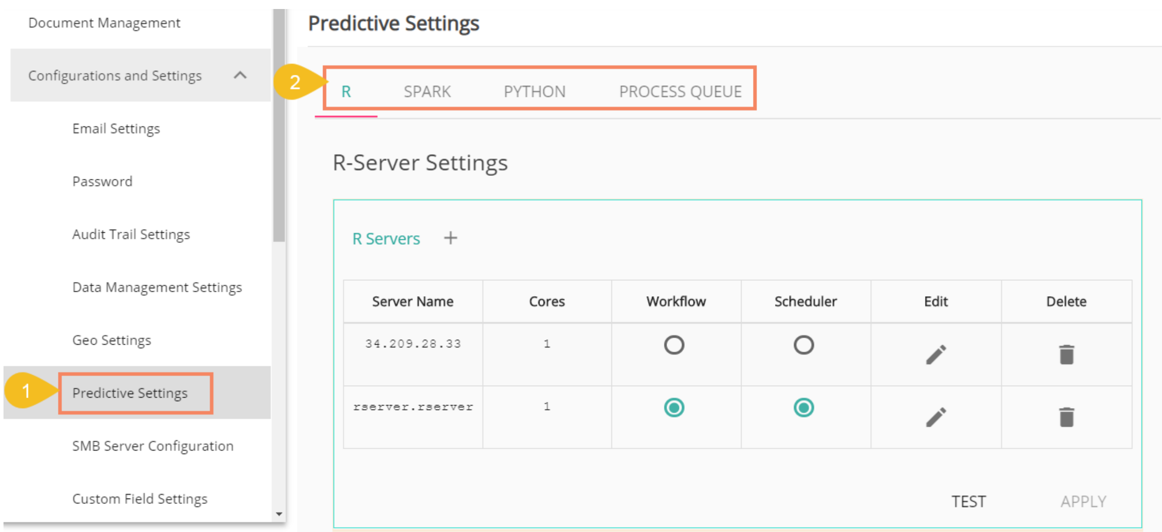
e. The selected Geo Shapefile gets removed from the list

5.2.2.6. Predictive Settings

This section explains the R-Server Configuration and Predictive Spark App Settings details for the Predictive Analysis plugin of the BizViz Platform.

a. Click the '**Predictive Settings**' option from the list of '**Configurations and Settings**' admin options

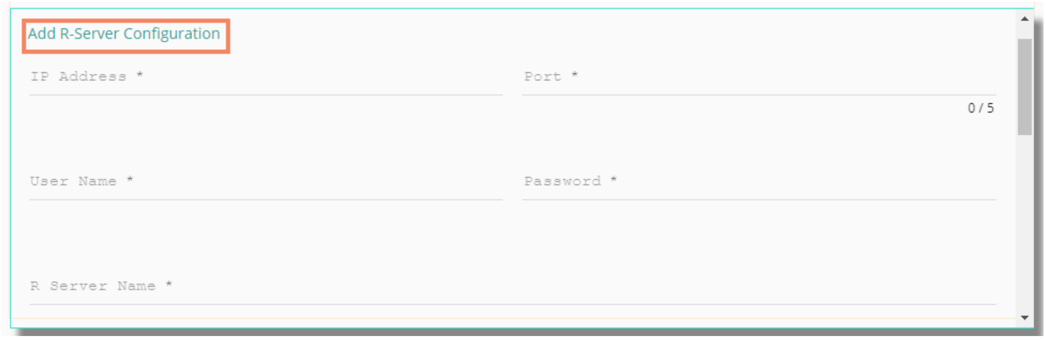
b. Displays various Predictive Settings horizontally on the right side of the screen as displayed below:



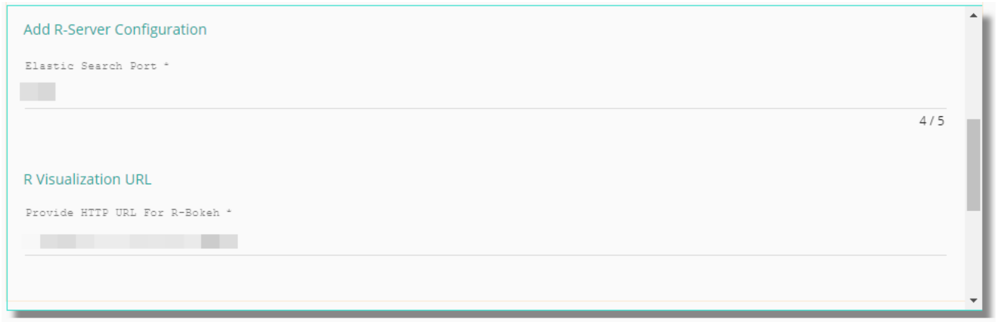
- **Steps to Create a New R-Server**

a. Navigate to the '**Predictive Settings**' admin option
b. Click the R tab
c. Users get redirected to the R Server Settings page
d. Click '**Add**' + icon given for the R server
e. A scrollable '**Add R-Server Configuration**' window opens
f. Provide the following information to configure a new R server:
   i. IP Address: IP address of the R-server

ii. Port: R-Server's port number
iii. User Name: Enter a username to log in to the R- server
iv. Password: Enter the password for the above username
v. R Server Name: Provide the R- Server address

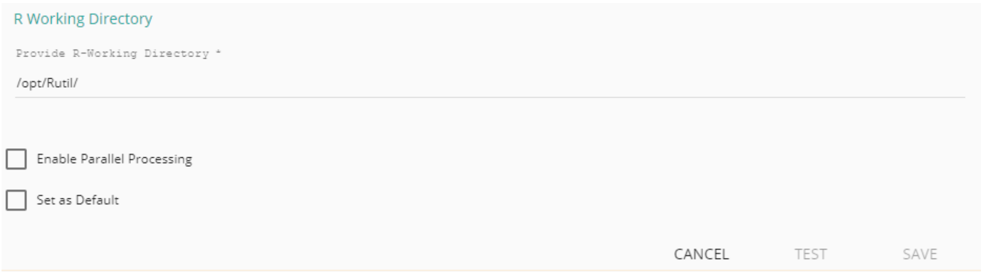


vi. Elastic Search Port: Provide an elastic search port number
vii. R Visualization URL: Provide HTTP URL for R-Bokeh

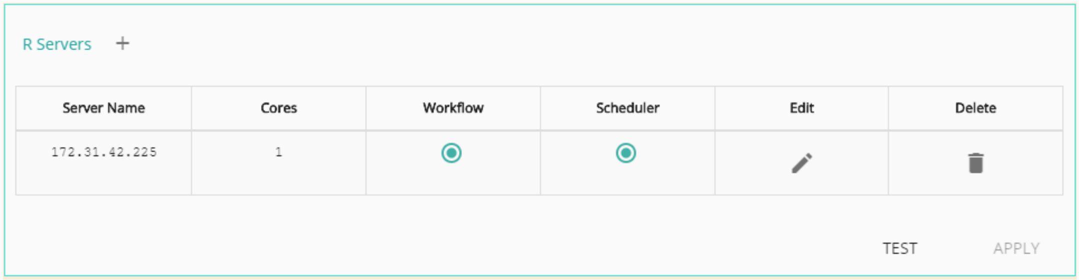


viii. R Working Directory: Provide the relevant link to access R-Working Directory
ix. Enable Parallel Processing- Select this option by using a check mark in the box
x. Set as Default: Select this option by using a check mark in the box

g. Click '**TEST**' to verify the R-Server connection
h. A message will pop-up to assure about the connection
i. Click the '**SAVE**' option to save the verified R-server configuration details



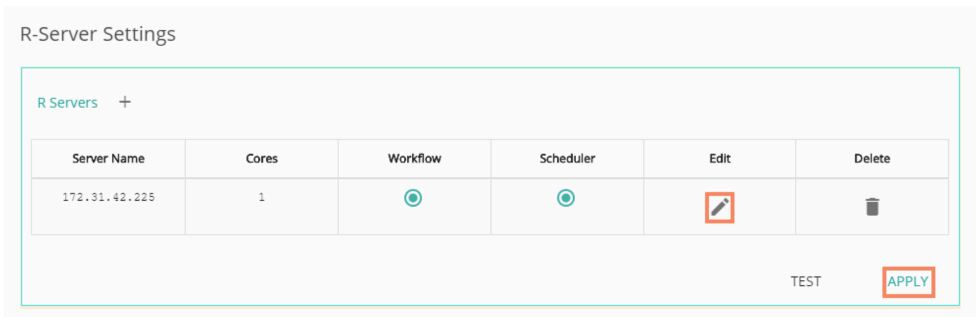
j. A message will pop-up to ensure that a new R-Server has been created
k. The newly created R-Server gets added to the R-Server list displayed under '**R-Servers**' window



Note:

a. Users can click '**Edit**' icon from the R Servers window to modify the R Server settings.

b. Users can click '**APPLY**' from the R Servers window to update the R Server settings.



a. The Administrator can configure multiple R-Servers, but the process execution happens on a single server at a time.

b. Click '**CLEAR**' to erase the information from the R-Server configuration fields.

c. The admin needs to provide a working directory while configuring the R server and users should be given read and write permission to that directory.

- **Spark Server Settings**

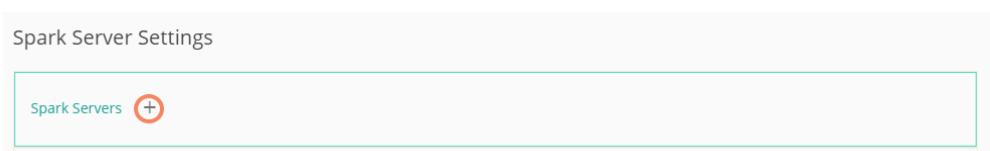
  Users can configure a new Spark Server or edit the existing server via the Spark Server Settings.

  a. Navigate to the '**Predictive Settings**' admin option

  b. Select '**Spark**' tab

  c. The Spark Server Settings page opens

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



  e. A new window '**Add Spark Server Configuration**' opens

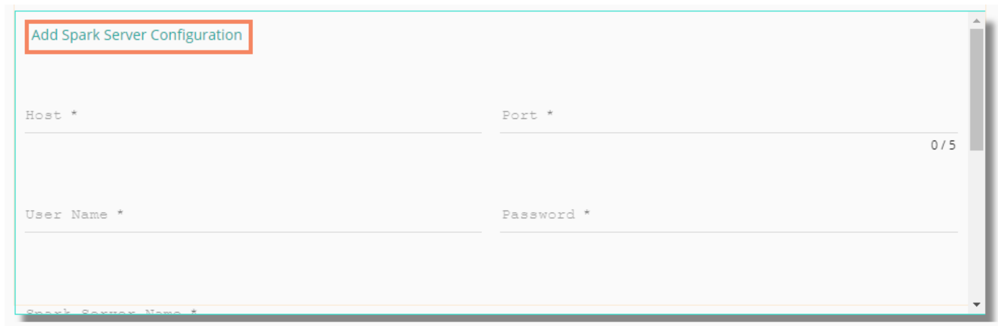
f. Provide the following information:

i. Host: Host address of the Spark server

ii. Port: Spark server's port number

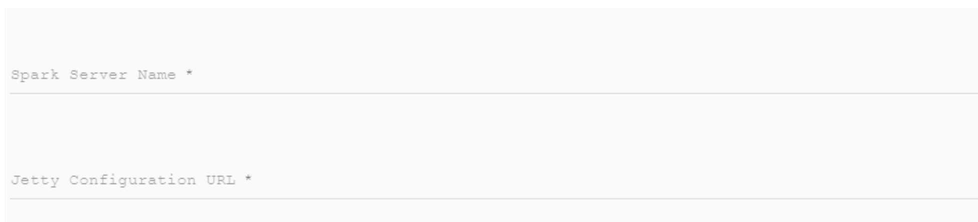
iii. User Name: Enter a username to log in to the Spark server

iv. Password: Enter the password for the above username



v. Spark Server Name: Provide Spark Server Address

vi. Jetty Confirmation URL: Provide Jetty confirmation URL link



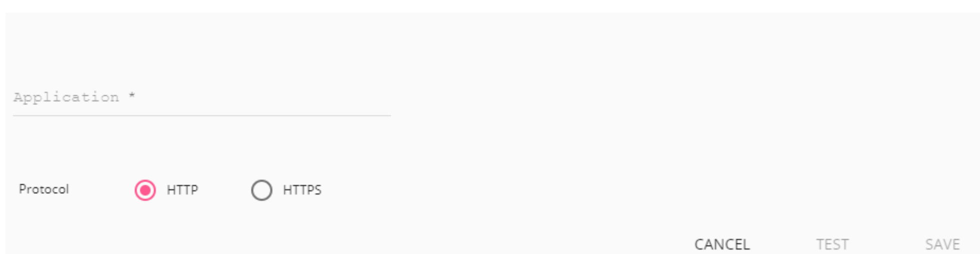
vii. Application: Provide the application name

viii. Protocol: Select a protocol option by using the radio option

ix. Click '**TEST**' to verify the connection

x. A message will pop-up to assure about the connection

xi. Click '**SAVE**'



xii. Creates and adds the newly configured Spark server details to the '**Spark Server Settings**' window.

- **Python Server**

  Users can configure the Predictive Python Application settings via the **'Python Server**

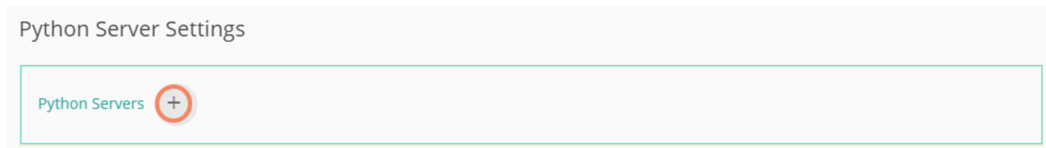
Configuration' fields.

a. Navigate to the '**Predictive Settings**' admin option

b. Select the '**Python**' tab

c. The Python Server Settings page opens

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



e. The '**Add Python Server Configuration**' window opens

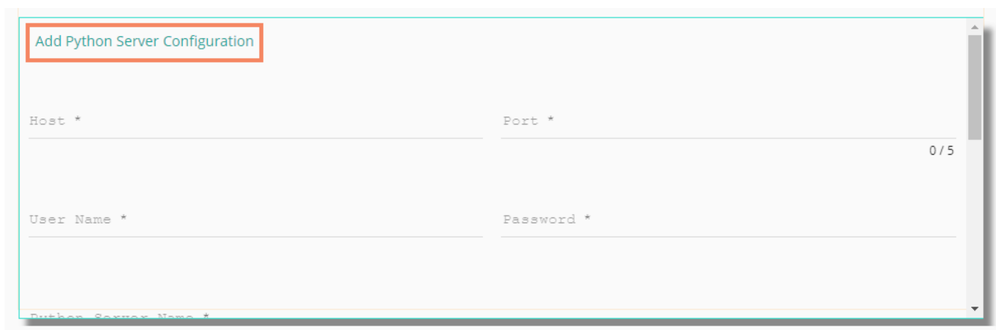
f. Provide the following information:

   i. Host: Host address of the Spark server

   ii. Port: Spark server's port number

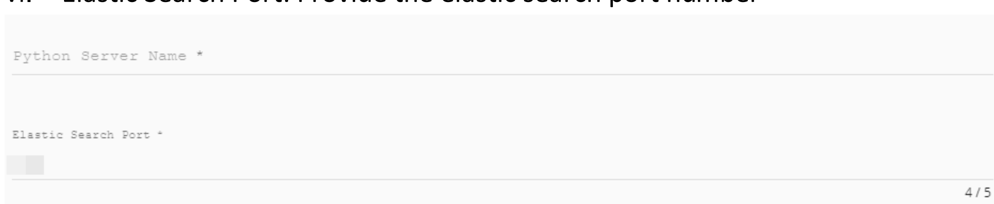
   iii. User Name: Enter a username to log in to the Spark server

   iv. Password: Enter the password for the above username



   v. Python Server Name: Provide Python Server Address

   vi. Elastic Search Port: Provide the elastic search port number



   vii. Web Socket URL: Provide the web socket URL link

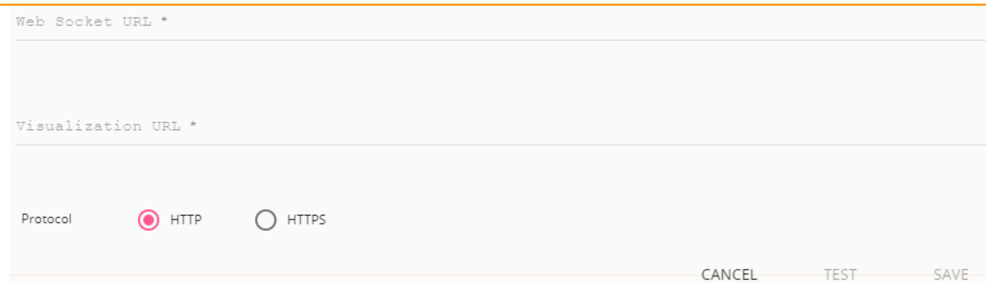
   viii. Visualization URL: Provide the Visualization URL link

   ix. Protocol: Select a protocol option by using the radio option

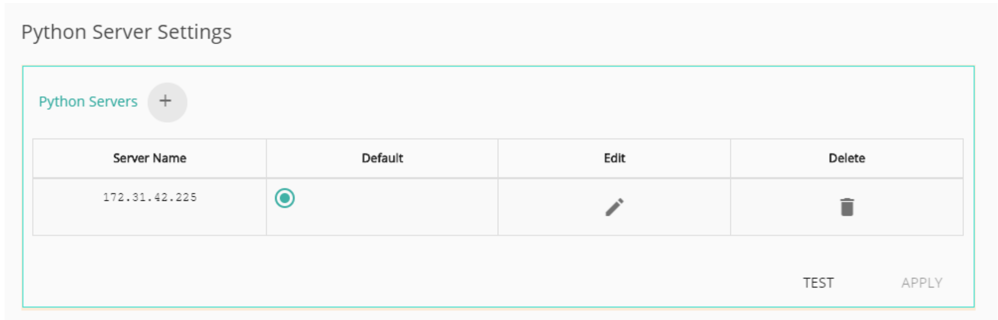
   x. Click '**TEST**' to verify the connection

   xi. A message will pop-up to assure about the connection

   xii. Click '**SAVE**'



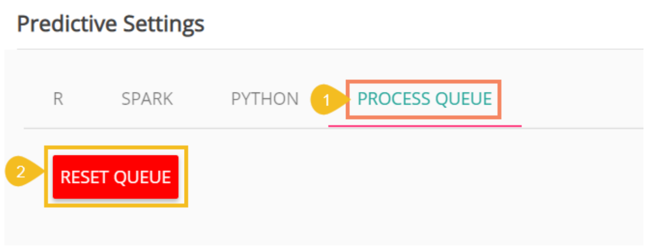
xiii. The newly configured Python Server gets added to the '**Python Servers**' window.



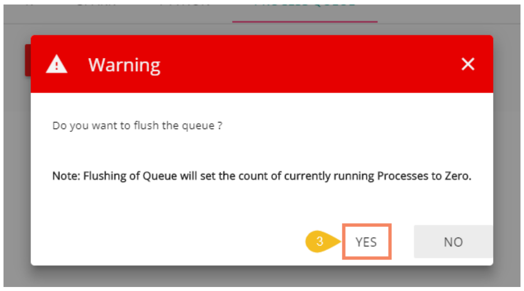
Note:

a. Click '**Edit**' icon to modify an existing python server configuration
b. Click '**CLEAR**' to erase the Python App Configuration details.

- **Process Queue**
  Users can reset the Predictive process queue by clicking the 'RESET QUEUE' option from this page.



The users get a warning message in which choosing 'YES' sets the count of currently running processes to Zero for the Predictive Workbench.



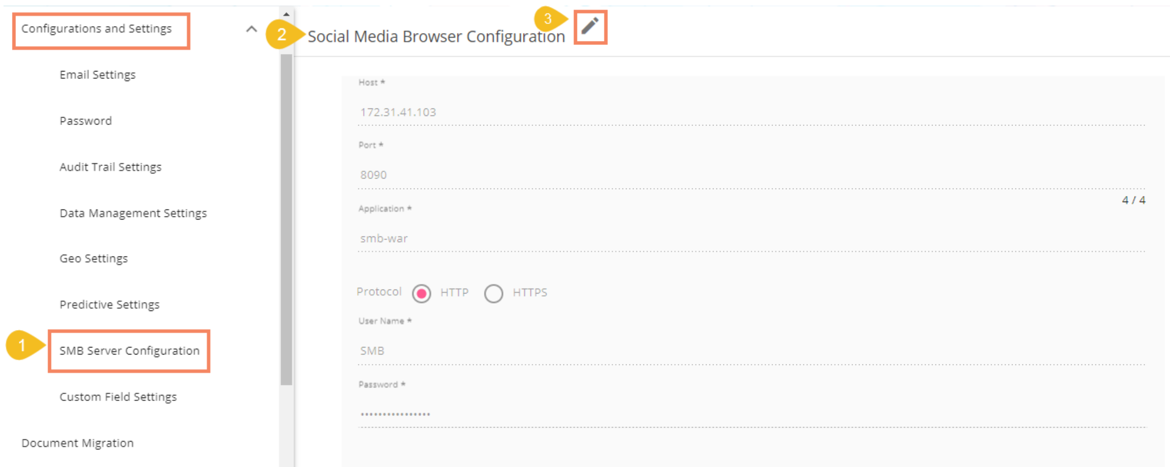
5.2.2.7. SMB Server Configuration

This section covers Social Media Browser configuration details.

a. Click '**SMB Server Configuration**' from the '**Configuration and Settings**' list.

b. The '**Social Media Browser Configuration**' fields appear

c. Click the '**Edit**' icon



d. Fill in the following information to configure the Social Media Browser settings:

i. Host

ii. Port

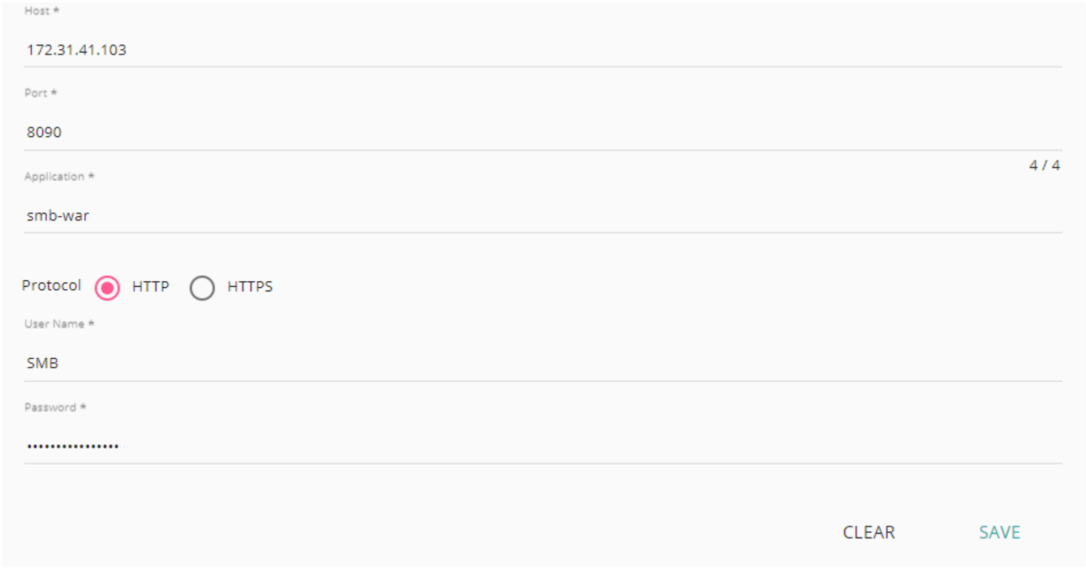
iii. Application

iv. Protocol

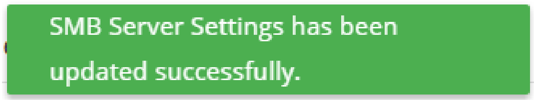
v. User Name

vi. Password

e. Click the '**SAVE**' option



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

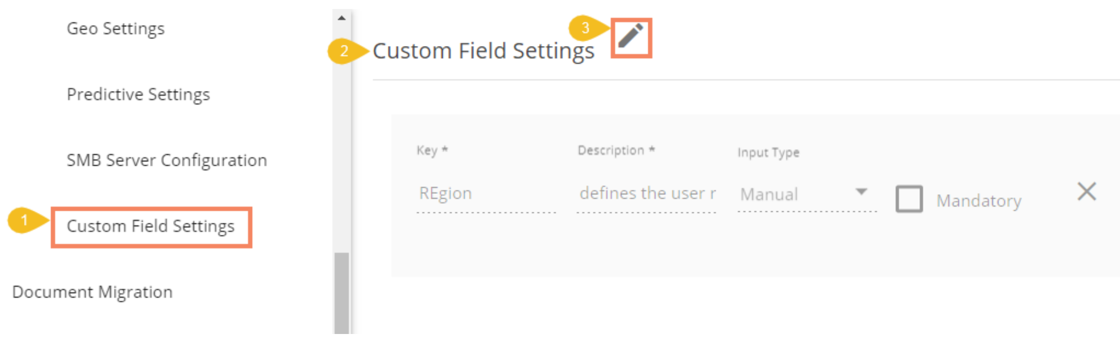


Note: Click ‘**CLEAR**’ to erase the existing SMB Server Configuration details.

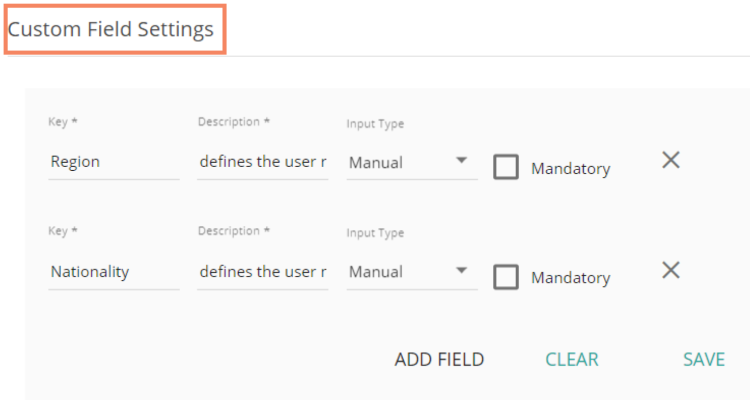
5.2.2.8. Custom Field Settings

This section configures the custom fields settings for the user groups and the users assigned to those groups.

a. Click ‘**Custom Field Settings**’ from the ‘**Configuration and Settings**’ list
b. The Custom Field Settings window opens
c. Click the ‘**Edit**’ icon to insert a new custom field



d. Click ‘**ADD FIELD**’ to add a new custom field
e. Provide the following information for each custom field:
   i. Key: Provide the key value of the custom field
   ii. Description: Describe the inserted key
   iii. Input Type: Select an input option from the drop-down menu
      1. Manual: By selecting this option, users need to fill the field manually
      2. User Lookup: By selecting this option, users need to choose from a drop-down menu
   iv. Mandatory: Use checkmark in the given box to make the inserted custom field mandatory
f. Click the ‘**SAVE**’ option to save the inserted custom fields

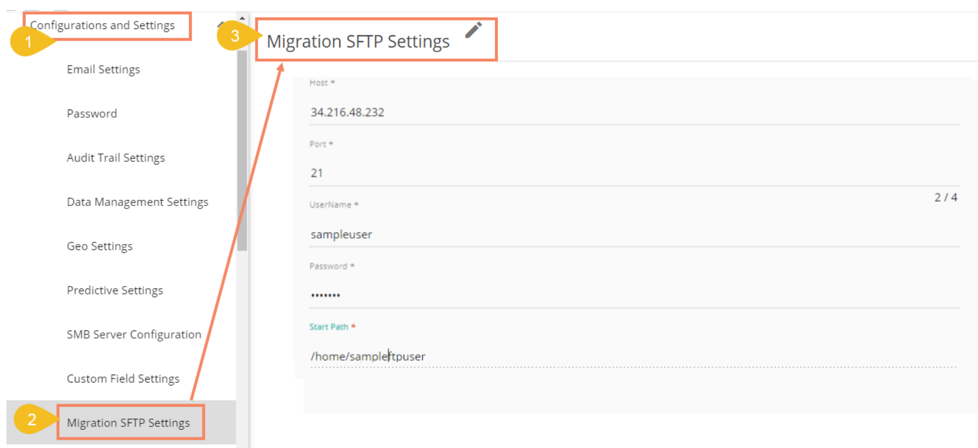


Note:

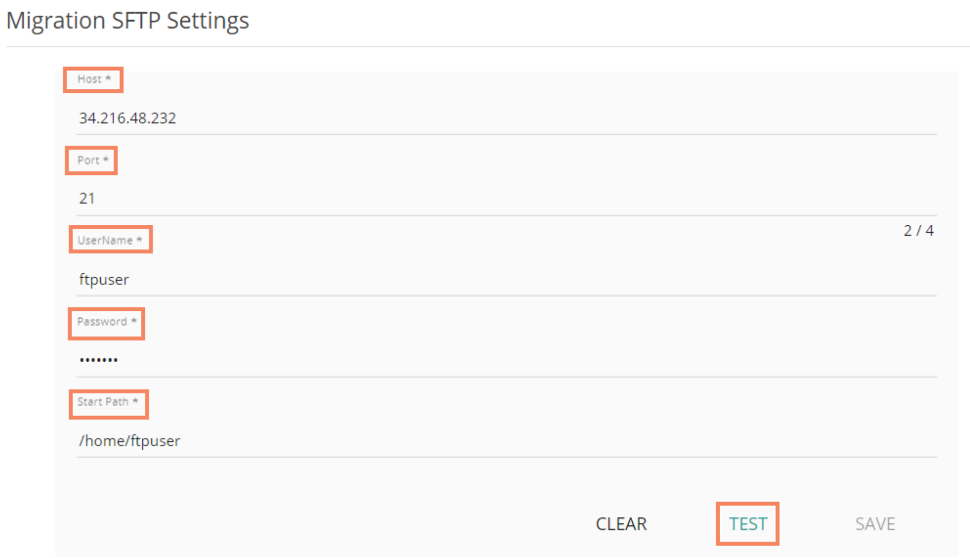
a. Click ‘**ADD FIELD**’ to add a new custom field.
b. Click ‘**CLEAR**’ to erase the entered custom field details.
c. Click the ‘**Remove Field**’ icon to remove a custom field.

5.2.2.9. Migration SFTP Settings

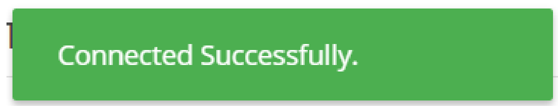
The Configuration and Settings admin module contains an option to set the SFTP server settings to migrate a document from the different server.



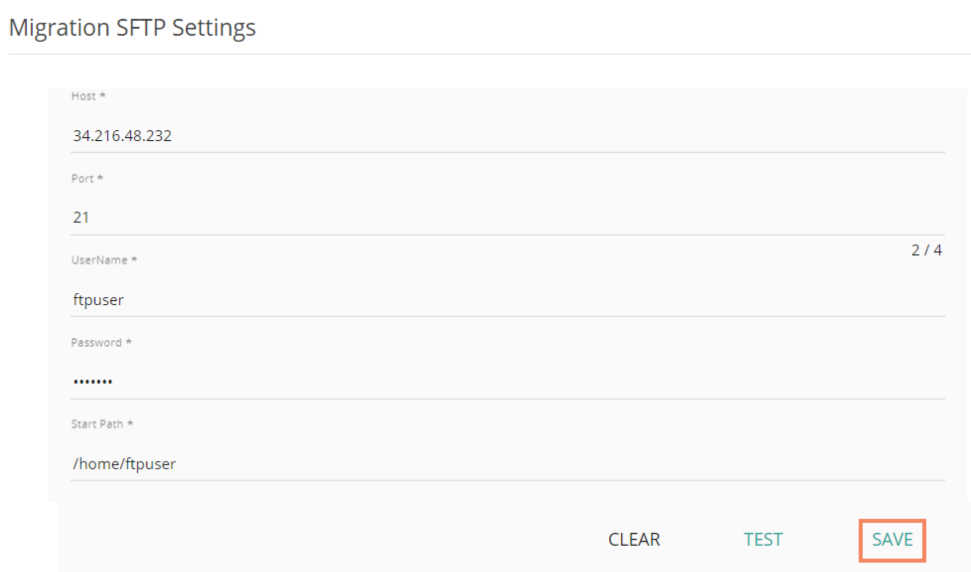
i) Users can modify the following SFTP server details by clicking the ‘Edit’ option:
   a. Host
   b. Port
   c. Username
   d. Password
   e. Start Path
ii) Users need to click ‘TEST’ option after modifying the SFTP Server details



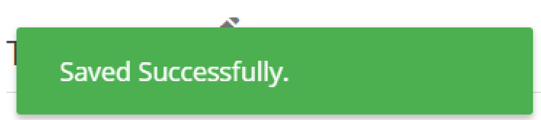
iii) A success message appears assuring that the connection is successful



iv) Click ‘**SAVE**’ to save the settings

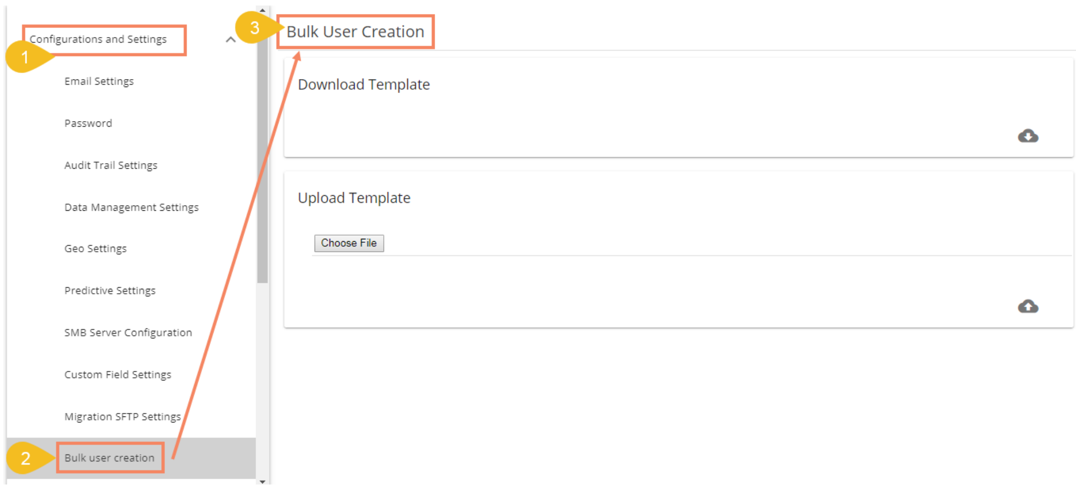


v) A success message appears, and the selected SFTP server details get saved



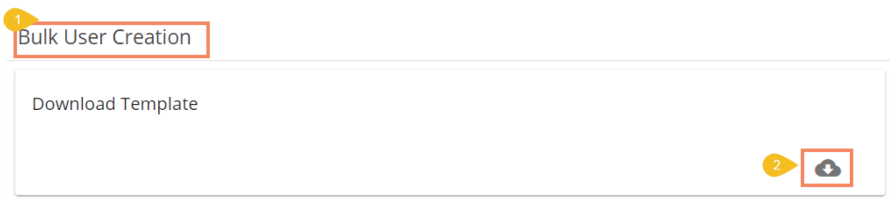
5.2.2.10. Bulk User Creation

The current option provided under the ‘**Configuration and Settings**’ tab helps the administrator to create multiple users using the standard template.

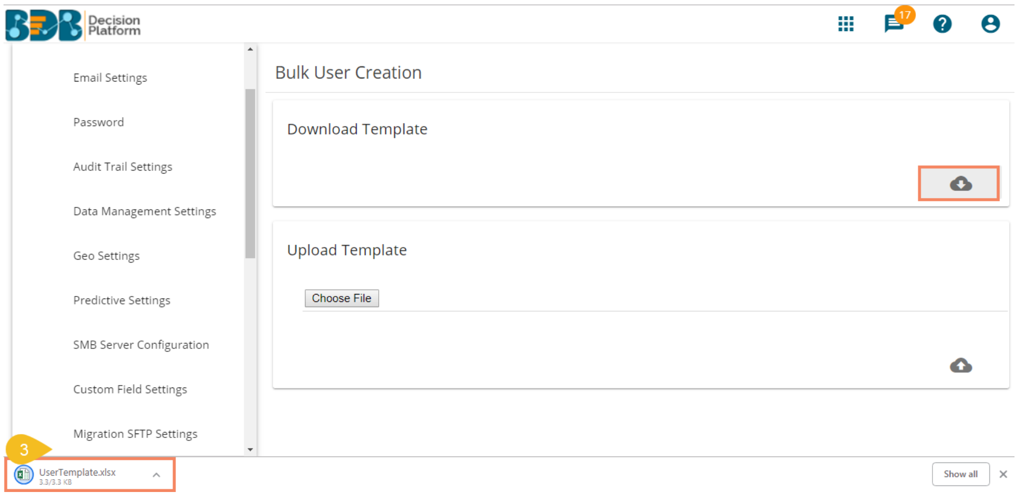


i) To download the Standard Template

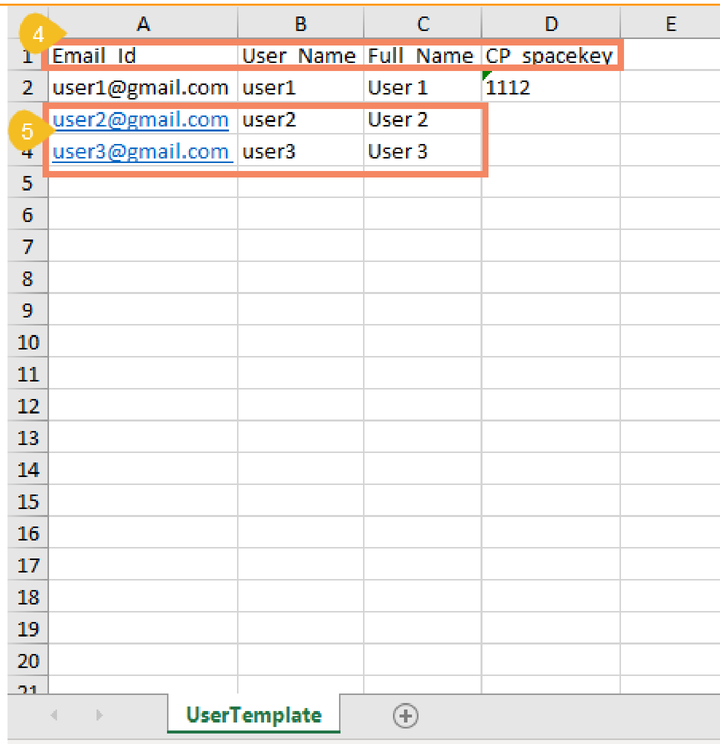
1. Navigate to the 'Bulk User Creation' page
2. Click the 'Download' icon



3. A model template for the bulk user creation gets downloaded



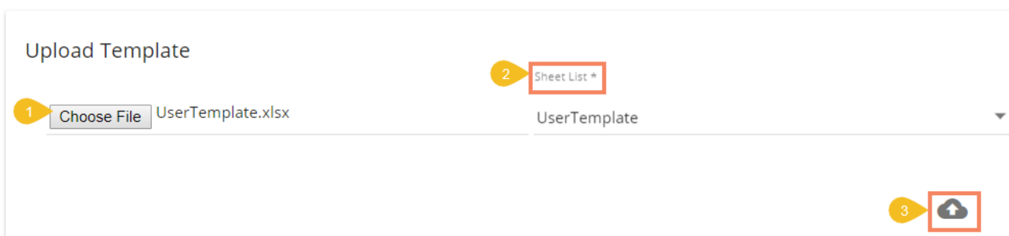
4. The admin can insert multiple users in the downloaded user template
5. Use the following format (as shown in the image) to enter the user details



	A	B	C	D	E
1	Email_Id	User_Name	Full_Name	CP_spacekey	
2	user1@gmail.com	user1	User 1	1112	
3	user2@gmail.com	user2	User 2		
4	user3@gmail.com	user3	User 3		

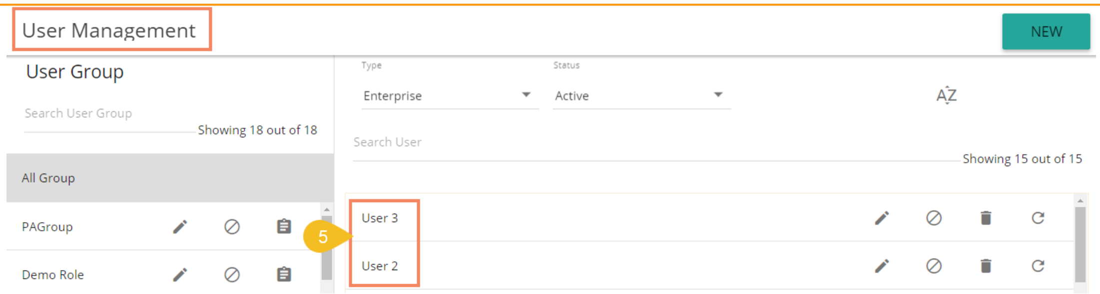
ii) Steps to Upload a file with multiple usernames

1. Navigate to the ‘Bulk User Creation’ page
2. Use the ‘Choose File’ option to select the file with multiple usernames
3. Click the ‘Upload’ option



4. A success message appears to confirm the user creation

5. The newly created users display in the user list provided inside the ‘**User Management**’ module



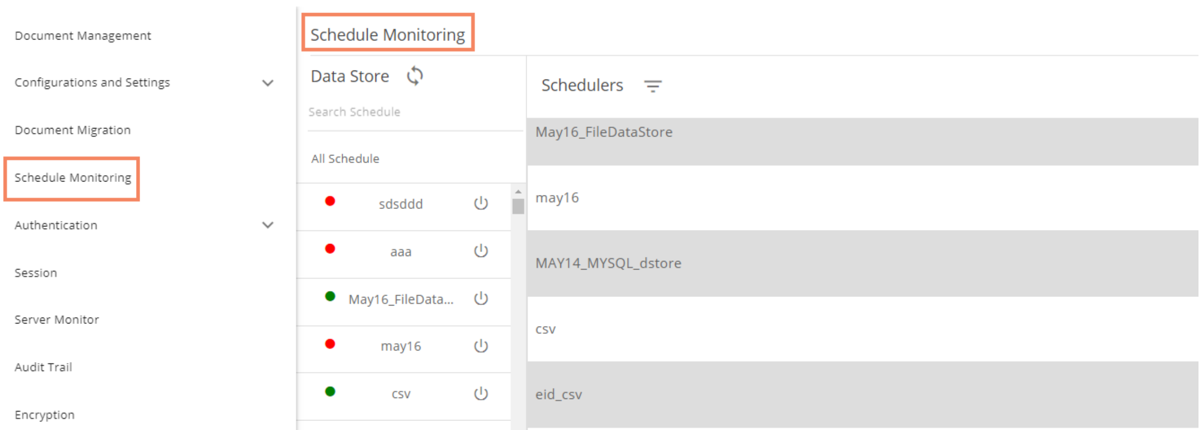
Note:

a. The users created through the ‘Bulk User Creation’ functionality get added to the ‘View Role’ user group by default.
b. The admin can manually provide a user group to the users created via the ‘Bulk User Creation’ option. The administrator can allot different user groups to the users created via the Bulk User Creation functionality.
c. The ‘CP_spacekey’ column provided in the user template refers to Custom Properties values that the administrator can insert to restrict the display of data for the specific users. It is optional information. The admin can insert the user group related custom properties value to restrict data display for the newly created users.

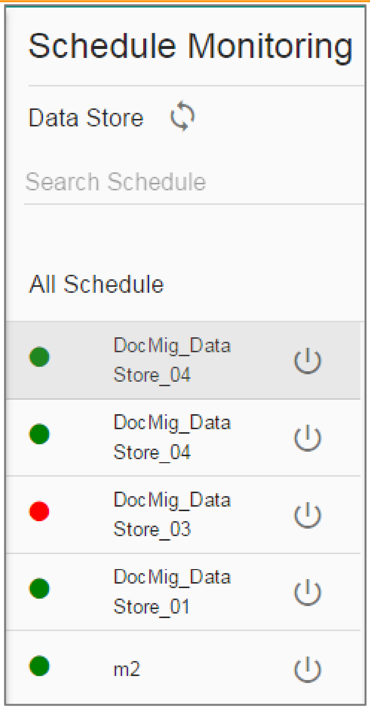
5.2.3. Schedule Monitoring Settings

This option helps the administrator to monitor the scheduled data stores.

i) Click ‘**Schedule Monitoring**’ option from the list of admin options
ii) The ‘**Schedule Monitoring**’ window appears on the right side of the page



iii) Search and select a scheduled data store from the ‘**All Schedule**’ list (Use the ‘**Search Schedule**’ space to search for a scheduled data store)



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

Schedulers

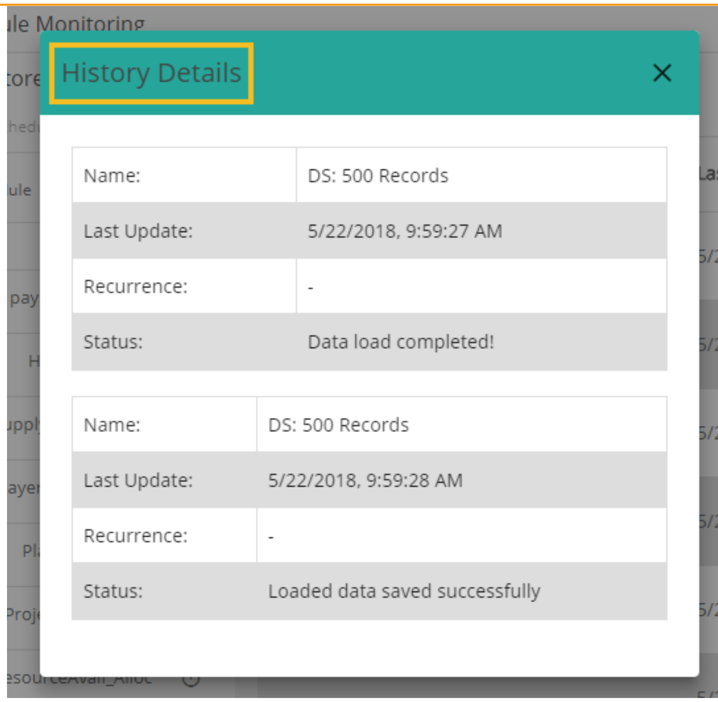
Scheduler Name	Last Updated Date	Recurrence	Status	
DS: 500 Records	5/22/2018, 9:59:14 AM	-	Refresh success	
DS: 500 Records Copy	5/22/2018, 9:58:21 AM	-	Refresh failed	
DS: 500 Records Copy	5/22/2018, 9:57:18 AM	-	Refresh failed	
Oracle_may14	5/21/2018, 2:28:24 PM	-	Refresh failed	
Oracle_may14	5/21/2018,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

Note:

a. Click the '**Start/Stop**' button to start/stop the scheduler.

b. Click the '**Refresh**' icon to refresh the data store(s).

c. Click the '**Information**' icon to display the '**History Details**' of the selected schedule.



d. Use '**Filter**' option to display filtered details for the selected scheduled job.

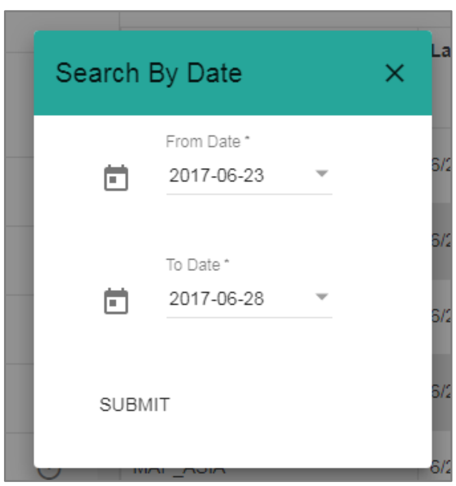
i) Click the '**Filter**' option

ii) A window appears

iii) Fill the required information:

1. From Date
2. To Date

iv) Click '**SUBMIT**' option



v) The filtered data gets displayed

Schedulers

Scheduler Name	Last Updated Date	Recurrence	Status	
Map_Canada	6/27/2017, 5:34:44 PM	-	Refresh success	
TEST_MAP	6/27/2017, 5:21:39 PM	-	Refresh success	
MAP_ASIA	6/27/2017, 5:16:05 PM	-	Refresh success	
New Store	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
VIVEK_STORE_9_1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
May25Mysql	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	
treemap1	6/27/2017, 12:00:00 PM	6/28/2017, 12:00:00 PM	Scheduler success	

5.2.4. Authentication

The administrator can configure windows AD or CA Clarity accounts by applying the below given settings:

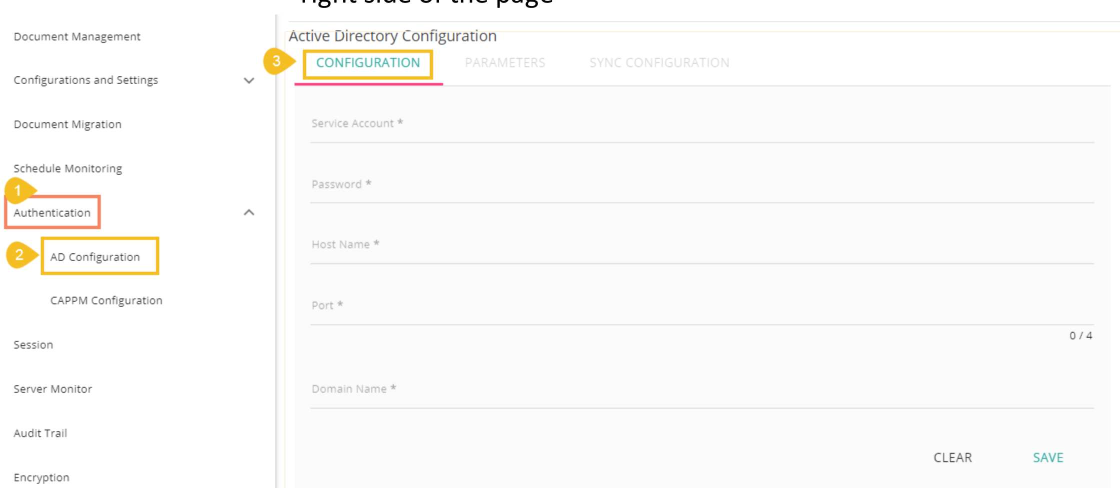
5.2.4.1. Active Directory Configuration

a. **Configuration**

i) Click '**Authentication**' option from the list of admin options

ii) Click '**AD Configuration**' authentication option

iii) The '**CONFIGURATION**' tab for the Active Directory Configuration opens on the right side of the page

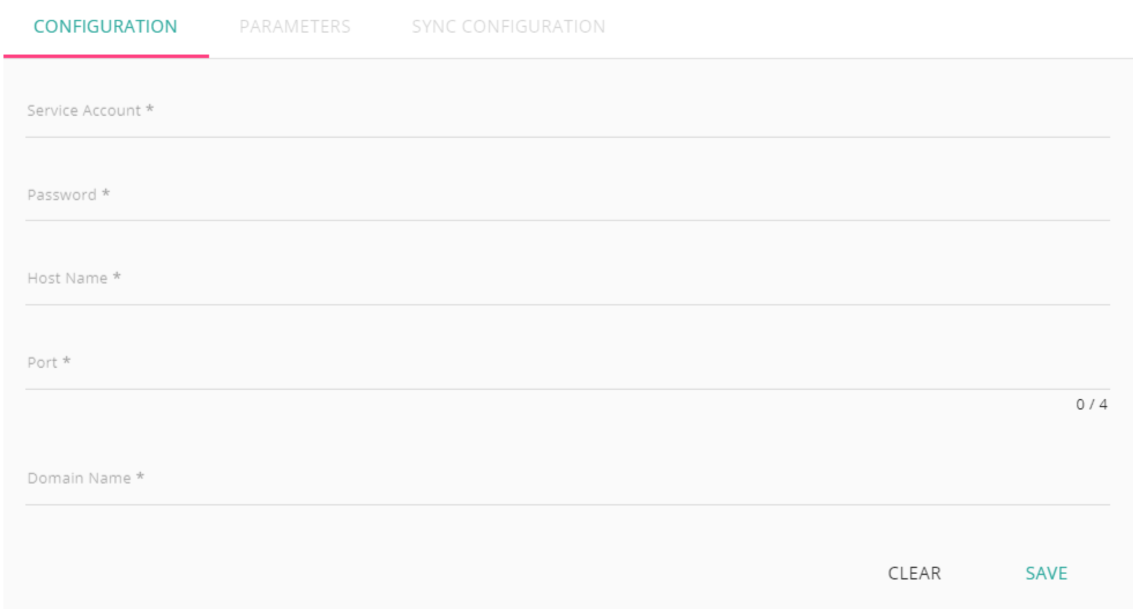


iv) Fill in the following information:

- **Service Account:** Name of the Windows AD service account
- **Password:** Secure authentication credential
- **Host Name:** IP address of the Windows AD server
- **Port:** Port number of Windows AD
- **Domain Name:** Enter the Domain Name

v) Click **'SAVE'**

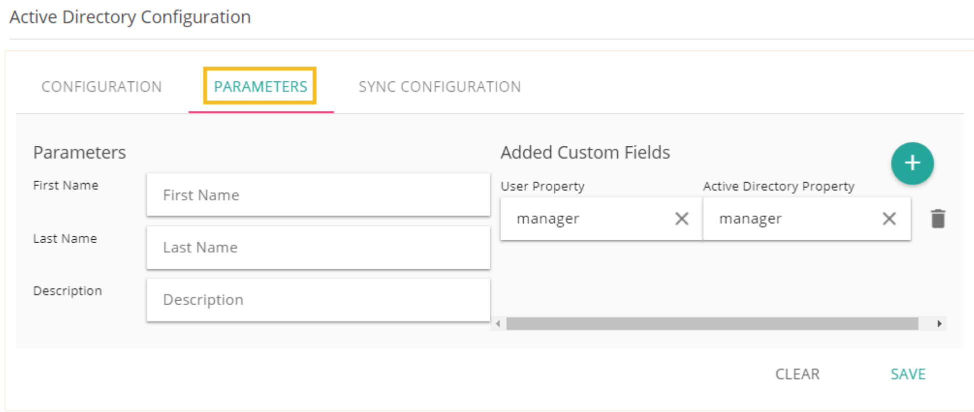
vi) A message appears to confirm the action.



b. **Parameters**

i) Set the user parameters by using this tab.

   i. First Name: Provide the first name of the user
   ii. Last Name: Provide the last name of the user
   iii. Description: Add description
   iv. Add a new custom field by clicking the '**Add**' icon
   v. Configure the following properties to add a Custom Field
      1. User Property: Select an option from the available context menu
      2. Active Directory Property: Select an option from the available context menu



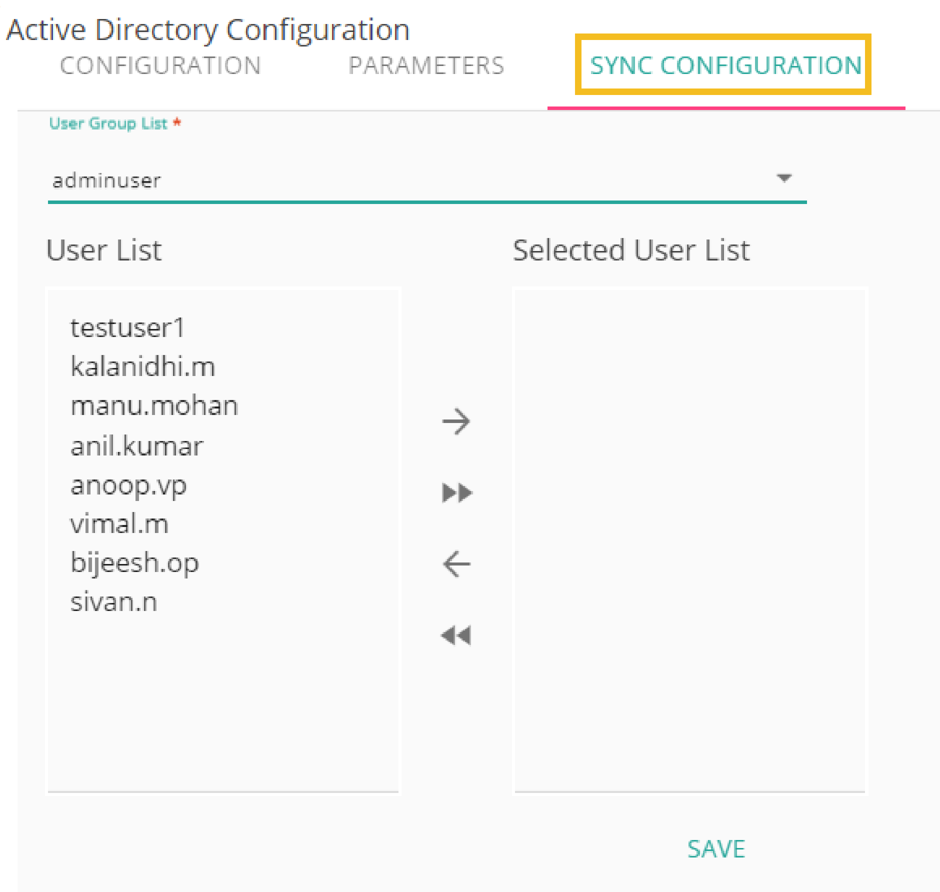
c. **Sync Configuration**

i) Once you get confirmation that AD details got saved, select the '**SYNC CONFIGURATION**' tab

ii) Select a user group using the '**User Group List**' drop-down menu

iii) Select and move users from '**User List**' to the '**Selected User List.**'

iv) Click '**Save**'

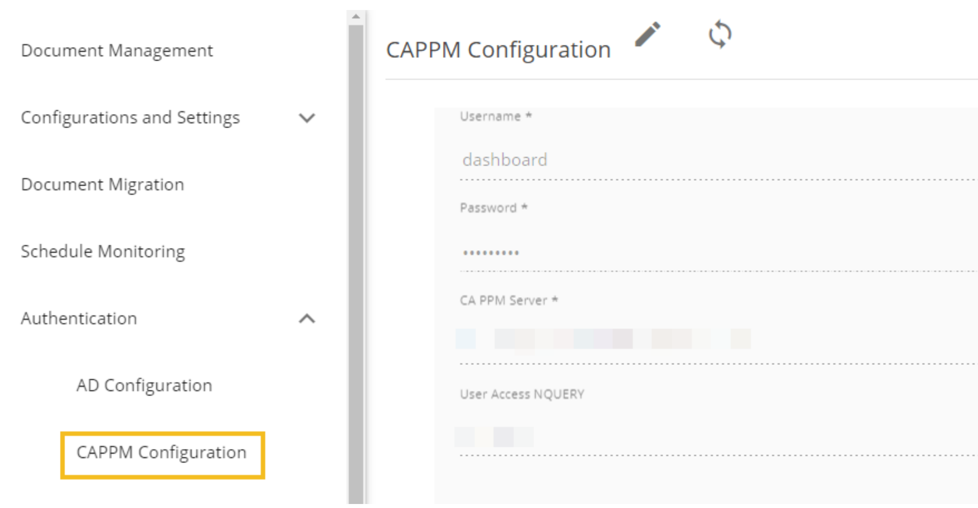


v) A pop-up message appears to confirm that the user list has been updated

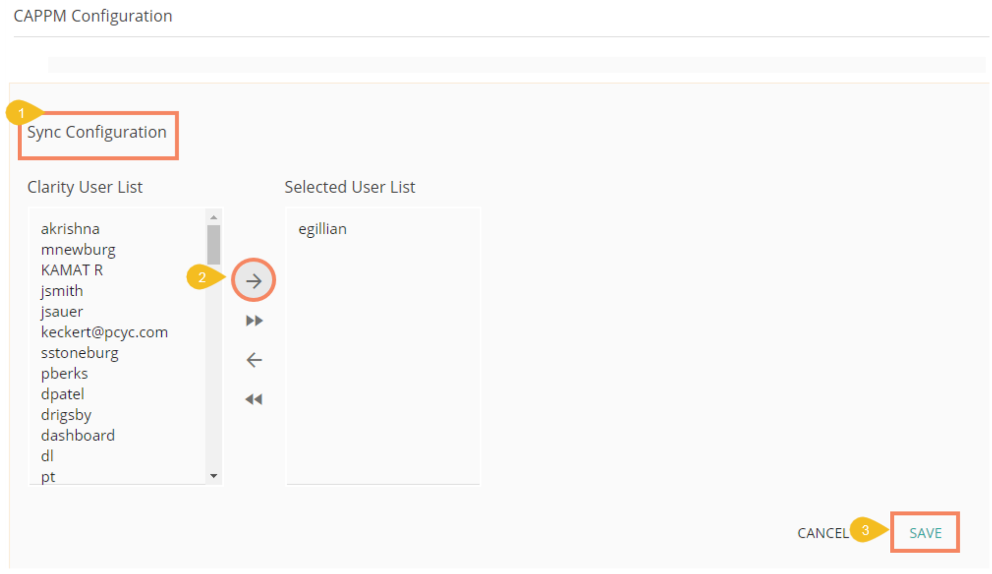
5.2.4.2. CAPPM Configuration

This section explains how to configure Clarity.

a. Select the '**CAPPM Configuration**' using the '**Authentication**' Admin option
b. Click the '**Edit**' icon provided on the '**CAPPM Configuration**' window
c. Fill in the required information:
   i. **Username**
   ii. **Password**
   iii. **CA PPM Server:** URL details of the Clarity server (E.g., http://dashboards.xyz.com)
   iv. **User Access NQUERY:** Name of the Query that fetches a list of the Clarity users
d. Click the '**Save**' option



e. Once you get confirmation that CAPPM configuration details are saved, click the '**Synchronize**' option
f. Select a user group using the '**User Group List**' drop-down menu
g. Select and move users from '**User List**' to the '**Selected User List'**
h. Click the '**Save**' option



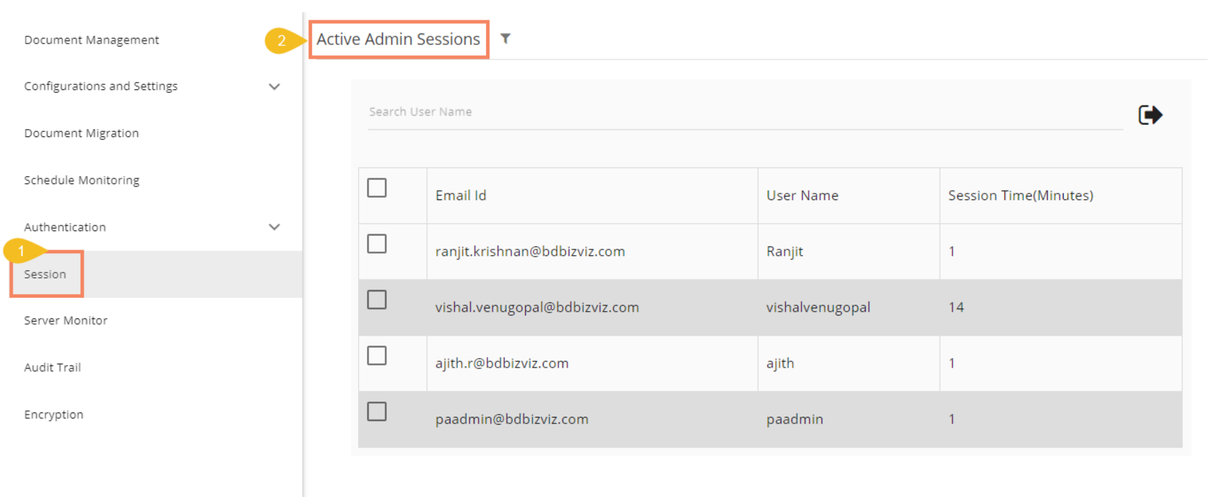
i. A pop-up message appears to confirm that the user list has been updated.

5.2.5. Sessions

The ‘**Sessions**’ is an administrative module to display active platform users.

i) Click ‘**Sessions**’ from the list of Admin options

ii) The ‘**Active Admin Sessions**’ page opens

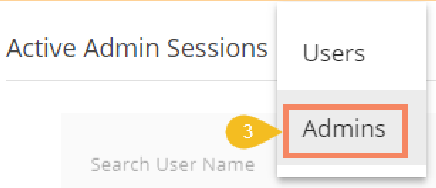


iii) Click the ‘**Filter**’ icon

a. A new window pops-up providing two filter options:

- Users
- Admins

b. Select any one filter option to launch the list of all the active sessions.



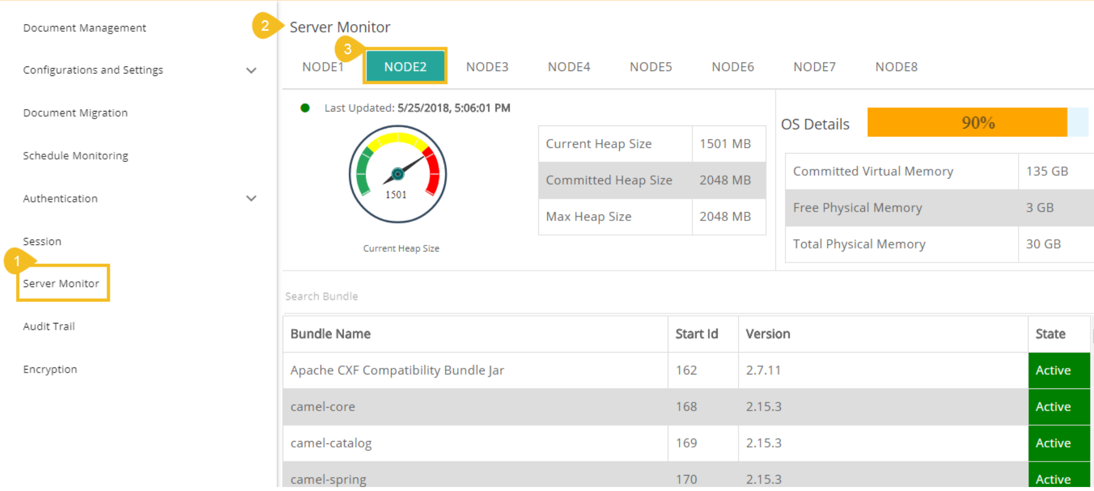
iv) Select a session from the list by check marking the box.
v) Click 'Kill **Session**' to kill the selected session.

Note: Users to whom the '**Kill Session**' option has been applied log out their sessions without any notification. The users need to log in again to the BDB platform.

5.2.6. Server Monitor

Server monitor reviews and analyzes a server for availability, operations, performance, security and other operations-related processes. The server administrators perform server monitoring to ensure that the server is performing as expected.

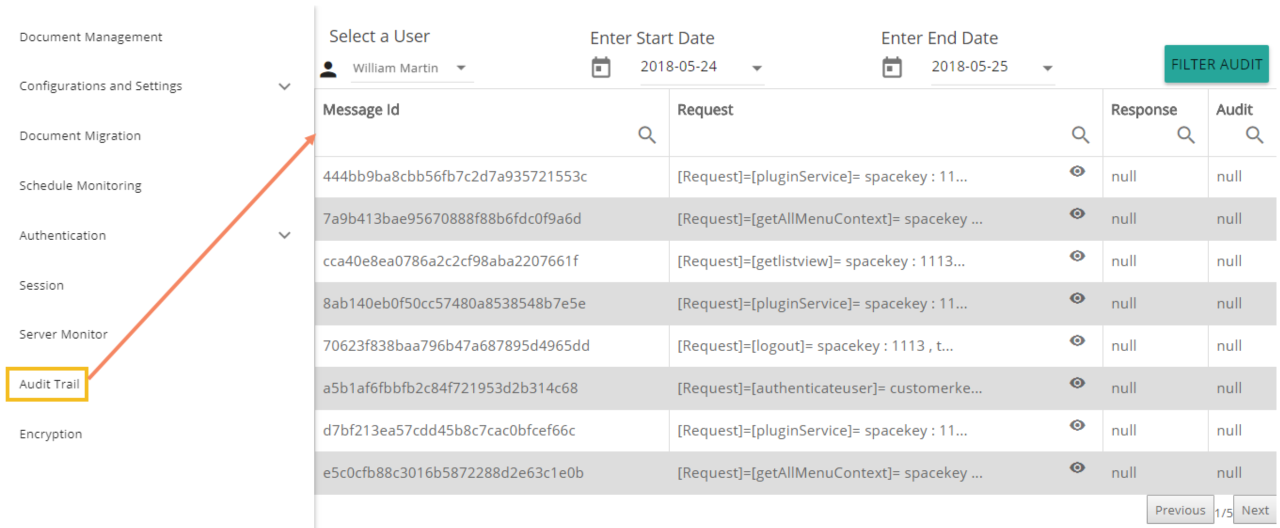
i) Click '**Server Monitor**' from the list of Admin options
ii) The '**Server Monitor**' page appears with Nodes ranging from 1 to 8
iii) Select a node to display the node-specific server details



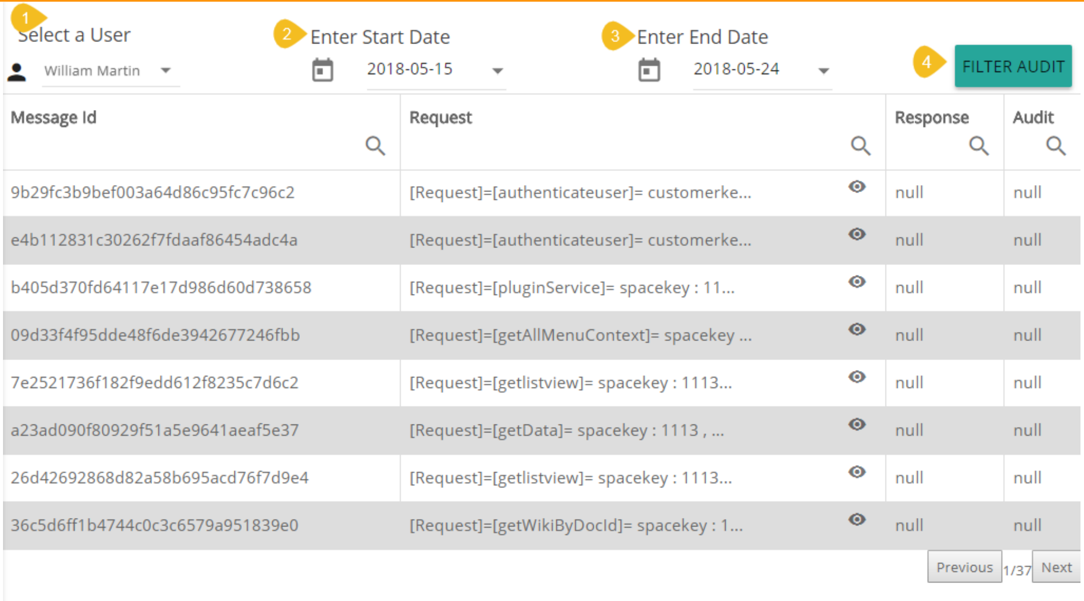
5.2.7. Audit Trail

The Audit trail (or Audit Log) module generates a sequential record of request and response between destination and source server.

i) Click the '**Audit Trail**' option from the list of admin options
ii) A page opens displaying the audit log details



- **Filter Audit:** Users can filter the audit log details by using the following steps:
  i) Select a User: Select a user from the drop-down list
  ii) Enter a Start Date: Select a Start Date from the drop-down list
  iii) Enter an End Date: Select an End Date from the drop-down list
  iv) Click the '**FILTER AUDIT**' option
  v) The filtered records of the audit log display in the list

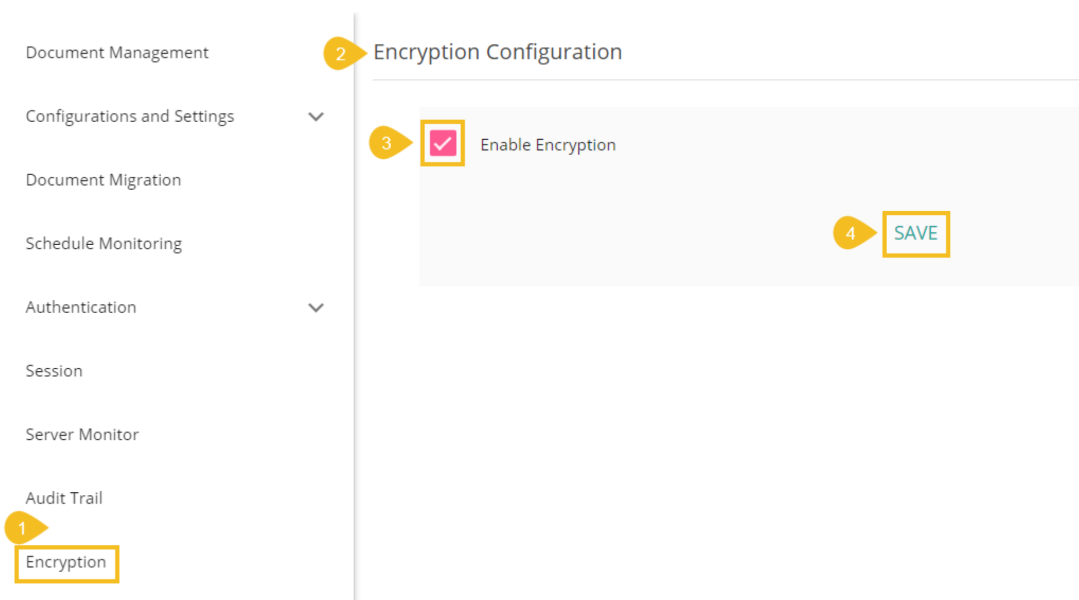


5.2.8. Encryption

Encryption is the process of encoding a message or information in such a way that only authorized users can access it. The primary purpose of this technology is to protect the privacy of digital data stored on computer systems or transmitted via the Internet or other computer networks.

The Encryption module provided under the list of admin options allows users to enable or disable encryption.

i) Click the '**Encryption**' option from the list of admin options
ii) The '**Encryption Configuration**' page opens
iii) Enable Encryption by a checkmark in the box
iv) Click the '**SAVE**' option



5.2.9. Migration

The Migration option is provided to migrate visual report, governed dashboard or Predictive Workflows, Scripts, and models to another space. The Migration admin option has two main categories: 1.Document Migration, and 2. PA Migration

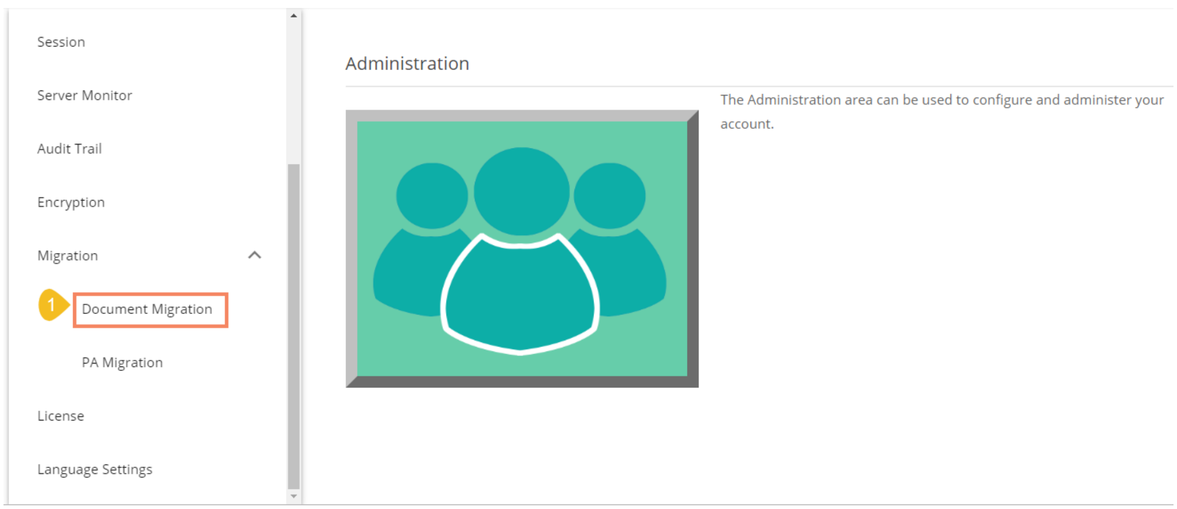
5.2.9.1. Document Migration

Users can migrate a business story or dashboard using the Document Migration option from the Administration panel. The entire migration task has three phases:

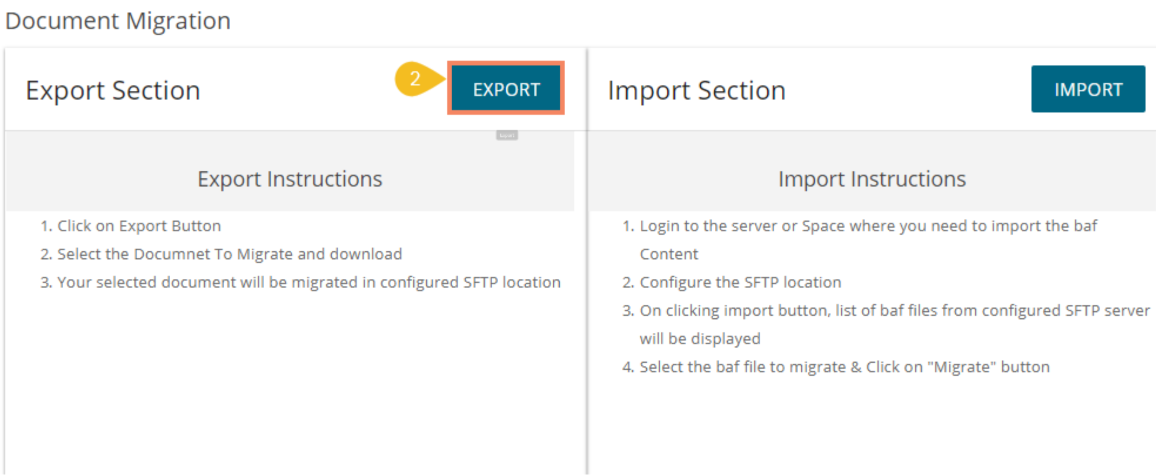
1) Configuring an SFTP Server: the SFTP server location should be similar for import and export account.
2) Export: users can select a document from using a source user account and download it to the SFTP server.
3) Import: users need to open this option using a destination user account where the exported file is intended to import.

Steps by step for document migration:

i) Click the '**Document Migration**' option from the Migration drop-down

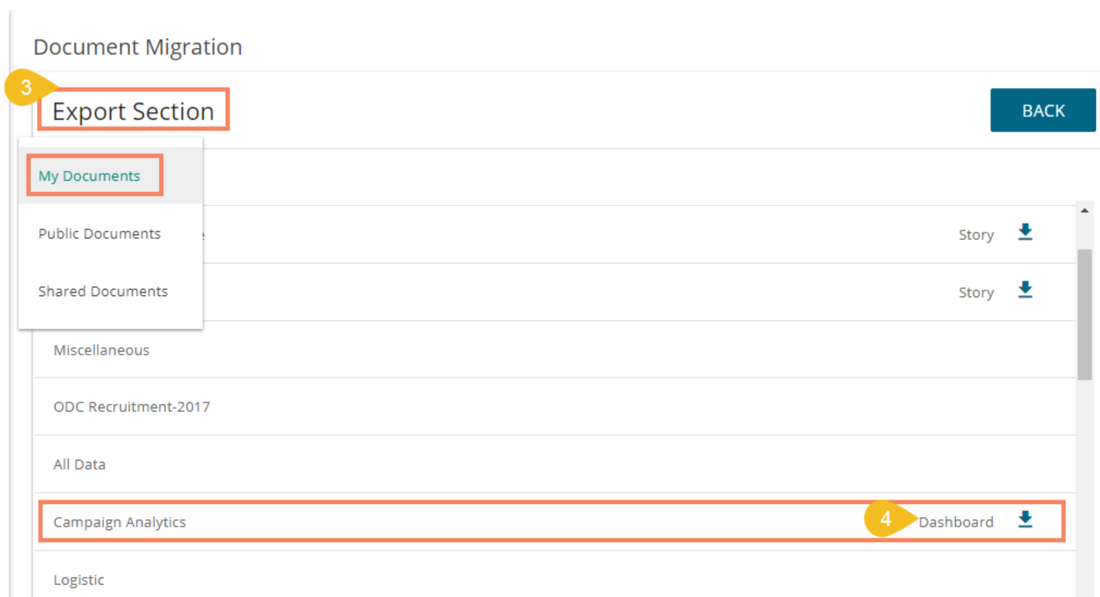


ii) Click the '**EXPORT**' option from the Document Migration page



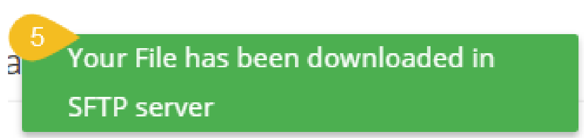
iii) The '**Export Section**' page opens with the list of documents in the various document spaces

iv) Select a document to Migrate and download it using the download option



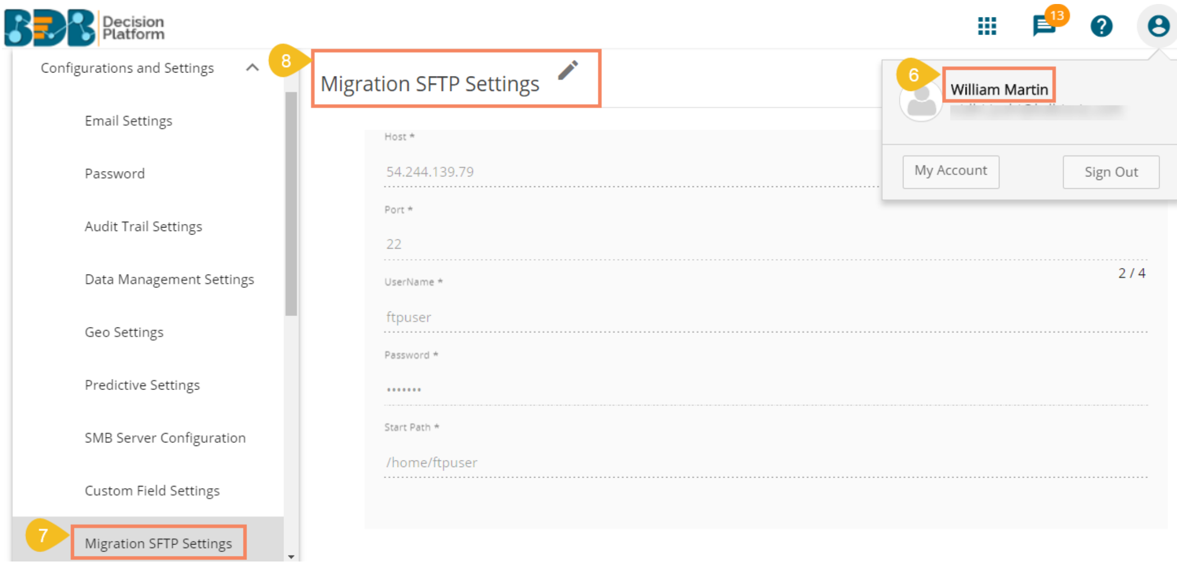
Note: Only stories and dashboards display the download icon, it is not applicable to the folders.

v) A success message appears at the completion of the download process to confirm the download of the seleted file in the SFTP server.

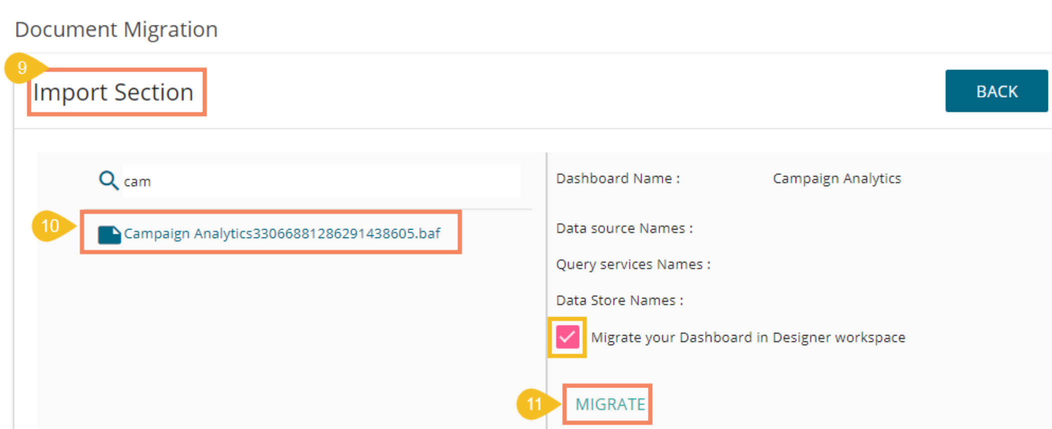


vi) Then log in as a different user to the server or space where you need to import the baf

content
vii) Navigate to Migrate SFTP Settings
viii) Configure the SFTP location (**SFTP location for the source and destination account should be similar to use the document migration functionality**)

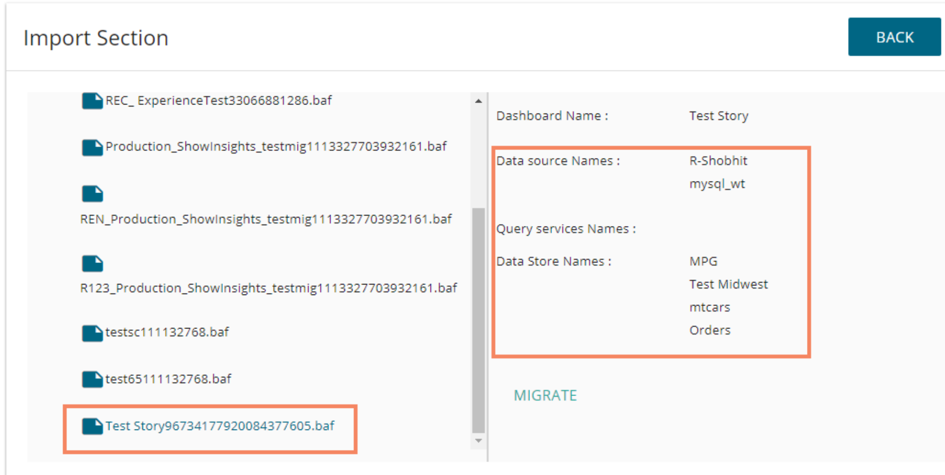


ix) By clicking the ‘**Import**’ button from the Document Migration page, the Import Section lists all the baf files from the configured SFTP server
x) Search and Select the baf file you want to migrate and click on it
xi) Click the ‘**MIGRATE**’ option from the right-side panel displaying the document details

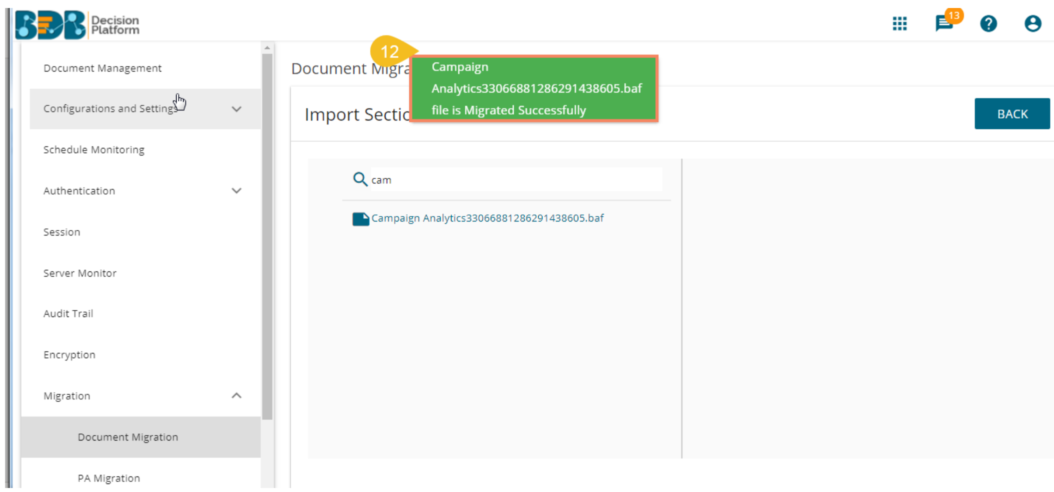


Note:

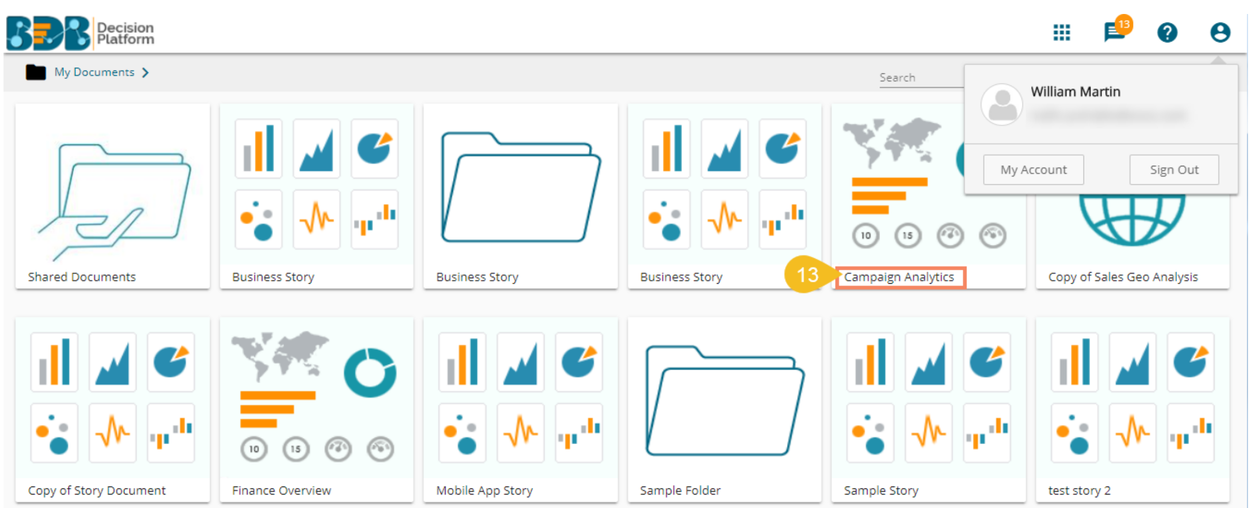
a. Users can also migrate the dashboard in the Designer workspace by using a check mark in the given box.
b. If the selected dashboard or story is created based on an RDBMS connector, the data connector details get displayed on the right-side panel.
E.g., The Test Story is created using data connectors R-Shobhit and mysql_wt the available data stores on these connectors are MPG, Test Midwest, mtcars, Orders as displayed in the following image:



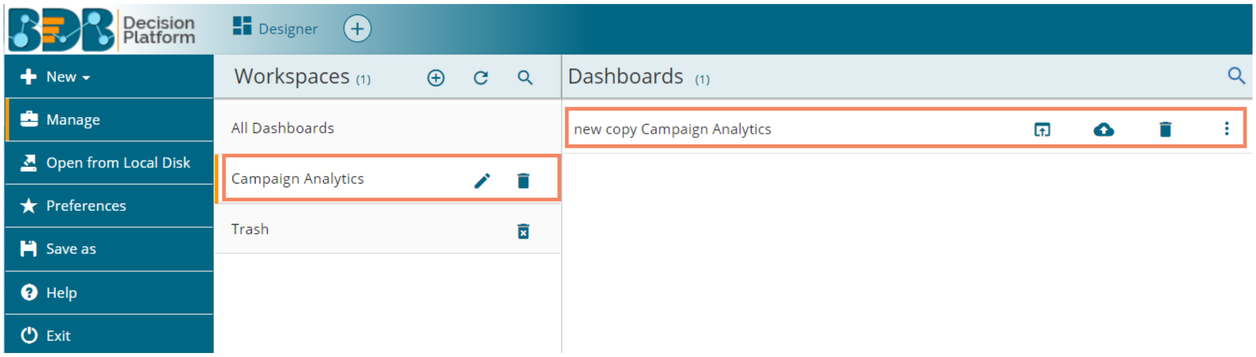
xii) A confirmation message appears to inform completion of the baf file migration.



xiii) The migrated document lists on the platform homepage

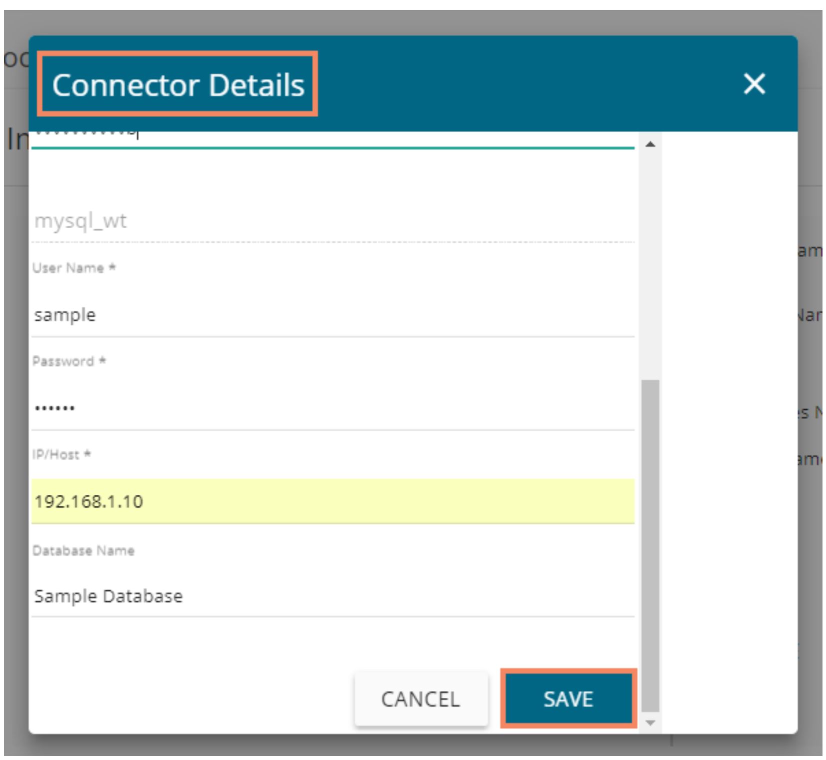


xiv) Users can open the Dashboard Designer plugin to check whether the selected Dashboard got migrated to the workspace provided if the users enabled that option for the dashboard.



Note:

a. Dashboards or stories created based on an RDBMS Data Service, Predictive Service, and Data Store require to provide the data connector details to pass while migrating.
   i. Users need to provide the following details of the Data Connector:
      1. User Name
      2. Password
      3. IP/Host
      4. Database Name
   ii. Click the '**SAVE**' option



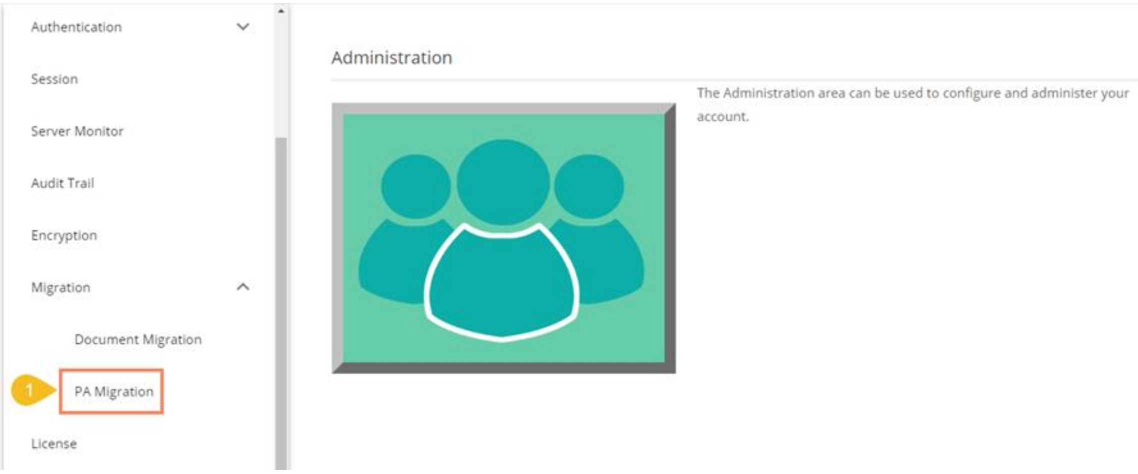
   iii. The selected data connector gets migrated to the destination user account.

b. Dashboards and Stories using the API data connectors/data sets don't require to provide the Connector details for document migration.
c. Dashboards and Stories using the File data connectors or Dashboards having file uploads do not require to provide the connector details for the '**Document Migration**' functionality.

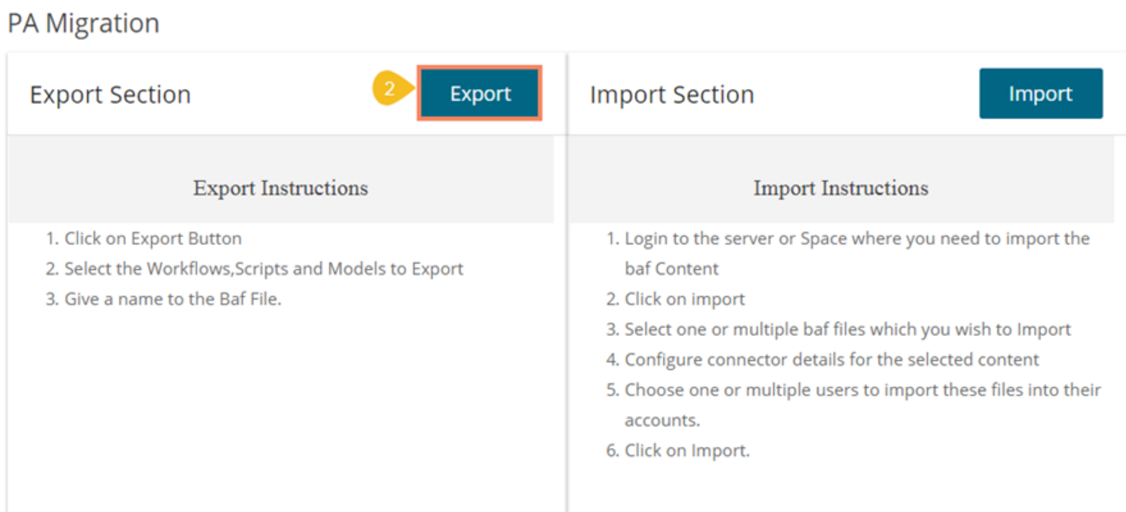
5.2.9.2. PA Migration

The PA Migration option allows users to migrate Predictive Workflows, Script, and model. The users can migrate multiple Workflows, scripts, and models to multiple users. However, the description is given below to migrate one PA workflow to another user.

i) Click the 'PA Migration' option from the Migration drop-down

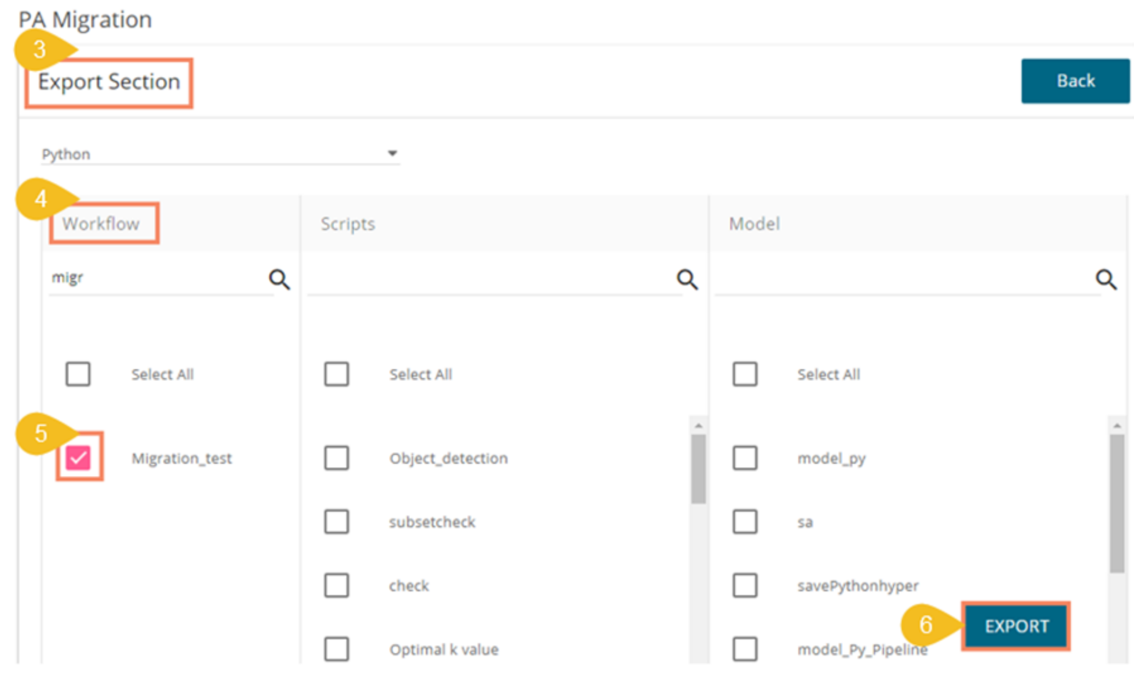


ii) Click the 'Export' option from the next screen

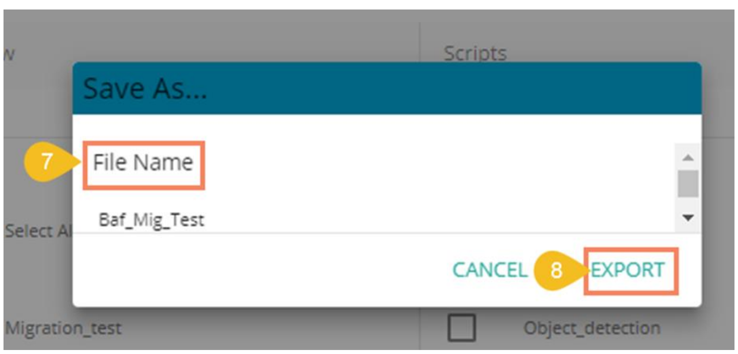


iii) The 'Export Section' opens
1. Select a Predictive Workspace to display the list of Workflows (By selecting 'All' option workflows from all the predictive workspaces display)

2. Select the Workflow(s), Script(s), or Model(s) using the respective lists (If the selected workflow contains script and model components, then those components get selected by default)
3. After selecting the desired workflows, scripts, and models click the 'Export' option

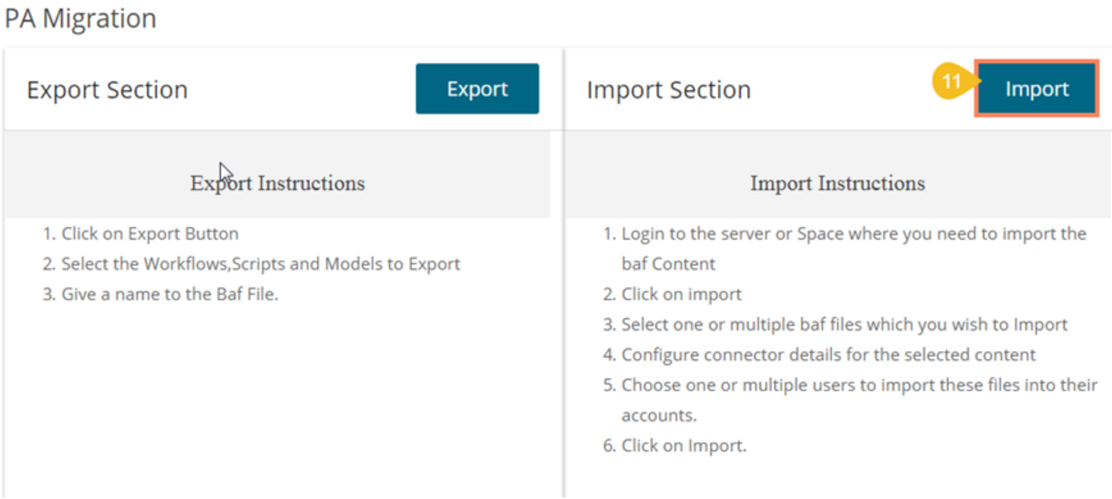


iv) A new window opens to provide a file name
1. Give the file name
2. Click the 'Export' option



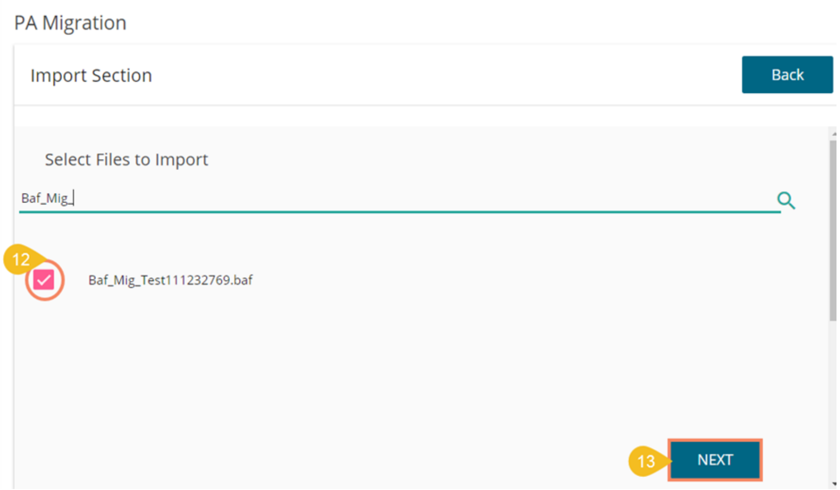
v) A notification message appears to inform that the file has got successfully downloaded in SFTP server
vi) Click the 'Back' option

vii) Click the 'Import' option from the next page that appears

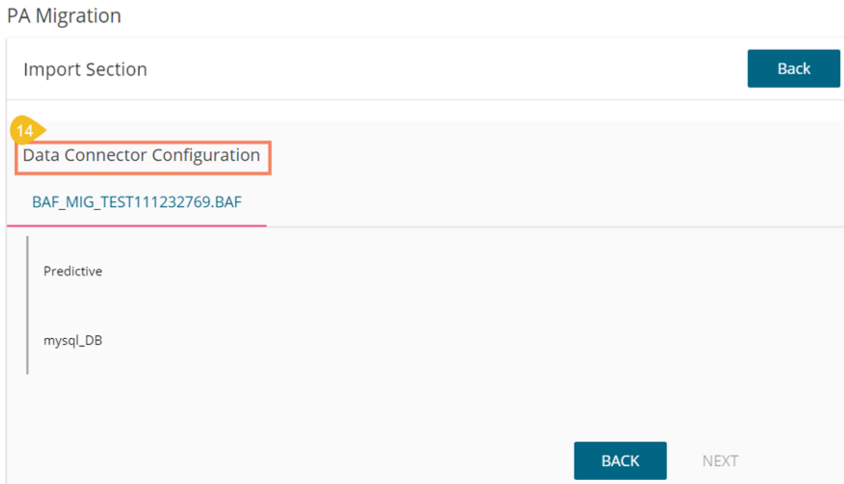


viii) Search for the crerated BAF file

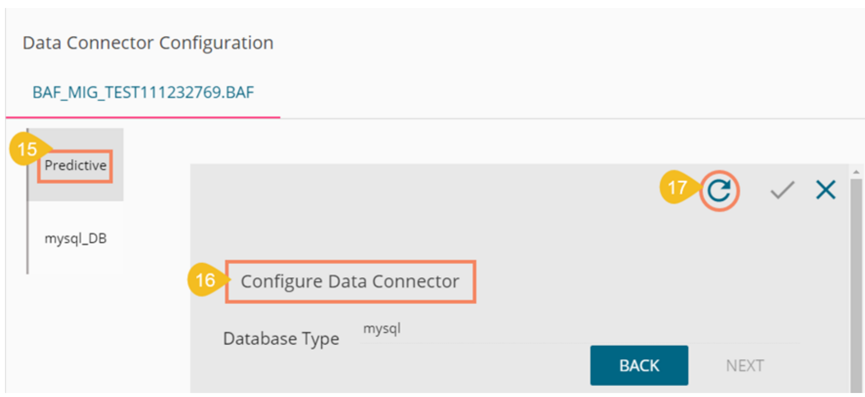
ix) Click the 'NEXT' option



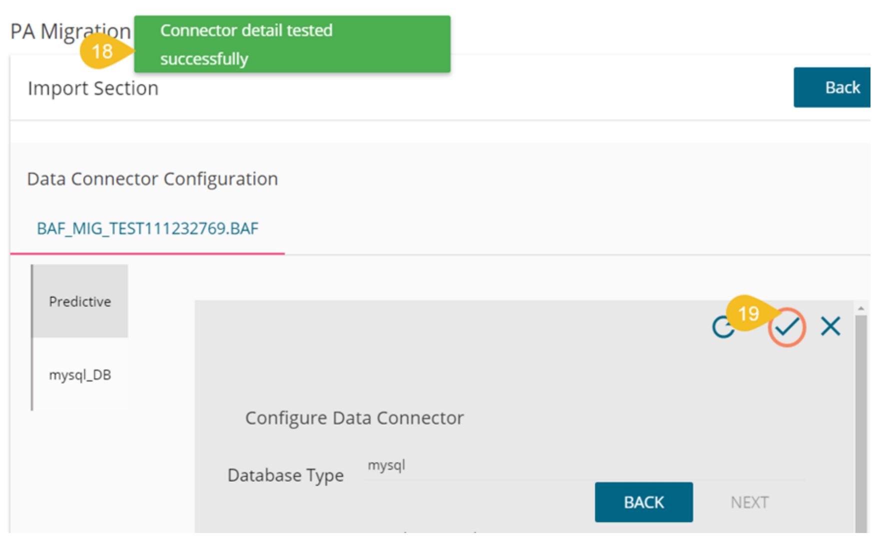
x) The Data Connector Configuration page opens (only for the Workflows created using RDBMS-MySQL, MSSQL, Oracle data source)



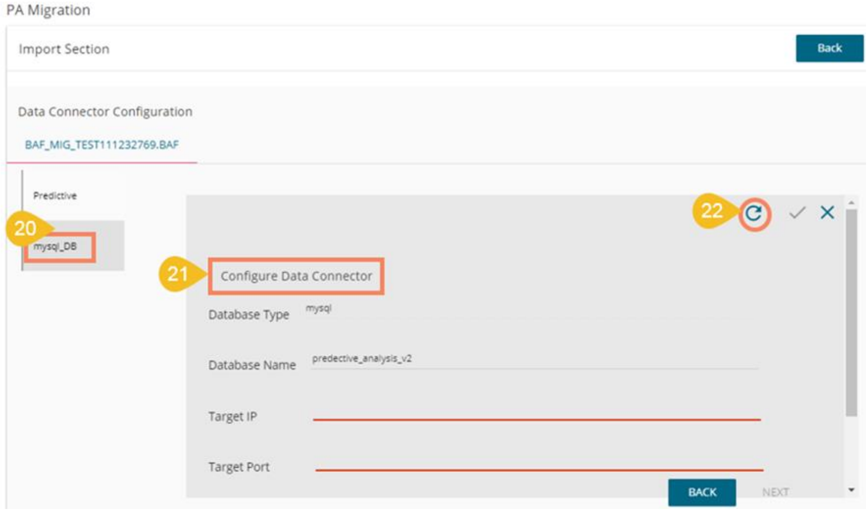
1. Configure Data Reader
   a. Select the Data Reader
   b. Configure the fields provided under ‘Configure Data Connector’ heading
   c. Click the ‘TEST’ icon to check the connection



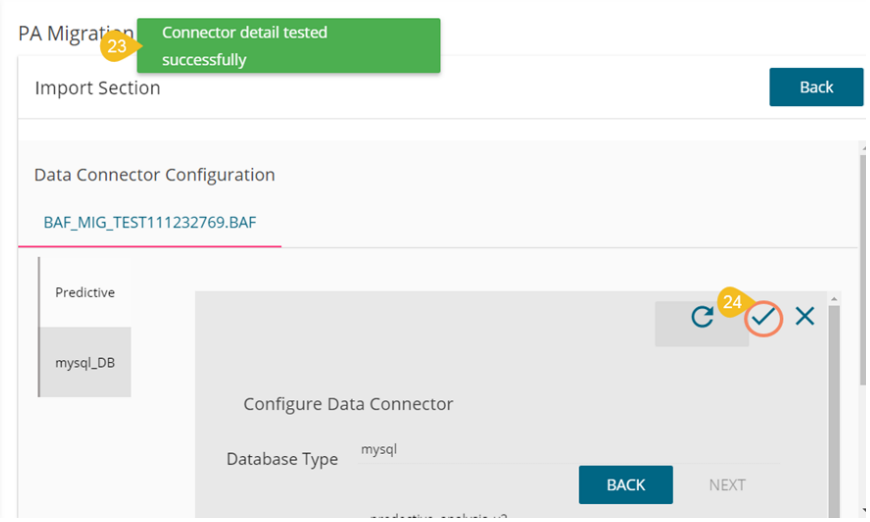
   d. A success message appears
   e. Click the ‘SAVE’ icon to save the connector details



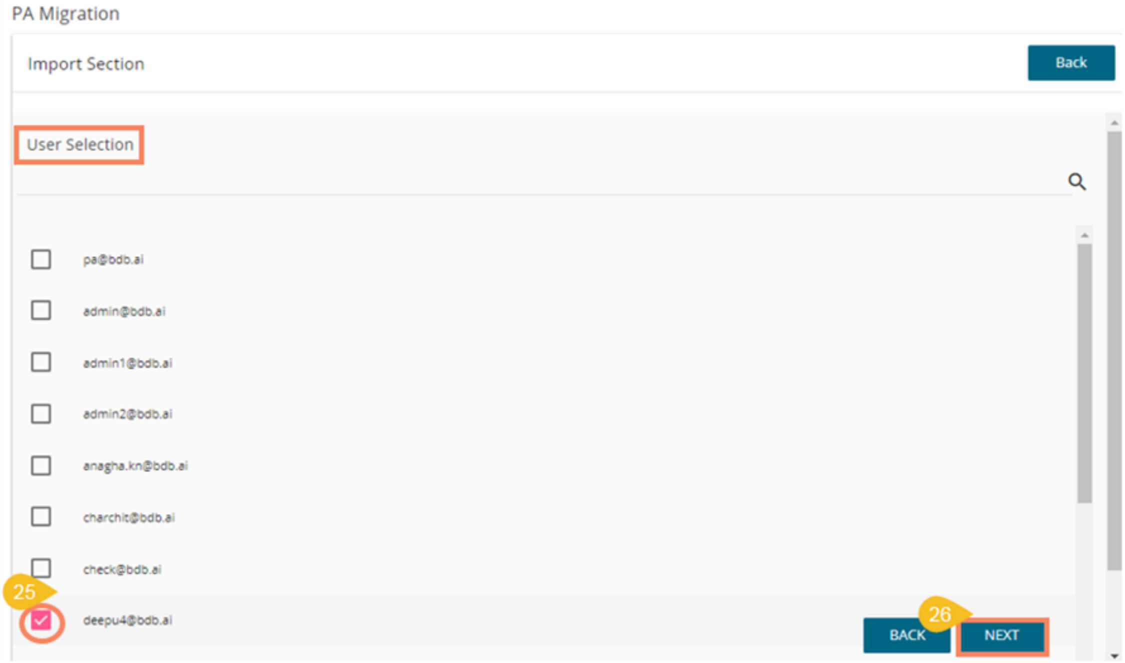
2. Configure Data Writer
   a. Select the Data Reader
   b. Configure the fields provided under ‘Configure Data Connector’ heading
   c. Click the ‘TEST’ icon to check the connection



   d. A success message appears
   e. Click the ‘SAVE’ icon to save the connector details

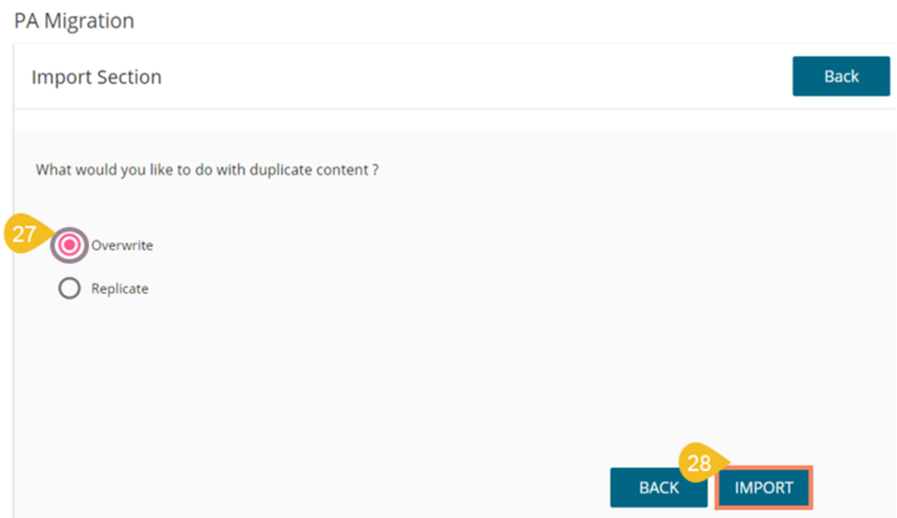


xi) The ‘User Selection’ page opens
1. Select user/users from the displayed list
2. Click the ‘NEXT’ option to proceed



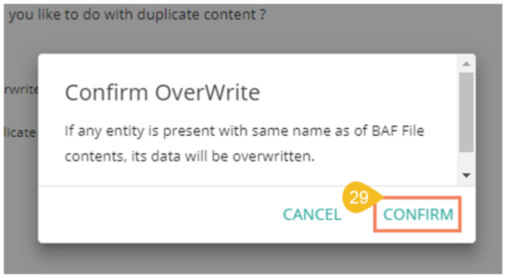
xii) Select an option out of Overwrite and Replicate to treat the duplicate content (if in case it happens to be duplicate)

xiii) Click the 'IMPORT' option

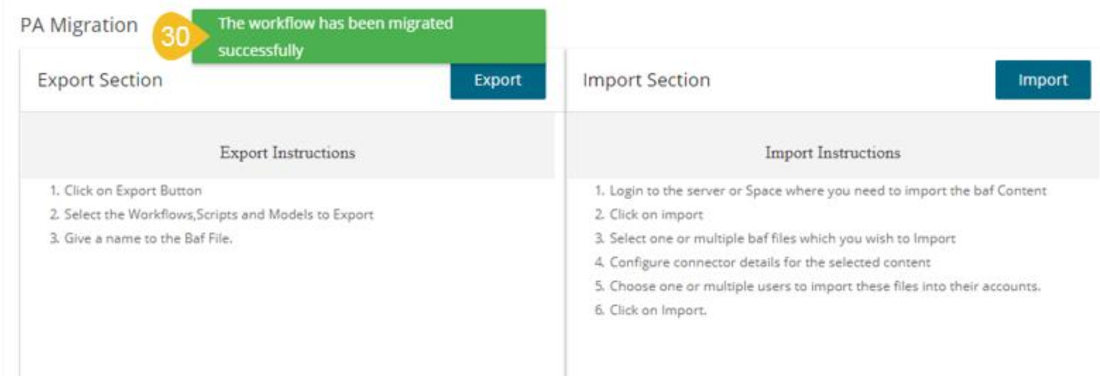


xiv) A confirmation message appears

1. Click the 'CONFIRM' option if wish to confirm the selected action

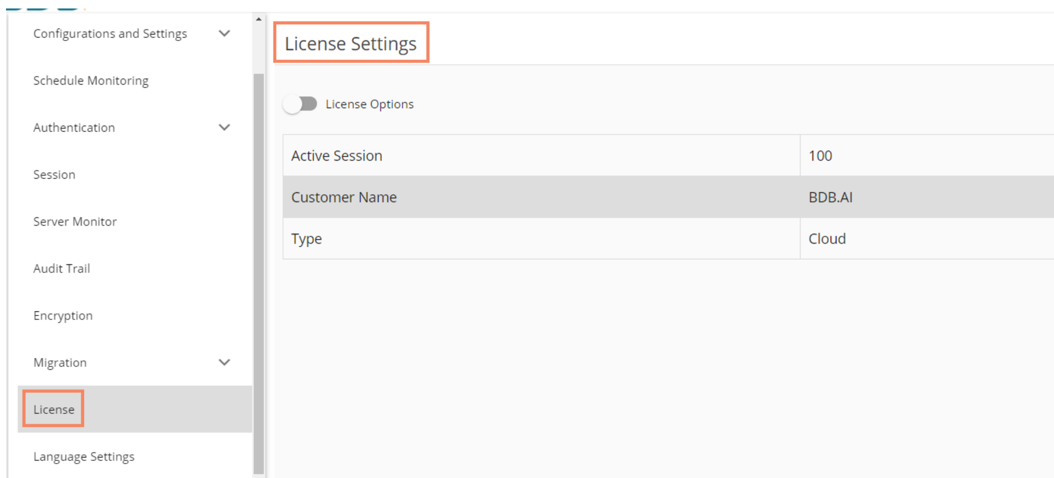


xv) A message appears to inform that the selected workflow has been successfully migrated.



5.2.10. License

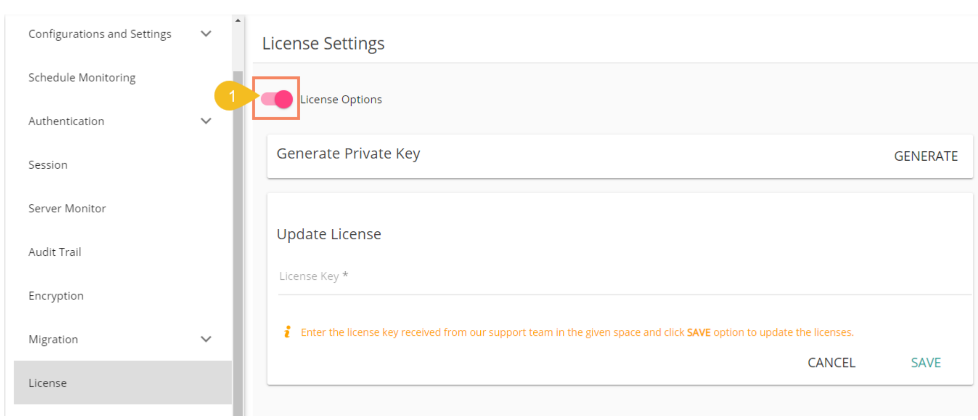
The License admin option displays the active sessions with customer name and product type.



License admin section also contains the 'License Options' to generate a Private Key and Update the licensed users.

The following steps are given to use the 'License Options'

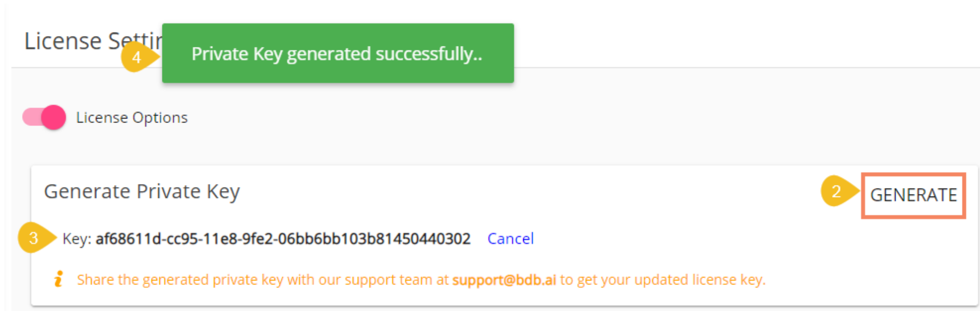
a. Generate Private Key
   i. Navigate to the 'License Settings' page
   ii. Enable the License Options by using the radio button



iii. Click the ‘GENERATE’ option

iv. A Private key gets generated, and a message appears to inform the same.

v. Users need to share the generated Private Key with our support team at support@bdb.ai to get the updated license key.

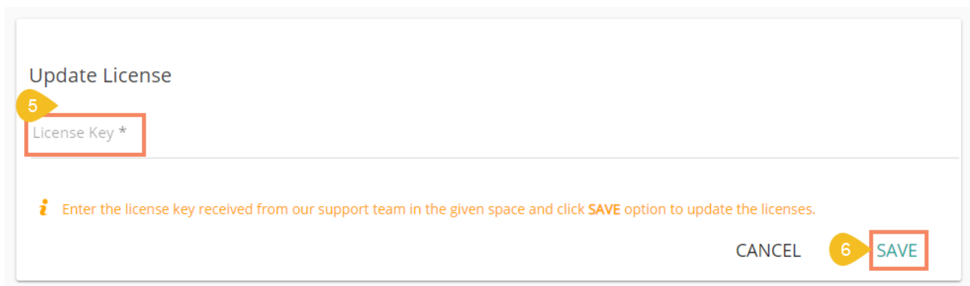


b. Update License

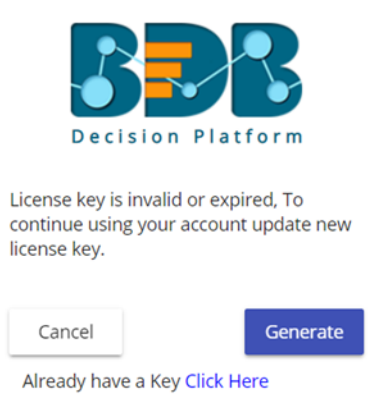
i. Once the user shares the generated private key with the support team of BDB, the support team sends them the license key.

ii. Users need to enter the license key provided by the support team in the space given under the ‘Update License’ section.

iii. Click the ‘SAVE’ option to update the existing licenses.



Note: The same workflow of License options is provided on the BDB Platform login page to facilitate the new users and (existing) users who wish to renew their expired licenses with BDB.

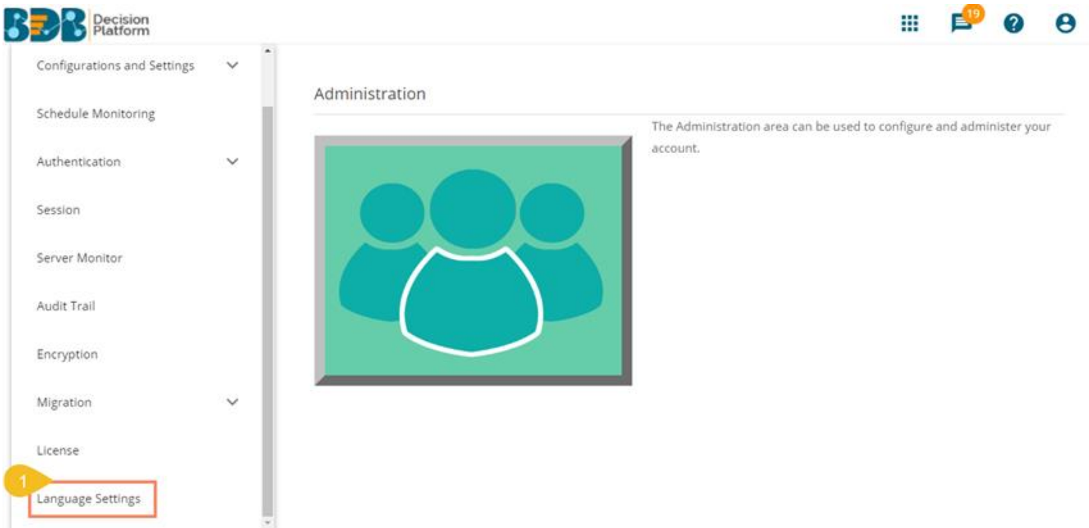


1. Click the ‘Generate’ option to get a new private key (which needs to be shared with the support team at support@bdb.ai to receive the License Key.
2. Choose the ‘Click Here’ option, if you have already received the License key from the BDB support team.

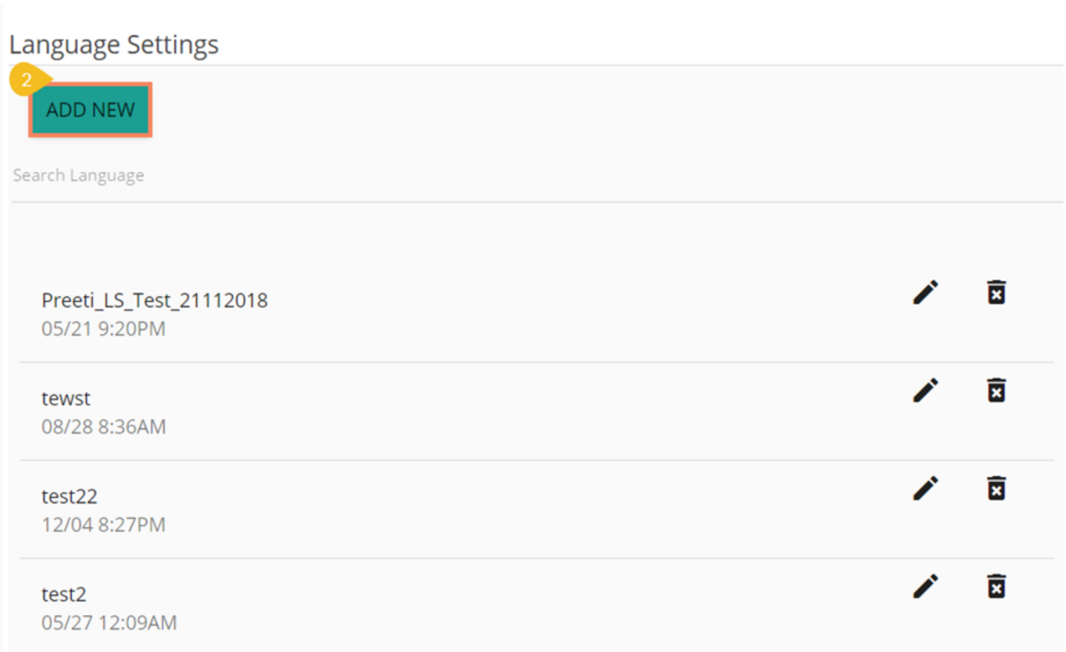
5.2.11. Language Settings

The Language Settings admin option allows the administrators to add new language settings containing terms from various available languages to be mapped with the Dashboard titles, sub titles, X and Y Axis description, Tooltip, Label dashboard in another language.

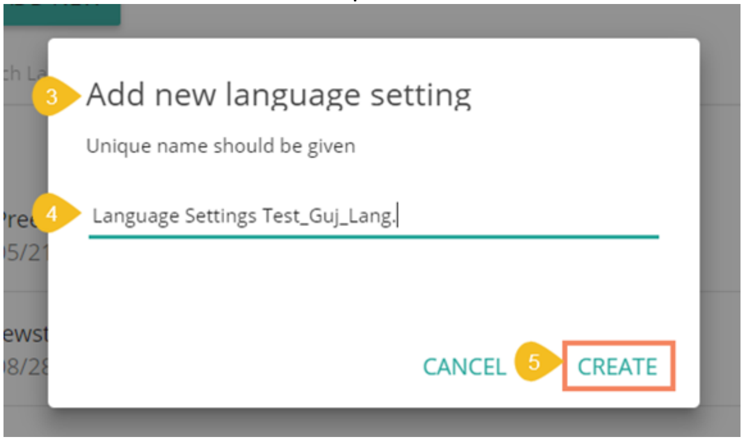
i) Click the ‘Language Settings’ option using the Administration module.



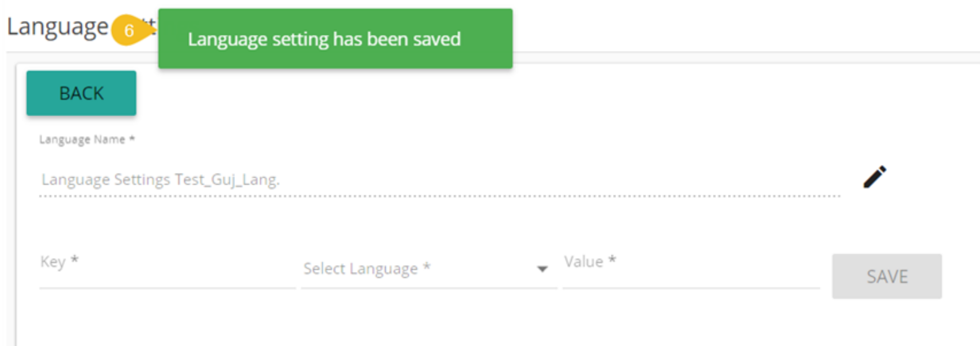
ii) Click the ‘ADD NEW’ option provided on the language settings page



iii) The ‘Add New Language Setting’ window opens
   1. Provide the unique name for the new language setting
   2. Click the ‘CREATE’ option

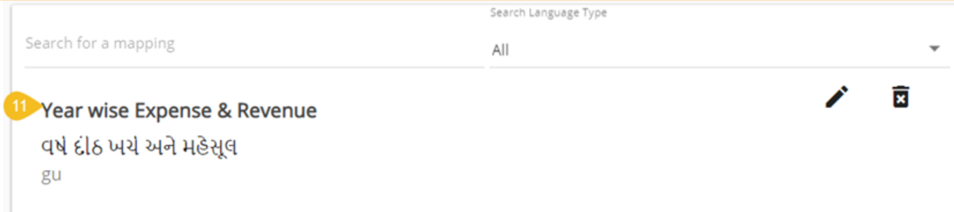


iv) A new Language Setting gets created, and a message appears to inform the same

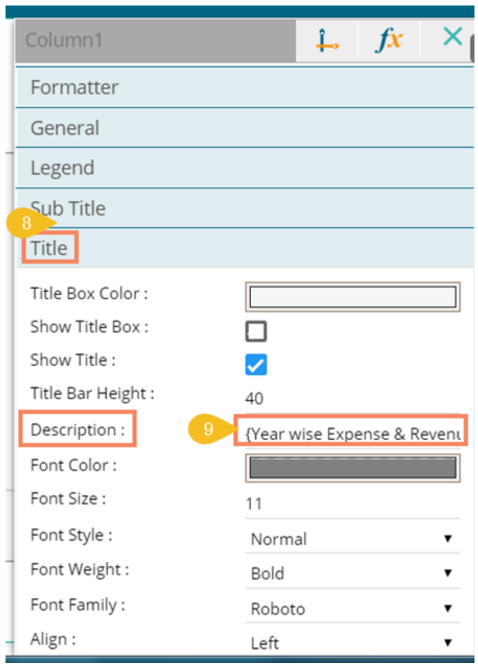


v) Users can add more terms to the newly created language setting using the following steps:
   1. Select a language code from the drop-down menu
   2. Provide the key term from the Dashboard
   3. Provide the value of the inserted key term in the selected language
   4. Click the ‘SAVE’ option

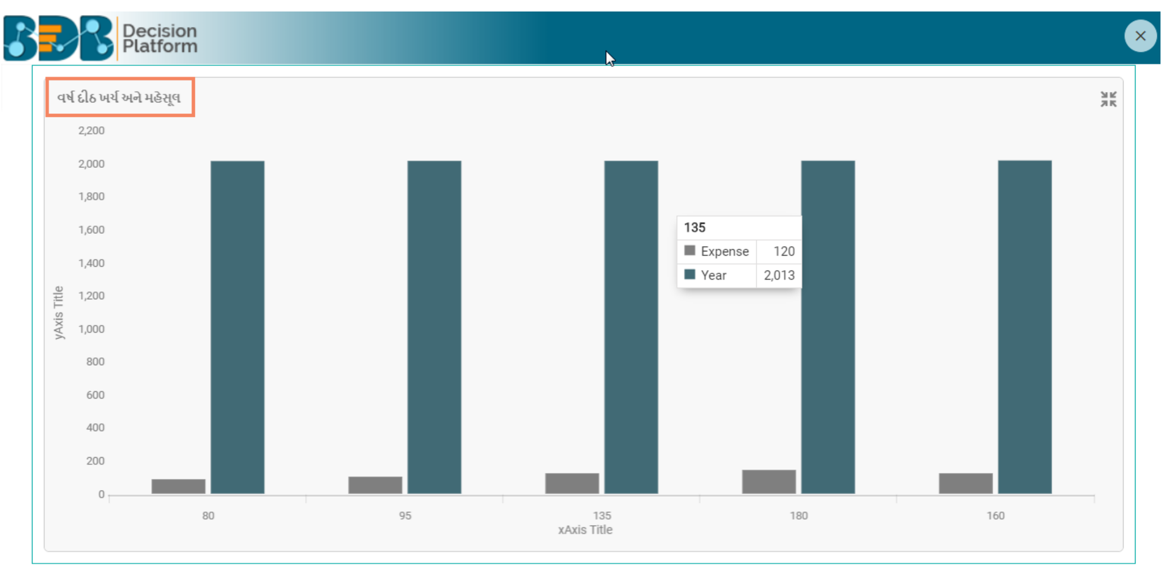
vi) The values get saved with key and language code for language mapping



vii) Access the ‘Title’ properties of the dashboard and make sure that the title description is provided in the “{}” brackets (if not then modify it accordingly)



viii) Click the ‘Preview’ icon to see the Dashboard title in the selected language



Note: The users can use the Language Setting functionality for the below given dashboard charting components:

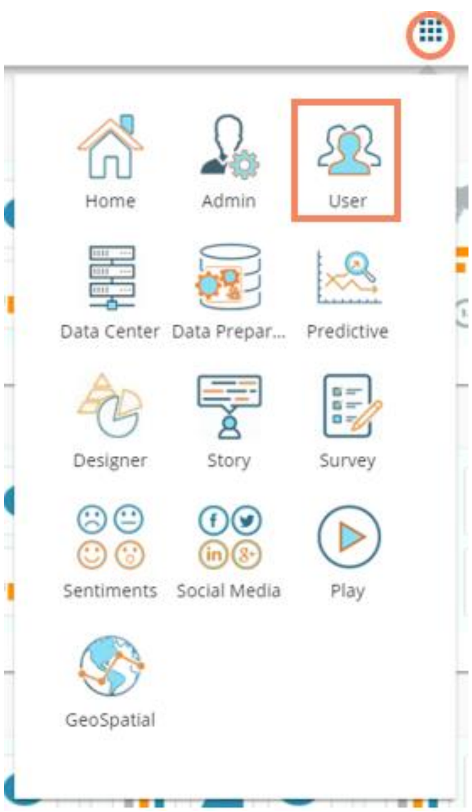
1. Title and Subtitle description
2. X-axis and Y-axis description (second Axis description)
3. Inbuilt Legends, Timeline Legends.
4. Legend component and static legends
5. Title of filters
6. Header name of Grids
7. Pie chart without a category: Legends
8. Tooltips and custom tooltip
9. Export, Filter Saver, Url button, Bullet, Gauge, Semi gauge titles

6. User Management

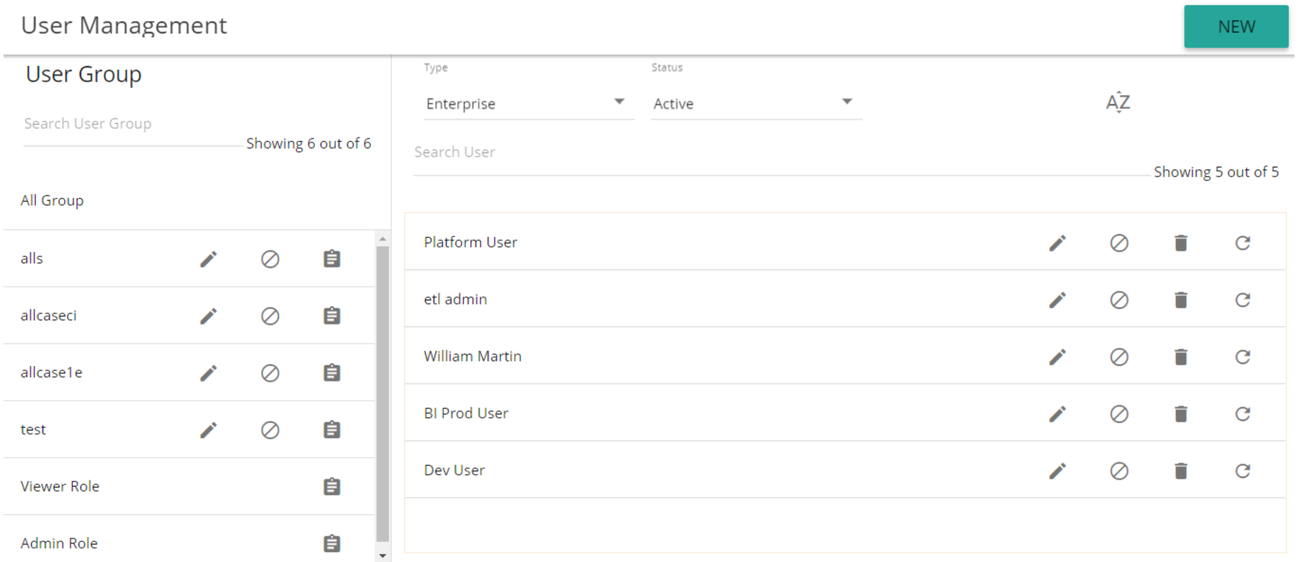
This section describes how to create a user or user group in BDB Platform. A newly formed user must be added to a user group to access the various platform application.

6.1. Accessing the User Management Page

i) Select the '**User**' plugin from the Apps menu



ii) The User Management page opens



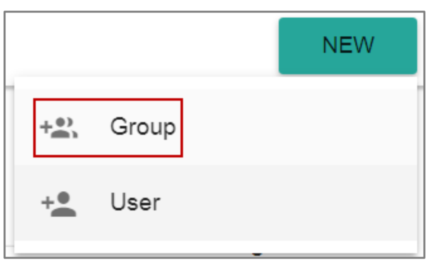
Note: The admin can search for a specific user or group by using the '**Search**' boxes

6.2. Creating a New User Group

i) Click the '**NEW**' option

ii) A context menu opens

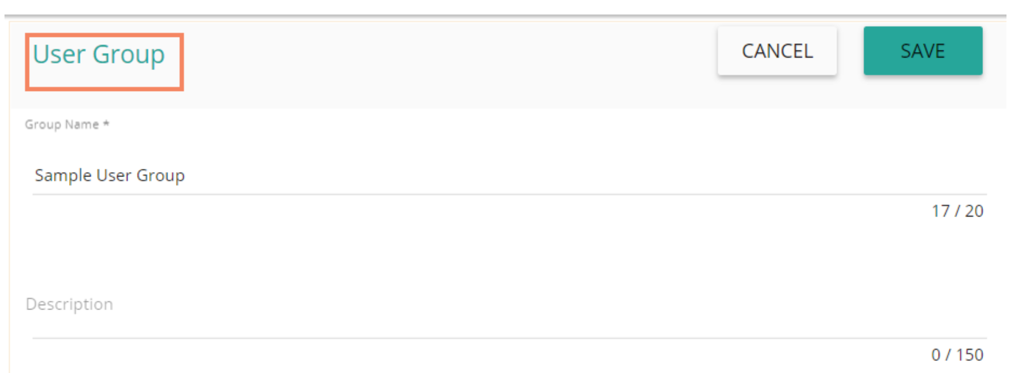
iii) Select '**Group**' option from the context menu



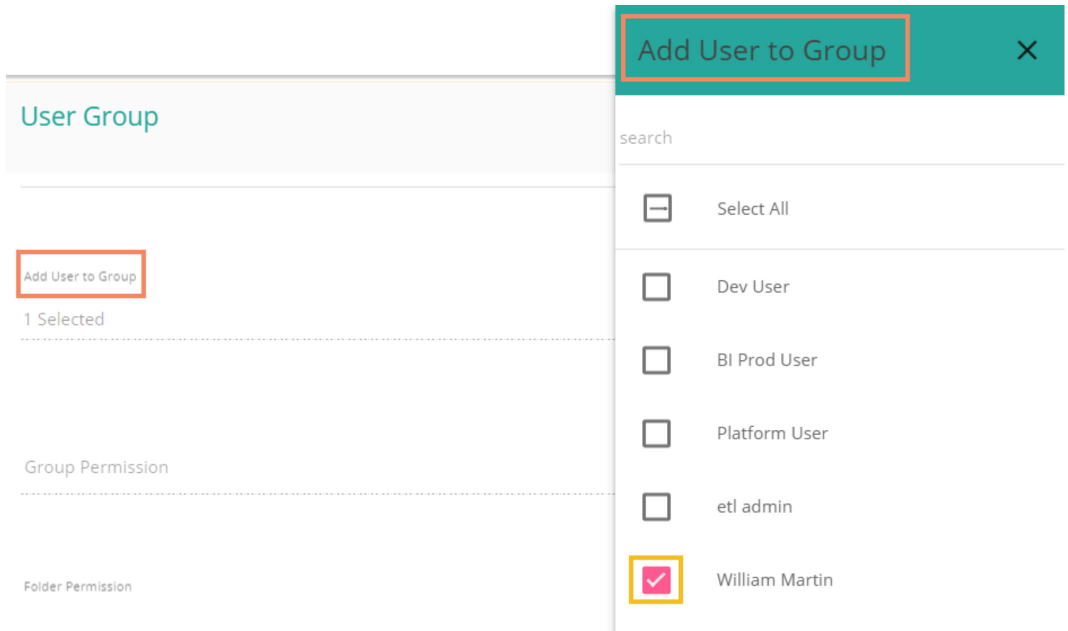
iv) Provide the following information for a new User Group:

a. **Group Name:** Enter a name for the user group (The group name should not exceed 20 words)

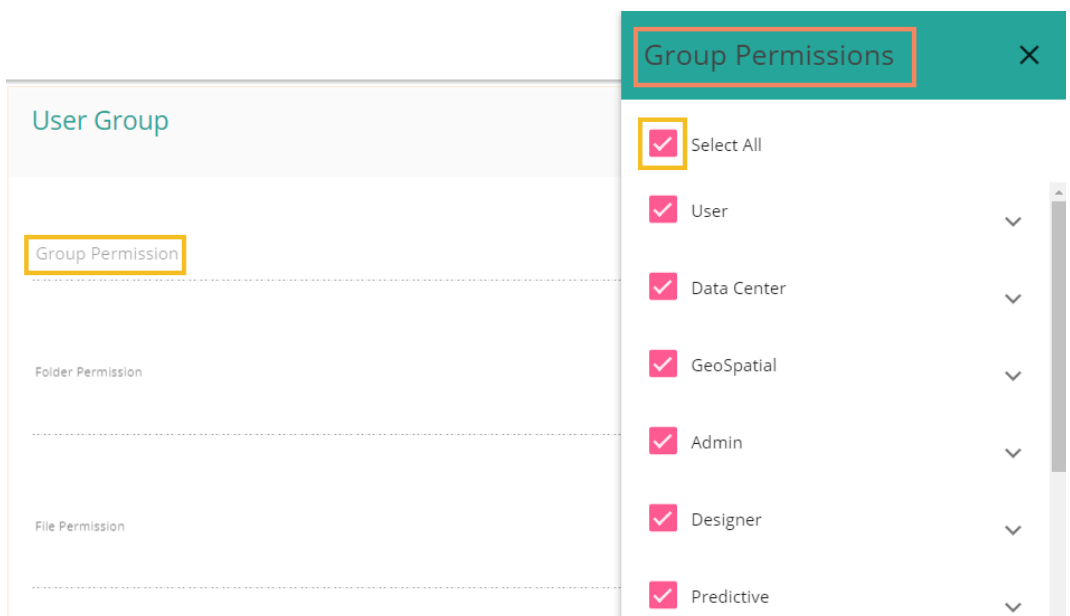
b. **Description:** Describe the user group (optional) (The description should not exceed 150 words)



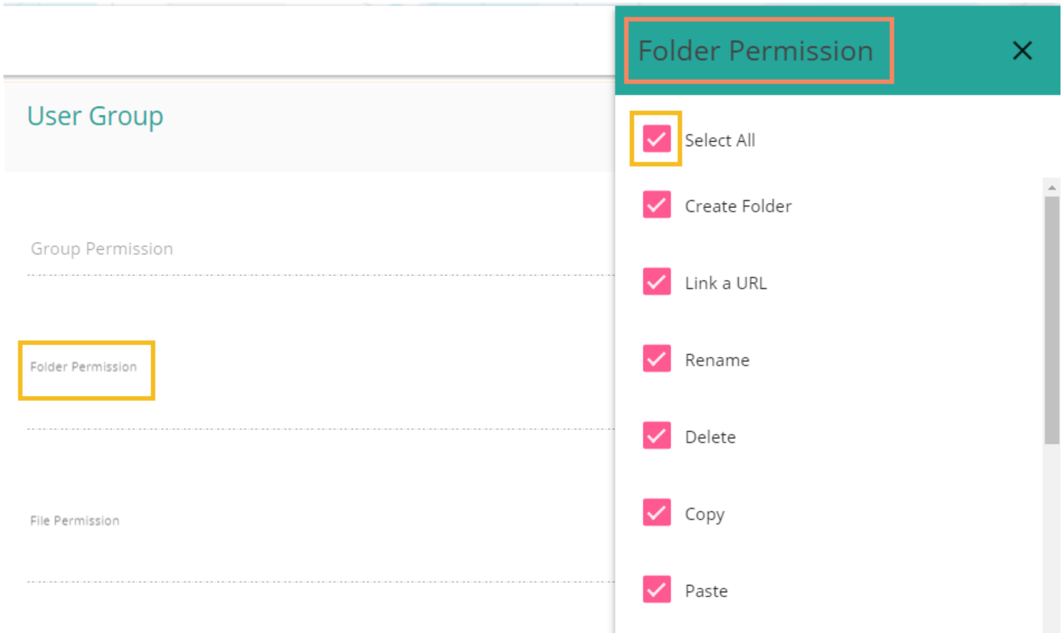
c. **Add User to Group**: Click the '**Add**' button and select User(s) by using a checkmark in the box from the displayed list of users.



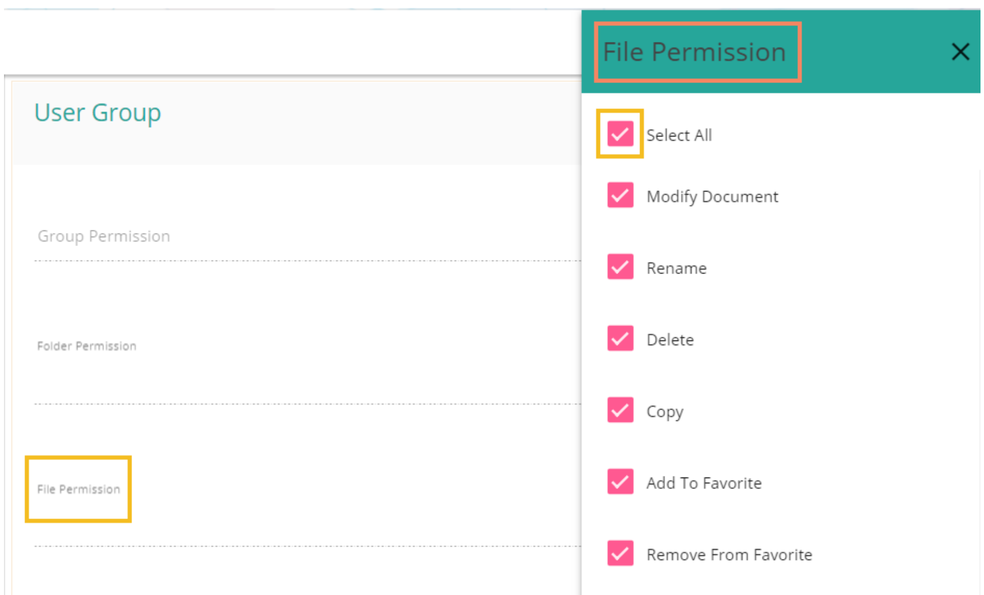
d. **Group Permission**: Click the '**Add**' button provided next to the Group Permission option. Assign various plugin/app rights to the User Group via the '**Group Permissions**' menu list (It is Mandatory).



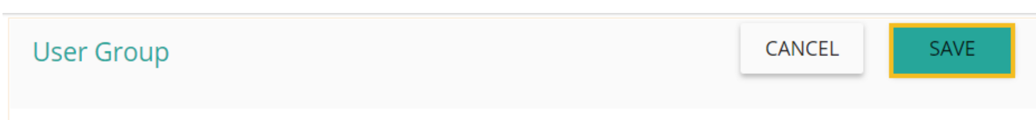
e. **Folder Permission**: Click the '**Add**' button provided next to the Folder Permission option. Assign various folder permissions to the User Group via the '**Folder Permission**' menu list.



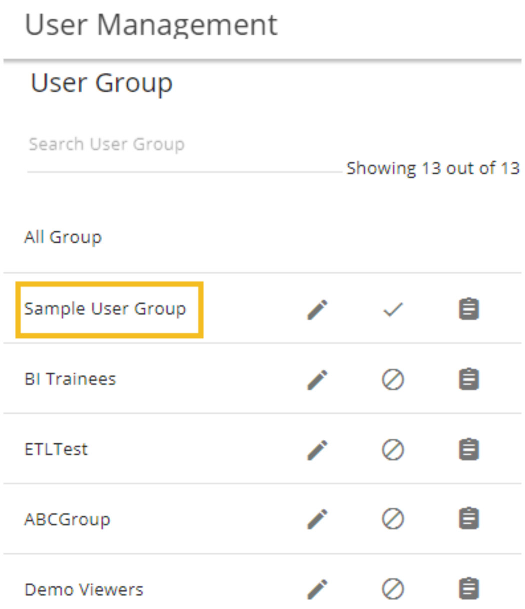
f. **File Permissions**: Click the '**Add**' button provided next to the File Permission option. Assign various file permissions to the User Group via the '**File Permission**' pop-up window.



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



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



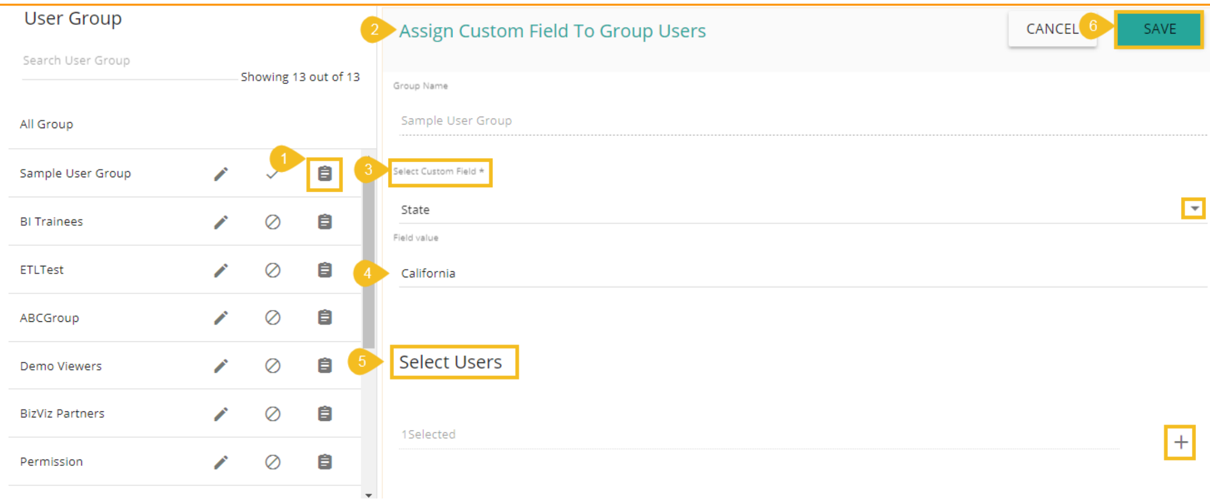
Note: Users can apply the following actions on a created user group.

Option	Name	Description
	Edit	To edit details for the selected user group
	Activate Group	To activate the selected user group
	Block Group	To block the selected user group
	Assign Custom Fields	To assign the group-specific custom fields.

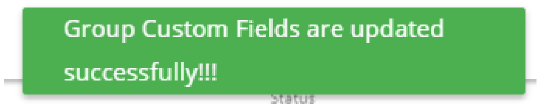
6.2.1. Assigning Group Custom Fields

This feature is provided to assign values to the custom fields.

i) Click ‘**Assign Custom Field**’ option provided next to a user group
ii) The ‘**Assign Custom Field to Group Users**’ page opens
iii) Select a Custom Field using the drop-down menu
iv) A new field displays to assign the ‘**Field Value**’ for the selected custom field
v) Select users using the ‘**Add**’ icon to assign the custom field to the selected users
vi) Click ‘**SAVE**’



vii) A message will pop-up to assure that the group custom fields are updated successfully

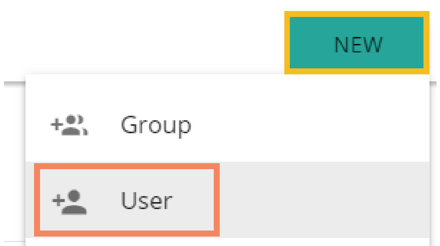


Note: The default user groups do not have the '**Edit**' and '**Block**' icons –E.g., Admin Role and Viewer Role.

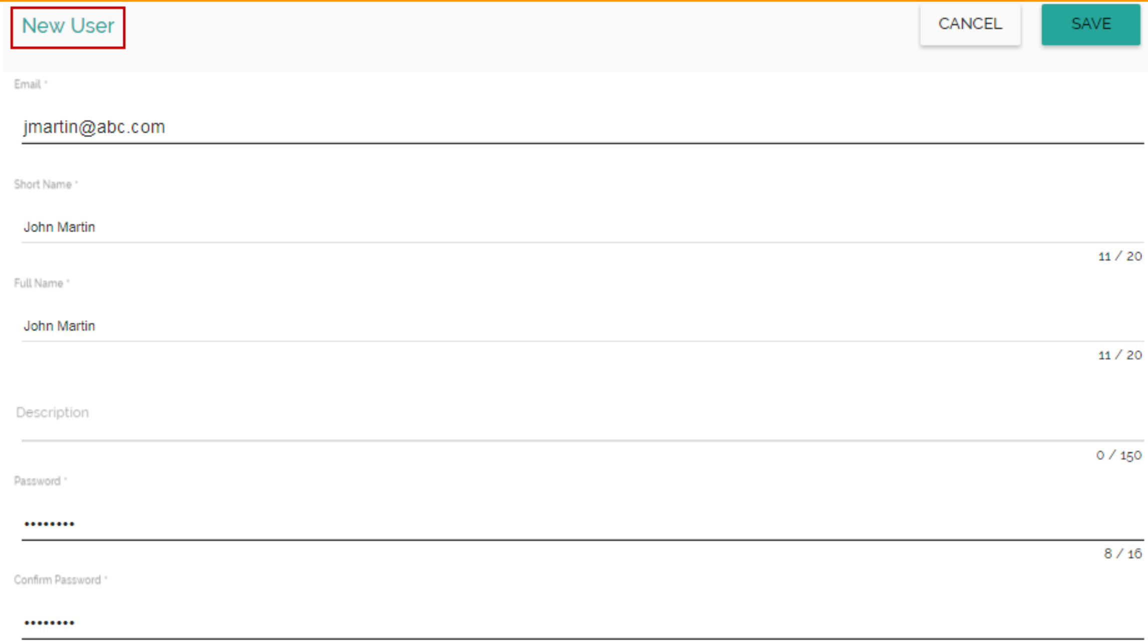
6.3. Creating a New User

i) Click '**NEW**'
ii) A context menu opens
iii) Select the '**User**' option from the context menu

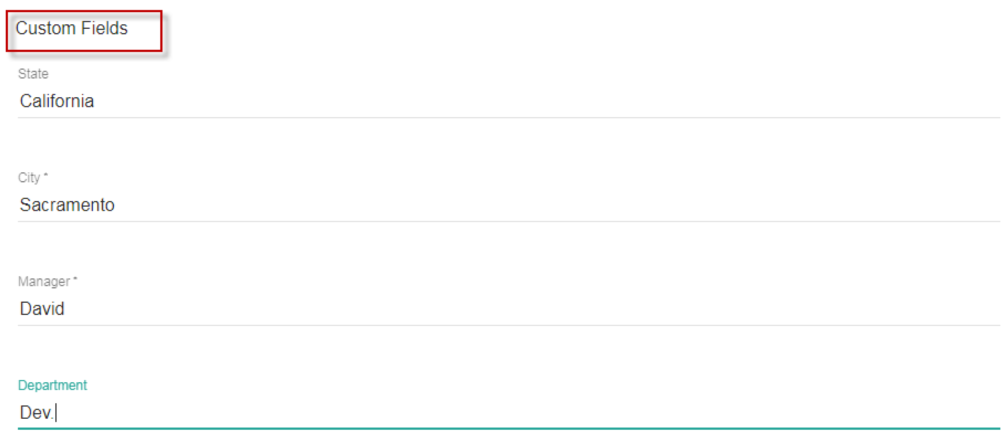
Set a

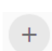


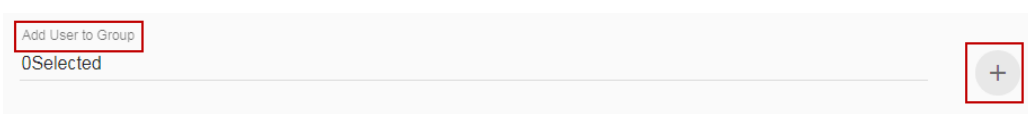
iv) The '**New User**' form opens
v) Fill in the following information to create a new User:
   a. **Email:** Email address
   b. **Short Name:** Short name of the user
   c. **Full Name:** Full name of the User
   d. **Description:** Describe the user (optional)
   e. **Password: Set** password for the new user
   f. **Confirm Password:** Confirm the above password



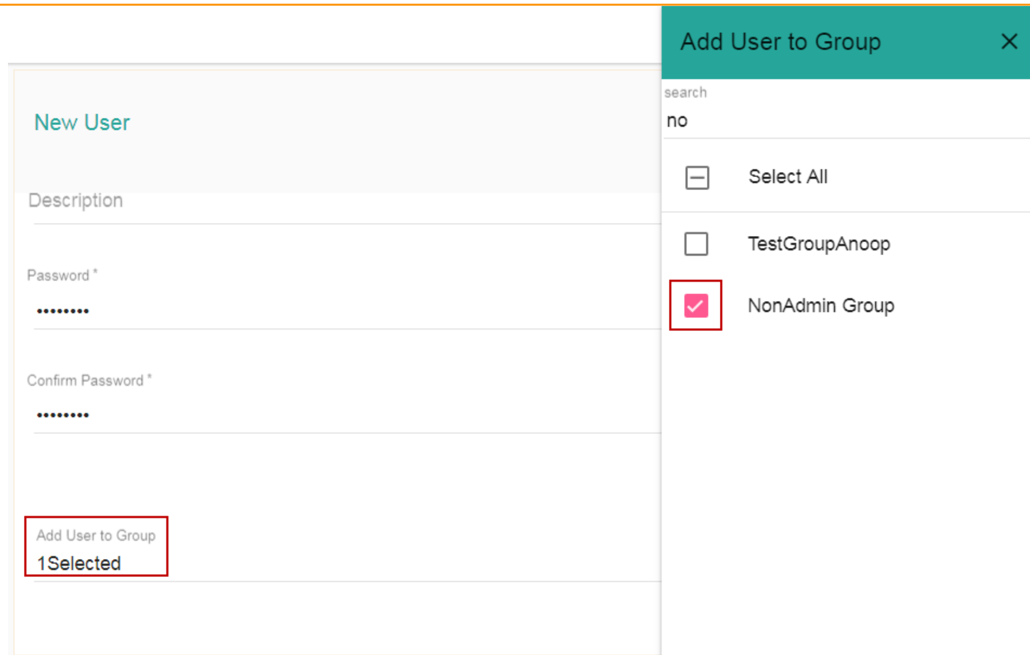
vi) Preconfigured custom fields display in this form. Users need to provide the required details using the custom fields if marked as mandatory (A user gets group specific custom fields)



vii) Click the ‘**Add**’ option  provided next to the ‘**Add User to Group**’ field

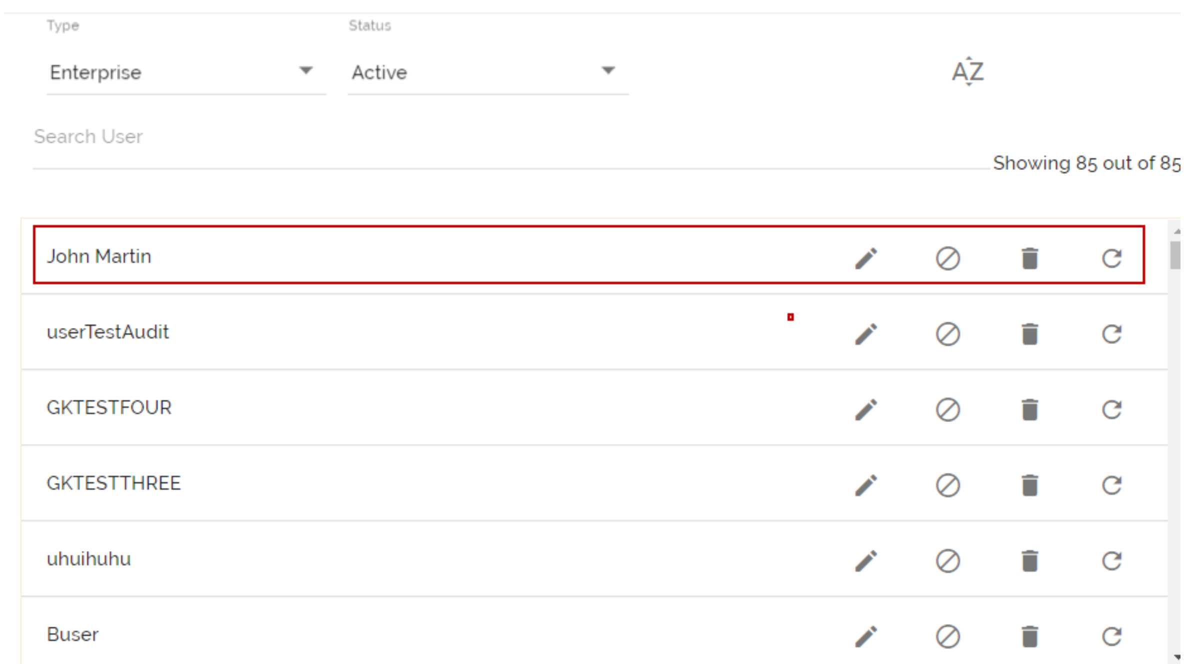


viii) A new window opens with the existing user groups list.
ix) Select the user groups from the window to add the new user.
x) Click the ‘**SAVE’** option



xi) The existing user list opens

xii) The newly created user gets added to the user list



Options	Name	Description
	Edit	Update/Edit the user specific details for a selected user
	Block	Block the selected user

	Remove	Remove the selected user from the user list
	Reset Password	A Reset password gets sent to the registered user email

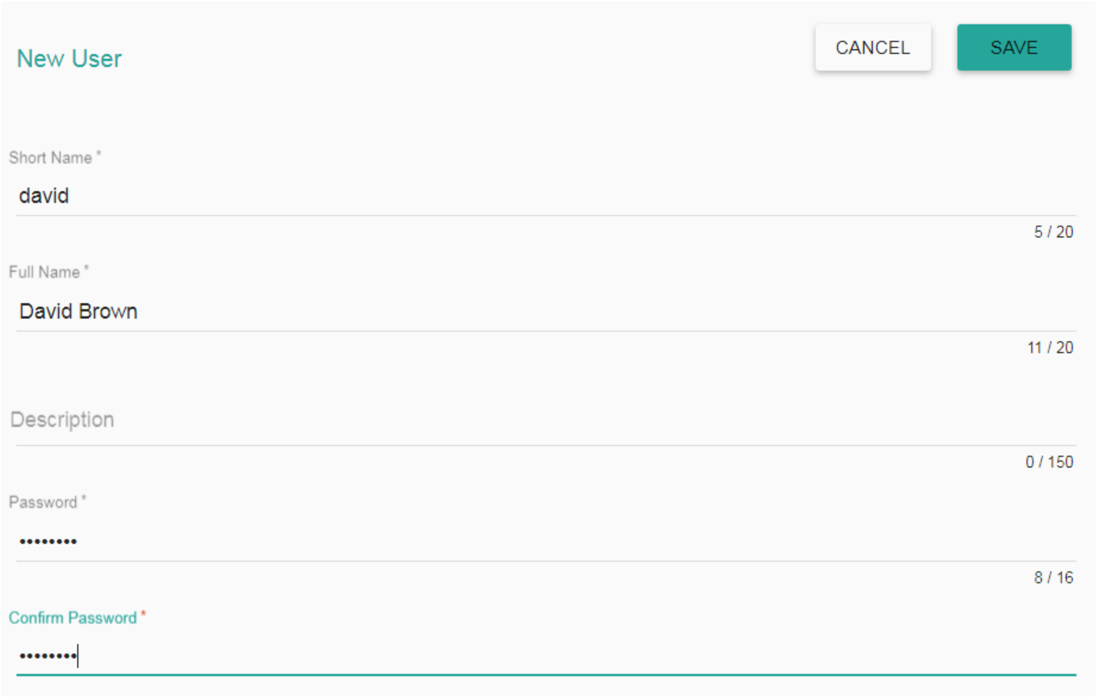
Note:

a. All the user specific details other than email id can be updated/edited by the Update User option
b. If the new user gets added to the Admin Group, the new user becomes admin.
c. A single user can be a part of multiple groups

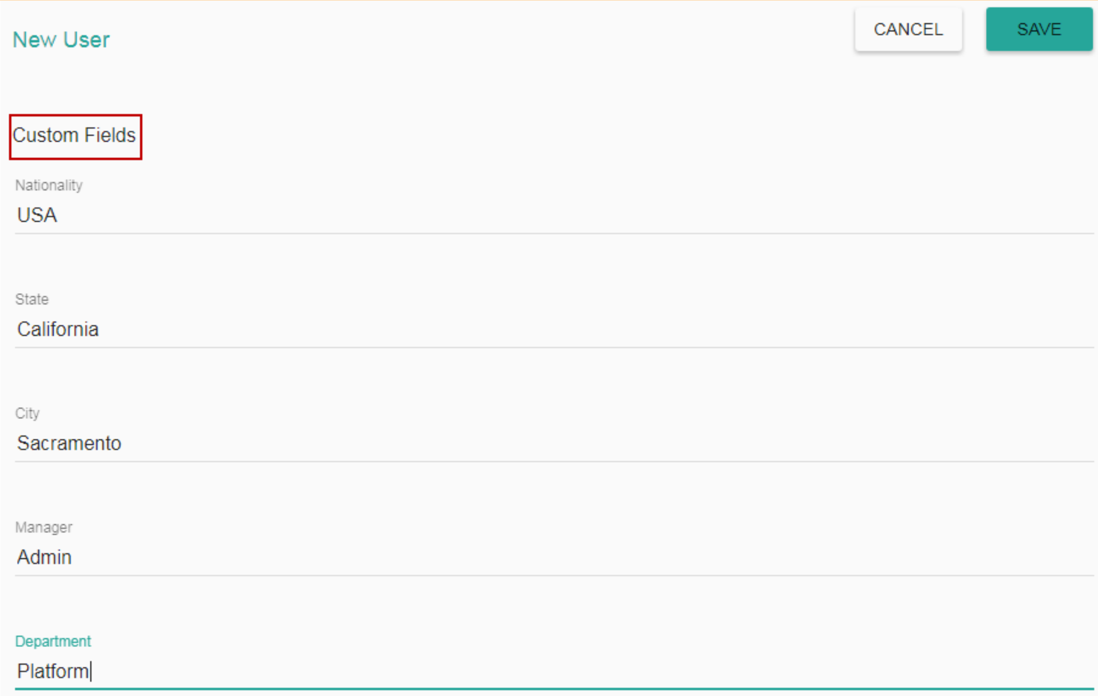
6.3.1. Default User Role

All the new users created via the User Management Module are added to a default role (the viewer role). The default user role restricts all new users from accessing any of the Platform plugins until they are attached to some user group.

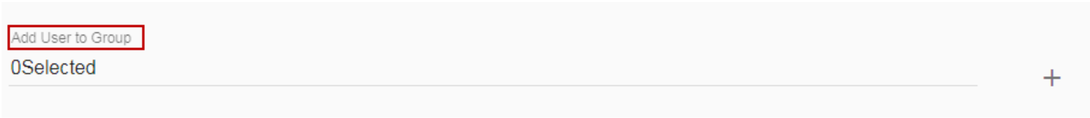
i) Select '**User**' option from the '**New**' context menu
ii) The '**New User**' form opens
iii) Provide the required information to create a new user



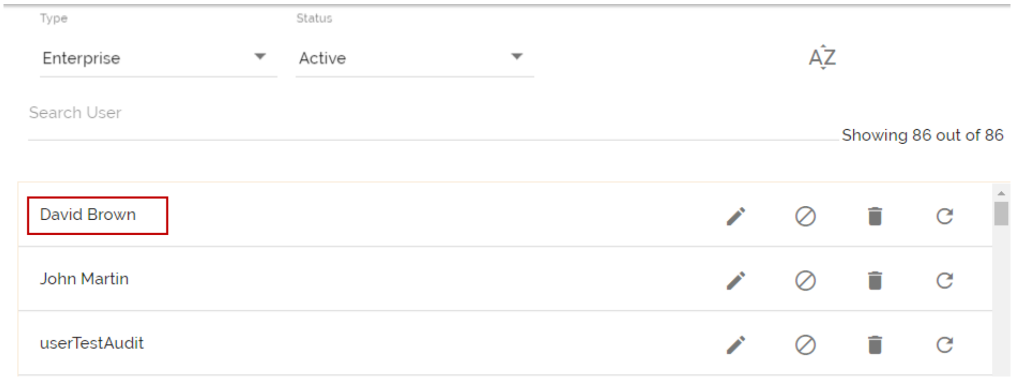
iv) Provide the '**Custom Fields**' details for the new user (If marked as mandatory)



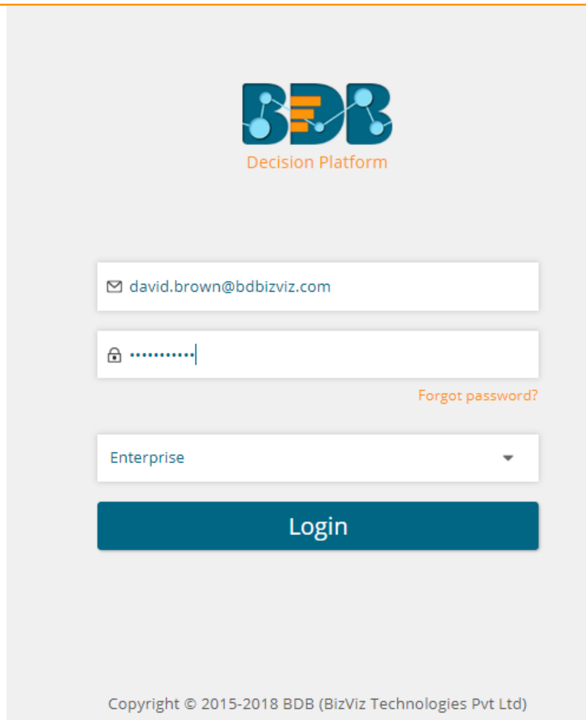
v) Do not add the user to any group



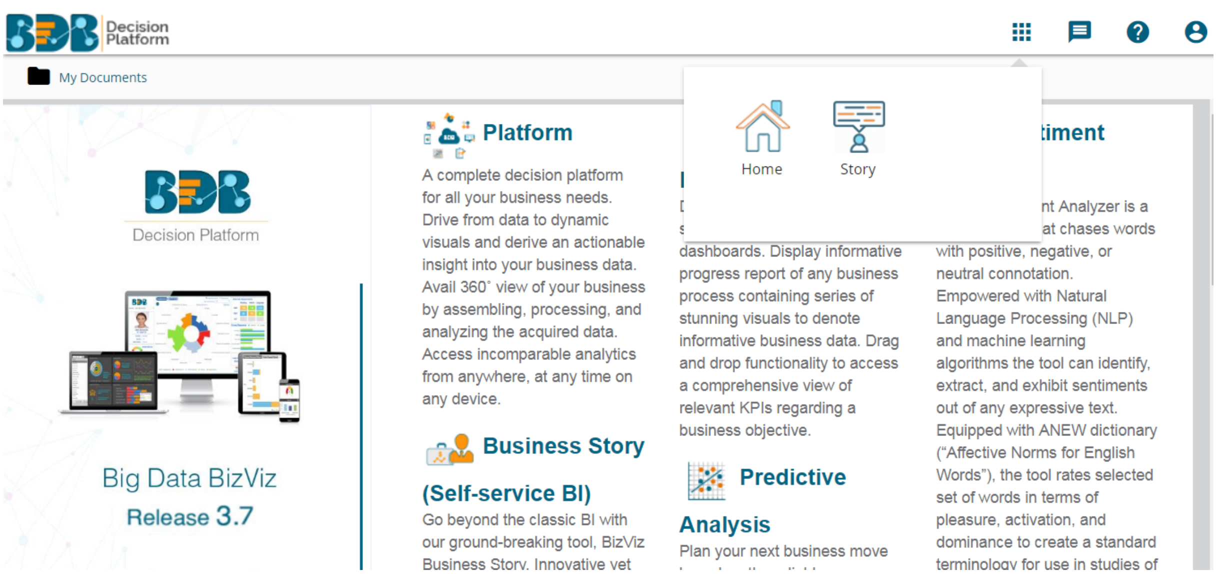
vi) The user is created and added to the list of users (By default the newly created user is added to the Viewer Role User Group)



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



viii) The new user can access the platform homepage, but not the platform plugins



Note: The BizViz Platform provides some category of users (as explained below):

1. **Viewer Role**: Any new user created under the BDB Platform who is not added to any user group falls into this user role by default.
2. **Admin Role**: The users part of the Admin Group with permissions to access all the BDB Plugins belong to this group.
3. **Ordinary User Role:** The users part of any group other than Admin Role with the credited permissions from the group fall into this category.

6.4. User Status

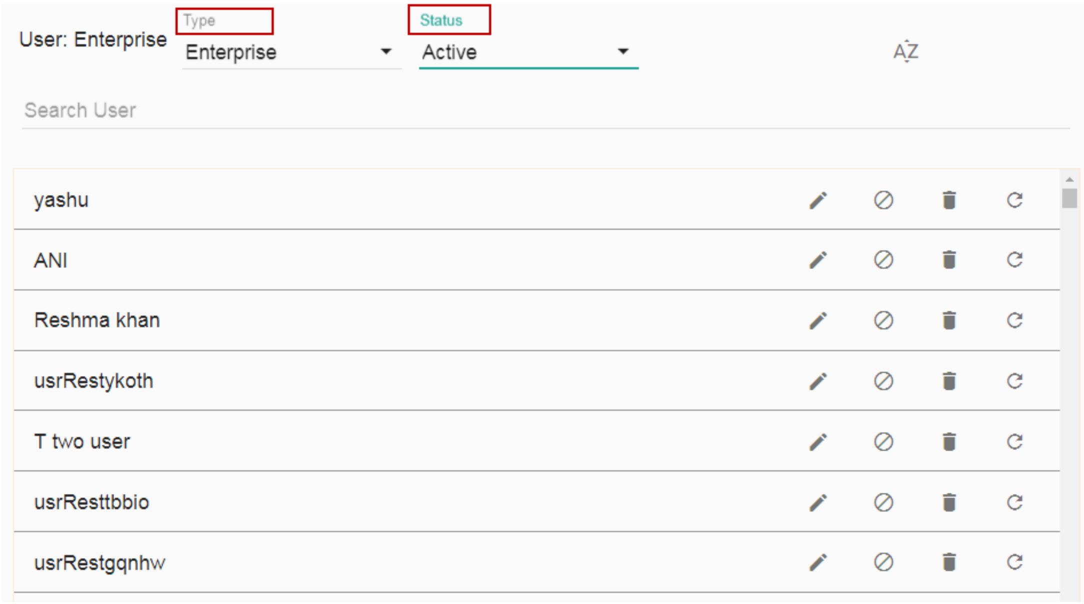
This feature helps the administrator to identify the various status of system users and enable an expired user account.

i) Navigate to the User Management page.

ii) Users can see two drop-down menus.

a. **Type**: It contains the following authentication types as drop-down options
   i. Enterprise
   ii. Window AD
   iii. CA PPM

b. **Status**: It includes the following user status as drop-down options
   i. Active
   ii. Blocked
   iii. Expired
   iv. Deleted



Note: Users can select any combination of the filter values mentioned above to display filtered/customized lists of users.

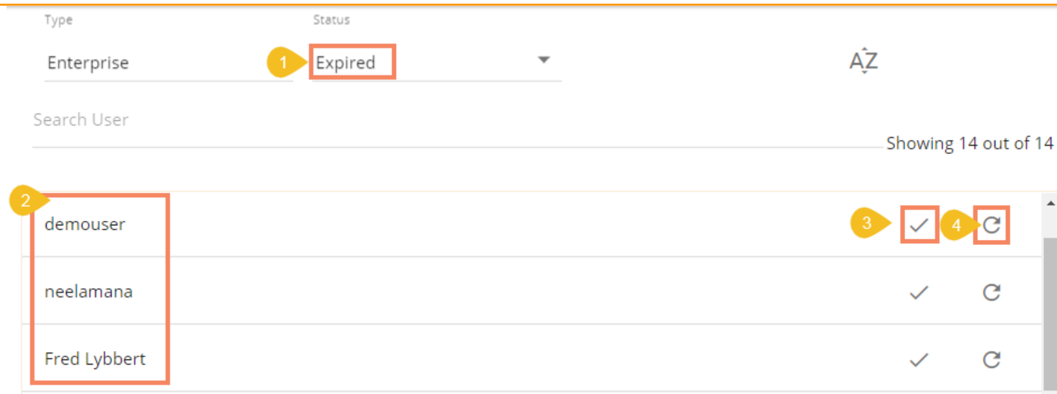
6.4.1. Activating an Expired User Account

i) Select '**Expire**' as the status option

ii) A list of all expired user accounts/ groups appears

iii) Click the '**Activate**' ✓ icon to activate a specific user/user group

iv) Click the '**Reset Password**' option to set a new password for an activated user



Note: By clicking '**Activate**,' an expired user account can be activated. The user can use the old password. However, when the user uses the '**Reset Password**' option, the same user gets activated with a new password (In this case, the user needs to set a new password).

7. Data Center

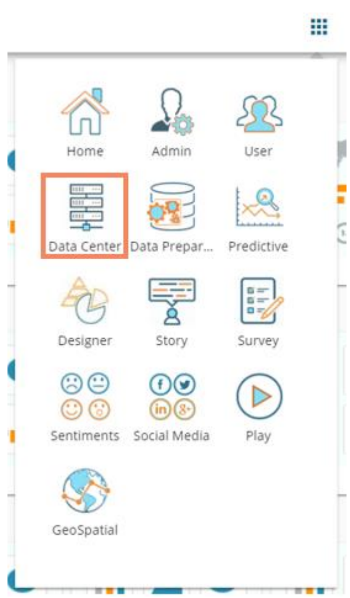
This section explains how to connect with multiple databases to create data service and elastic search-based Data Store. It also describes steps to create data store metadata.

7.1. Data Connector

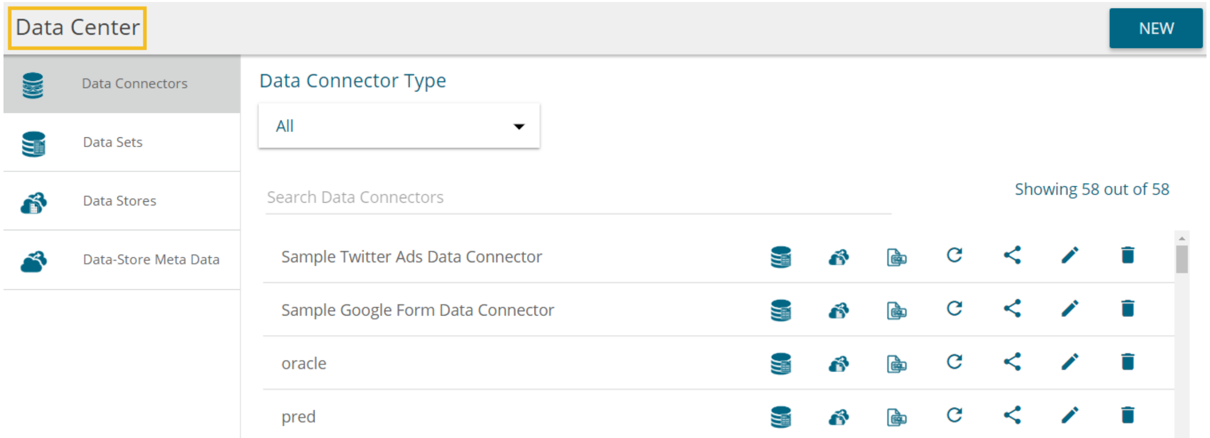
BDB Decision Platform offers a wide choice of data connectors ranging from RDBMS, Big Data and File types to various API connectors to fetch data from any media.

7.1.1. Creating a Data Connector

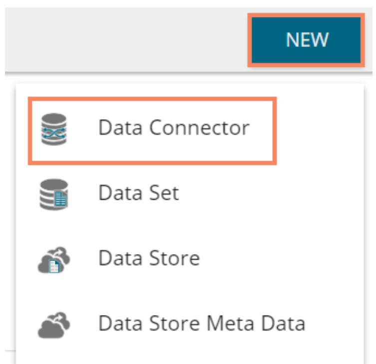
i) Click the '**Data Center**' option from the Apps menu



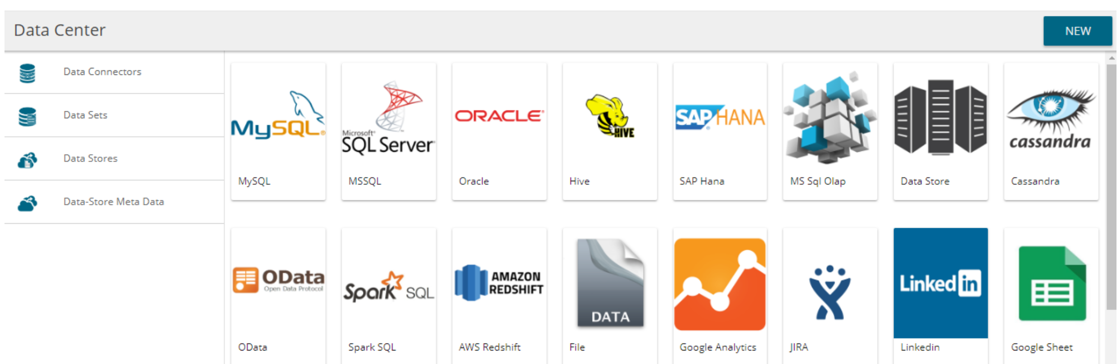
ii) The Data Center page opens



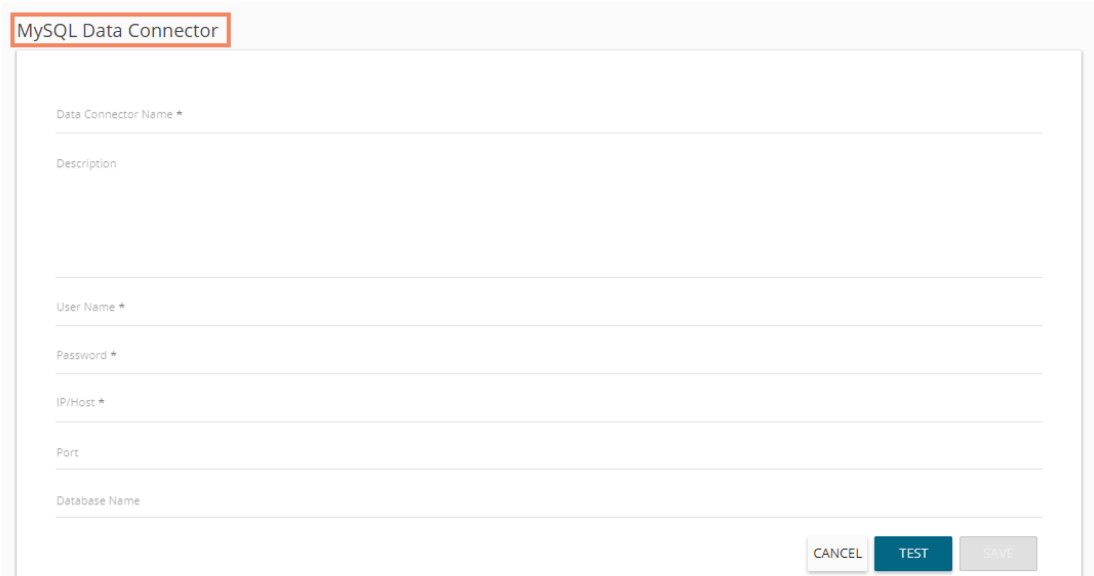
iii) Click the '**NEW**' option
iv) A context menu opens
v) Select the '**Data Connector**' option from the context menu



vi) A new page with all the available data connector types opens

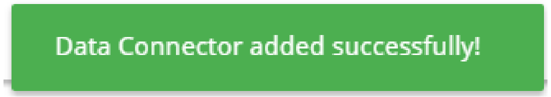


vii) By selecting a connector type, users need to configure that connector
viii) Users need to fill in the required details for the selected data connector
ix) Verify the data connection by clicking the '**TEST**' option
E.g. The following image displays details to be filled to create a MySQL Data Connector

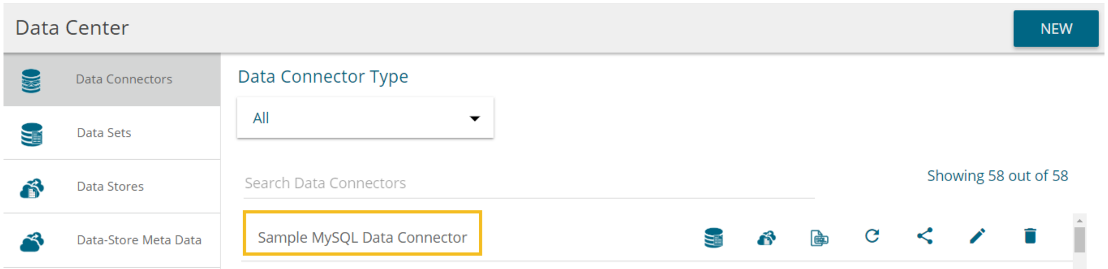


x) Once the connection is tested successfully, click the '**SAVE**' option

xi) A Success message will pop-up as below:

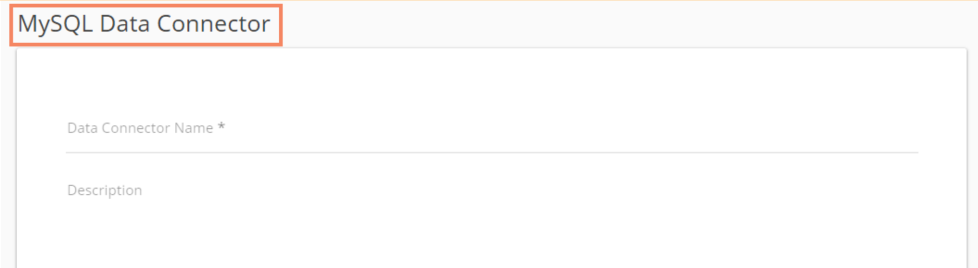


xii) The newly created data connector gets added to the data connector list
E.g. The Data Connector Name given for the following MySQL Data Connector is Sample MySQL Data Connector.

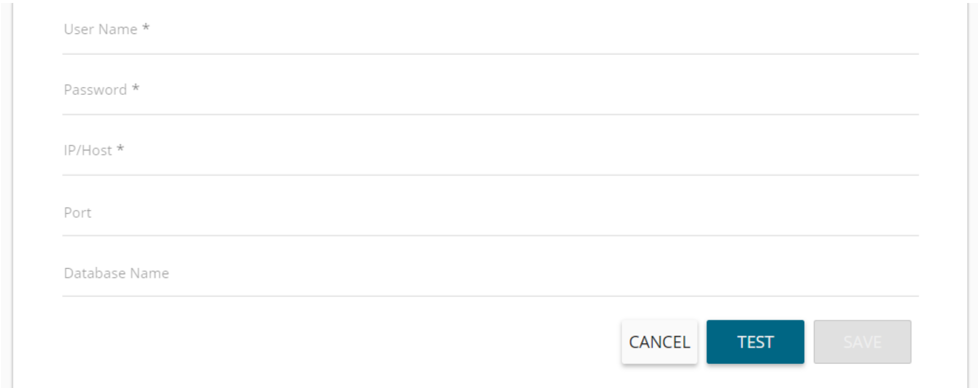


Users need to fill in the required information in the connector specific forms as described below to create that connector.

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

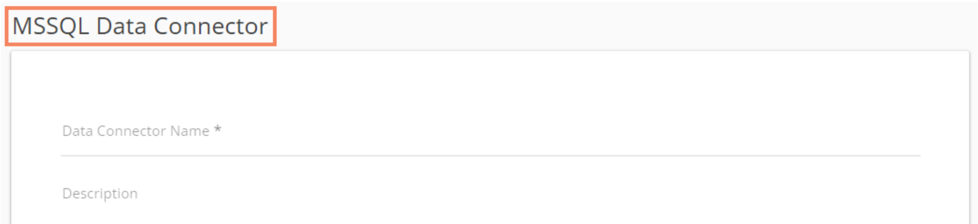


iii) **User Name**: Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where you wish to store data

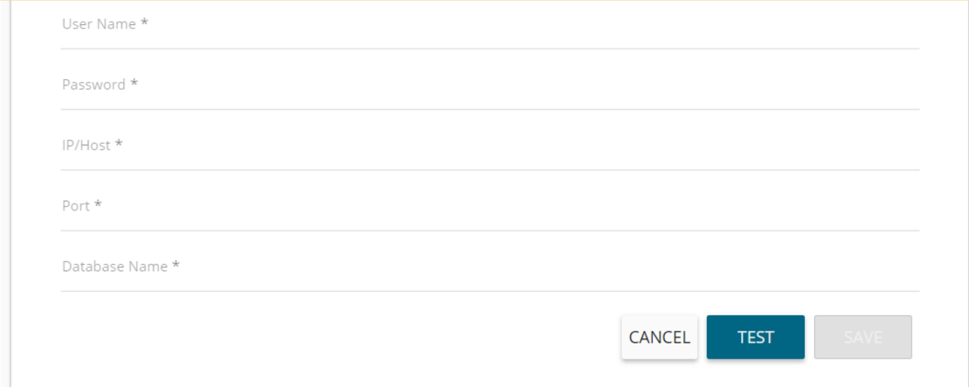


2. MSSQL Data Connector

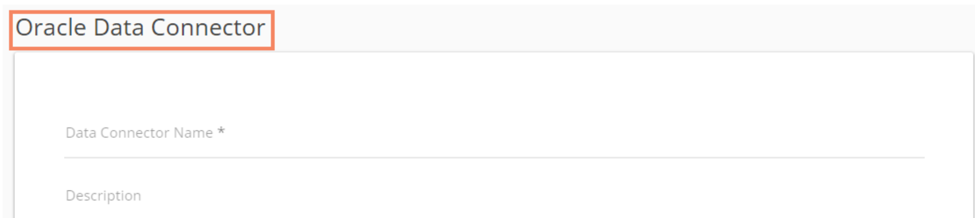
i) **Data Connector Name**: A user defined name to identify the data source
ii) **Description**: Connection Details



iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password**: Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where you wish to store data

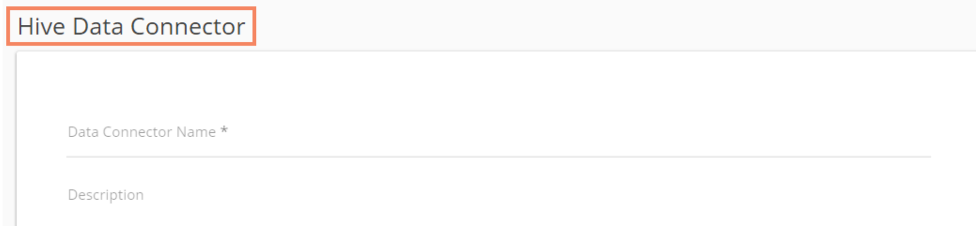


3. **Oracle Data Connector**
   i) **Data Connector Name**: A user defined name to identify the data source
   ii) **Description:** Connection Details

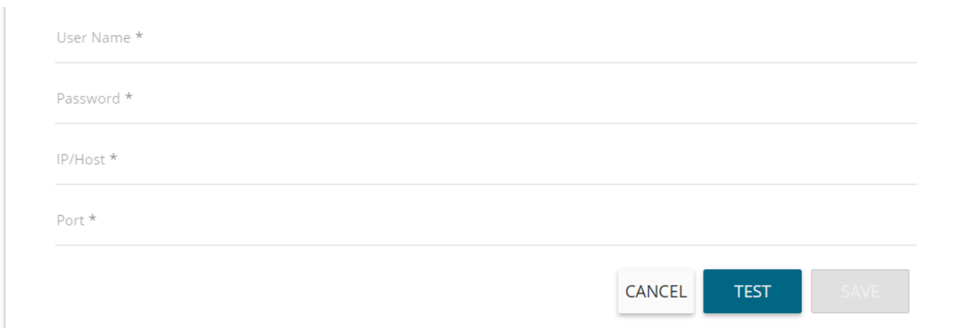


   iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
   iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
   v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
   vi) **Port**: The server port number
   vii) **SID Service Name**: Unique alias used for the database (when connecting)

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

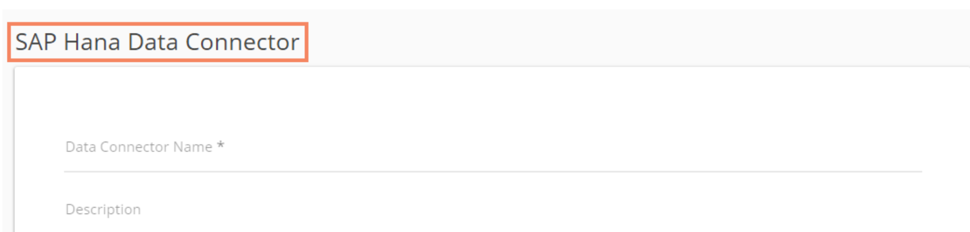


iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST**: Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number

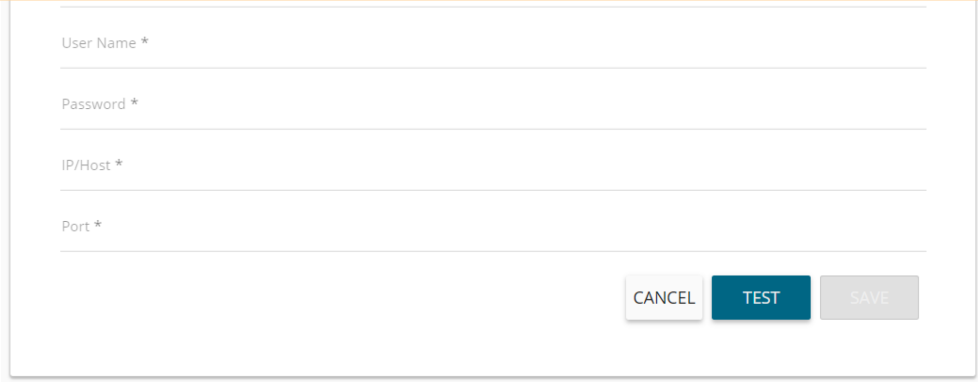


5. SAP Hana Data Connector

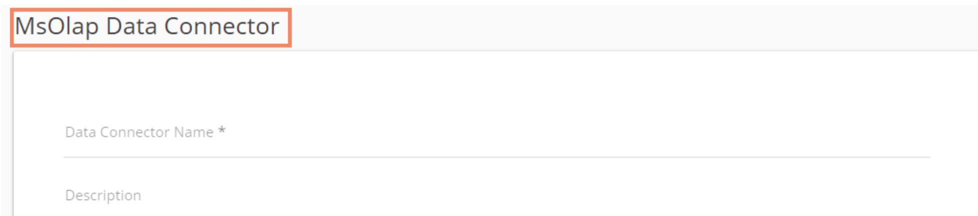
i) **Data Connector Name**: A user defined name to identify the data source
ii) **Description**: Connection Details



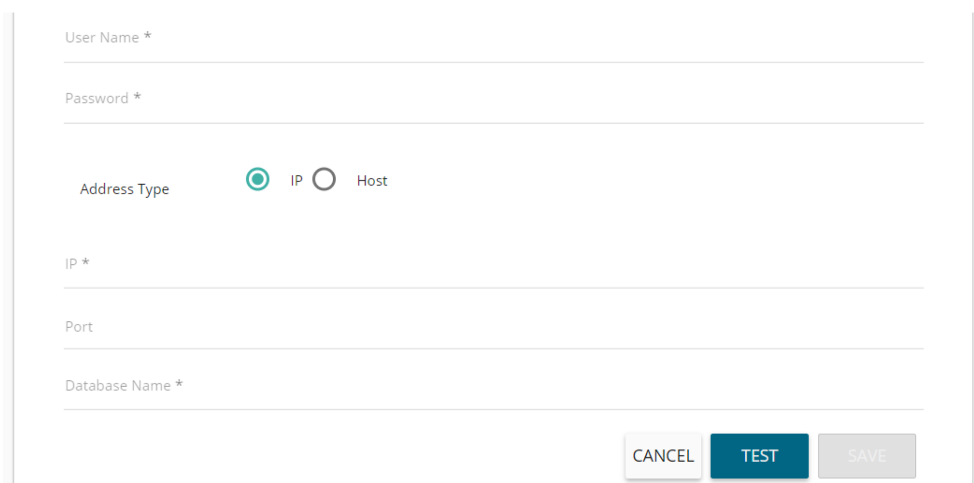
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number



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



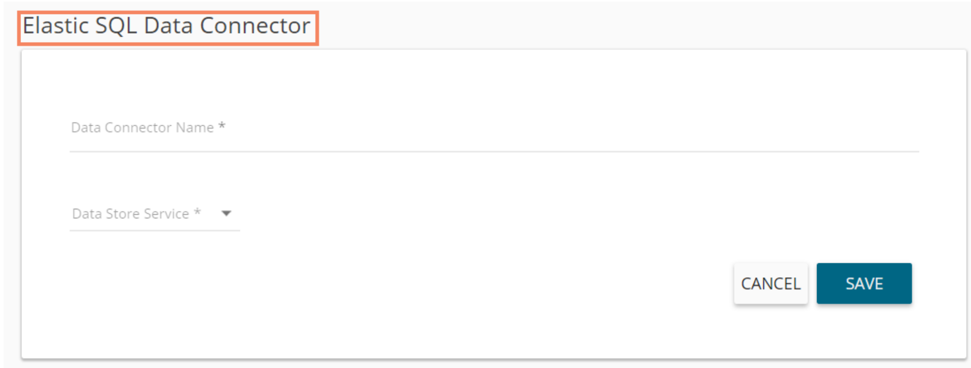
   iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
   iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
   v) **Address Type (IP/Host):** As per the selected Address Type a field appears below. Users need to enter database server details (from where the user wants to fetch data).
   vi) **Port:** The server port number
   vii) **Database Name:** Name of the database where you wish to store data



7. **Data Store – Elastic SQL Data Connector**

i) **Data Connector Name:** A user defined name to identify the data source

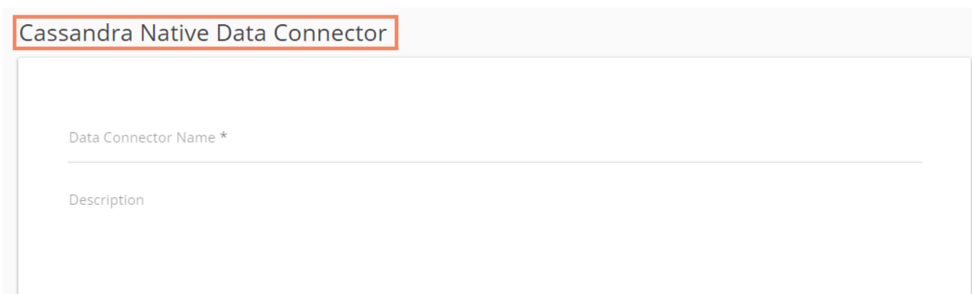
ii) **Data Store Service:** Select a data store service from the drop-down list



8. Cassandra Native Data Connector

i) **Data Connector Name:** A user defined name to identify the data source

ii) **Description:** Connection Details



iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)

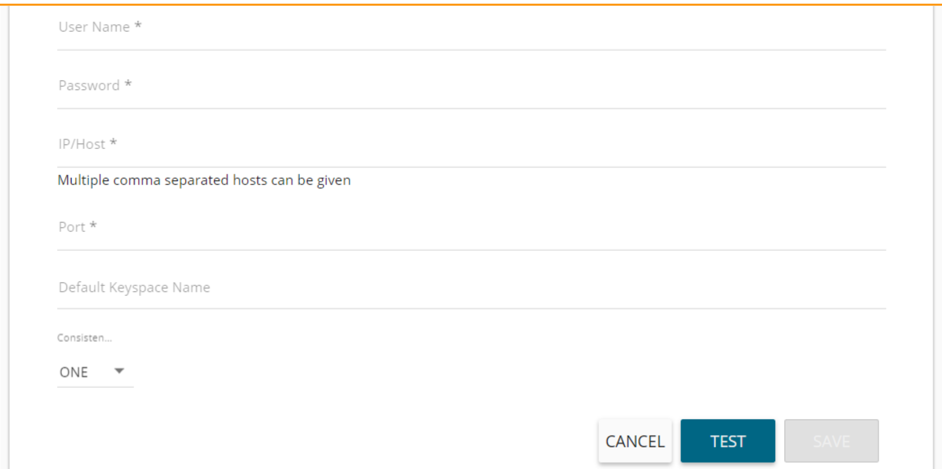
iv) **Password:** Enter the Password (It should be the same as provided in the connection server)

v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)

vi) **Port:** The server port number

vii) **Default Key-Space Name:** Enter the default keyspace name

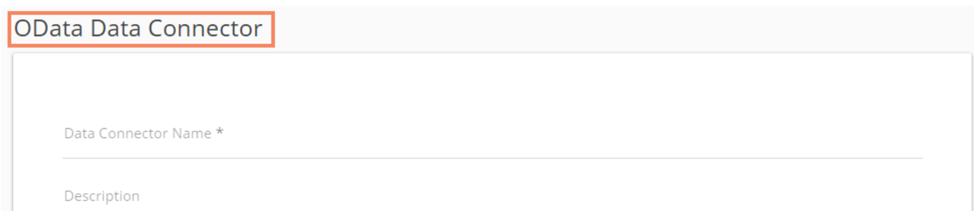
viii) **Consistency:** Select a consistency option from the drop-down list (One/Two/Three/Quorum)



9. O Data Connector

i) **Data Connector Name:** A user defined name to identify the data source

ii) **Description:** Connection Details

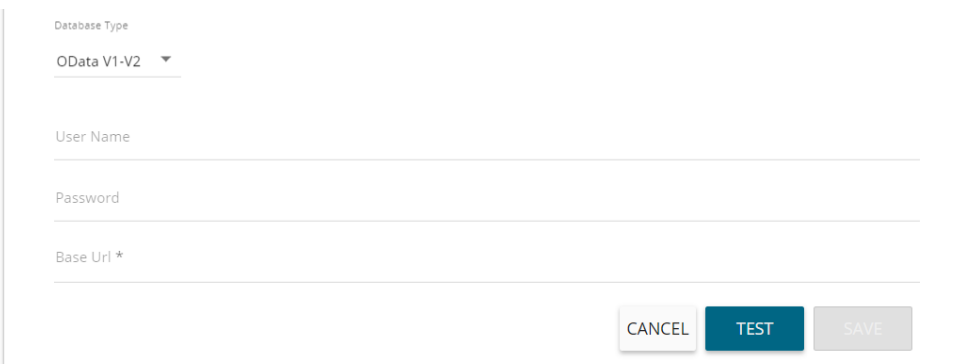


iii) **Database Type:** Select the Database type using the drop-down menu in which you wish to store the data(OData V1-V2/OData V3-V4)

iv) **User Name:** Enter a User Name (It should be the same as given in the connection server)

v) **Password:** Enter the Password (It should be the same as provided in the connection server)

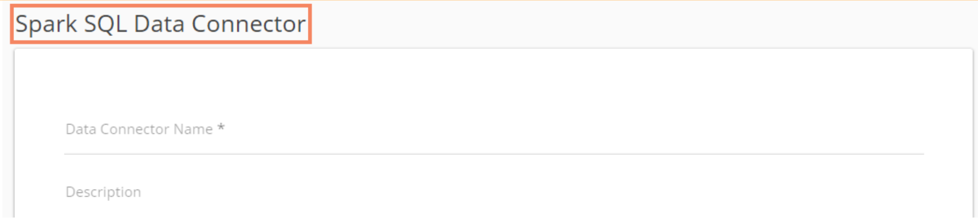
vi) **Base Url:** Enter Service Root URL or Base URL



10. Spark SQL Data Connector

i) **Data Connector Name:** A user defined name to identify the data source

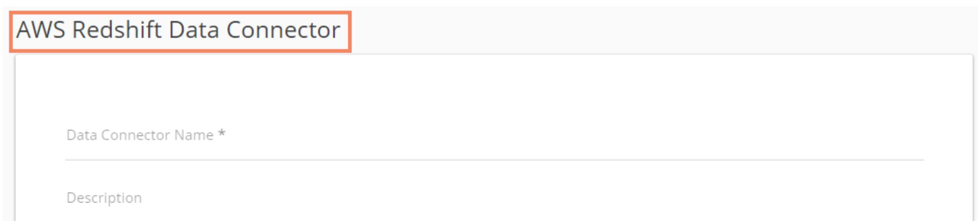
ii) **Description:** Connection Details



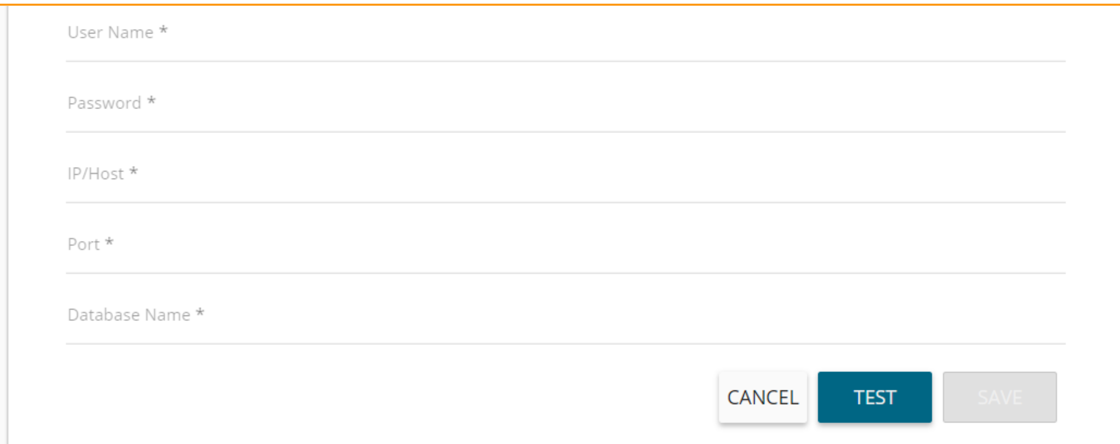
iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number

11. AWS Redshift

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



iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
iv) **Password:** Enter the password (It should be the same as provided in the connection server)
v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
vi) **Port:** The server port number
vii) **Database Name:** Name of the database where you wish to store the data

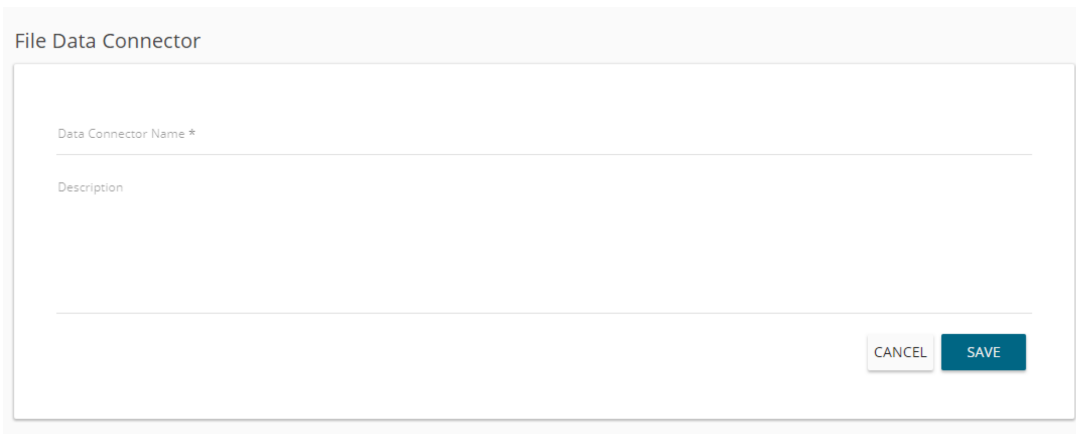


12. File

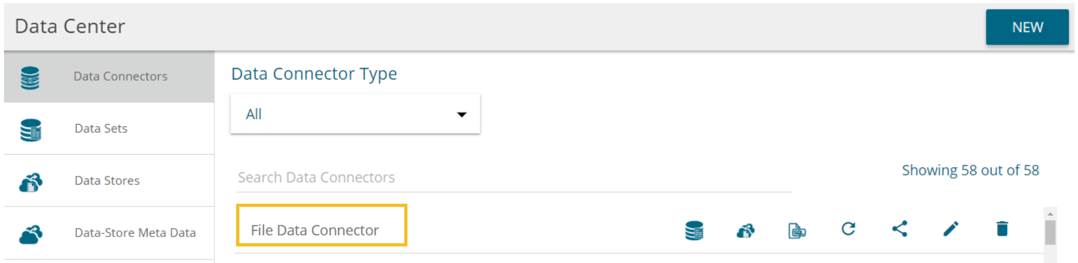
i) **Data Connector Name:** A user defined name to identify the data source

ii) **Description:** Connection details (optional)

iii) Click the **'SAVE'** option



iv) The newly created file connector gets added to the data connector list.

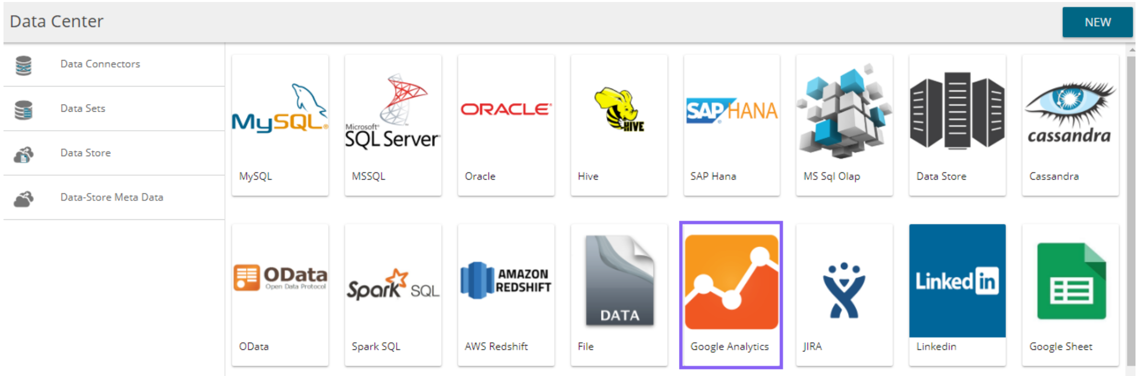


Note: Users need to select a file from the system while creating a datastore based on the file connector.

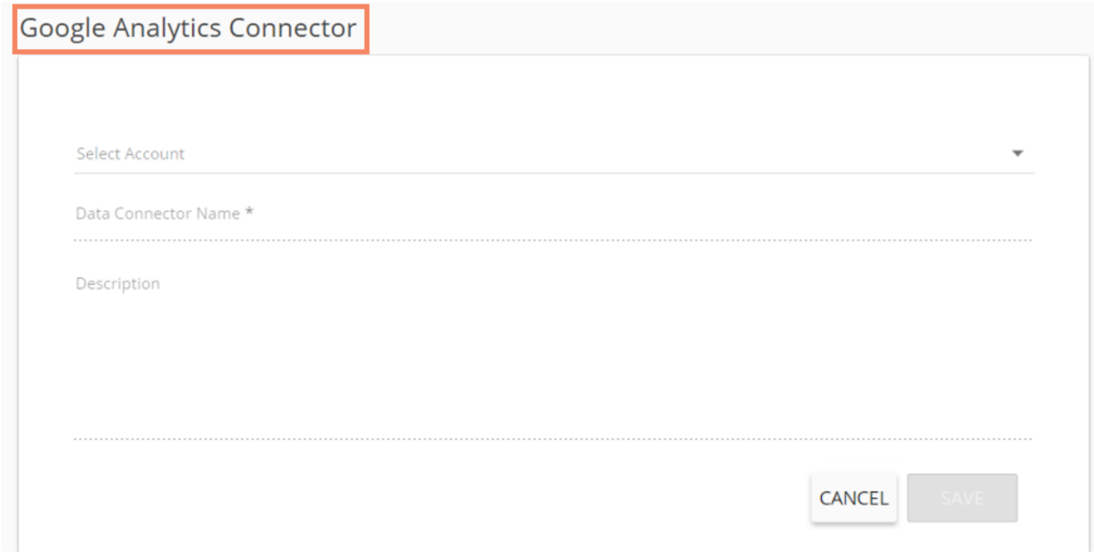
13. Google Analytics Connector

i) Navigate to the Data Connector page by using the 'NEW' context menu.

ii) Click ‘**Google Analytics**’ connector



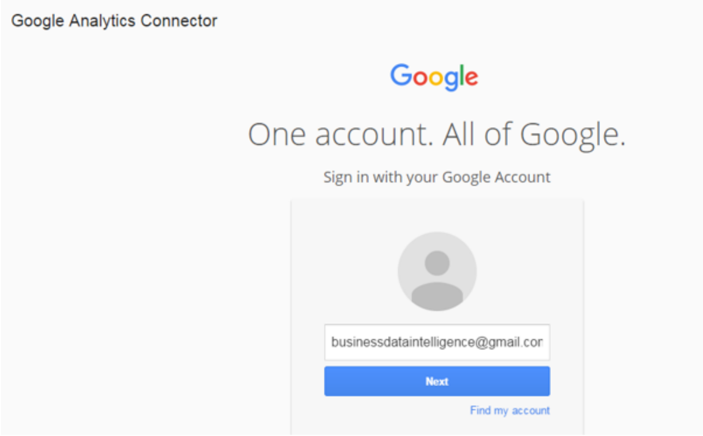
iii) Users get directed to the Google Analytics Connector form



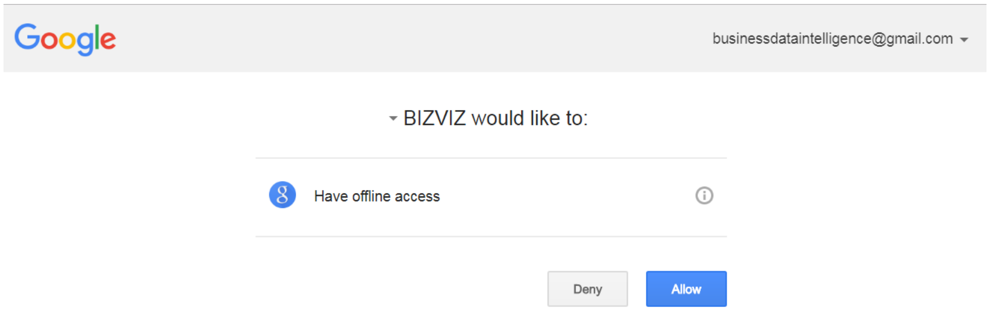
iv) Select Account: Either select a Google account from the list or choose ‘Add New Account’ option to add a new Google account

v) Adding a new google account redirects users to follow the below given steps:

a. After selecting a google account, users need to login to the same

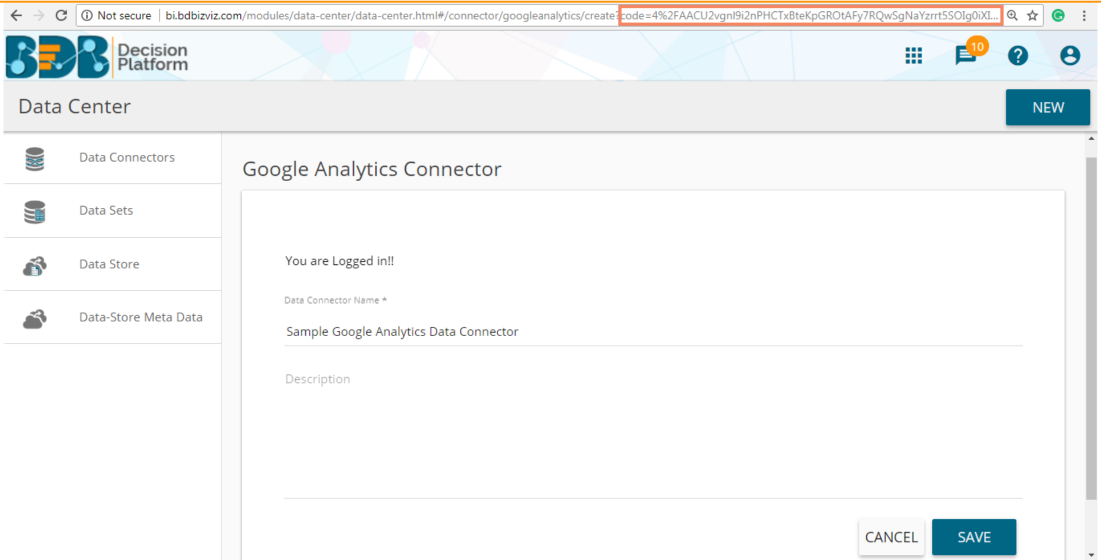


b. Give access to the analytics data by clicking the 'Allow' option



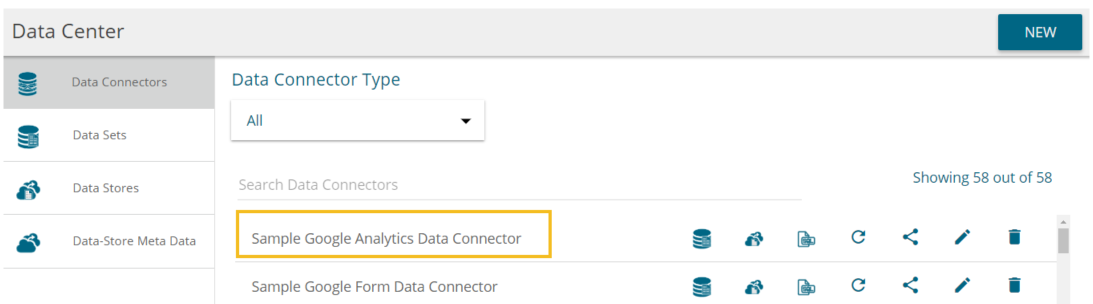
c. Users get redirected to the data connector form with an authorization code in the URL, after getting the access permission.

i. Click '**CHANGE ACCOUNT**' option, if wish to change the selected account
ii. **Data Connector Name:** Enter a user-defined name to identify the data connector
iii. **Description:** Describe the data connector (optional)
iv. Click **'SAVE'**



Note: Users can '**CANCEL**' the connector if wished to do so from the current page.

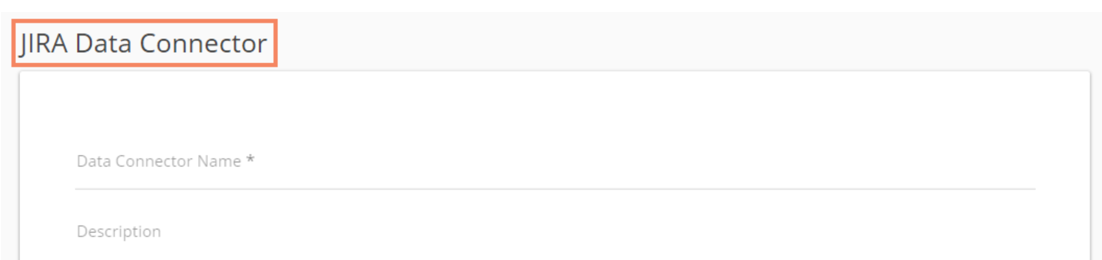
vi) The newly created Google Analytics Data Connector gets added to the existing data connectors list



14. JIRA

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

ii) **Description:** Describe the data connector

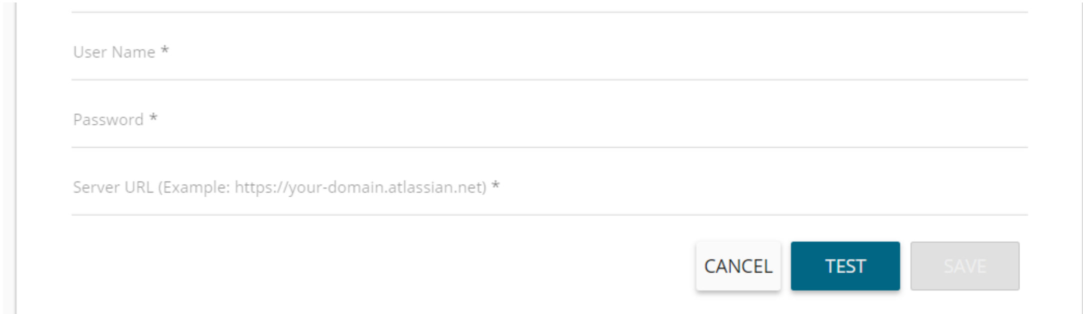


iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)

iv) **Password:** Enter the password (It should be the same as provided in the connection server)

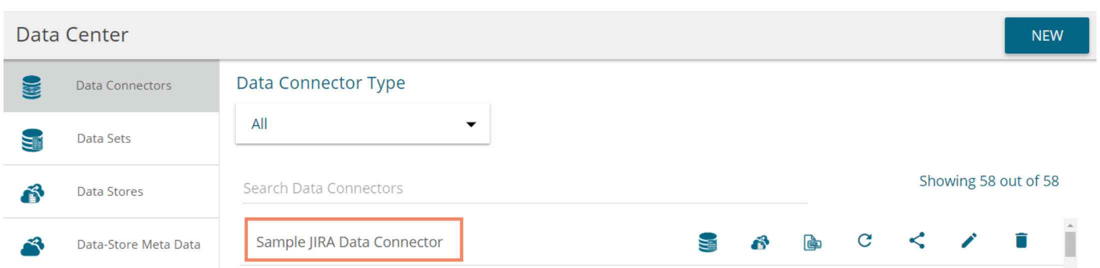
v) **Server URL:** Enter the server URL link

vi) Click **'TEST'** to verify the connection



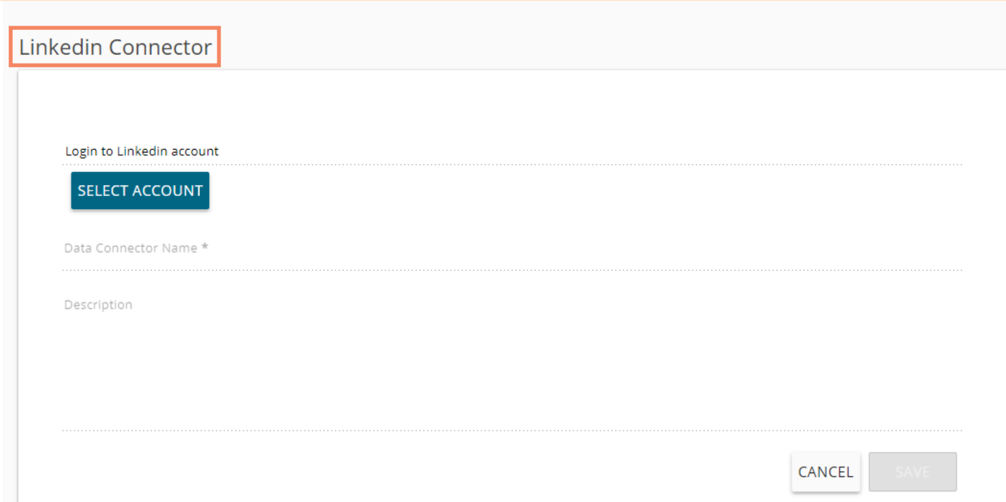
vii) Click **'SAVE'** after the connector is successfully verified

viii) The newly created JIRA Data Connector gets added to the Data Connector list

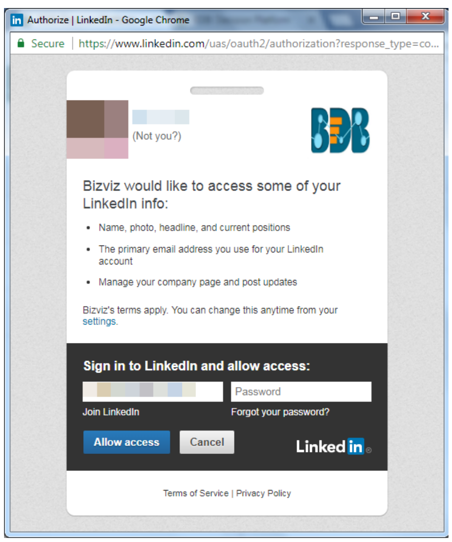


15. LinkedIn

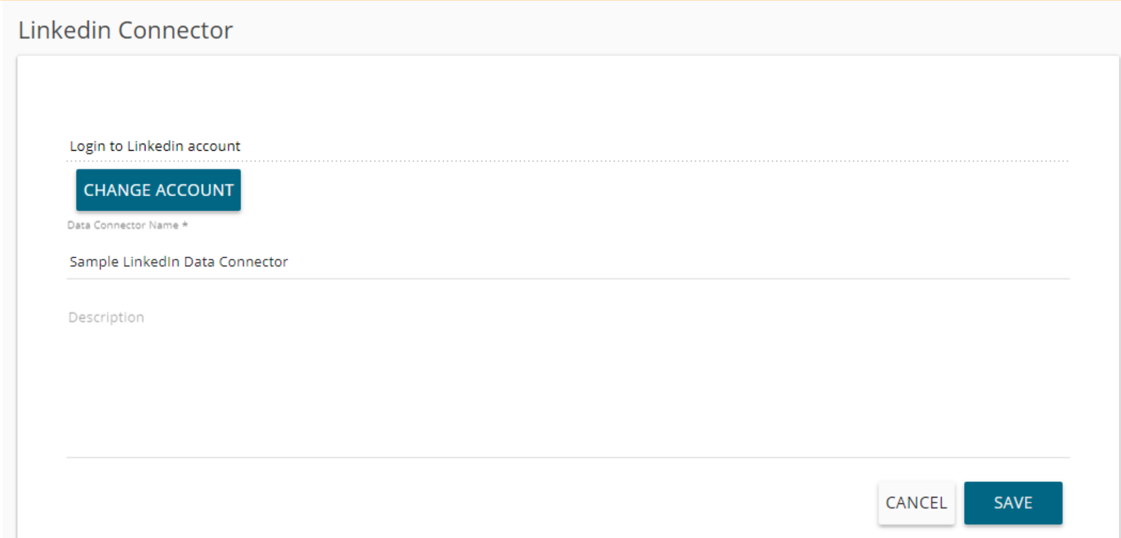
i) Select **'LinkedIn'** connector from the Data Connector page
ii) The user gets redirected to select a LinkedIn account
iii) Click '**SELECT ACCOUNT**' option



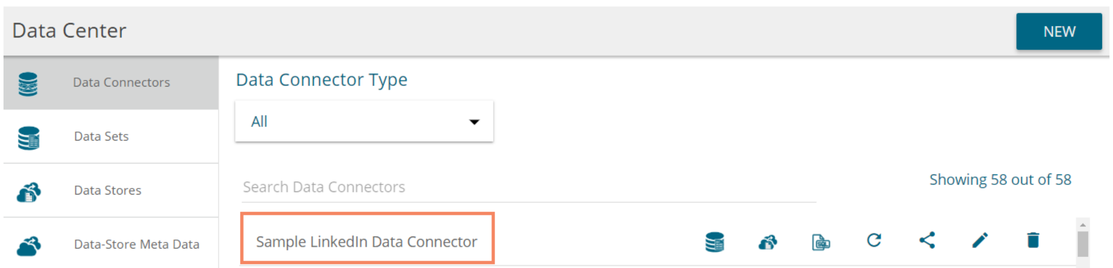
iv) A new window opens
1. Log in to a valid LinkedIn account
2. Click '**Allow access**' option to provide permission to BDB for accessing data from the selected LinkedIn account



v) Users get redirected to the LinkedIn Connector page
vi) Click '**CHANGE ACCOUNT**' if you wish to change the selected account
1. Define the name of the connector (E.g., In this case, it is defined as '**Sample LinkedIn Data Connector**.'
2. Click '**SAVE**' option

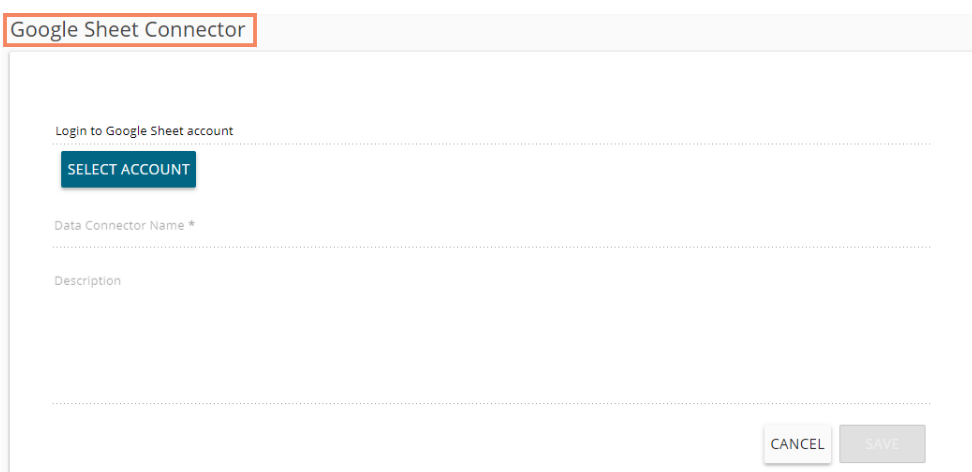


3. A message appears to notify that a new LinkedIn connector has been successfully created. The newly formed data connector gets added to the list of data connectors.

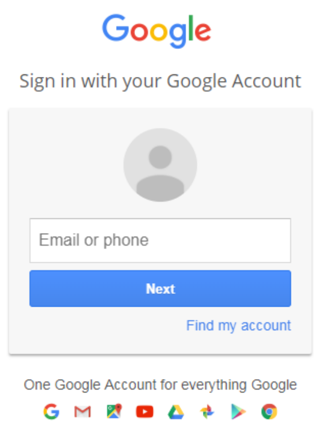


16. Google Sheet

i) Select '**Google Sheet**' connector from the Data Connector page
ii) The Google Sheet Connector page opens
iii) Click '**SELECT ACCOUNT**' to login to a Google Sheet

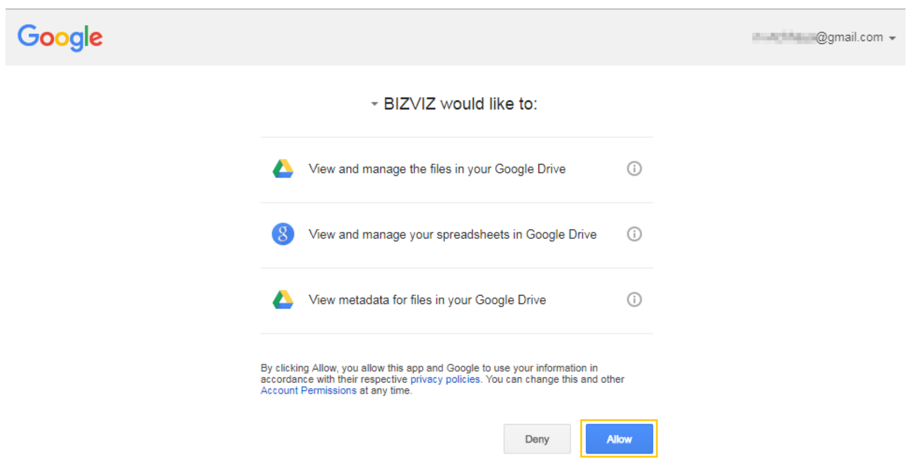


iv) Enter the credentials of your Google Account



v) A new page opens asking users to share their information with BizViz

vi) Click ‘**Allow**’ to share the same

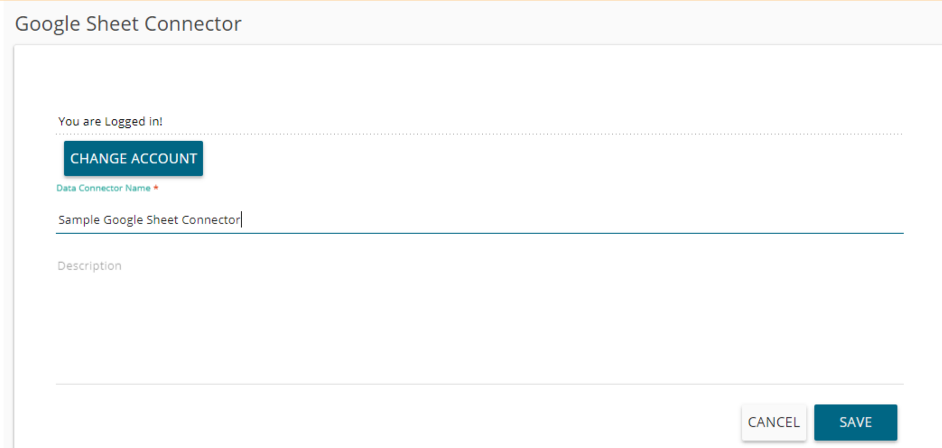


vii) The Google Sheet Connector page

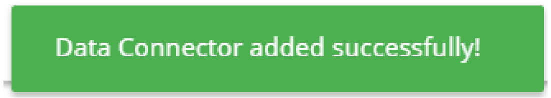
   i. The ‘**SELECT ACCOUNT**’ button gets changed into the ‘**CHANGE ACCOUNT**’ option

   ii. Provide a name for the Data Connector

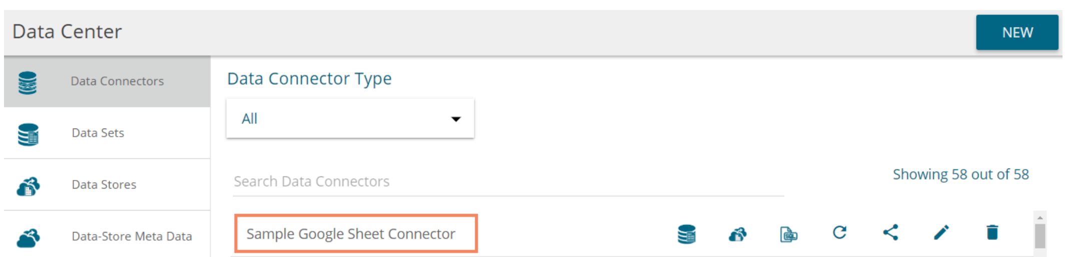
viii) Click the ‘**SAVE**’ option



ix) A success message will pop-up as below

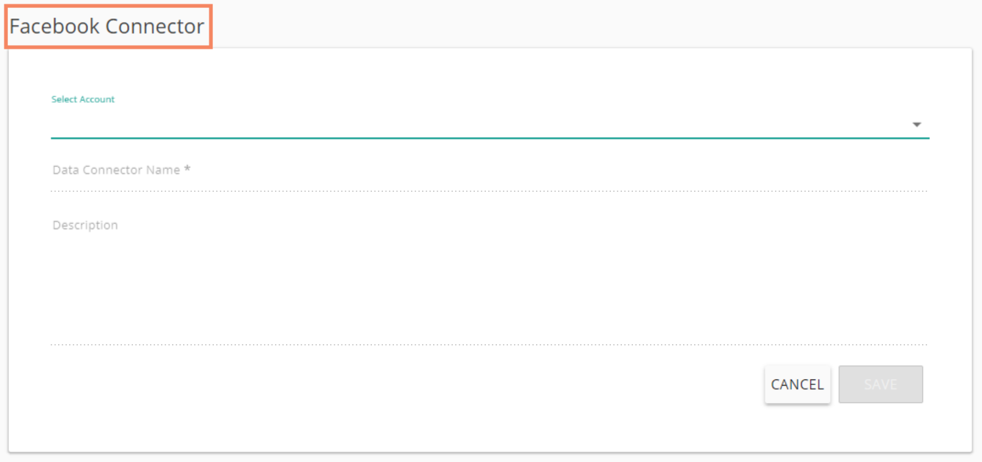


x) The newly created Google Sheet Data Connector gets added to the list of connectors

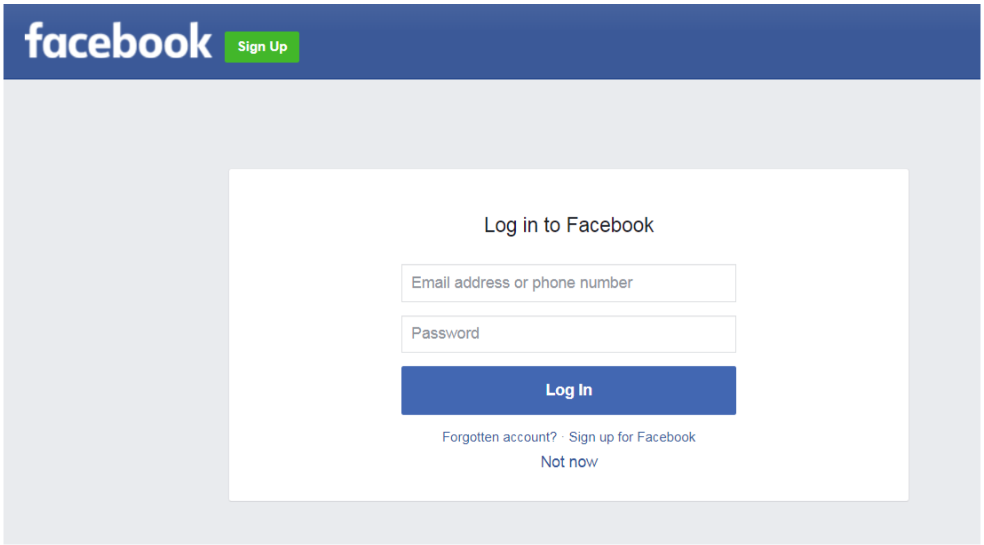


17. Facebook

i) Select the '**Facebook**' connector from the Data Connector page
ii) The Facebook Connector page opens
iii) Select an account using the **'Select Account'** drop-down menu

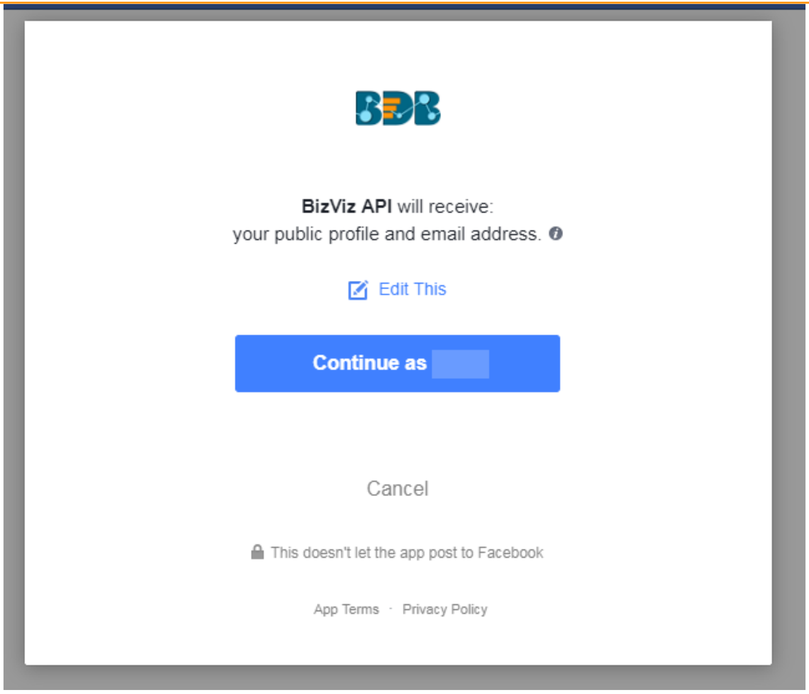


iv) Enter the credentials for a Facebook account for login

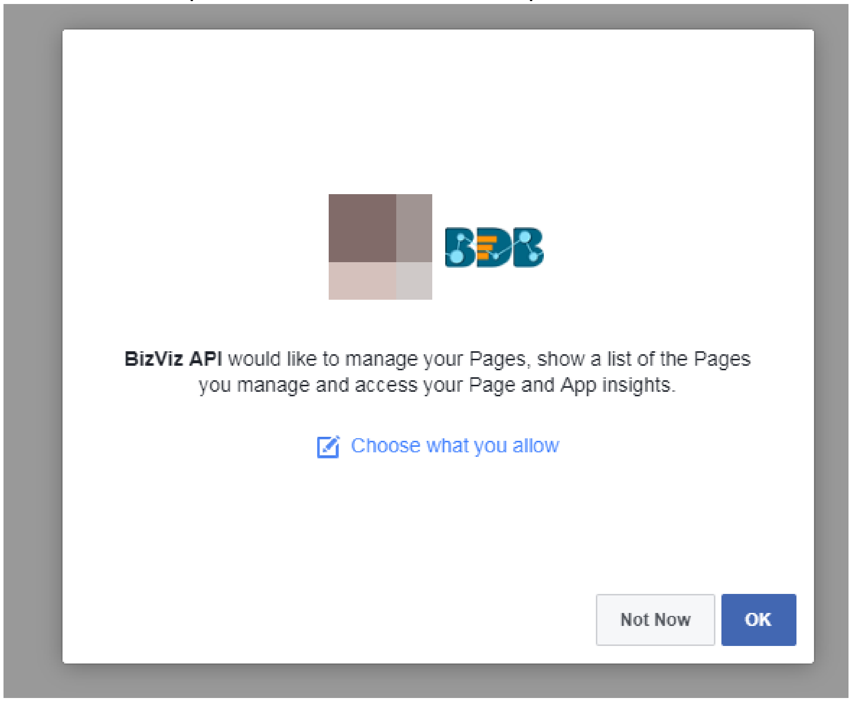


v) A new page opens allowing BizViz to access the information from the logged in Facebook account

vi) Click the Continue as 'The profile owner's name' if you wish to map the same account, or use 'Edit' option to edit the information.



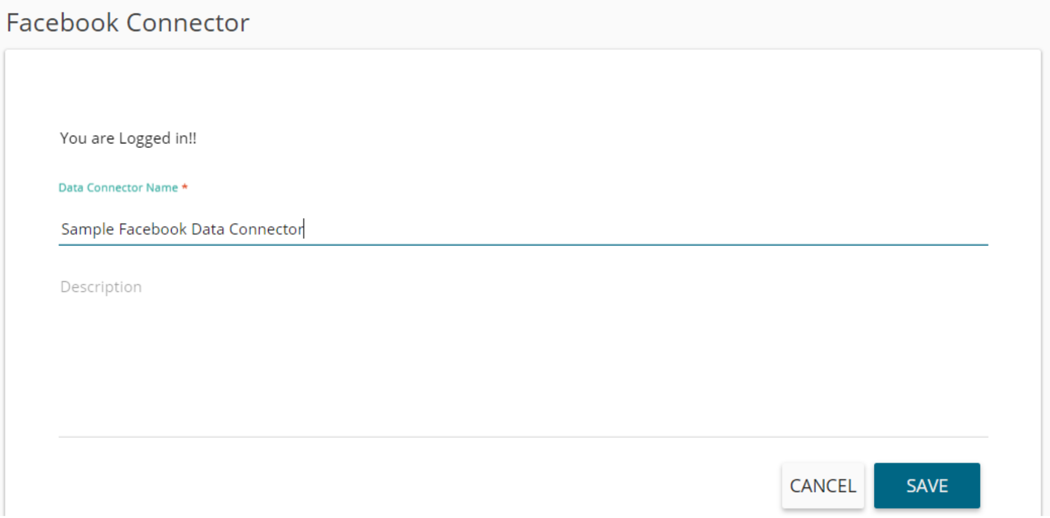
vii) Select the '**OK**' option to allow the selected options from Facebook account



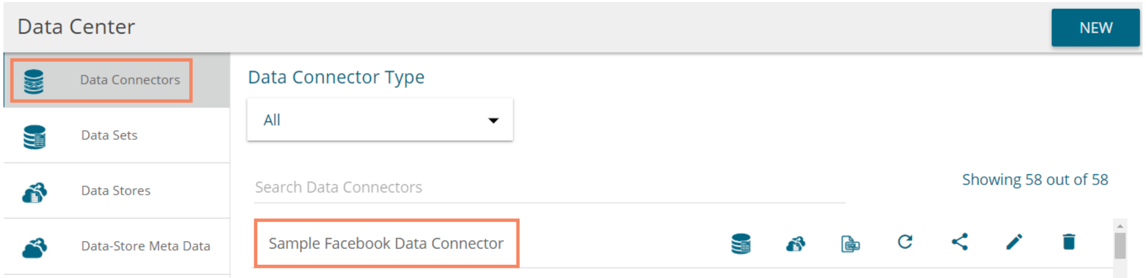
viii) By selecting the continuation option, users are notified as logged in to the selected account redirected to the Facebook Connector page

ix) Provide a title for the data Connector

x) Click the '**SAVE**' option

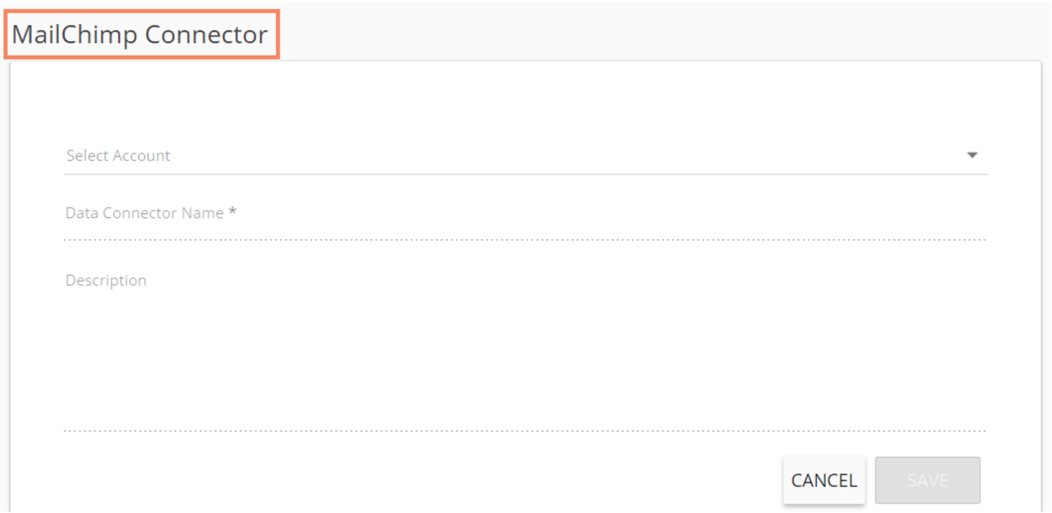


xi) The newly created Facebook Connector gets added to the data connector list



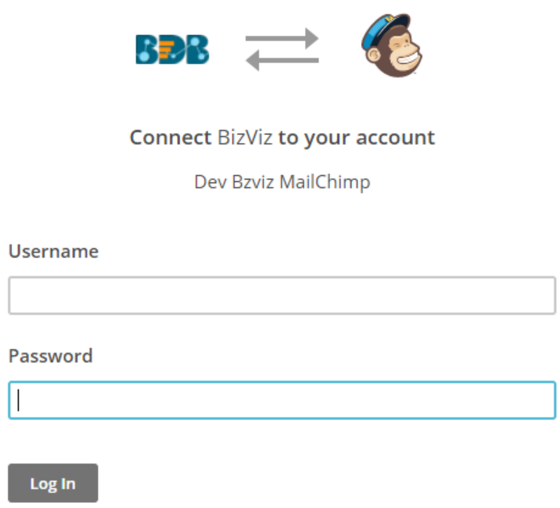
18. MailChimp

i) Select '**MailChimp**' connector from the Data Connector page
ii) The MailChimp Connector page opens
iii) Click the **'SELECT ACCOUNT'** option to choose a MailChimp account

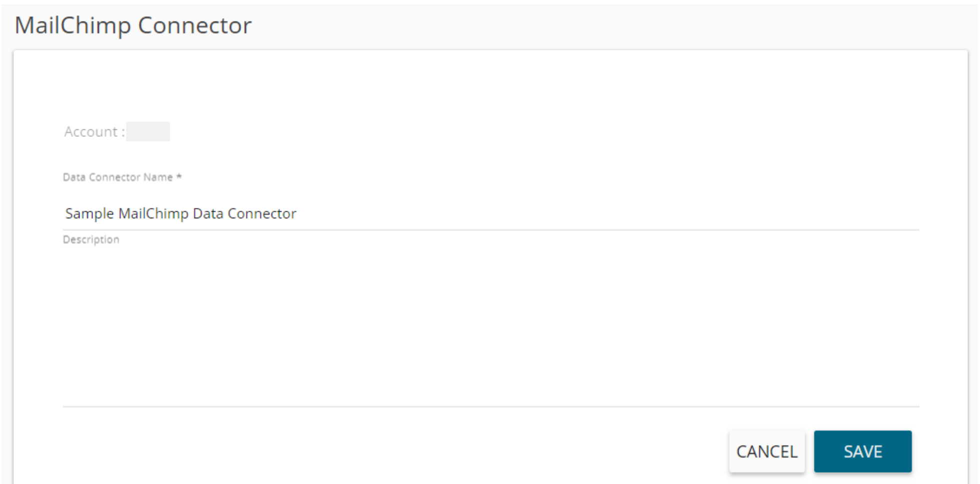


iv) Enter the credentials of the selected MailChimp account

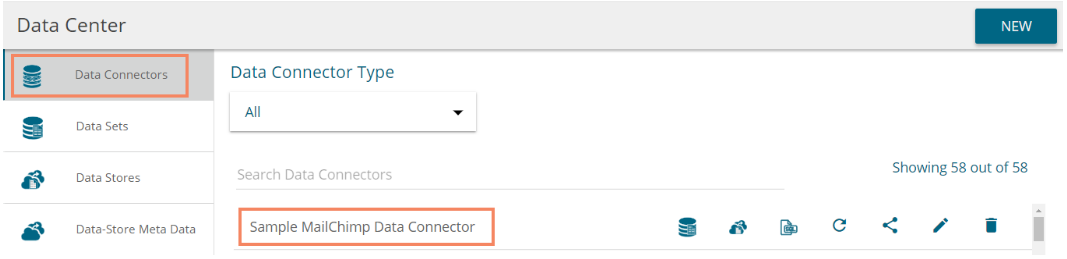
v) Click 'Log In' option for connecting it with the BDB platform



vi) Users get redirected to the MailChimp Data Connector page
vii) Provide a title for the data Connector
viii) Click the '**SAVE**' option

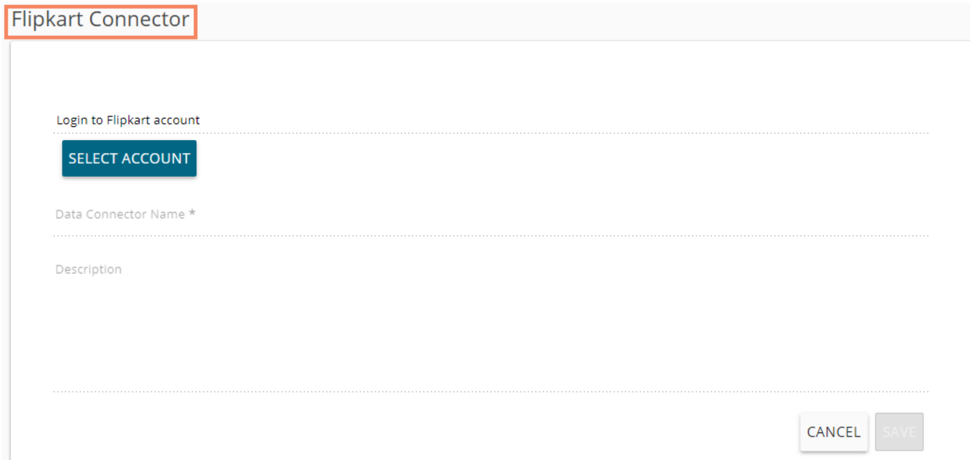


ix) The newly created MailChimp Data Connector gets added to the data connector list

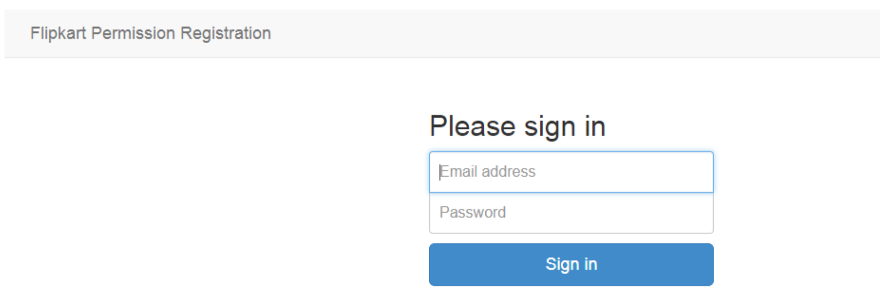


19. Flipkart

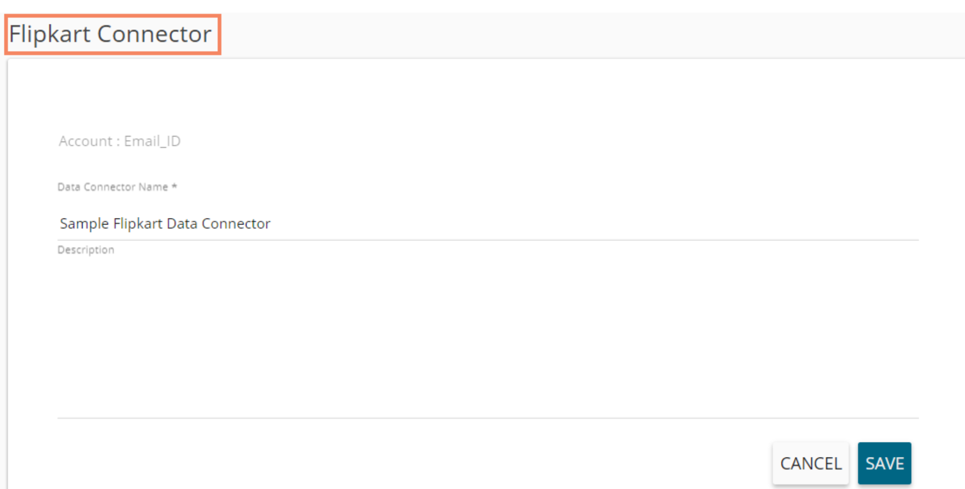
i) Select the '**Flipkart**' connector from the Data Connector page
ii) The Flipkart Connector page opens
iii) Click the **'SELECT ACCOUNT'** option



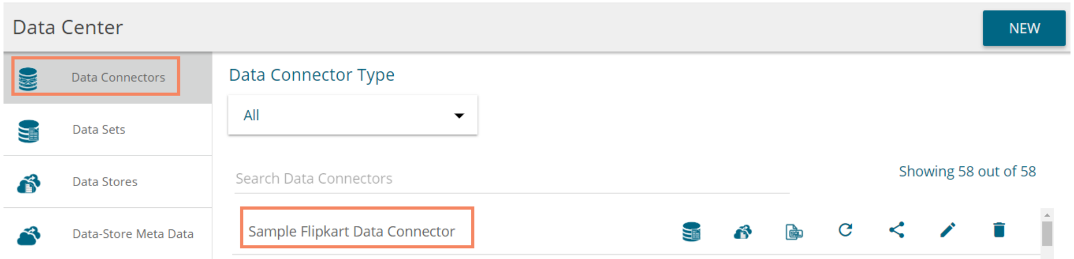
iv) Enter the credentials to get Flipkart Permission Registration for the selected Flipkart account
v) Click the '**Sign In**' option



vi) The Flipkart Connector page opens again with the connected Flipkart account
vii) Provide a title for the data Connector
viii) Click the '**SAVE**' option



ix) The newly created Flipkart Connector gets added to the data connector list

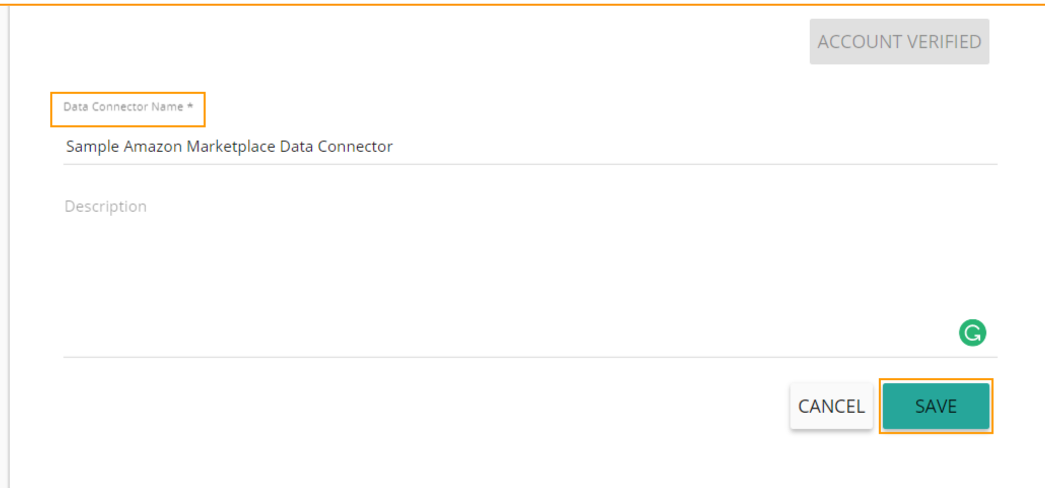


20. Amazon

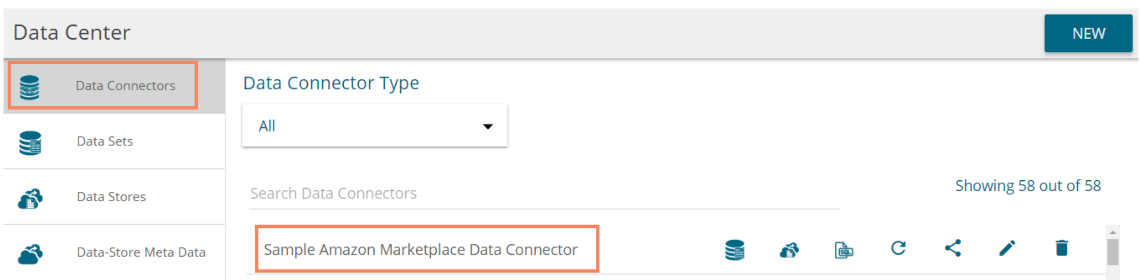
i) Select the ‘**Amazon Marketplace**’ connector from the Data Connector page
ii) The Amazon Marketplace Connector page opens
iii) Select a link using the drop-down menu
iv) Provide the following information:
   a. Server id
   b. MWS Auth Token
   c. Click ‘**VERIFY ACCOUNT**’ option

v) A pop-up message appears to confirm that the account has been successfully verified

vi) The Amazon Marketplace connector page reopens with the ‘**ACCOUNT VERIFIED**’ notification
vii) Provide a title for the Data Connector
viii) Click the ‘**SAVE**’ option

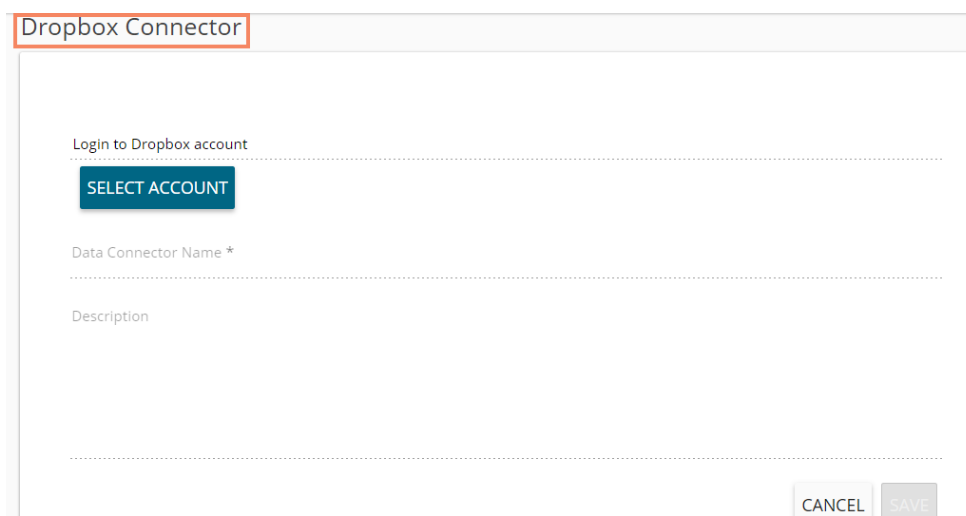


ix) The newly created Amazon Marketplace Connector gets added to the data connector list

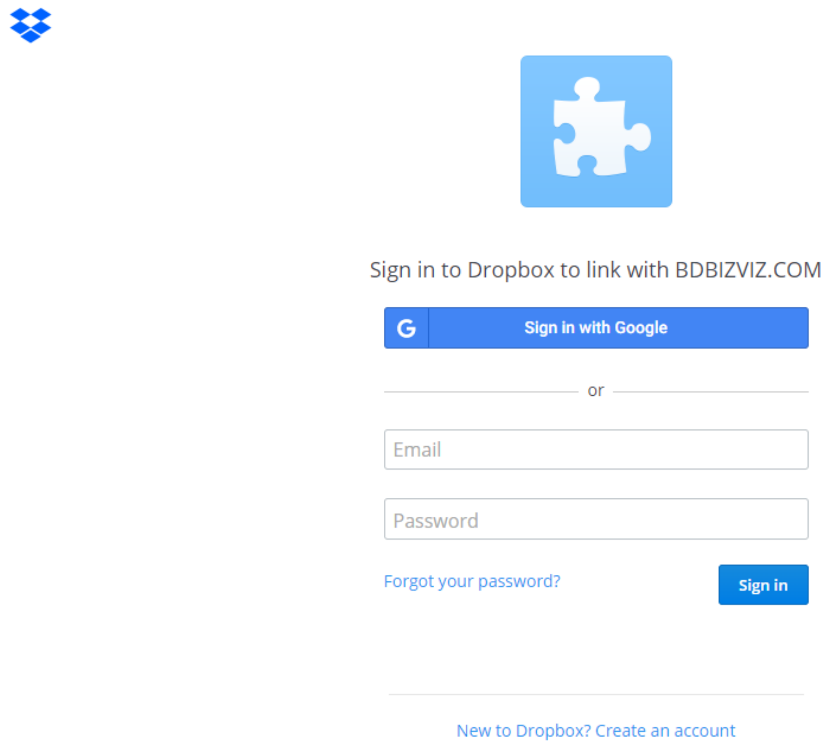


21. Dropbox

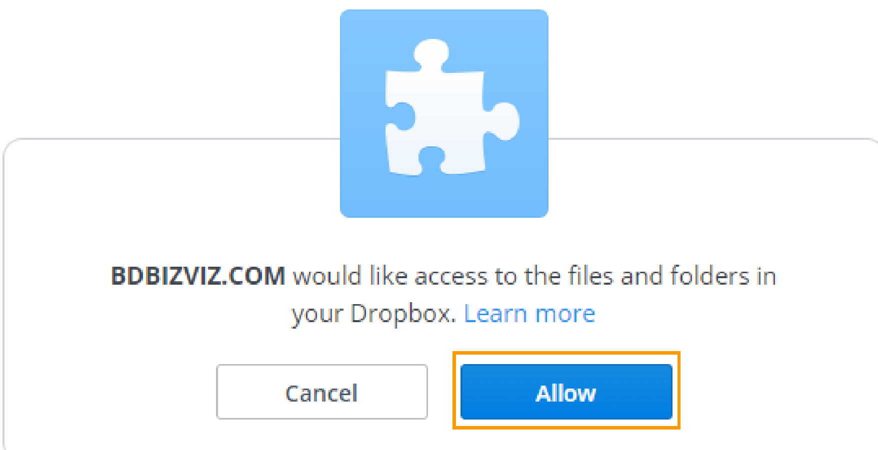
i) Select '**Dropbox'** connector from the Data Connector page
ii) The Dropbox Connector page opens
iii) Click '**SELECT ACCOUNT**' for login to a Dropbox account



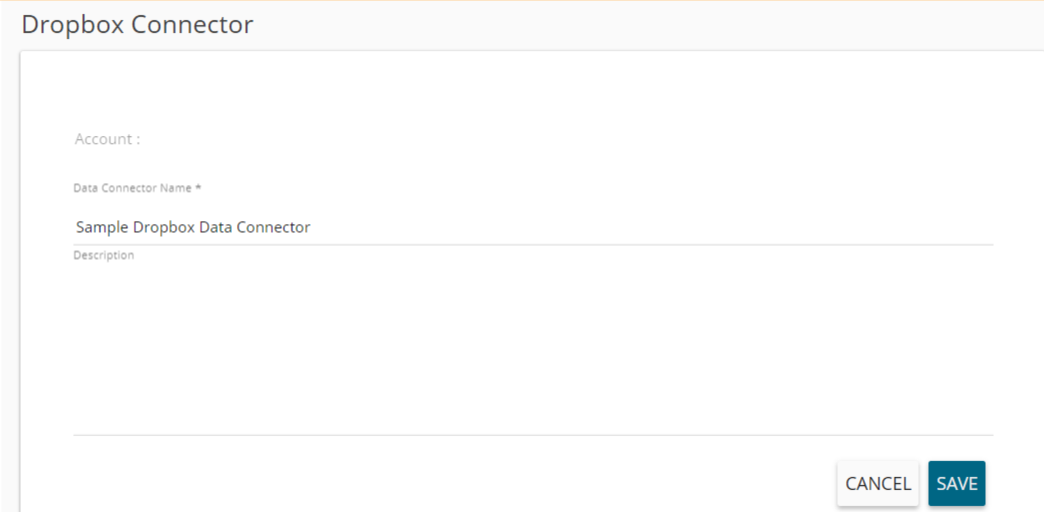
iv) The '**Sign in**' page of the Dropbox opens
v) Enter the credentials to Sign in



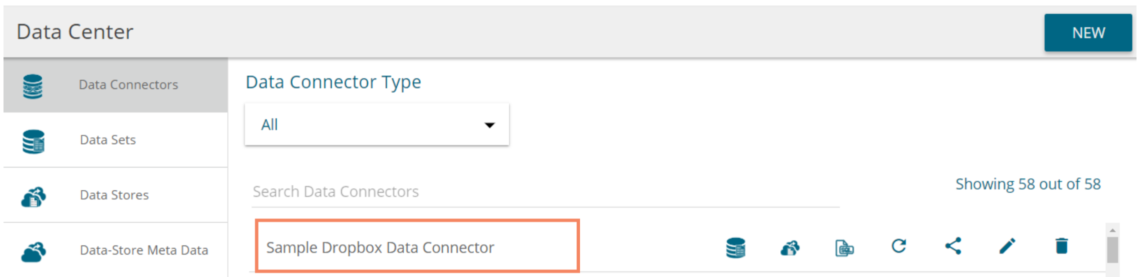
vi) A message will pop-up to allow Dropbox account access to BDB
vii) Click the ‘**Allow**’ option to provide access to the selected Dropbox account



viii) The Dropbox connector page opens with the connected Dropbox account
   a. The selected Dropbox account get mentioned on the page.
   b. Enter a Data Connector Name
   c. Click the ‘**SAVE**’ option

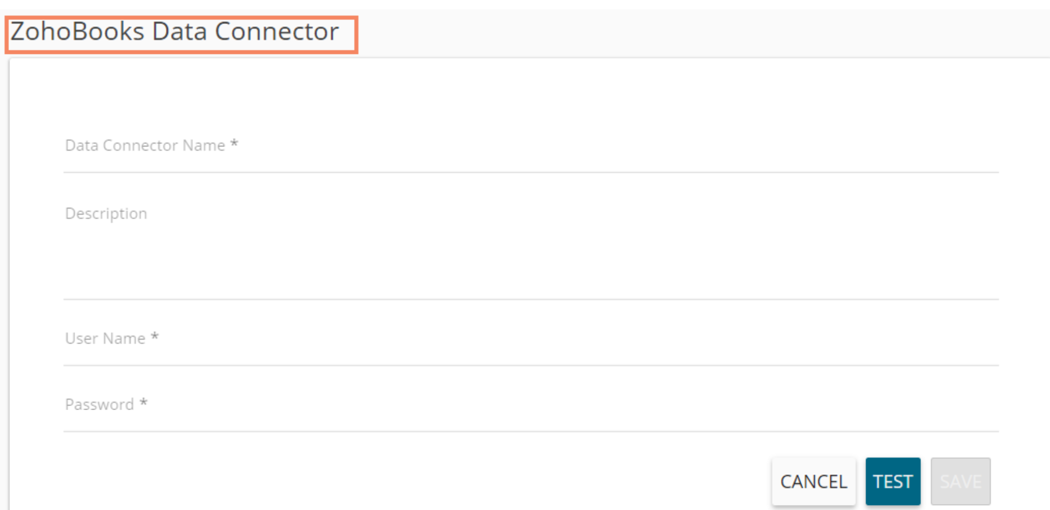


ix) The newly created Dropbox Connector gets added to the Data Connectors list

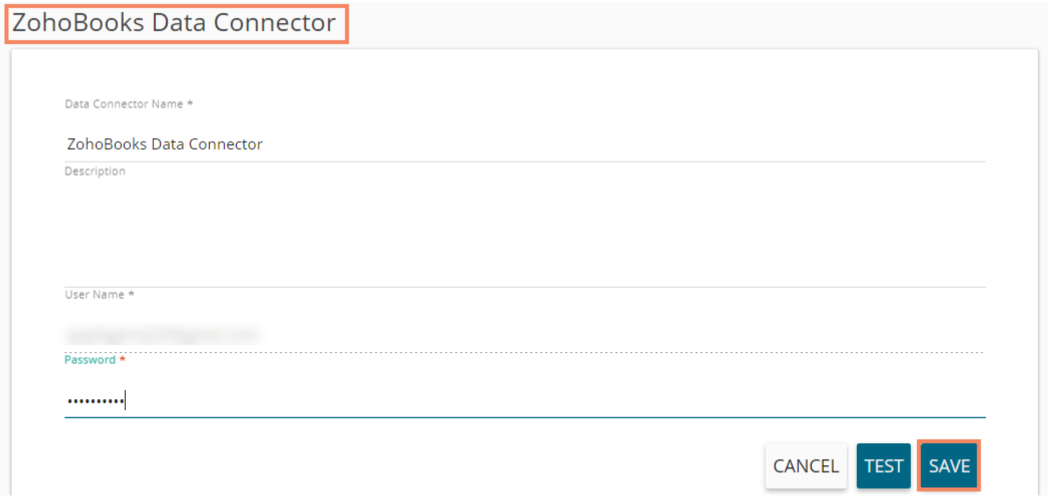


22. ZOHO Books

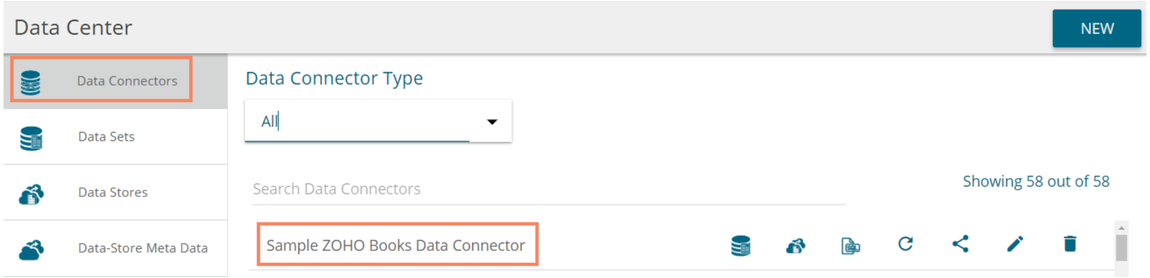
i) Select '**ZOHO Books'** connector from the Data Connector page
ii) The ZOHO Books Data Connector page opens
   a. Provide User Name
   b. Give a valid Password for the account
   c. Click the '**TEST**' option



d. Click ‘**SAVE**’ after the data connection gets verified

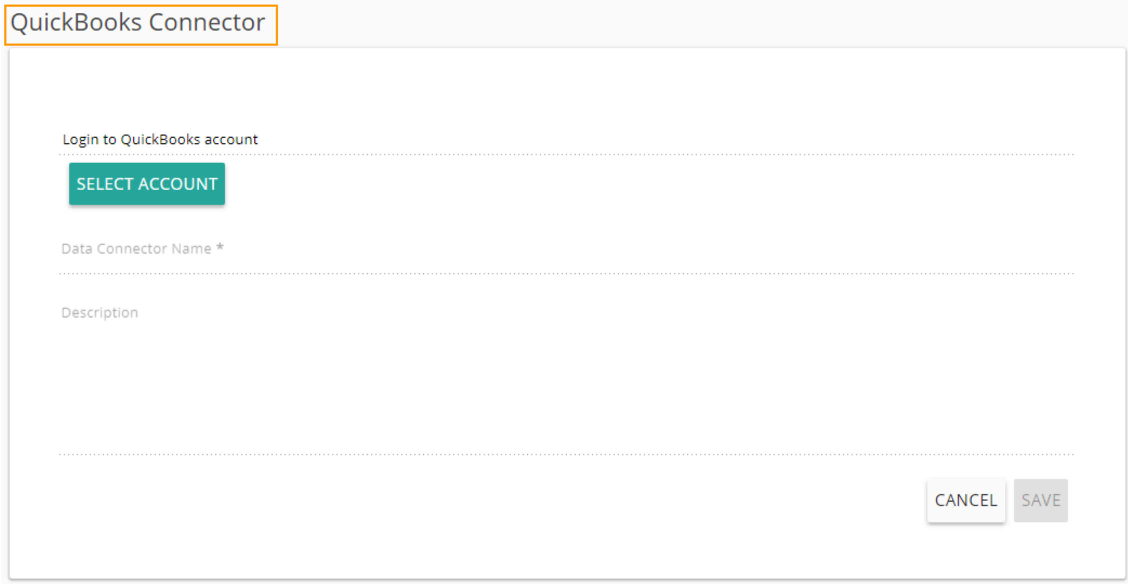


iii) The newly created ZOHO Books Connector gets added to the Data Connectors list



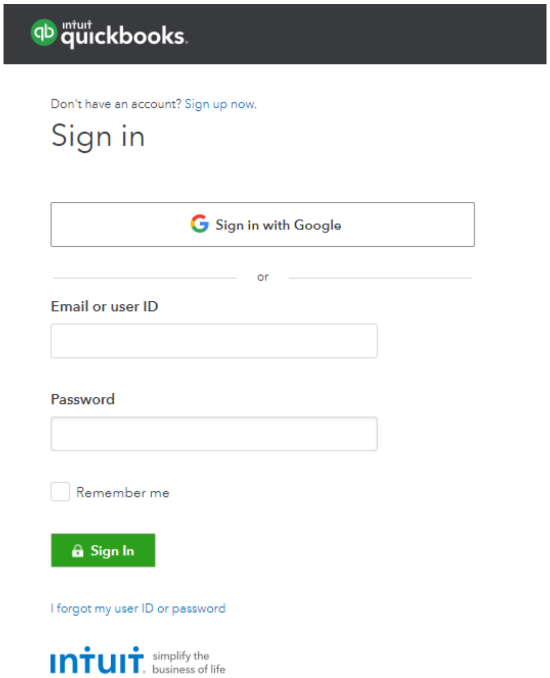
23. QuickBooks

i) Select ‘**QuickBooks’** connector from the Data Connector page
ii) The QuickBooks Connector page opens
iii) Click ‘**SELECT ACCOUNT**’ for login to a QuickBooks account

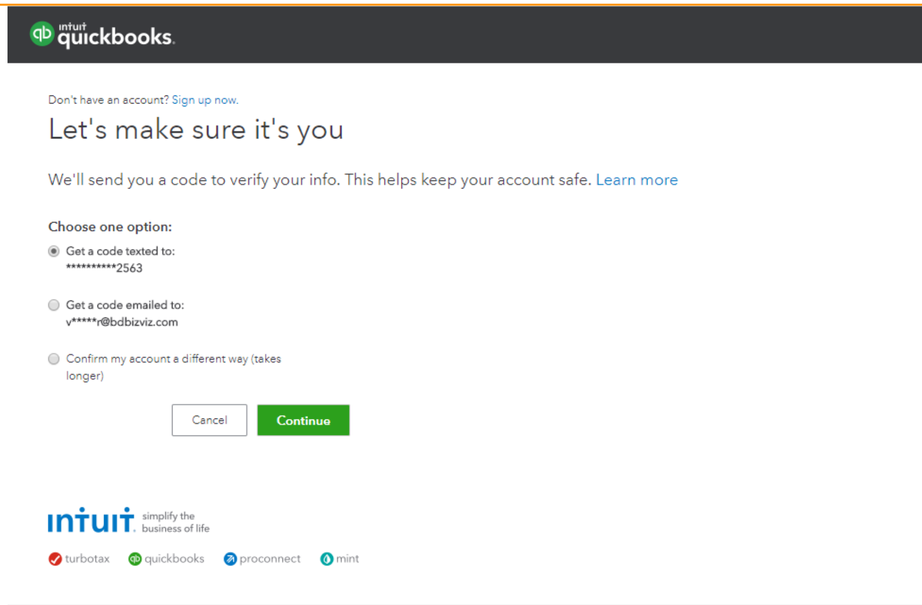


iv) The '**Sign in**' page of the QuickBooks opens

v) Enter the credentials to Sign in

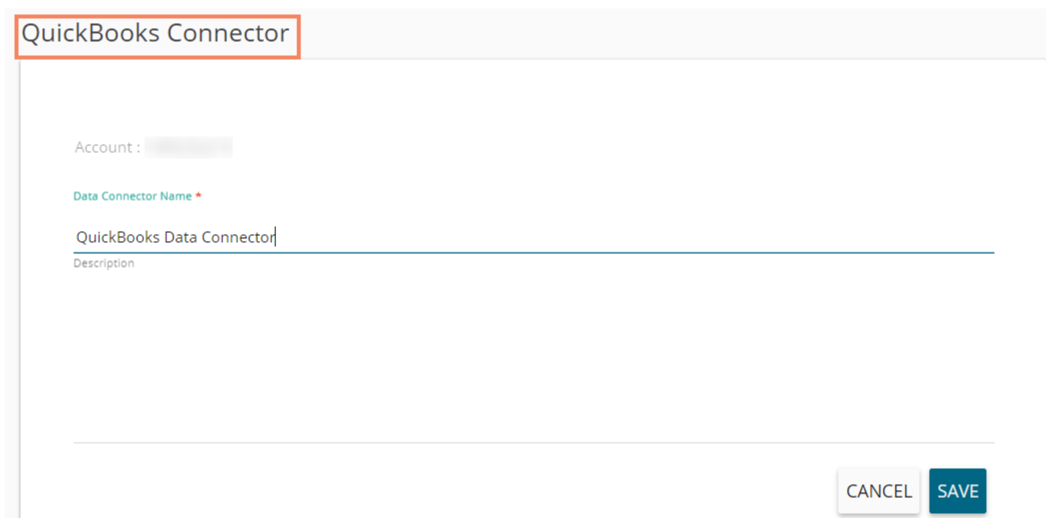


vi) Users receive a code to assure the authenticity if the selected account. The users get verification code through the registered email or mobile.

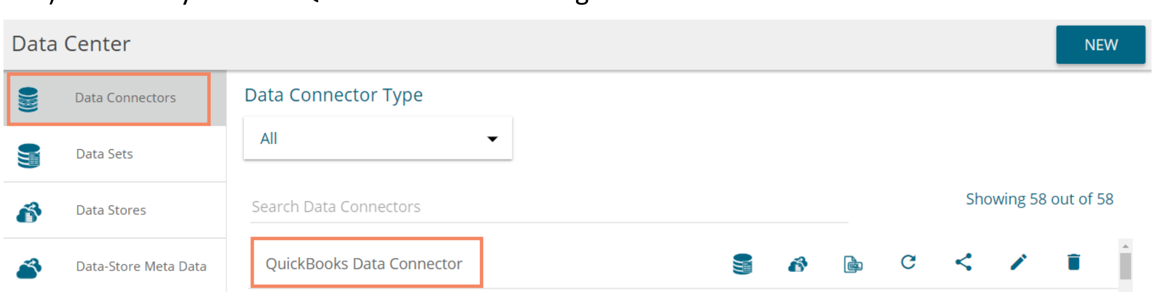


vii) The QuickBooks connector page opens after verification gets over

a. Displays the account number of the selected account on this page
b. Enter a Data Connector Name
c. Click the '**SAVE**' option

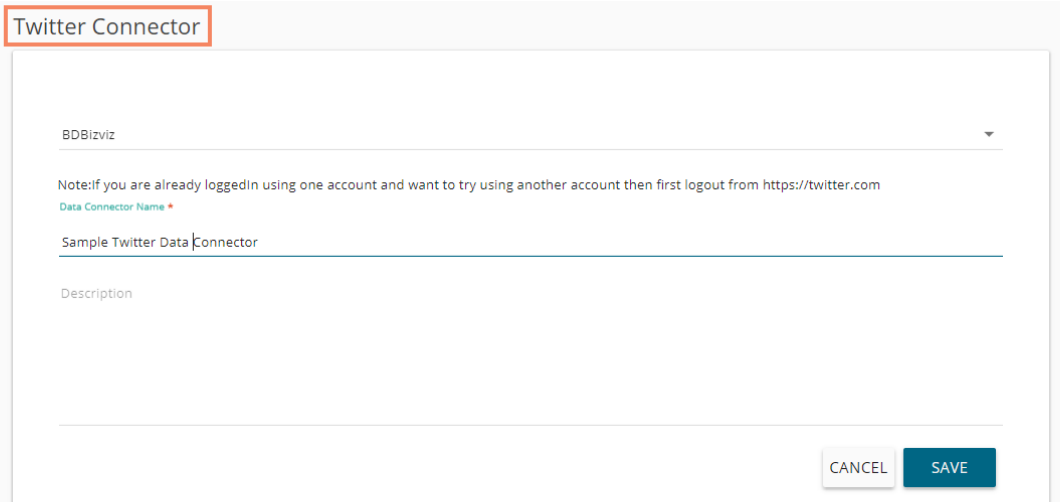


viii) The newly created QuickBooks Connector gets added to the Data Connectors list

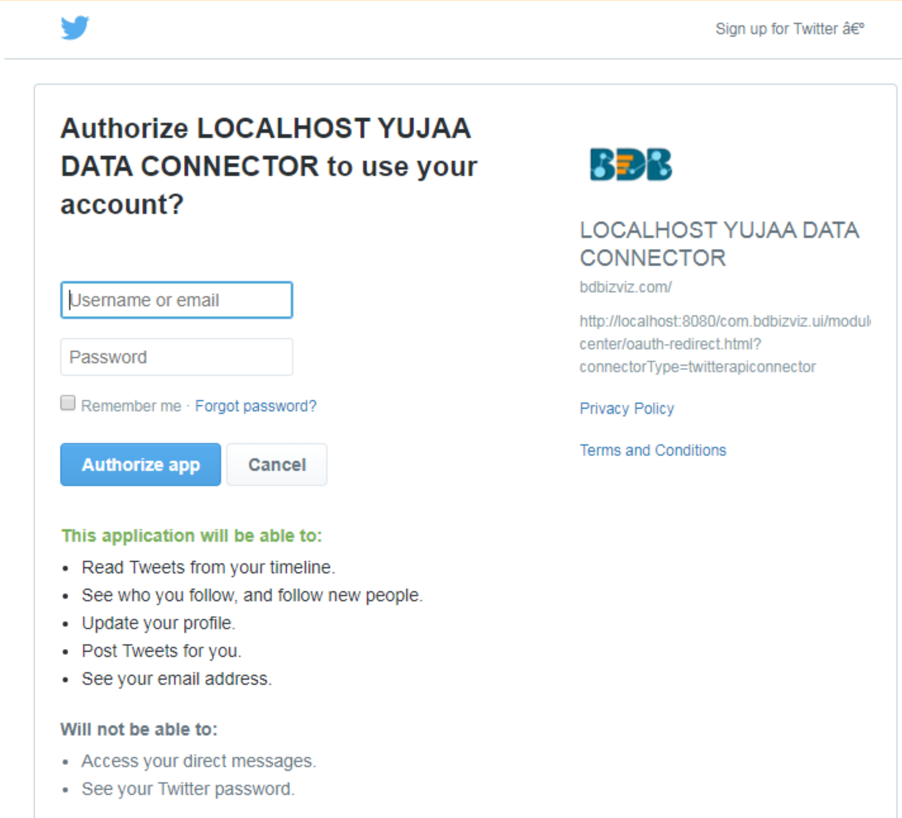


24. Twitter

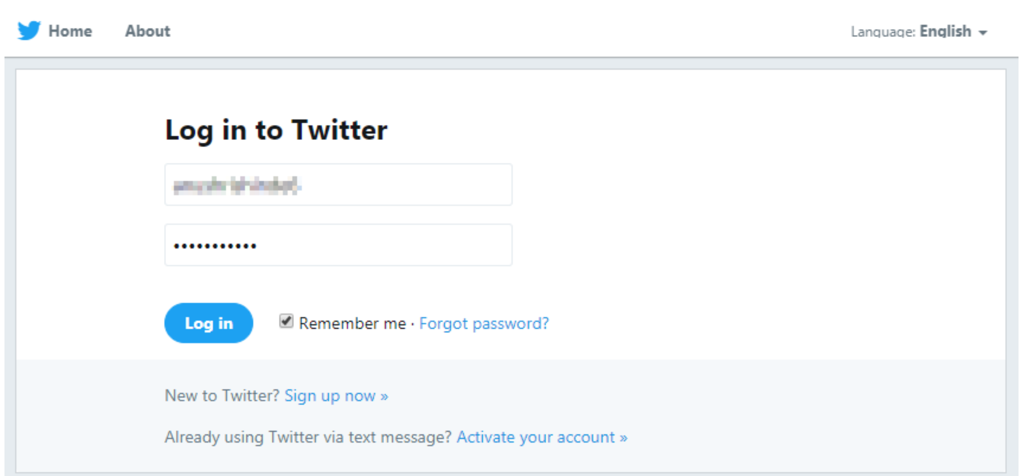
i) Select '**Twitter'** connector type icon from the Data Connector page
ii) The Twitter Connector page opens
iii) Either select a Twitter account listed in the drop-down menu or add a new Twitter account



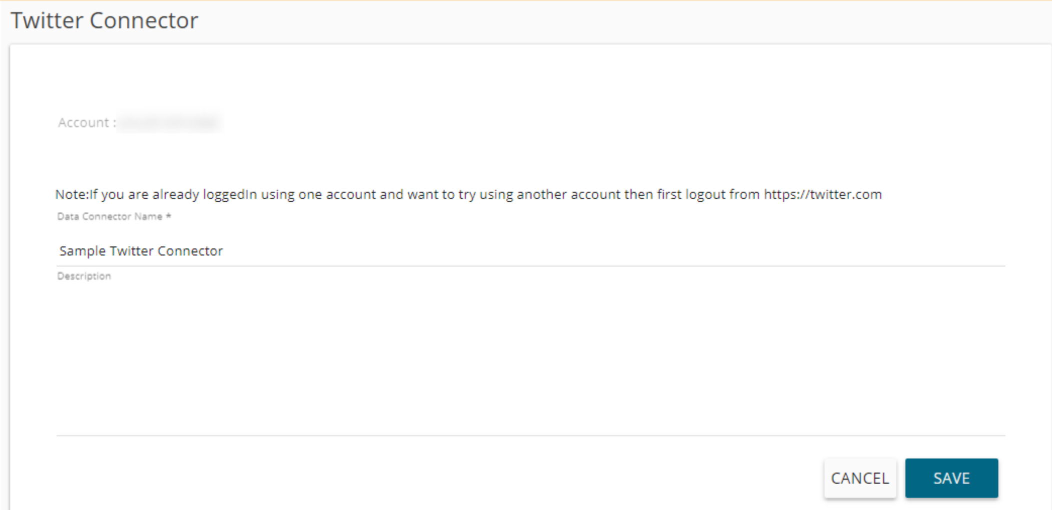
iv) If users wish to add a new account, the authorization page allowing BDB to access the Twitter account opens
v) Enter the credentials to Sign in
vi) Users receive a code to assure the authenticity of the selected account (Users get the verification code through the registered email and mobile)



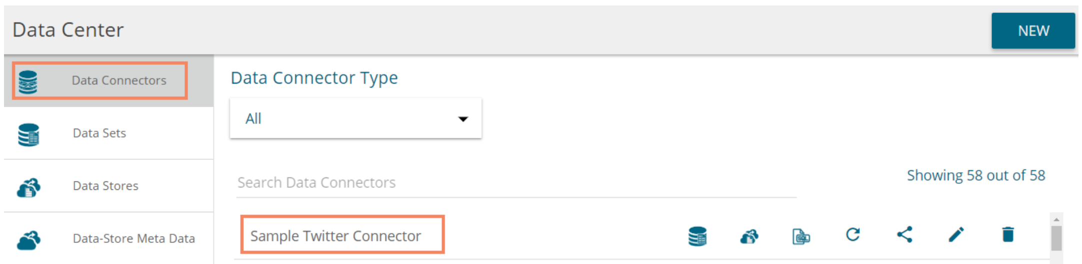
vii) The Twitter Login page opens



viii) The Twitter Connector page opens
   a. Enter a Data Connector Name
   b. Click the ‘**SAVE**’ option



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

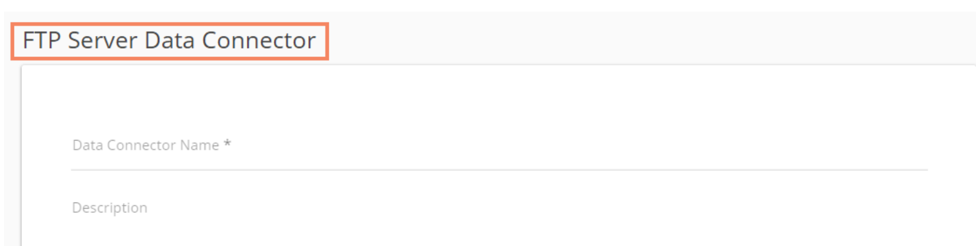


25. FTP Server

i) Select '**FTP Server**' connector type icon from the Data Connector page

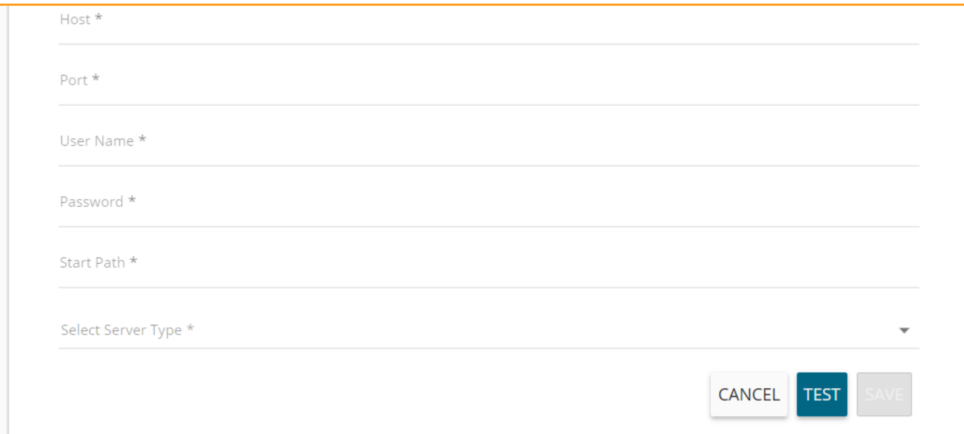
ii) Fill in the following information:

6. Data Connector Name: A user defined name to identify the data source
7. Description: Describe the connector details

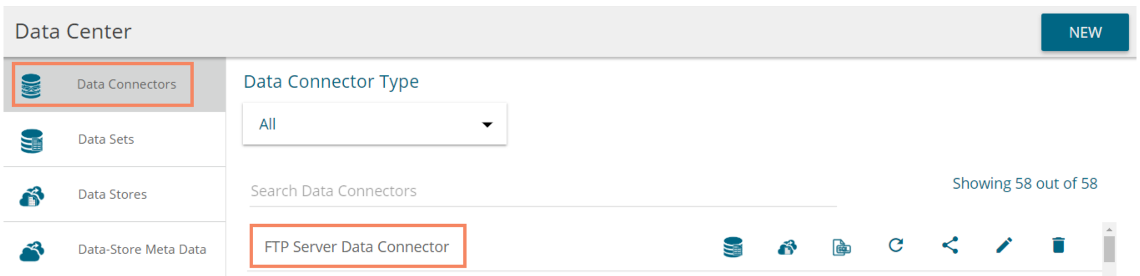


8. Host: Enter database server details (from where the user wants to fetch data)
9. Port: The server port number
10. User Name: Enter a User Name (It should be the same as given in the connection server)
11. Password: Enter the Password (It should be the same as provided in the connection server)
12. Start Path: Give a defined path to start

iii) Verify the data connection by clicking the '**TEST**' option

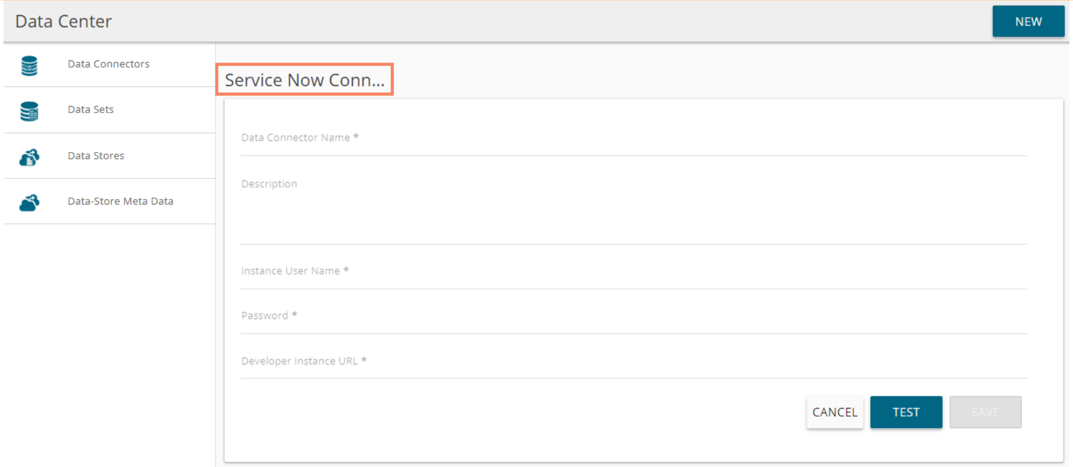


iv) Once the connection is tested successfully, click the ‘**SAVE**’ option
v) The newly created FTP data connector gets added to the Data Connectors list



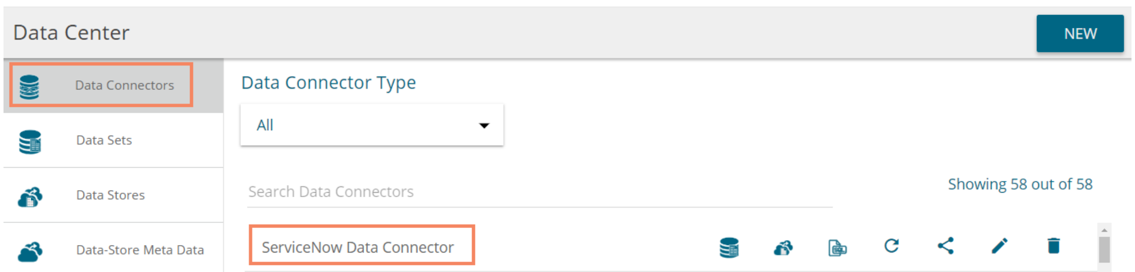
26. ServiceNow

i) Select ‘**ServiceNow**’ connector type icon from the Data Connector page
ii) Users get directed to the Service Now Connector page
iii) Fill in the following information:
   1. Data Connector Name: A user defined name to identify the data source
   2. Description: Describe the connector details
   3. Instance Username: Enter the Instance username
   4. Password: Enter the password for the selected user
   5. Developer Instance URL: Provide the developer’s Instance URL
iv) Verify the data connection by clicking the ‘**TEST**’ option



v) Once the connection is tested successfully, click the '**SAVE**' option

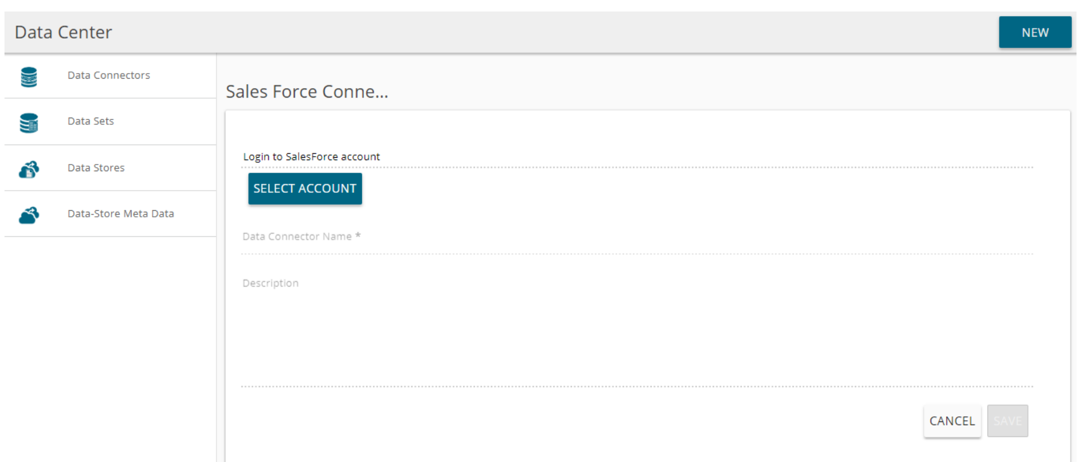
vi) The newly created ServiceNow data connector gets added to the Data Connectors list



27. Salesforce

i) Select '**Salesforce**' connector type icon from the Data Connector page

ii) Users get directed to the Sales Force Connector page

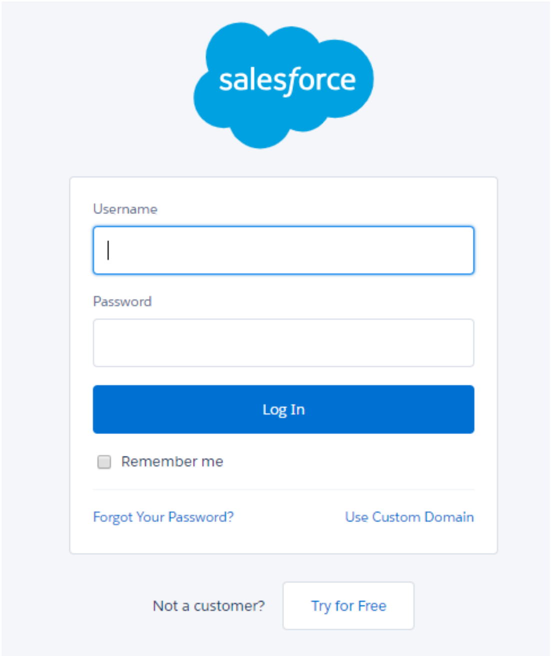


iii) Click the '**SELECT ACCOUNT**' option to select an account

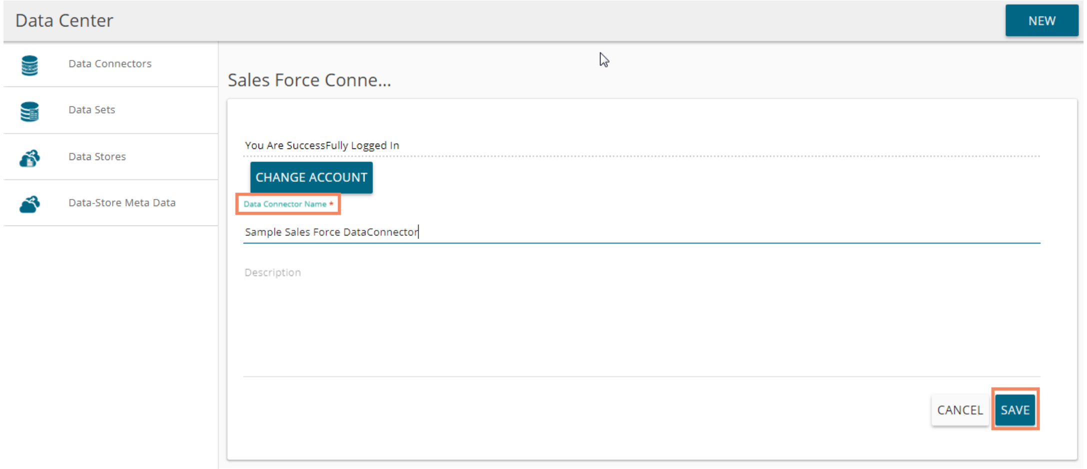
iv) Users get the Salesforce login page

1. Insert the valid username

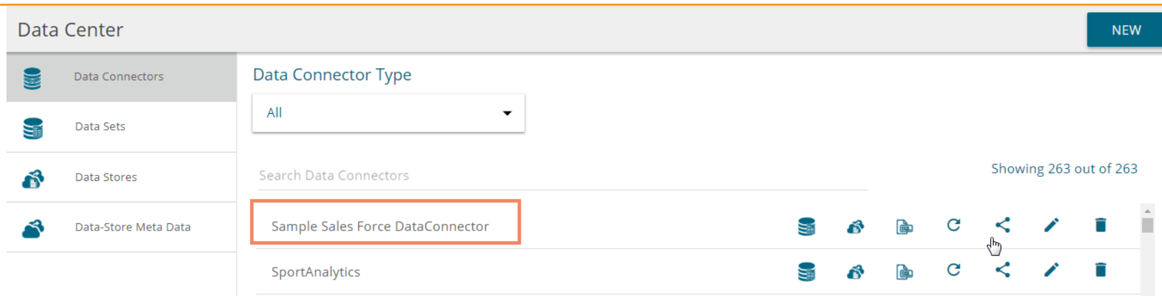
2. Provide the correct password for your account
3. Click the ‘Log In’ option



v) After successfully logged in process users, get redirected to the Salesforce connector page
1. Provide the Data Connector name
2. Describe the data connector (optional)
3. Click the ‘**SAVE**’ option

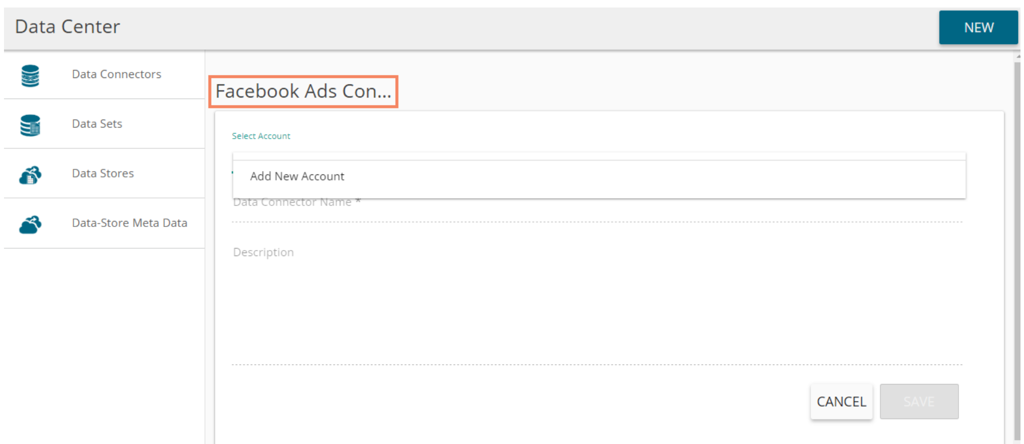


vi) The newly created data connector gets saved in the list of Data Connectors

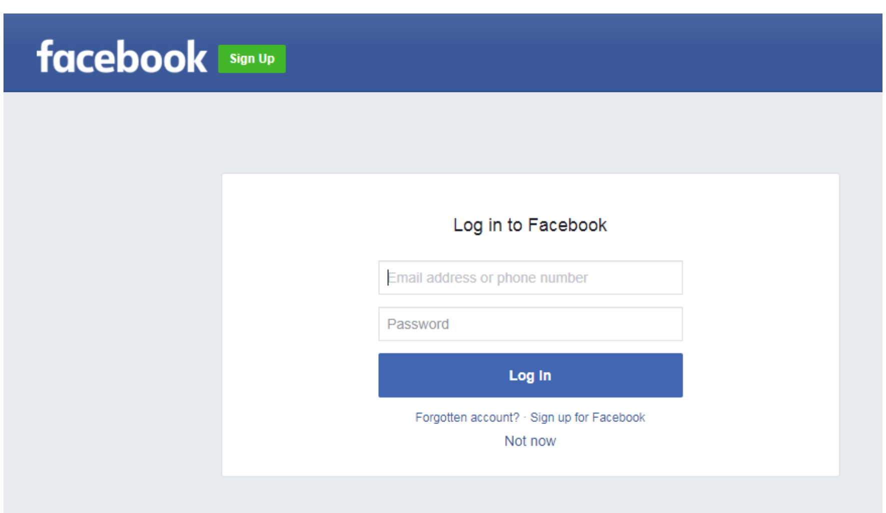


28. Facebook Ads

i) Select '**Facebook Ads**' connector type icon from the Data Connector page
ii) Users get directed to the Facebook Ads Connector page
iii) Use the 'Select Account' drop-down to either select an existing account or Add New Account

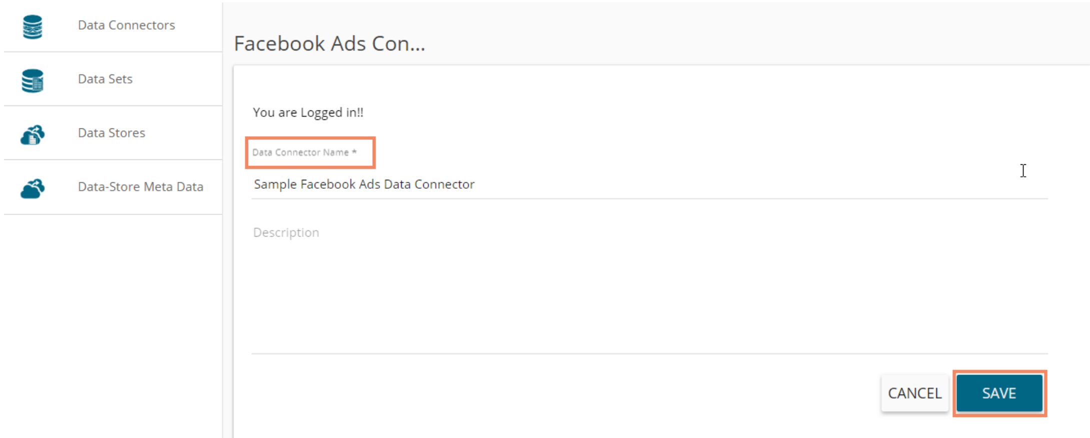


iv) Users get directed to the Facebook login page
   1. Provide a relevant email address or phone number
   2. Provide the correct password for the selected account
   3. Click the '**Log In**' option

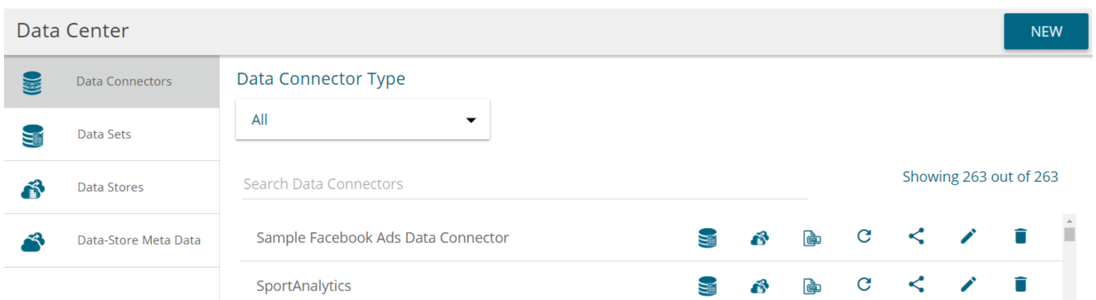


v) After successful login to the selected Facebook account, users get redirected to the Facebook Ads connector page

1. Enter the Data Connector name
2. Provide Description for the data connector (optional)
3. Click ‘**SAVE**’ option



vi) A new Facebook Ads Data Connector gets created and added to the List of the Data Connectors

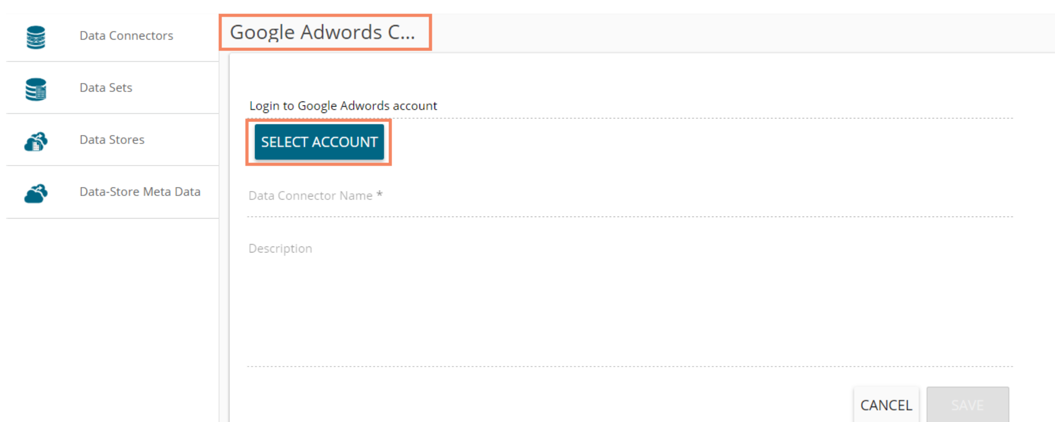


29. Google AdWords

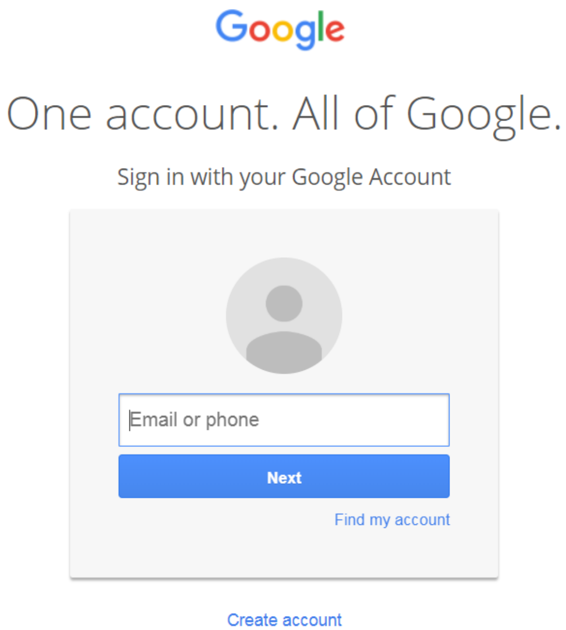
i) Click the ‘**Google AdWords**’ connector type icon from the Data Connector page

ii) Users get directed to the Facebook Ads Connector page

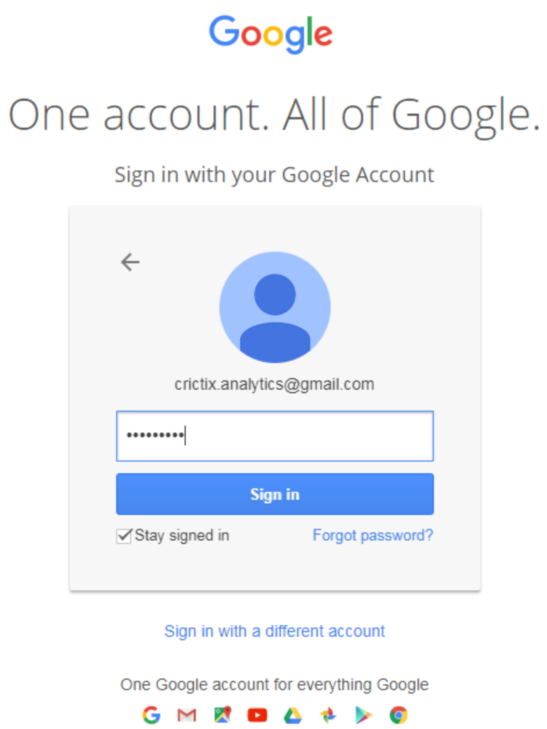
iii) Log in to a Goole AdWords account using the ‘**Select Account**’ option



iv) Users get a Google page instructing them to enter a valid email id or contact number

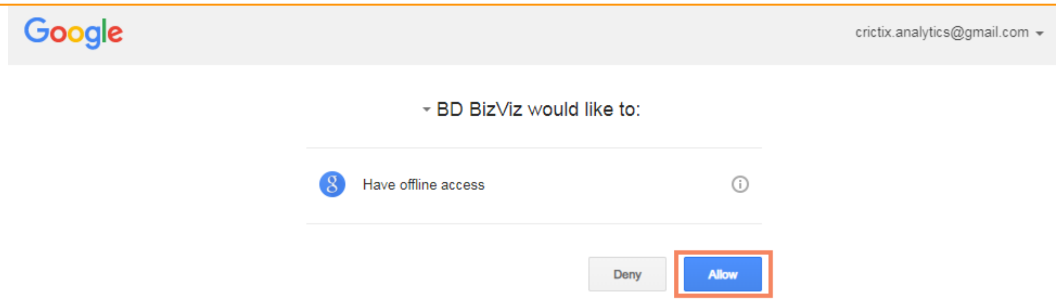


v) Provide the correct password for the selected Google AdWords account

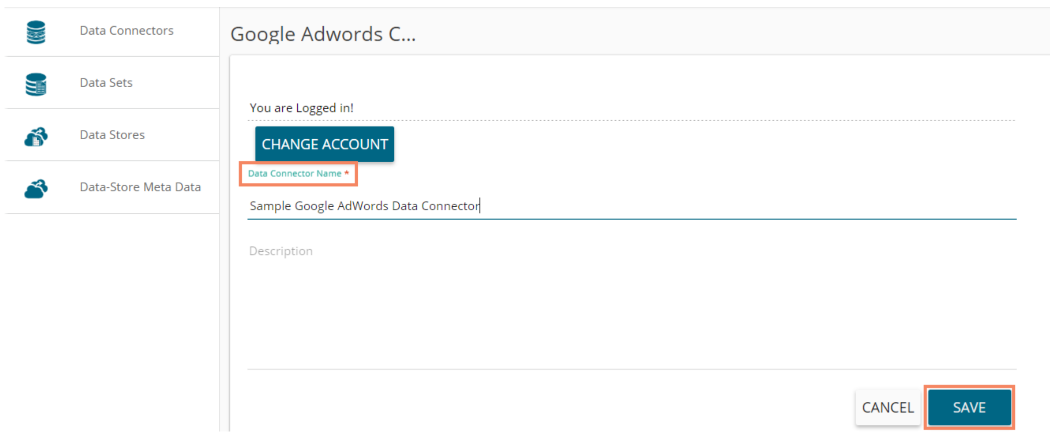


vi) Users get a page asking their permission to allow BDB data access from their selected Google AdWords account

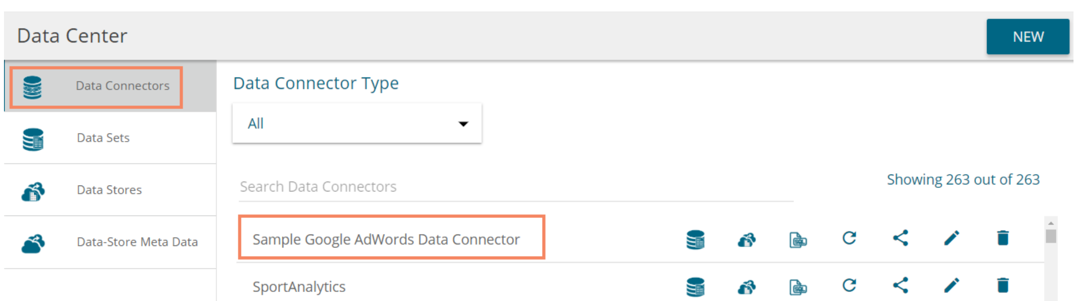
vii) Click the 'Allow' option to permit the data access



viii) Users get redirected to the Google AdWords connector page
   a. Provide data connector name
   b. Describe the data connector (optional)
   c. Click the ‘SAVE’ option



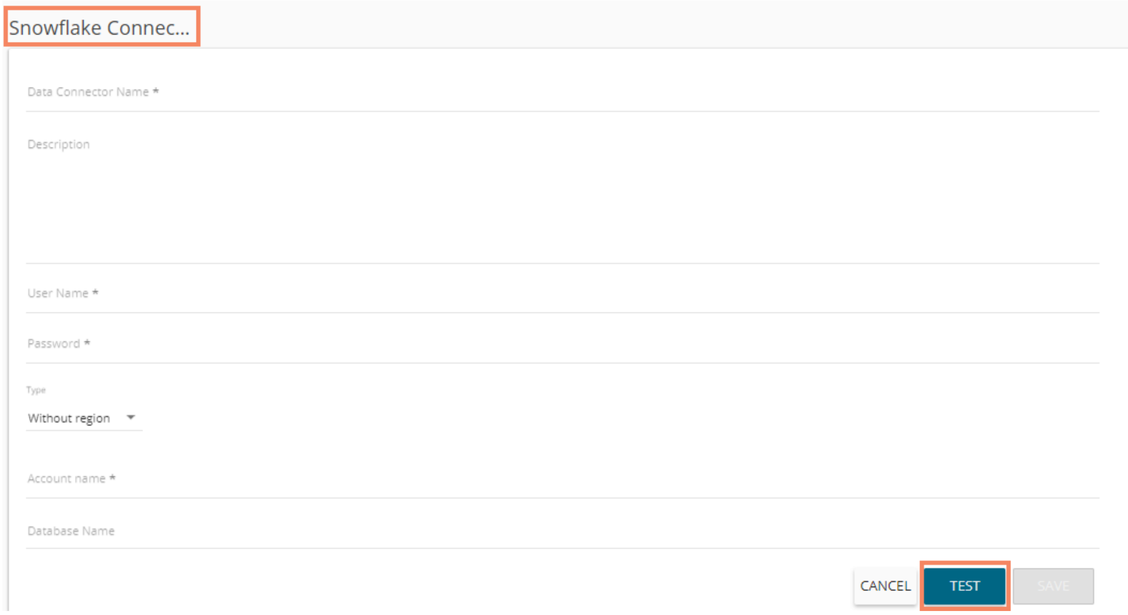
ix) The newly created Data Connector gets added to the ‘Data Connectors’ list



30. Snowflake

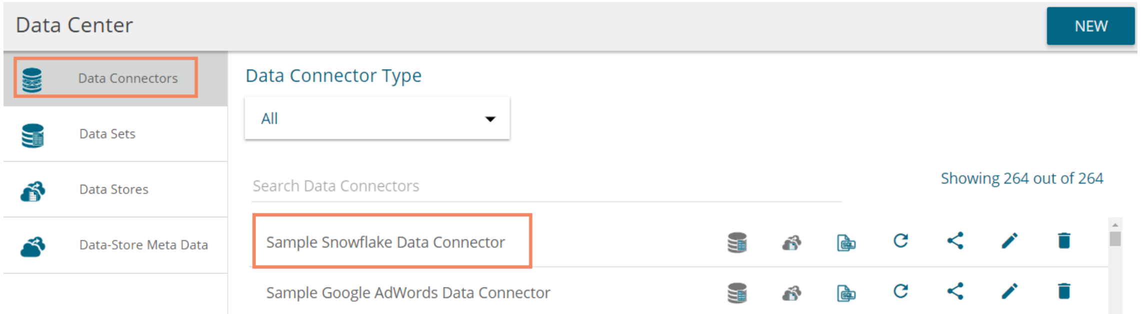
i) Click the ‘**Snowflake**’ Data Connector icon from the Data Connector page
ii) Users get directed to the Snowflake Data Connector page
   a. Provide the Data Connector name
   b. Describe the data connector (optional)
   c. Enter the valid username
   d. Enter the correct password for the selected account

e. Select a type by using the drop-down menu
f. Provide the relevant URL link for the account name field
g. Click 'TEST' to check the connection



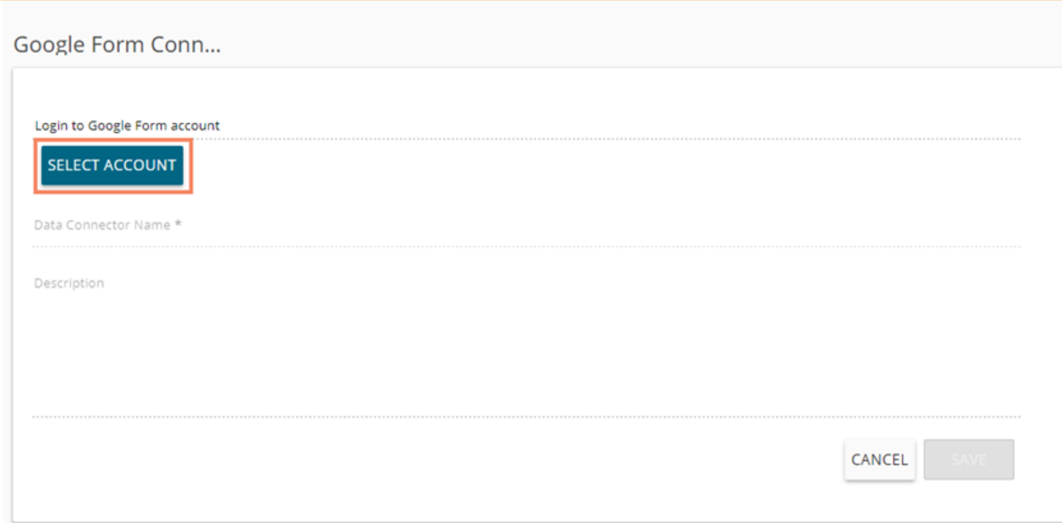
iii) Users get a message "Successfully connected…!" if the connection gets successfully verified

iv) Click 'SAVE' after getting the success message
v) A new Snowflake Data Connector gets created and saved under the Data Connectors list

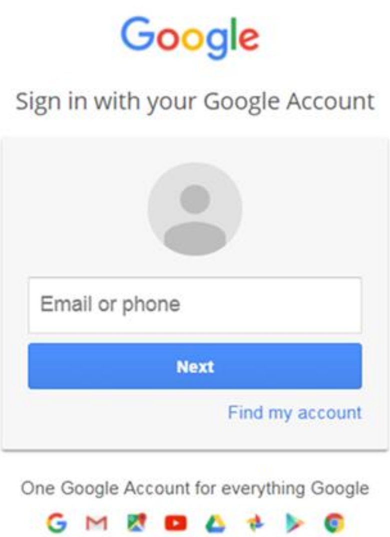


31. Google Form

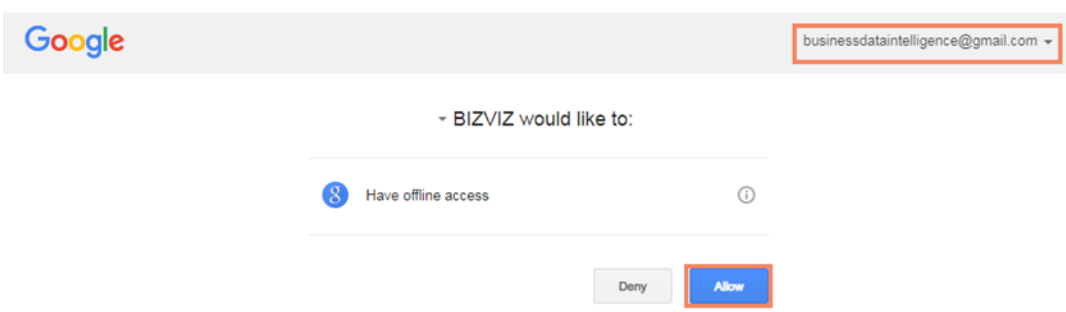
i) Click the '**Google Form**' Data Connector icon from the Data Connector page
ii) Users get directed to the Google Form Data Connector page
iii) Click the 'SELECT ACCOUNT' option



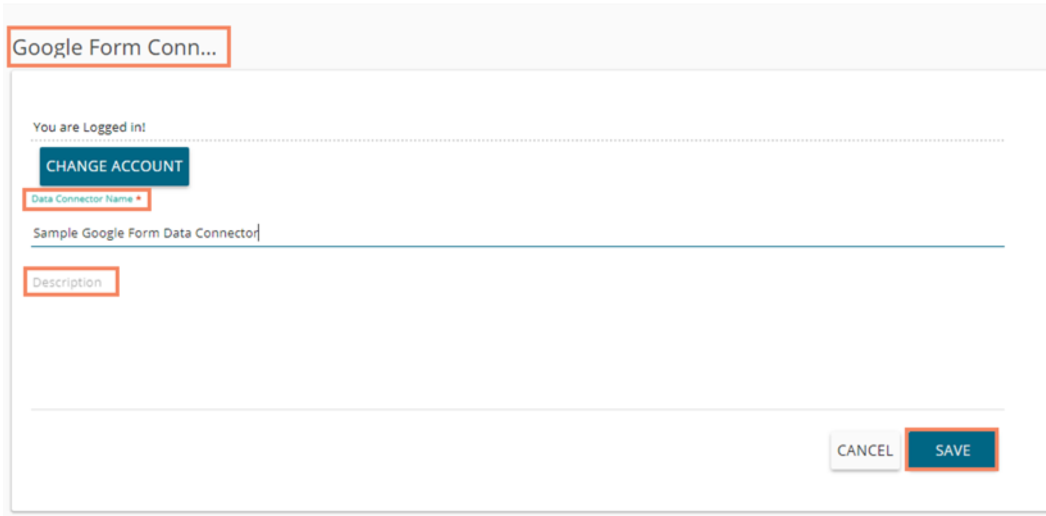
iv) A page opens directing users to log in for a Google account
v) Enter the required credentials for the selected Google Account



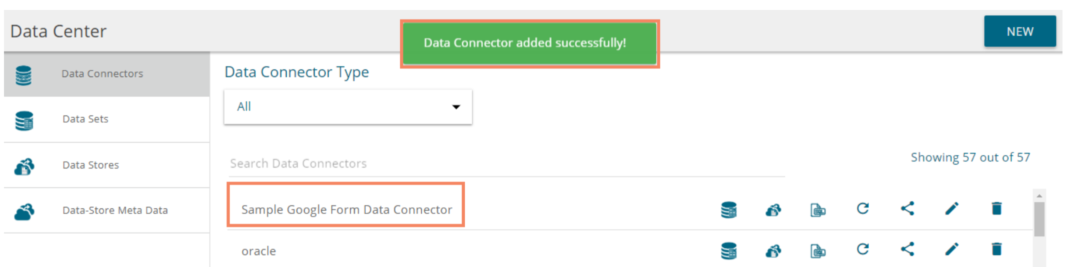
vi) Allow BDB to access data from the selected Google account by clicking the 'Allow' option



vii) The Google Form Data Connector page opens with a notification that the user is successfully logged in to the selected Google account
   a. Provide a data connector name
   b. Describe the data connector
   c. Click the 'SAVE' option

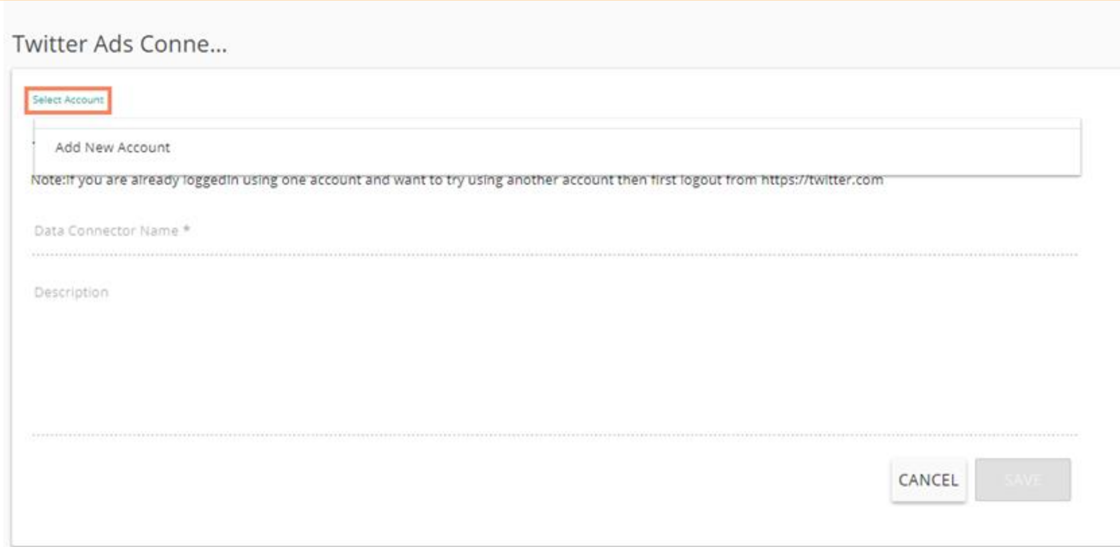


viii) A new Google Form data connector gets created and added to the Data Connector List

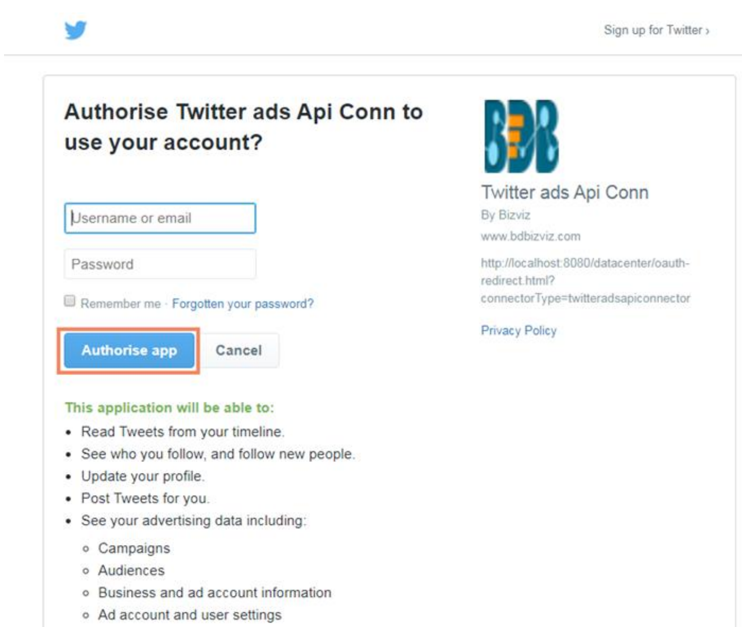


32. Twitter Ads

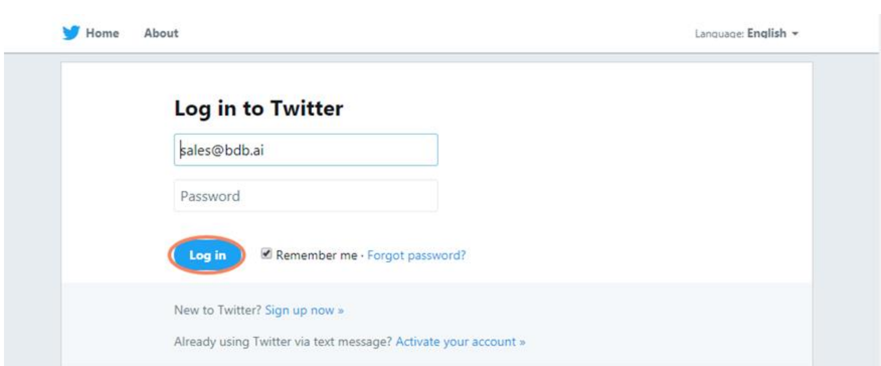
i) Click the 'Twitter Ads' Data Connector icon from the Data Connector page
ii) Users get directed to the Twitter Ads Data Connector page
iii) Select an account or Add a new account using the drop-down menu



iv) Authorize BDB to access data from the selected Twitter account

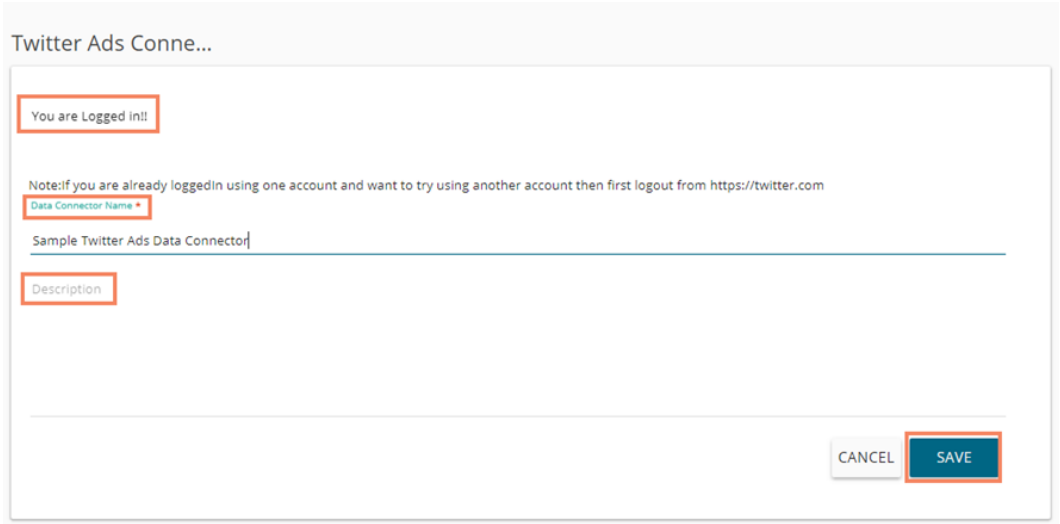


v) Log in to the Twitter account

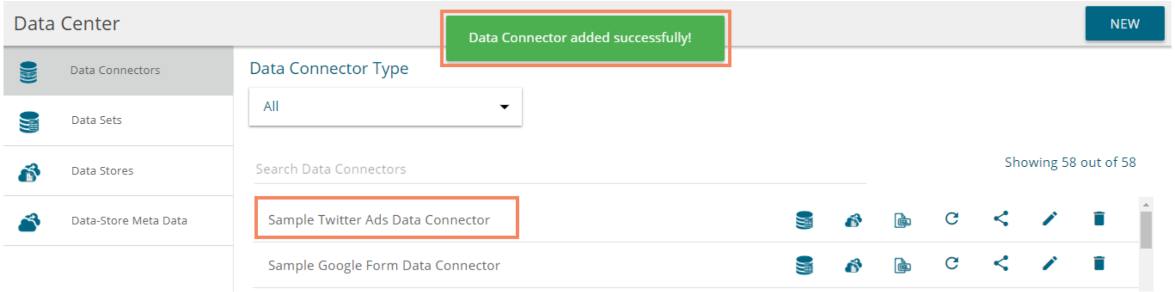


vi) The Twitter Ads Data Connector page opens with a notification that the user is successfully logged in to the selected account

a. Provide the data connector name
b. Describe the data connector
c. Click the 'SAVE' option



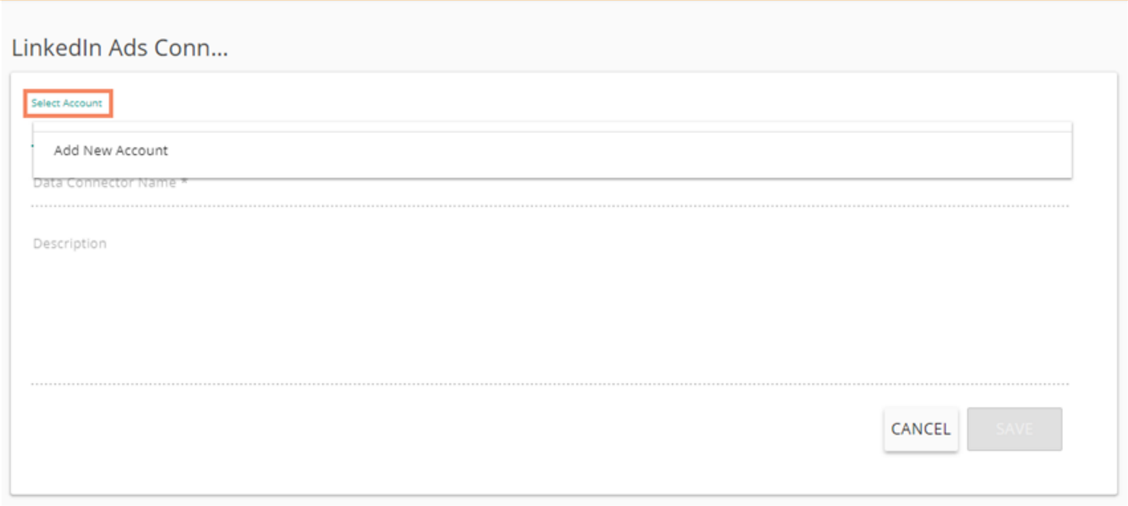
vii) A new Twitter Ads data connector gets created and added to the Data Connector List



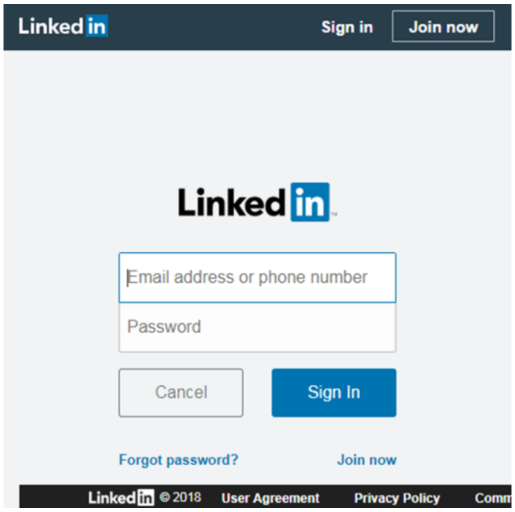
33. LinkedIn Ads

i) Click the 'LinkedIn Ads' Data Connector icon from the Data Connector page

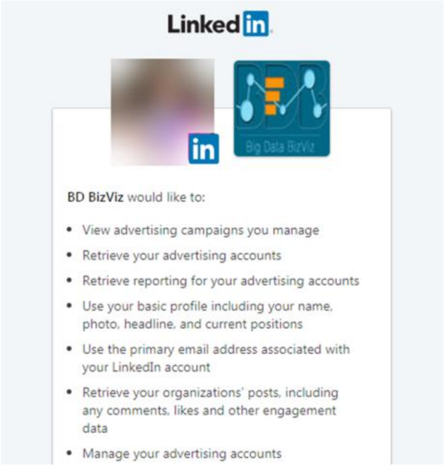
ii) Users get directed to the LinkedIn Ads Data Connector page
iii) Select an account or add a new account using the drop-down menu



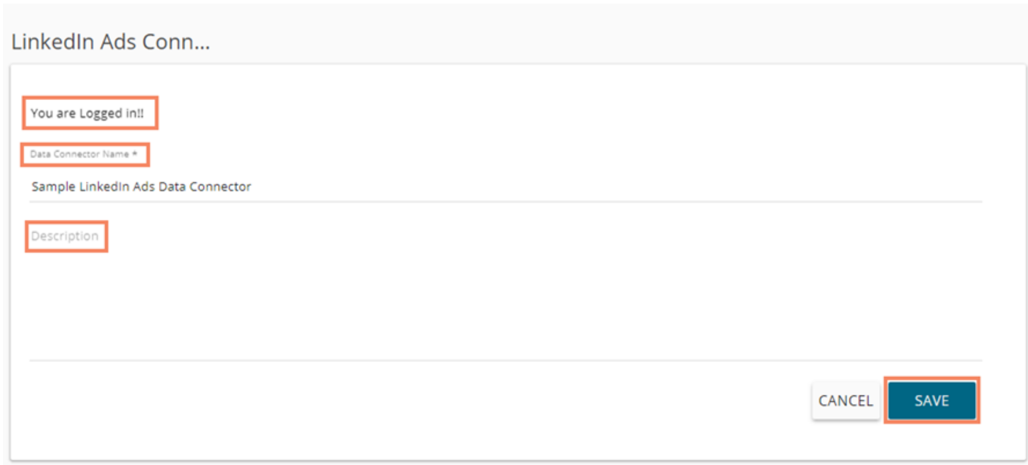
iv) The LinkedIn Login page opens for signing in to the account



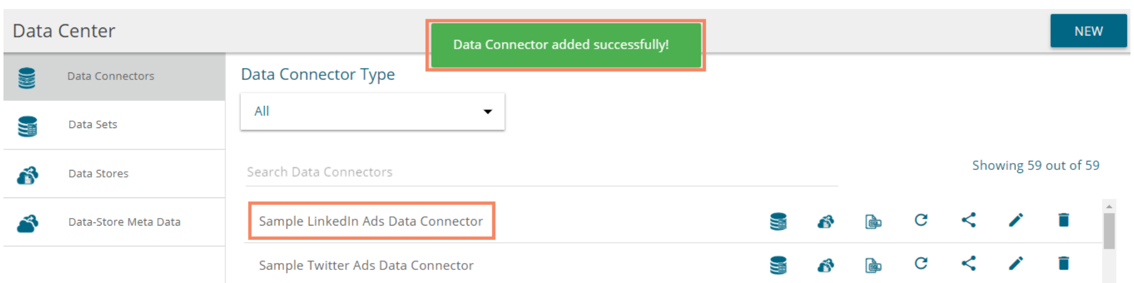
v) Allow BDB to access data from the selected LinkedIn account



vi) The LinkedIn Ads Data Connector page opens with a notification that the users is successfully logged in to the selected account
  a. Provide the Data Connector name
  b. Describe the Data connector (optional)
  c. Click the 'SAVE' option



vii) A new LinkedIn Ads Data connector gets created and added to the Data Connector List

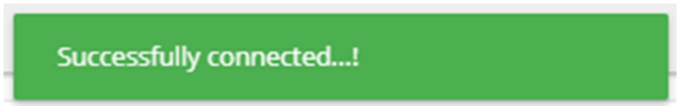


34. Postgre SQL

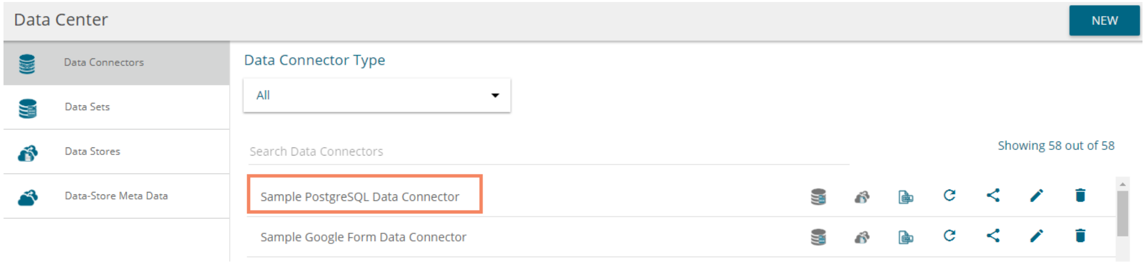
i) Click the 'Postgre SQL' Data Connector icon from the Data Connector page
ii) Users get directed to the Postgre SQL Data Connector page
iii) Provide the following information:
  a. Data Connector name
  b. Username
  c. Password
  d. IP/Host
  e. Port
  f. Database Name
iv) Click the 'TEST' option

v)A success message appears to inform that connection has been developed

vi) Click the 'SAVE' option



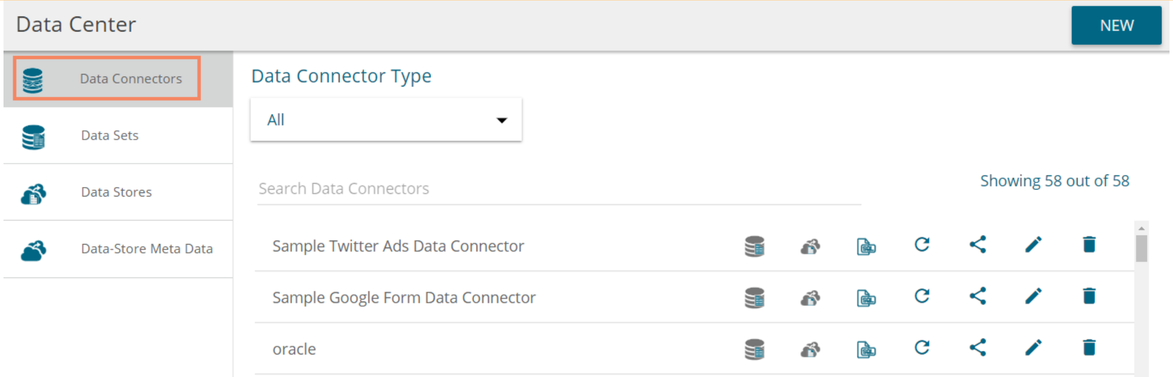
vii) A new Postgre SQL data connector gets created and added to the Data Connectors list



7.1.2. Data Connector List

All the created data connectors are listed on the Data Center page.

- The list appears by default while selecting the '**Data Center**' option from the apps list
- Users can also get the list of data connectors by clicking on the '**Data Connectors**' option provided at the top left side of the page

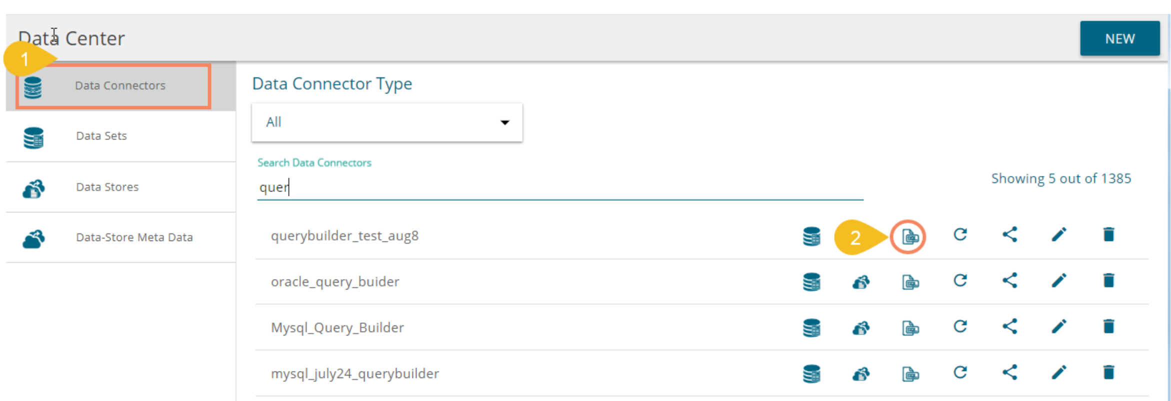


Option	Name	Task
	New Data Set	Redirect user to create a new Data Set
	New Data Store	Redirect user to create a new Data Store
	Reconnect	Reconnect with the server
	Share	Share connector with the selected user(s) or group(s)
	Edit	Edit the connector fields
	Remove	Remove a connector from the list

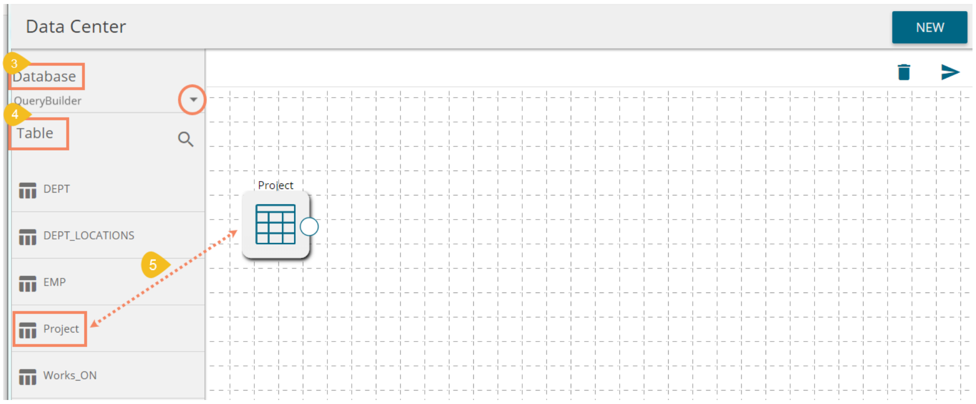
7.1.3. Creating Data Store/Data Set by using Query Builder

The query builder functionality is introduced to create database queries. It can be used to perform most database functions like Functions like count, max, min, average, and sum and write the Join statements (It supports all types of joins-left, right, inner, outer). The result can be the generated query and the data returned from the database for the query. The generated query can be further used to simplify the Data Set or Data Store creation process.

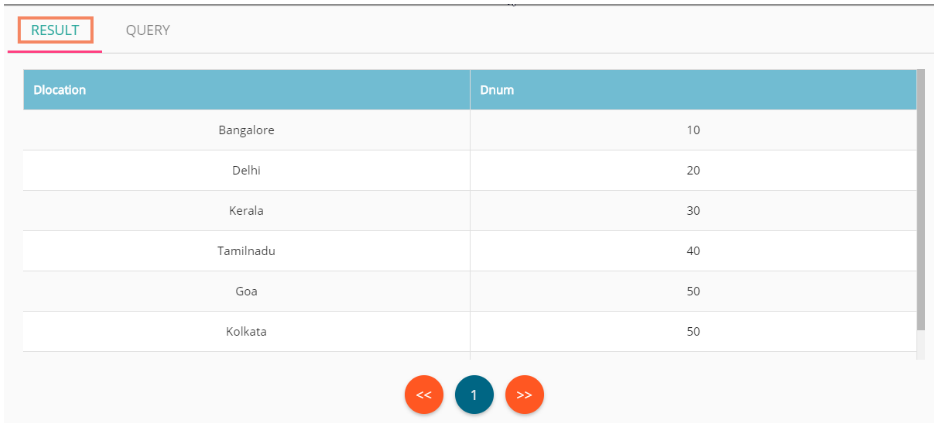
i) Navigate to the list of Data Connectors using the Data Center module
ii) Select an MYSQL connector and click on the New Query builder icon



iii) A new page opens redirecting the user to select a database
iv) List of the existing tables appears from the selected database
v) Drag-drop a database table to the workspace (The users can drag multiple tables to the workspace)

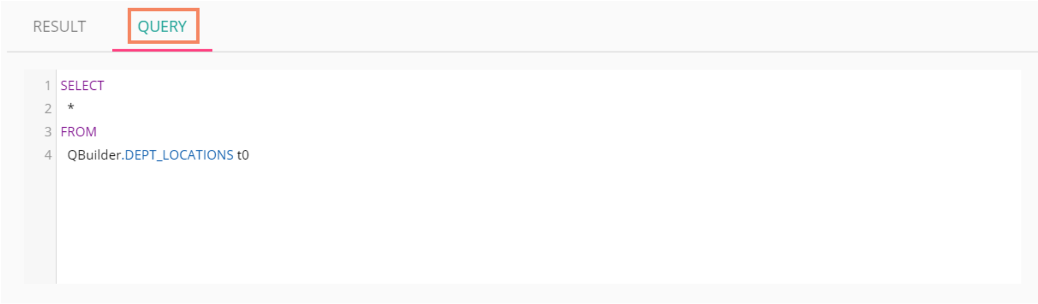


vi) Click the 'Execute Query' option.
vii) The requested data gets sent to the server, and the result displays on the screen with two tabs - one for showing the query result and other displaying the generated query itself.
1. The '**RESULT**' tab opens by default with the preview of the data

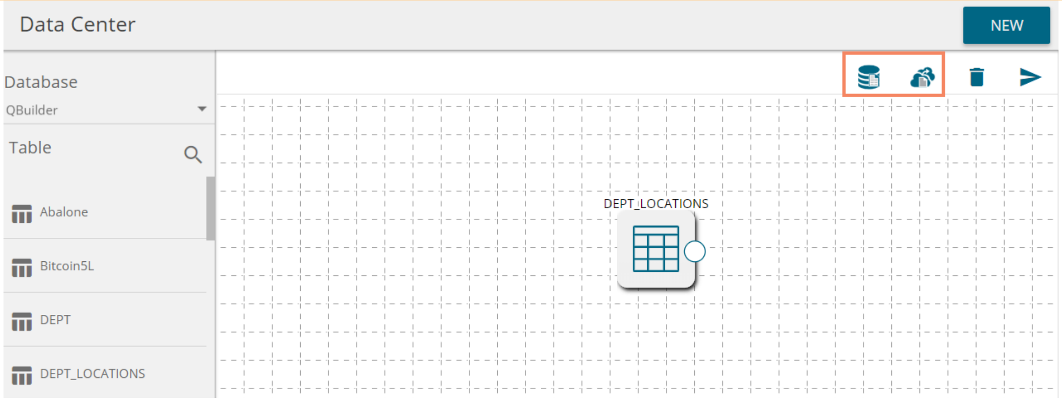


Dlocation	Dnum
Bangalore	10
Delhi	20
Kerala	30
Tamilnadu	40
Goa	50
Kolkata	50

2. The '**QUERY**' tab displays the generated query



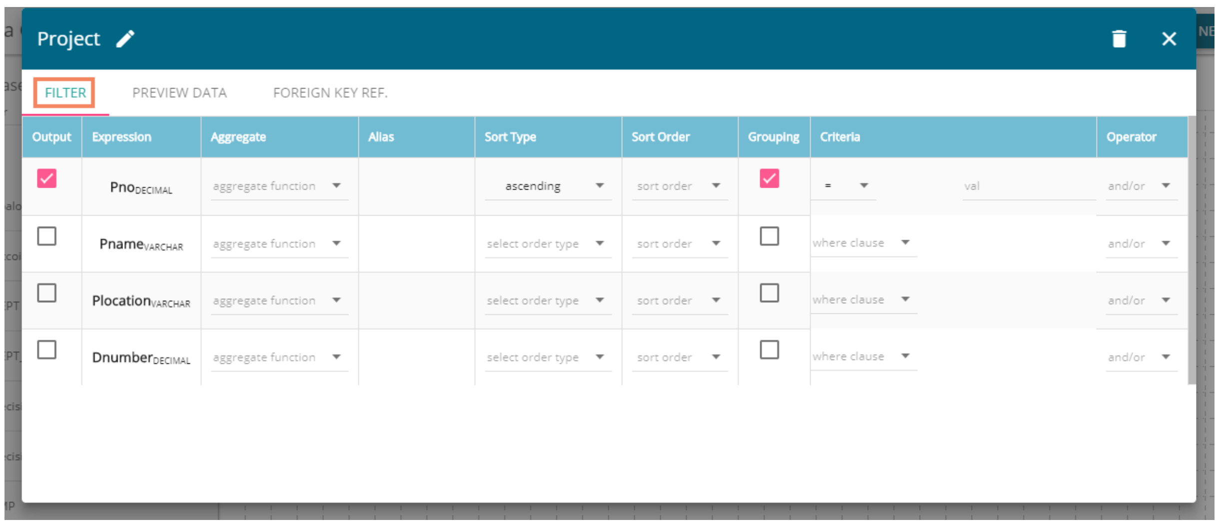
viii) After executing the query, the users get two more options to '**Create Data Set**' and '**Create Data Store**' from the generated query.



ix) The users can click the dragged table component

x) A new page opens with FILTER, PREVIEW DATA, and FOREIGN KEY REF tabs

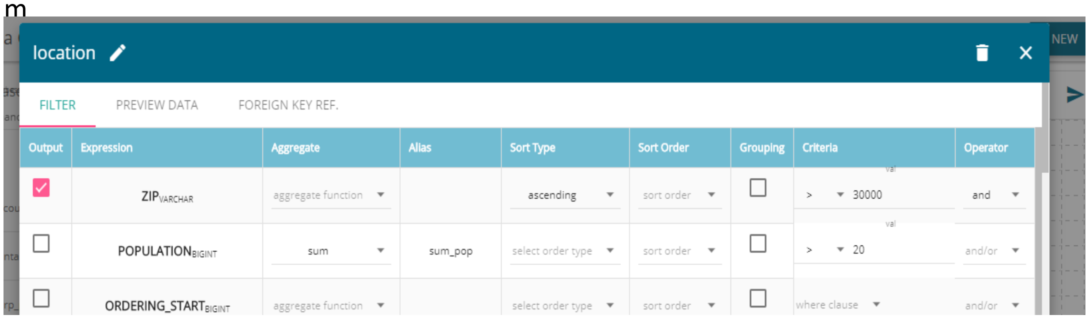
1. The FILTER tab displays various columns heading with Selectors/Expressions, Aggregate Functions, Alias Column Names, Sort Type, Sort Order, Grouping, Criteria (Where Condition) and Operator to the user.



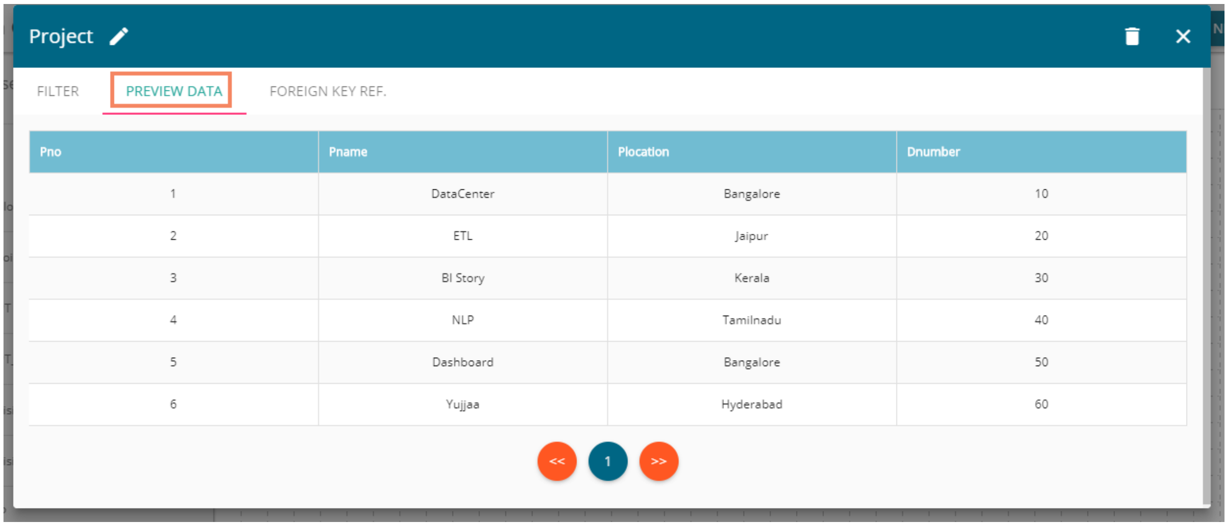
E.g., If you want to build a query like "Select ZIP, SUM(POPULATION) AS sum_pop from the location where POPULATION > 20 AND ZIP > 30000 ORDER BY ZIP ASC" then you can do it by selecting the checkboxes and providing appropriate values in criteria as shown in the following

i

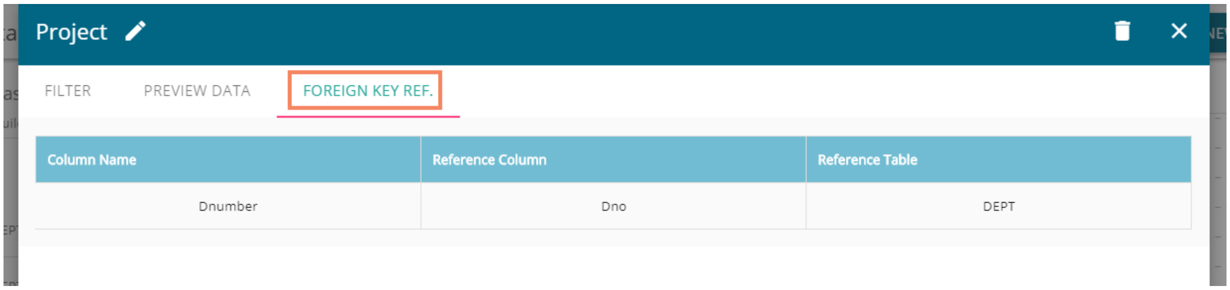
m



2. PREVIEW DATA - This tab displays sample data that can be used by the user to decide what type of data is present in the table and accordingly conditions get created.



3. FOREIGN KEY REF. - This tab provides the foreign key references for the table. It can be used by the user while creating join conditions.

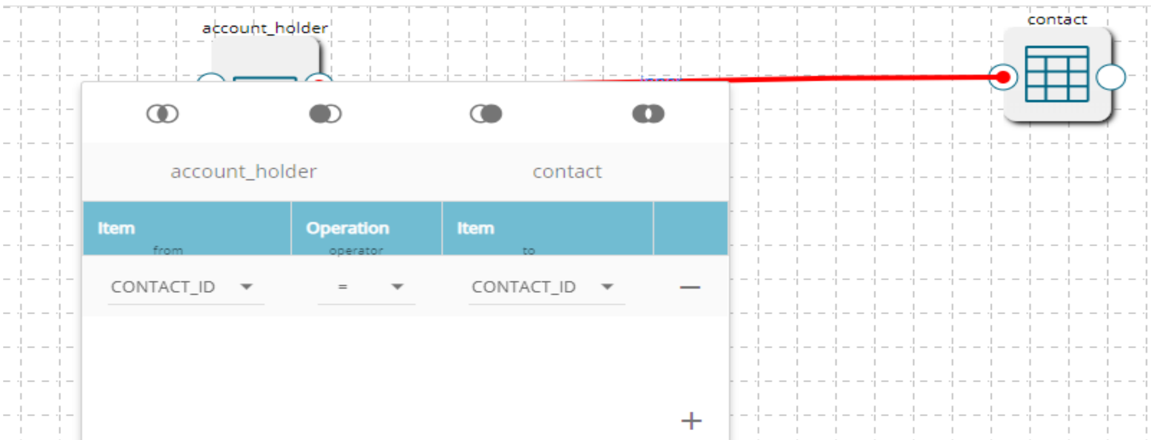


Note: Users can also get an Alias Name for the table and the 'Delete' option for the selected table.

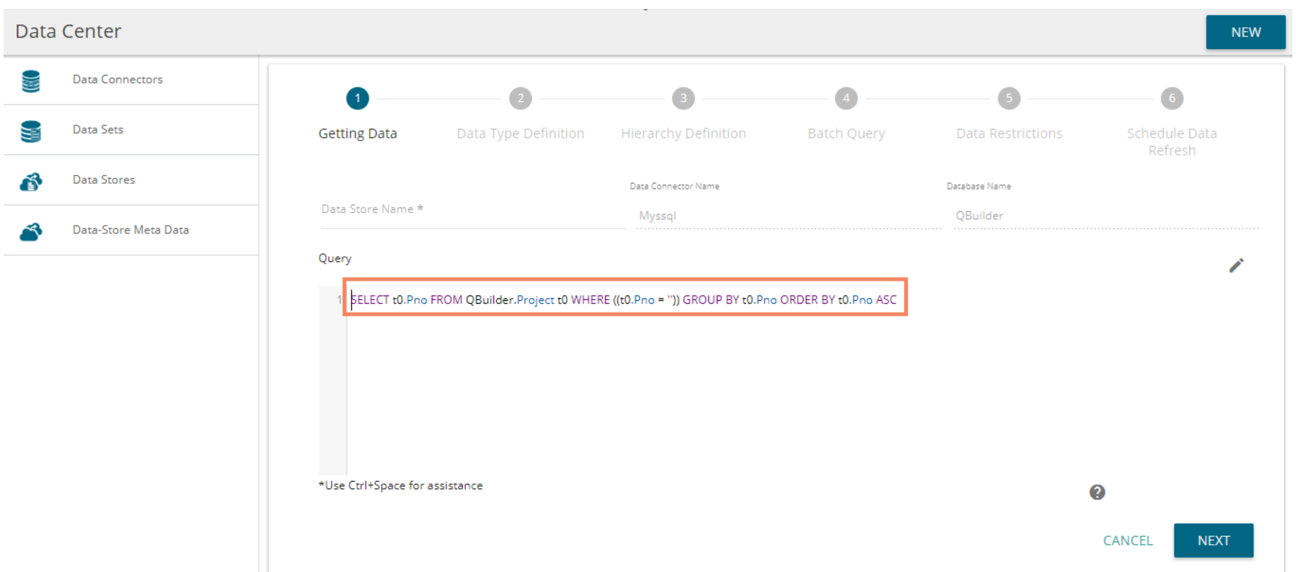
Note:

a. Users can join the multiple tables by joining the table-nodes. The users can see the the possible join conditions in the pop-up window that displays on clicking the node-link.

E.g., Two different tables 'account_holder' and 'contact' are joined in the following image. By clicking on the connection link, we got the option to choose the join condition. Note that auto-suggestion is provided to help the user with the join condition.



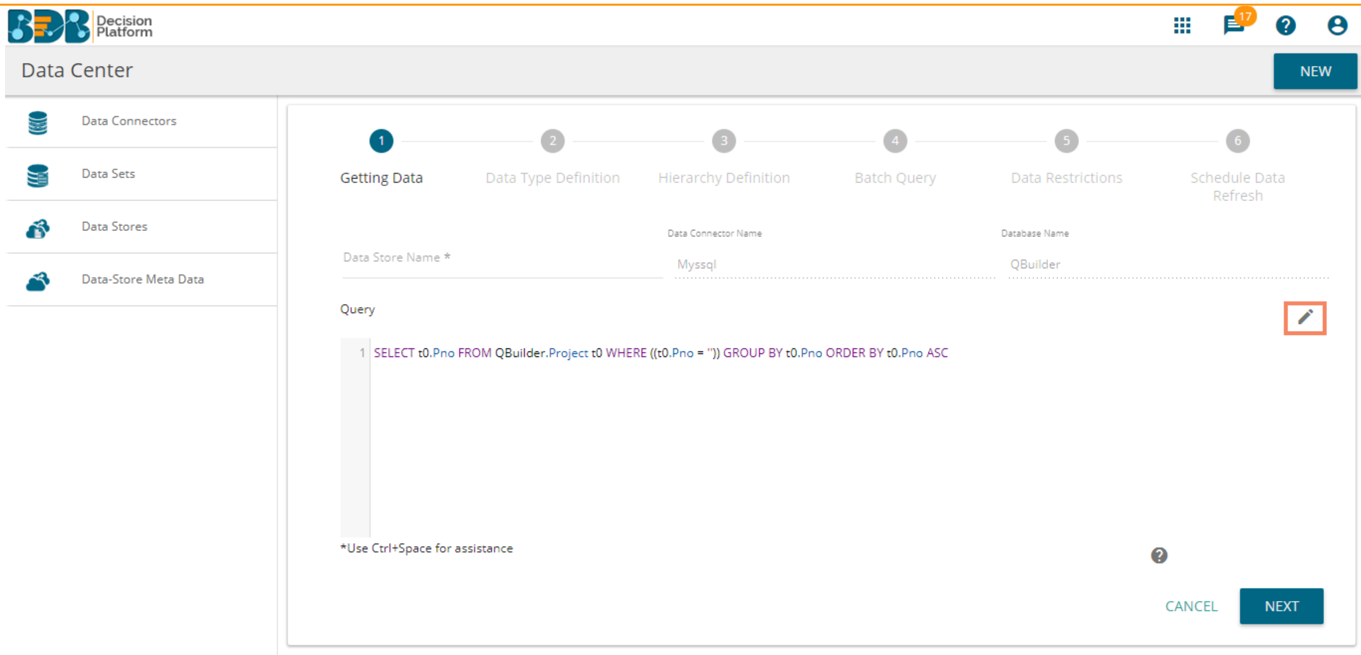
b. Users get the 'Create **Data Set**' or 'Create **Data Store**' options after clicking the execute query option. The users get directed to the forms to create new dataset or data store as per the selection with the generated query pasted in the 'Query' space as shown below. The user needs to follow the step by step process to create a Data Set or Data Store to create a new dataset or data store.



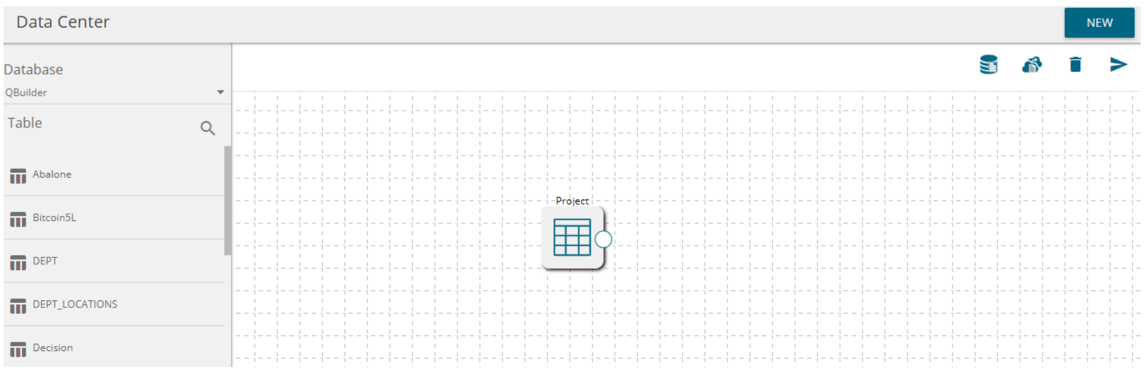
c. Users can use the Query Builder functionality to create basic queries and perform various joins, but it is not possible to create in-depth BI queries using the current Query Builder option.

7.1.3.1. Editing Data Store/Data Set by using Query Builder

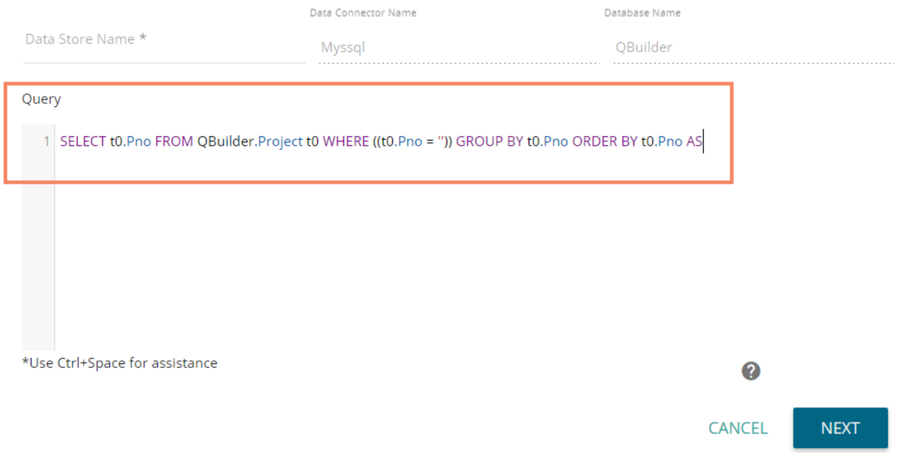
Data Sets and Data Stores created by queries which are generated by the Query Builder get an option to edit the query using the Query Builder.



Users get redirected to the Query Builder by clicking the '**edit in query builder'** option from the design Data Store or Data Set page.



Note: If users manually change or modify the query statement then the query builder page gets disabled, and the '**Edit**' option in the query builder disappears.

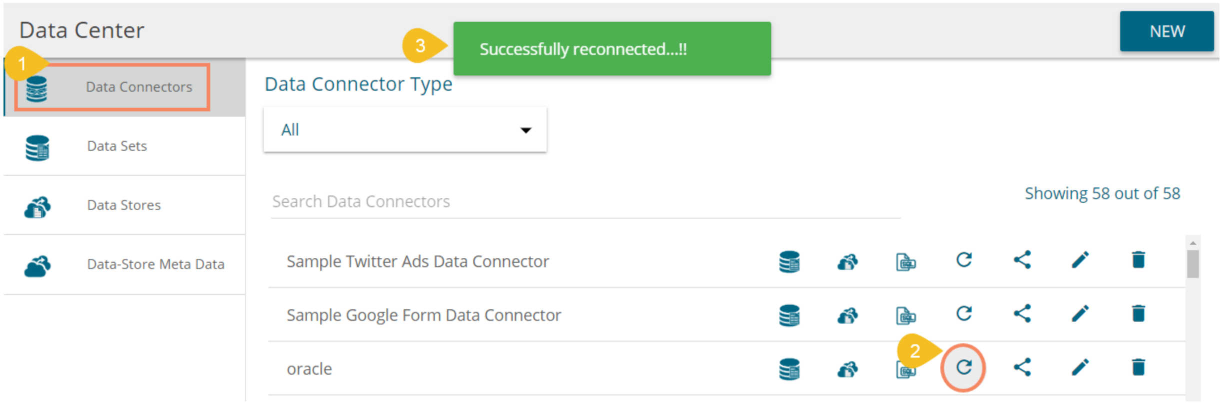


7.1.4. Reconnecting a Data Connector

i) Navigate to the Data Connector list

ii) Select a Data Connector and click the '**Reconnect**' icon provided in the connector list

iii) A message will pop-up to assure the action

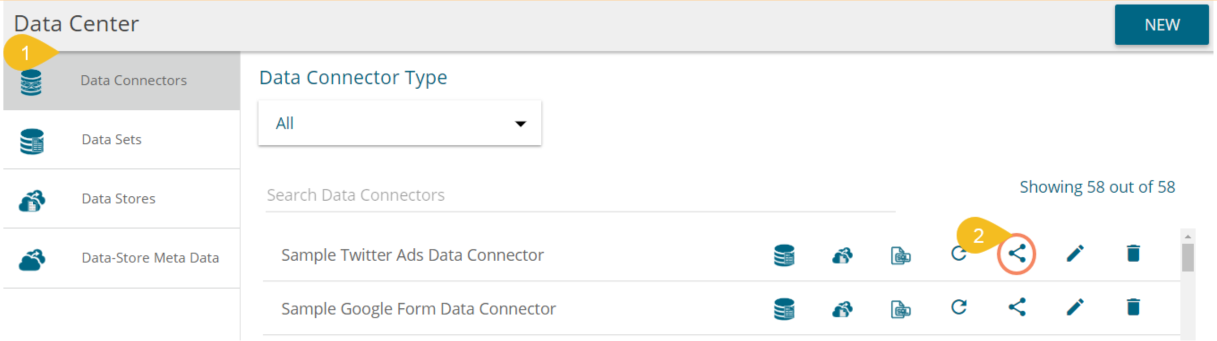


iv) The selected data connector gets reconnected

7.1.5. Sharing a Data Connector

i) Navigate to the Data Connector list

ii) Select a Data Connector and click the '**Share**' icon

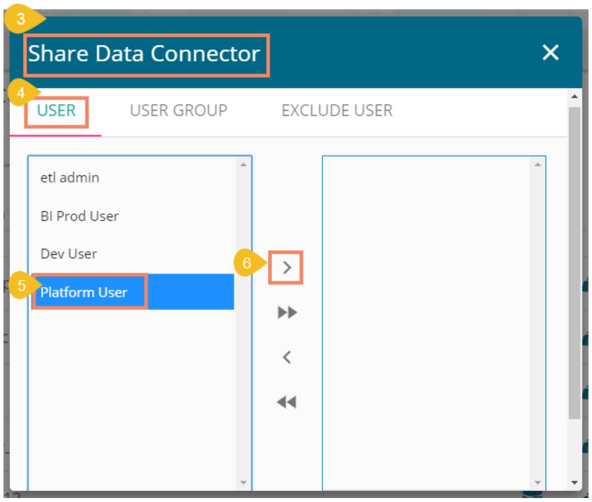


iii) Users get directed to the 'Share Data Connector' window

iv) Select an option out of the given choices: User and User Group/ Exclude User ('Exclude User' option can be chosen, if the document is already shared with a user/user group and you wish to exclude them from the privilege)

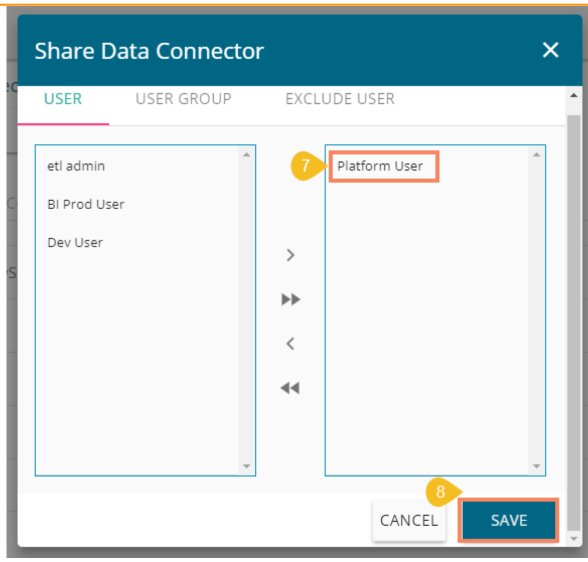
v) Select a user or user group using the displayed list of users/user groups

vi) Click the arrow to move the selected User(s)/User Group(s)

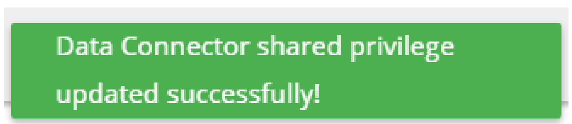


vii) The selected user(s)/user group(s) are moved to the box given on the right

viii) Click the '**SAVE**' option



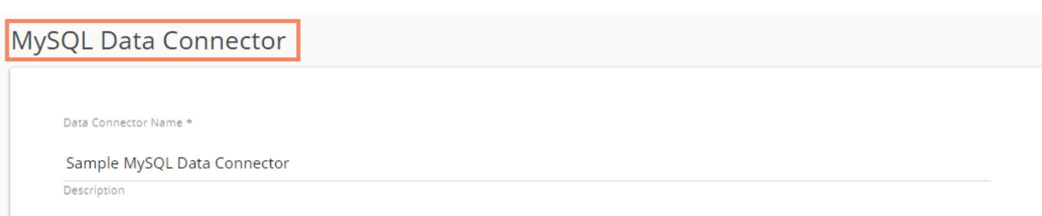
ix) A message will pop-up to communicate the same (as displayed below)

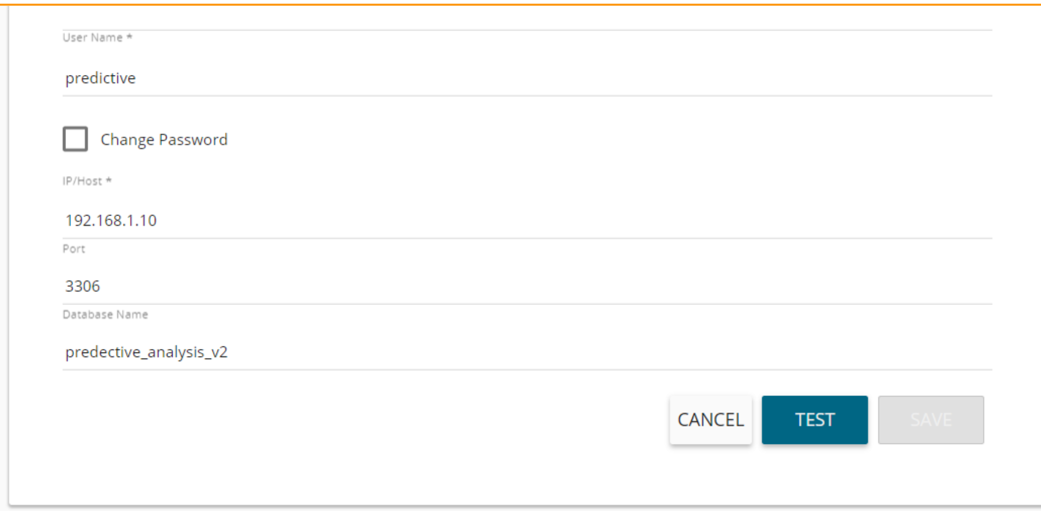


By completing the steps mentioned above, a data connector can be successfully shared with the selected user/user group. The selected users can be excluded from their privileges as well.

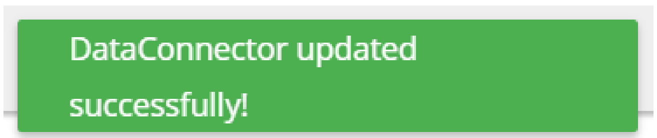
7.1.6. Editing a Data Connector

i) Navigate to the Data Connector list
ii) Select a Data Connector and click the '**Edit**' icon
iii) The MySQL Data Connector page opens
iv) Edit or modify the required details
v) Click '**TEST**' to verify the connector





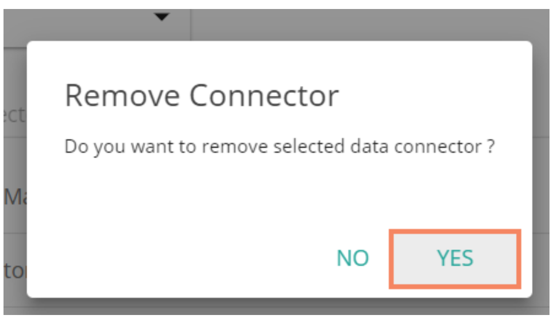
vi) Click '**SAVE**' to save the edited details
vii) A success message will pop-up stating that the data connector has been updated successfully



viii) The updated details get saved for the selected data connector

7.1.7. Removing a Data Connector

i) Navigate to the Data Connector list
ii) Select a Data Connector and click the '**Remove**' icon
iii) A message will pop-up to confirm the deletion
iv) Click the '**YES**' option



v) The selected data connector gets removed from the '**Data Connectors**' List

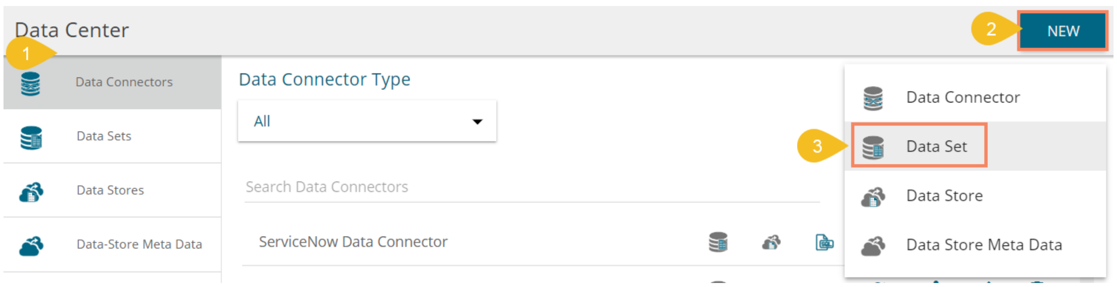
7.2. Data Set

This section includes steps to create a new Data Set based on an RDBMS/Big Data, API, and FTP Data Connectors. The description aims at explaining the steps of sample data sets based on the all above mention categories which can be followed to create data sets falling under similar categories.

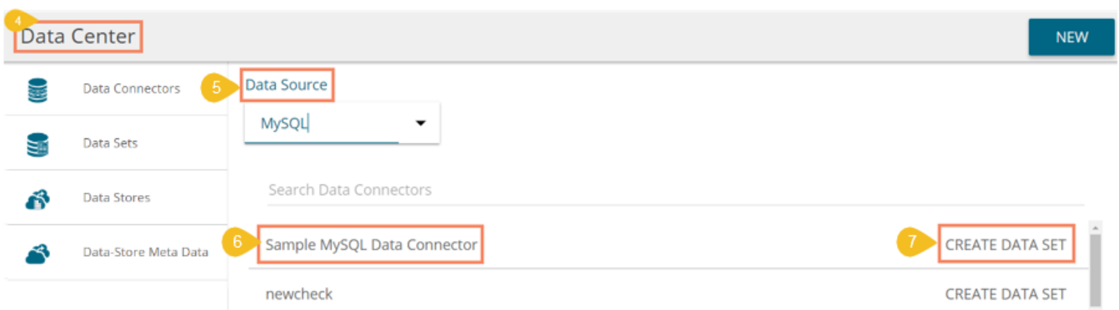
7.2.1. Creating a New Data Set using RDBMS or Big Data Connector

This section explains the steps to create a new Data Set

i) Navigate to the Data Center landing page
ii) Click the '**NEW**' option
iii) Select '**Data Set**' from the context menu

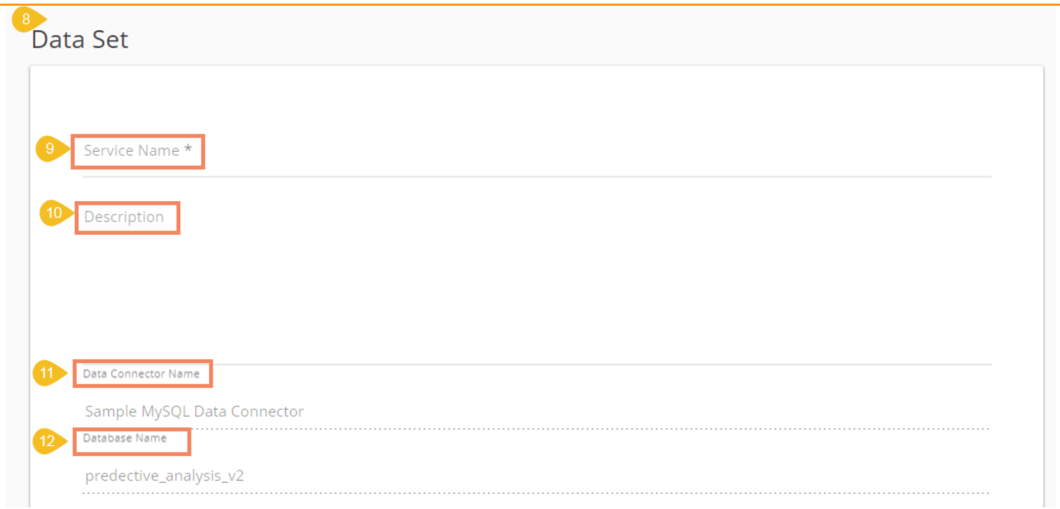


iv) A new page opens
v) Select a Connector Type from the '**Data Source**' filter
vi) Select a data connector from the '**Data Connectors**' list
vii) Click the '**CREATE DATA SET**' option provided next to the selected data connector

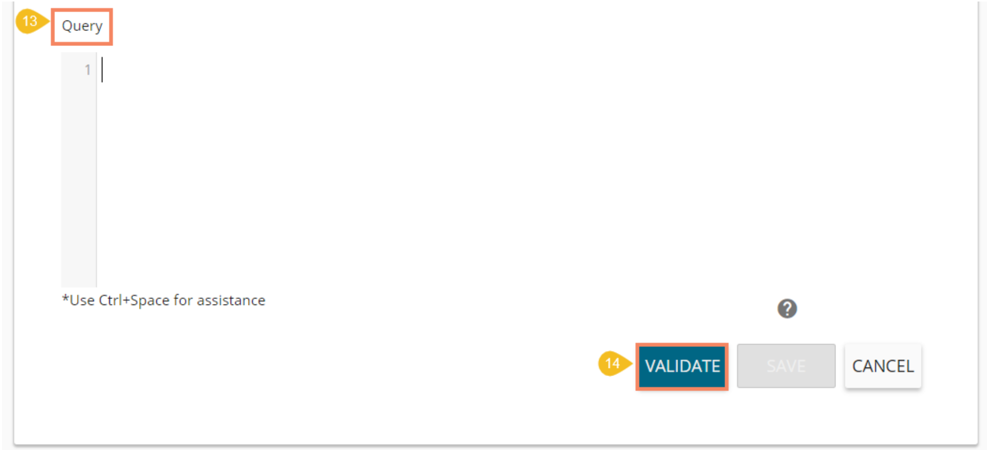


viii) The '**Data Set**' page opens for filling the required details

a. **Service Name**: Enter any user-defined name for the new data set
b. **Description**: Brief description of the Data Set (It is an optional field)
c. **Data Connector Name**: This is a pre-defined field based on the selected data connector
d. **Data Base Name**: This is a pre-defined field based on the data connector chosen earlier

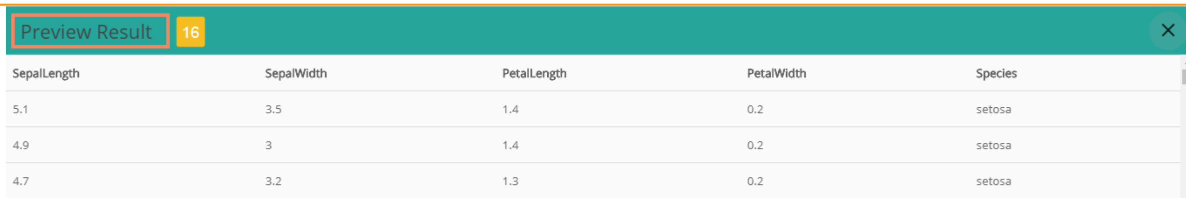


e. **Query**: Write a valid query service in the given space (Use '**Ctrl+Space**' for assistance in writing a query)
f. Click '**VALIDATE**' to execute the new Data Set



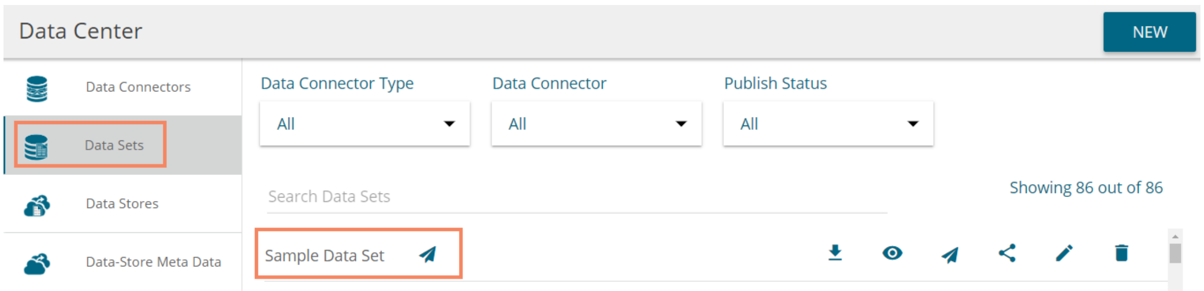
ix) The following message will pop-up at the successful execution

x) The '**Preview Result**' panel displays at the bottom of the page



xi) After getting the data preview, click the '**SAVE**' option

xii) A newly created Data Set gets added to the '**Data Sets**' List



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

Option	Name	Task
	Download	To download the Data Set
	View Link	To display the Data Set link
	Publish	To publish a Data Set
	Share Data Service	To shares a data set to/for the selected user(s) or group(s) or Exclude the selected users
	Edit	To edit the Data Set fields
	Remove	To remove the selected data set from the list

7.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

Users can insert dynamic filter condition via the query service to an RDBMS Data Set.

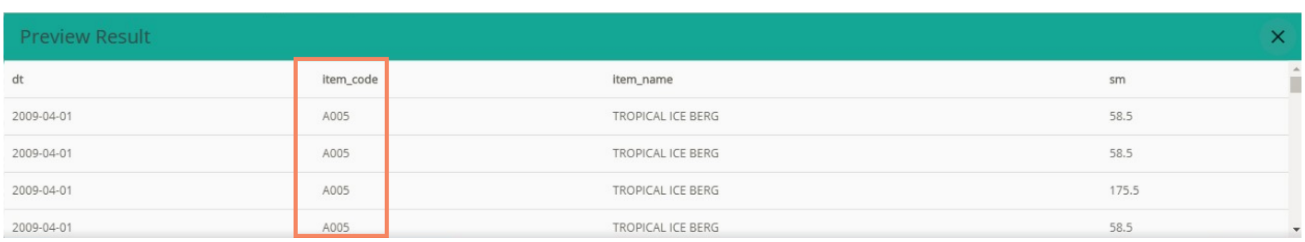
i) Navigate to the Data Set form for any RDBMS connector

ii) Enter filter condition to the '**Query**' section as highlighted in the below image

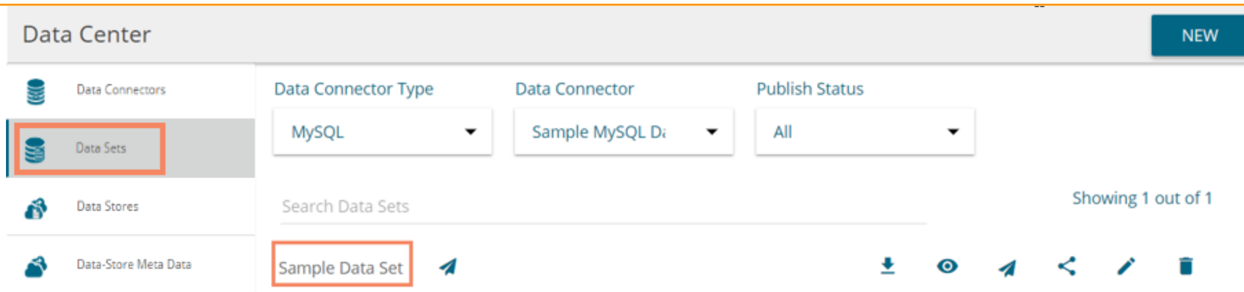
iii) Click the '**VALIDATE**' option

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

vii) The data preview of the filter data displays at the bottom of the page



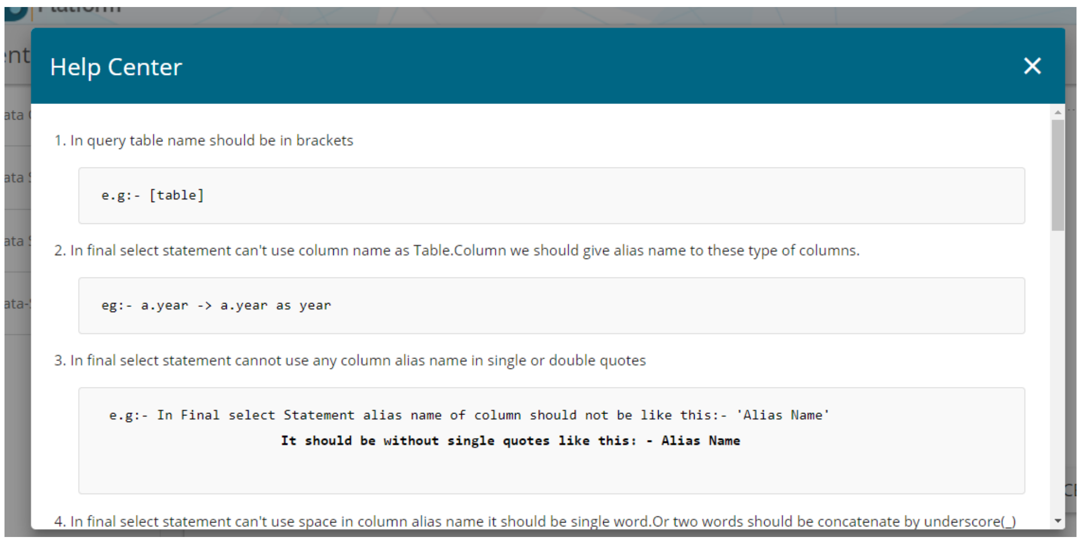
viii) Click the '**SAVE**' option on the Data Set form
ix) The newly created dataset gets saved under the list of the Data Sets



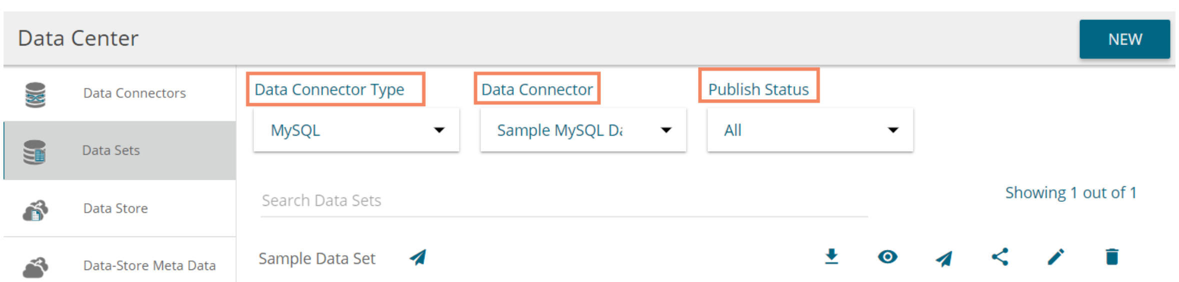
Note:

a. Use ‘**Ctrl+Space**’ to get assistance while writing a query.

b. Click the ‘**Help Center**’ icon from the Data Set form to get rules regarding the formation of a query. The query formation rules get displayed in a new pop-up screen.



c. Users can filter the Data Set list by Data Connector Type, Data Connector, and Publish Status. These filters are provided on the top of the Data Set List page.

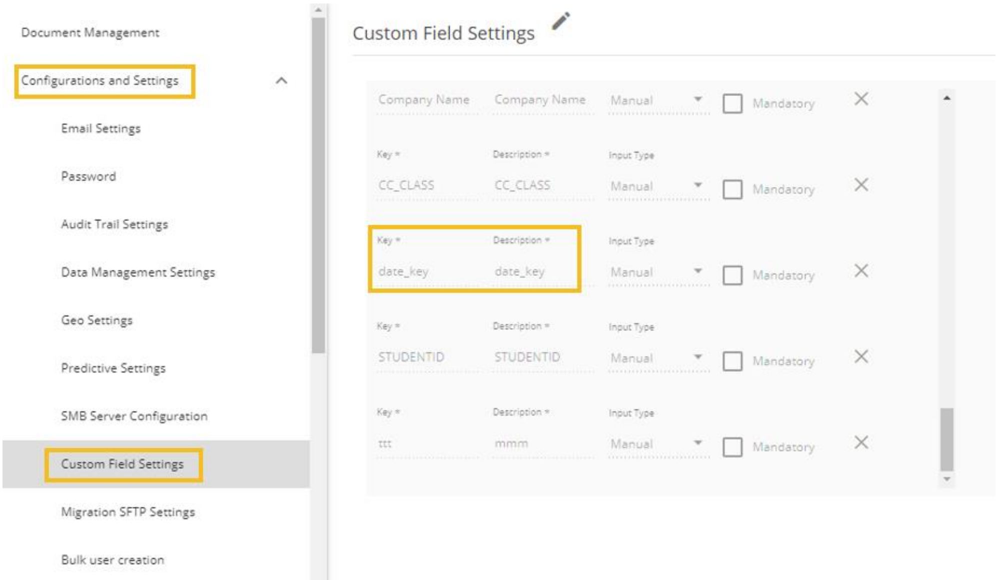


7.2.1.2. Restricting Displayed Data for End Users via Data Set

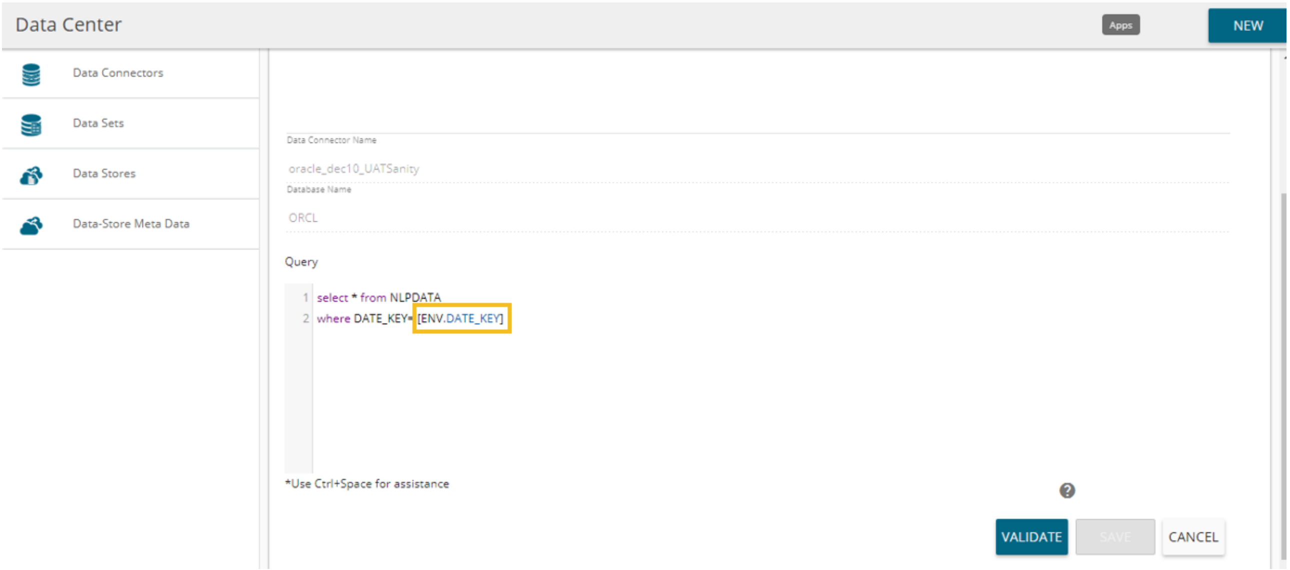
BDB Platforms provides an option to control data display for the Dashboard end-users. The

Note: Data Restriction through Data Service (Data Set) is interconnected with multiple platform plugins. Precondition for this feature is that the users should possess a good understanding of all the involved BDB Platform modules and Dashboard Designer plugin.

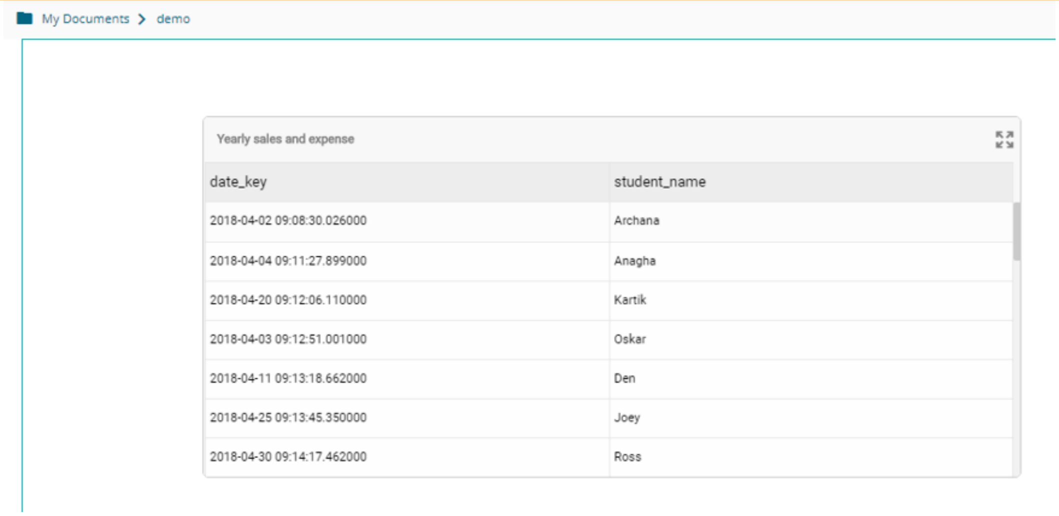
i) Create a Custom Field using the Configuration and settings admin section



ii) Create a Data Set using the ENV with the selected Custom Field Key

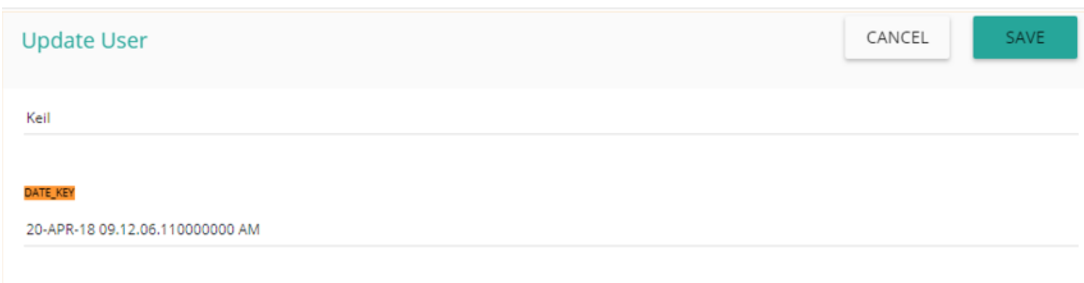


iii) Create a Dashboard using the Data Set
iv) Publish the Dashboard to the portal
v) Open the Dashboard (it opens in preview mode by default)

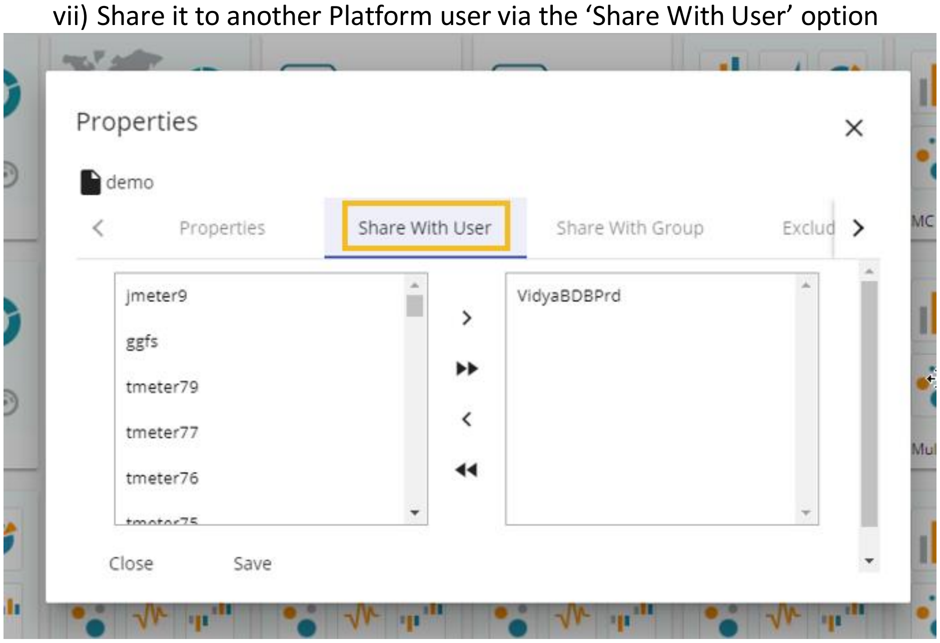


date_key	student_name
2018-04-02 09:08:30.026000	Archana
2018-04-04 09:11:27.899000	Anagha
2018-04-20 09:12:06.110000	Kartik
2018-04-03 09:12:51.001000	Oskar
2018-04-11 09:13:18.662000	Den
2018-04-25 09:13:45.350000	Joey
2018-04-30 09:14:17.462000	Ross

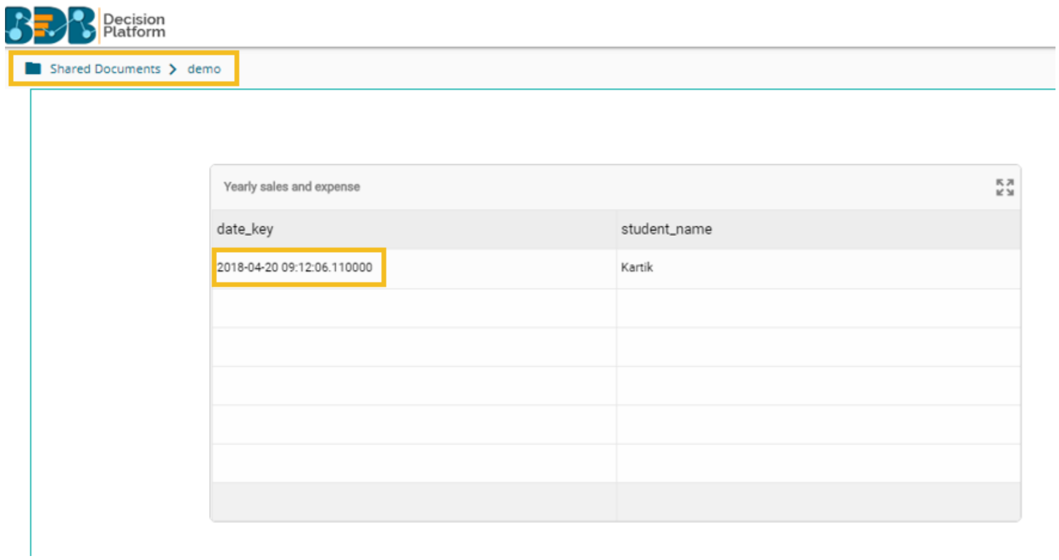
vi) Create a new user (using the 'User' module) and pass the Custom Field value/ Update the user passing the Custom Field Value



vii) Share it to another Platform user via the 'Share With User' option



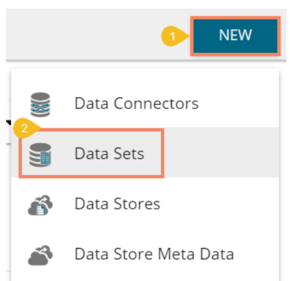
viii) Pass the value for the added Custom Field
ix) Access the dashboard from the user's account to whom it was shared
x) Open the shared dashboard; the dashboard displays only permitted data by the admin



7.2.2. Creating a New Data Set Using API Connectors

i) Click ‘**NEW**’ menu from the Data Center page.

ii) Select the ‘**Data Set**’ option from the context menu

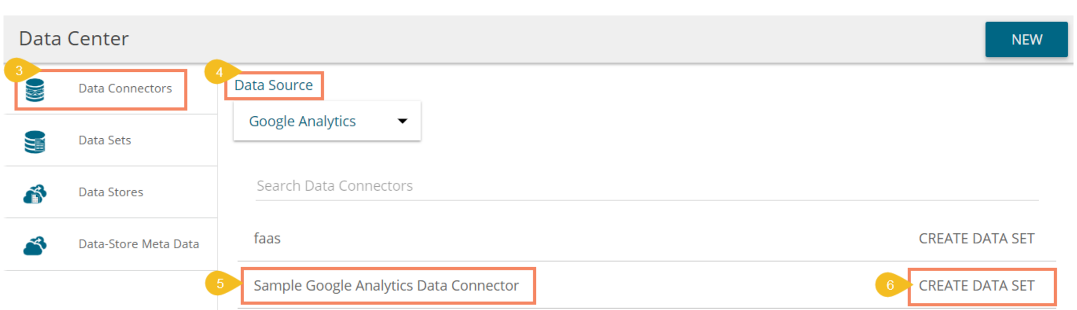


iii) The page containing all the data connectors opens

iv) Use the ‘**Data Source**’ filter to search for a specific API Data Connector (E.g., the below image displays ‘**Google Analytics**’ as the data source filter)

v) Select a data connector from the displayed list (E.g., in this case; a google analytics data connector is selected)

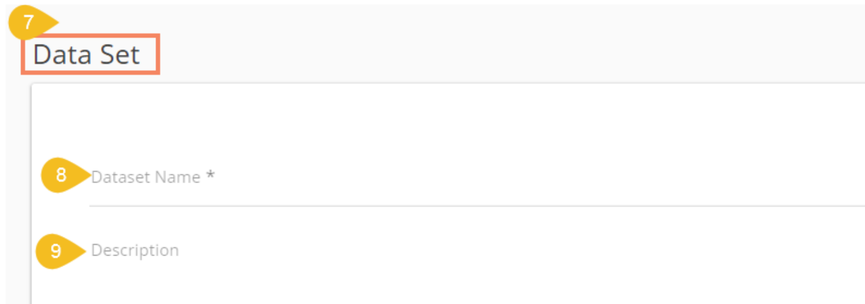
vi) Click the ‘**CREATE DATA SET**’ option



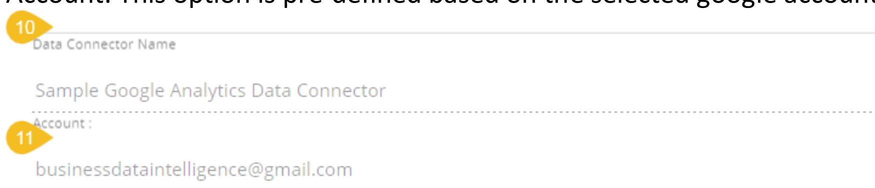
vii) Users are redirected to a new Data Set form for Google Analytics Data Set

viii) Fill in the following information:

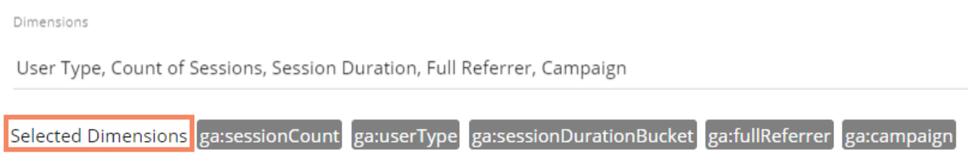
a. Service Name: Enter any user-defined name for the new dataset
b. Description: Brief description of the Data Set (It is an optional field)



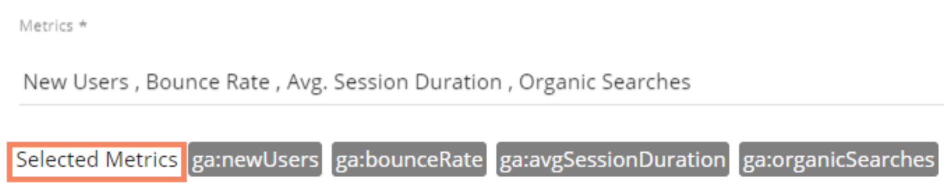
c. Data Connector Name: This option is pre-defined
d. Account: This option is pre-defined based on the selected google account



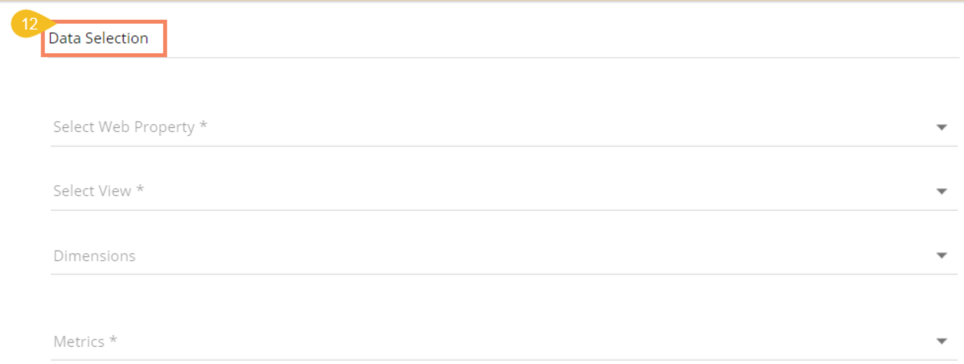
e. Users can select specific data using the below given drop-down lists:
   i. Select Web Property: Select the required web property using the drop-down menu
   ii. Select View: Select the required view using the drop-down menu
   iii. Dimensions: Select the required dimensions using the drop-down menu (The selected dimensions display below with ‘ga’ suffix)



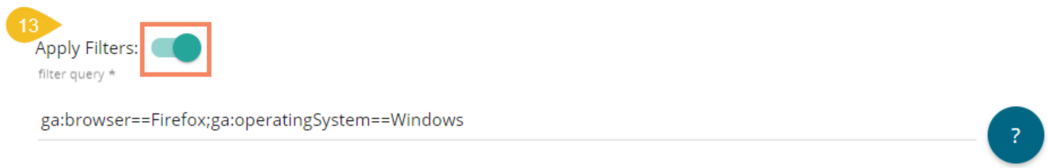
   iv. Metrics: Select the required metrics using the drop-down menu (The selected metrics display below with ‘ga’ suffix)



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

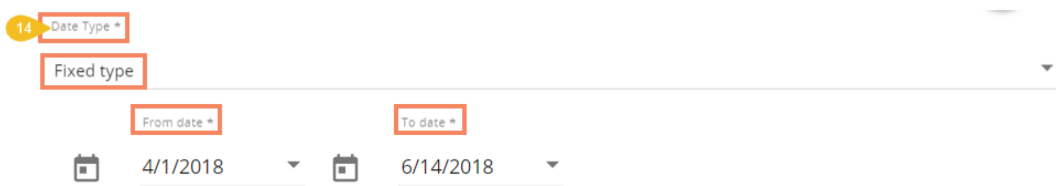


f. Apply Filter: Enable the filter option. The filter query displays below

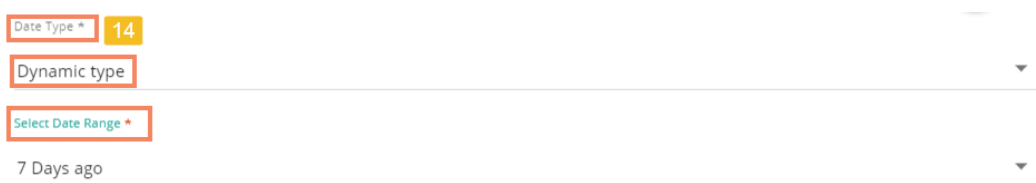


g. Date Type: Select a Date Type using the given options- '**Fixed Type**' and '**Dynamic Type.**'

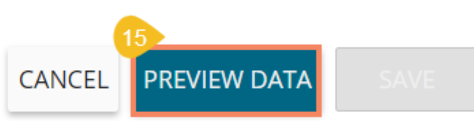
i. Fixed Type: Define a time range by specifying dates using the '**From date'** and '**To date**' options



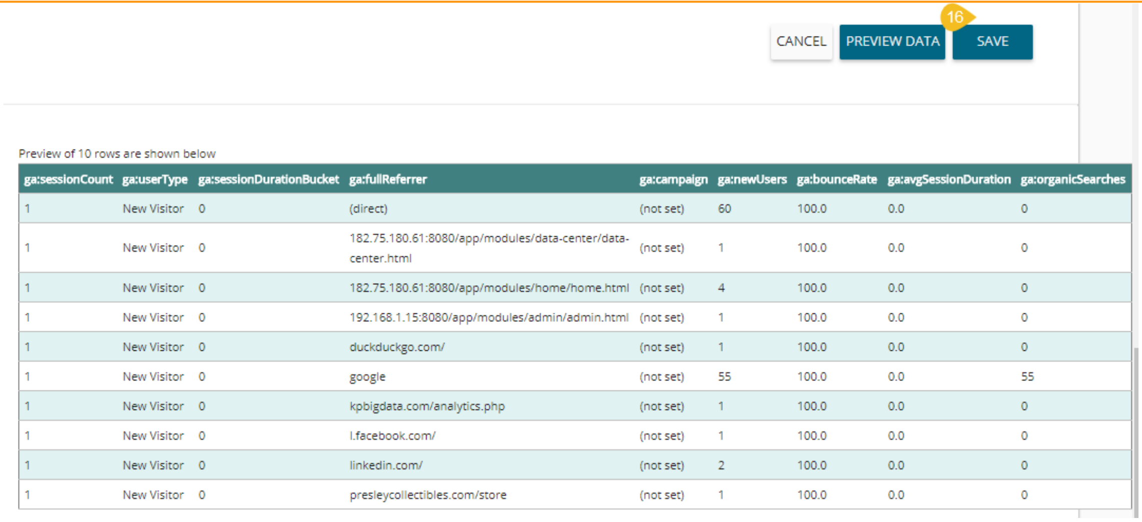
ii. Dynamic Type: Select an option from the drop-down menu to define the time range



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



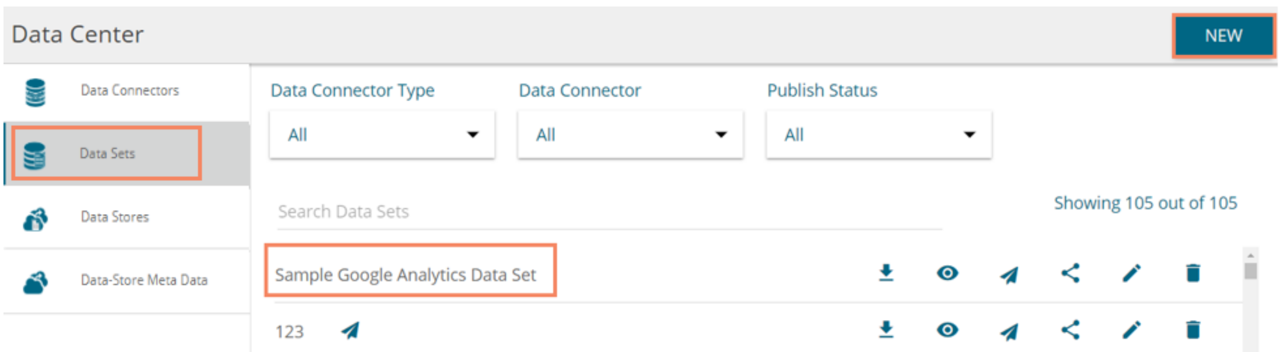
ix) After getting the data preview in the tabular format, click the '**SAVE**' option



ga:sessionCount	ga:userType	ga:sessionDurationBucket	ga:fullReferrer	ga:campaign	ga:newUsers	ga:bounceRate	ga:avgSessionDuration	ga:organicSearches
1	New Visitor	0	(direct)	(not set)	60	100.0	0.0	0
1	New Visitor	0	182.75.180.61:8080/app/modules/data-center/data-center.html	(not set)	1	100.0	0.0	0
1	New Visitor	0	182.75.180.61:8080/app/modules/home/home.html	(not set)	4	100.0	0.0	0
1	New Visitor	0	192.168.1.15:8080/app/modules/admin/admin.html	(not set)	1	100.0	0.0	0
1	New Visitor	0	duckduckgo.com/	(not set)	1	100.0	0.0	0
1	New Visitor	0	google	(not set)	55	100.0	0.0	55
1	New Visitor	0	kpbigdata.com/analytics.php	(not set)	1	100.0	0.0	0
1	New Visitor	0	l.facebook.com/	(not set)	1	100.0	0.0	0
1	New Visitor	0	linkedin.com/	(not set)	2	100.0	0.0	0
1	New Visitor	0	presleycollectibles.com/store	(not set)	1	100.0	0.0	0

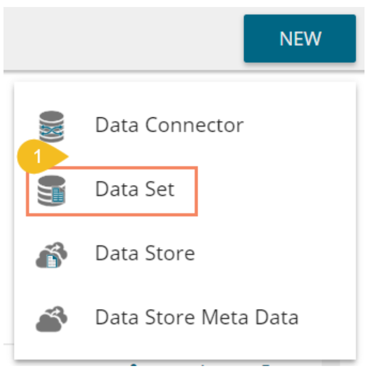
x) A success message appears to assure the creation of a new Data Set.

xi) The newly created Google Analytics dataset gets added to the '**Data Sets**' list



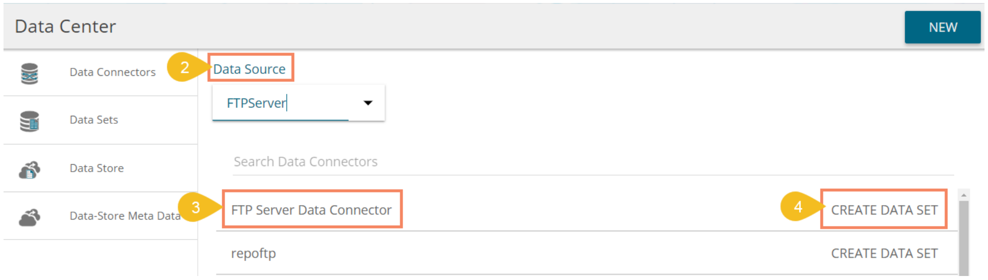
7.2.3. Creating a New FTP Data Set

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



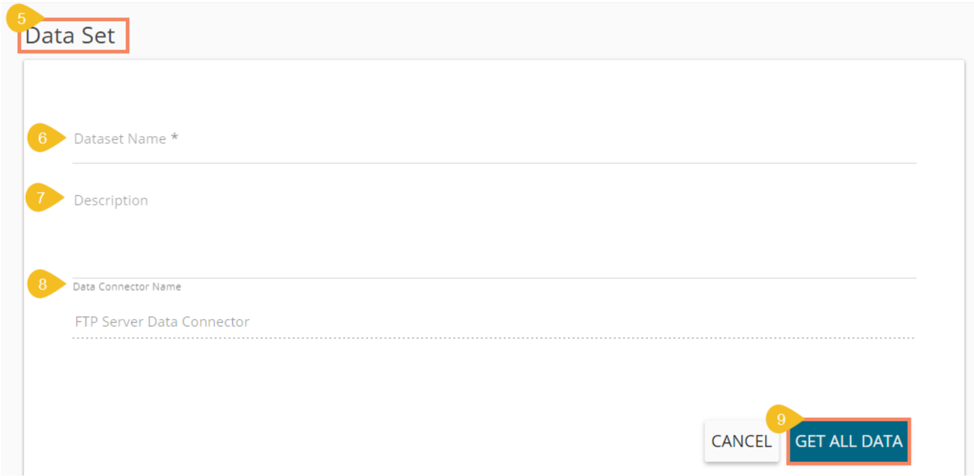
ii) The Data Connectors list appears

a. Select an FTP Server using the data source filter
b. Select an FTP Data Connector from the list
c. Click the '**CREATE DATA SET**' option

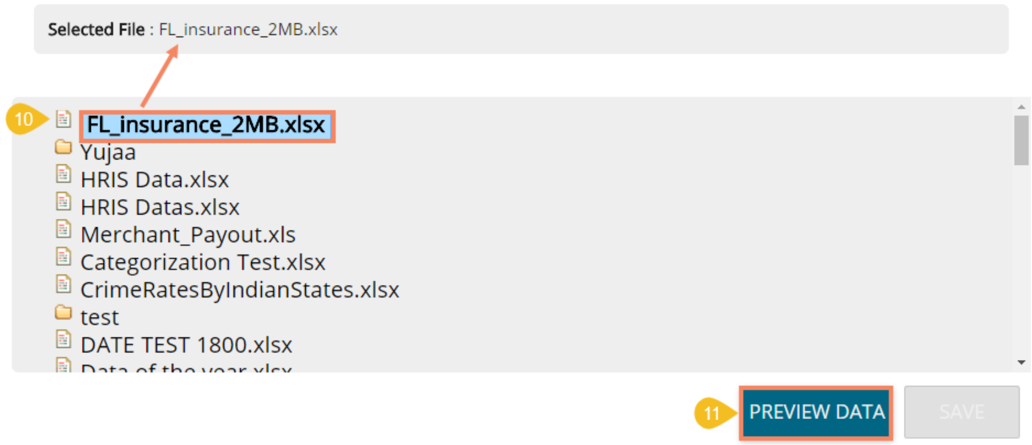


iii) The FTP Data Set form opens

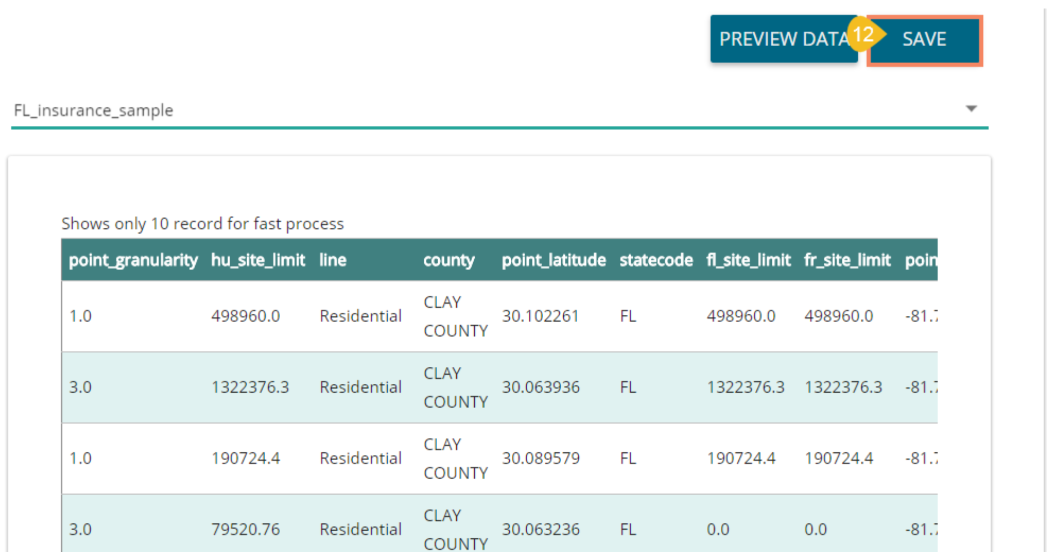
a. Provide Data Set Name
b. Provide Description of the Data Set (Optional)
c. A pre-selected Data Connector name appears
d. Click '**GET ALL DATA**' option



iv) Select a file from the displayed list (Use double-click on a file to select it.)
v) After selecting a specific file, click the '**PREVIEW DATA**' option

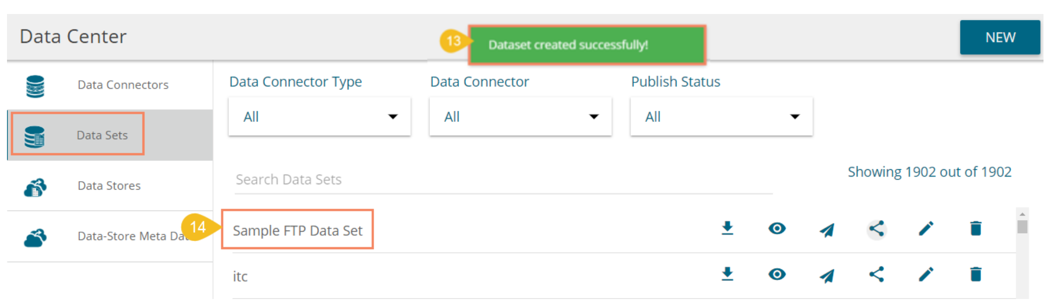


vi) Click the ‘**SAVE**’ option after getting the data preview



vii) A success message appears to assure the creation of a new dataset

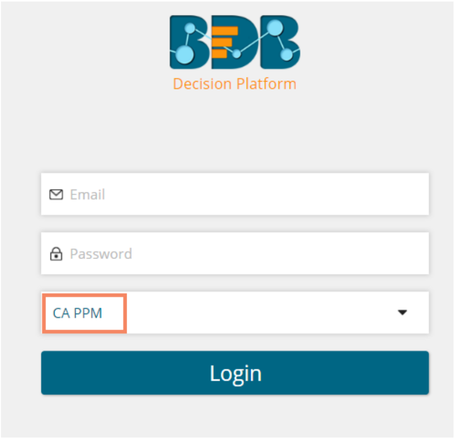
viii) The newly created FTP Data Set gets added to the Data Sets list



7.2.4. Creating a CA PPM Data Set

The CA Connector is accessible only for the CA PPM users.

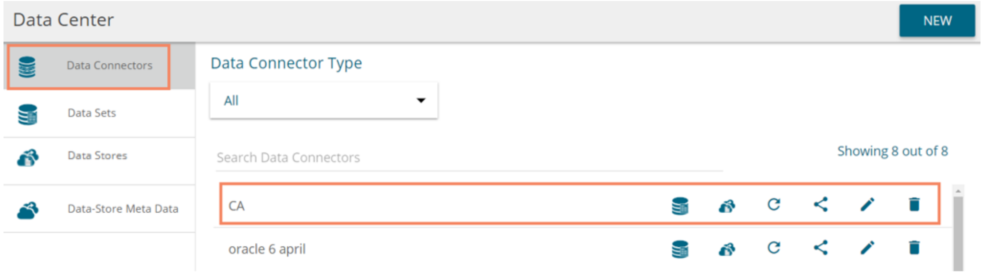
i) Login to the platform using the CA PPM authentication option



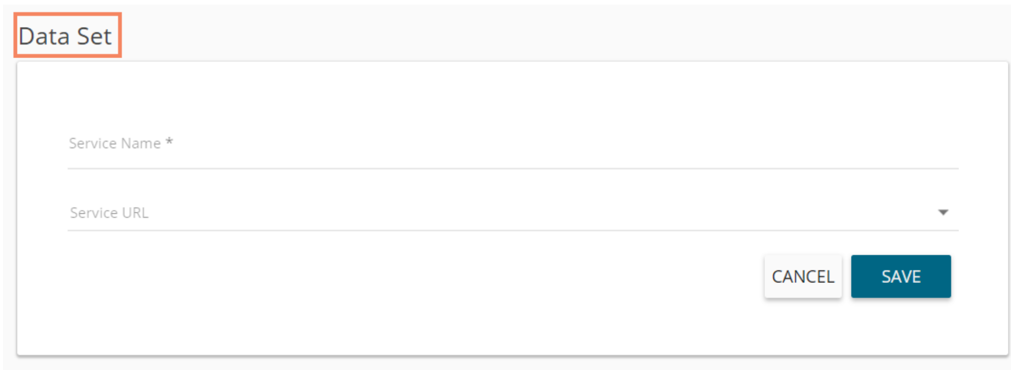
ii) Select Data Center from the Apps menu

iii) The Data Connector list opens

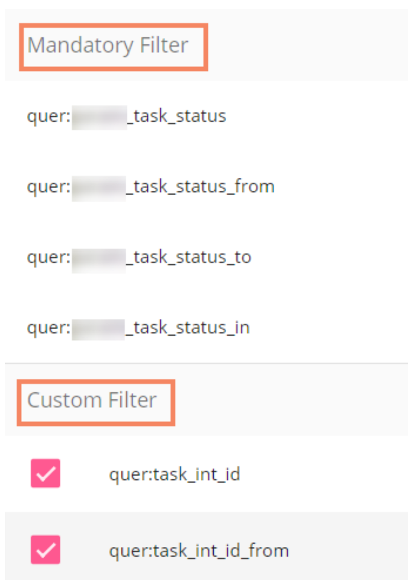
iv) Select the default data connector ‘**CA**’ from the data connector list



v) Click the '**Create New Data Set**' icon for the CA data connector
vi) A form to create new Data Set opens
vii) Configure the following information to create a CA PPM Data Set
   a. Service Name: A user-defined name given to the data set
   b. Service URL: Select a service URL from the drop-down menu

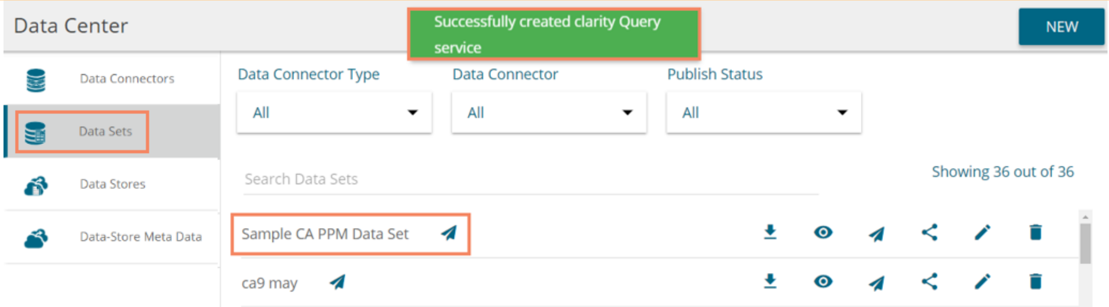


   c. Mandatory Filter: A list of the selected mandatory filter based on the service URL displays
   d. Custom Filter: Select the '**Custom Filter**' options from the drop-down menu



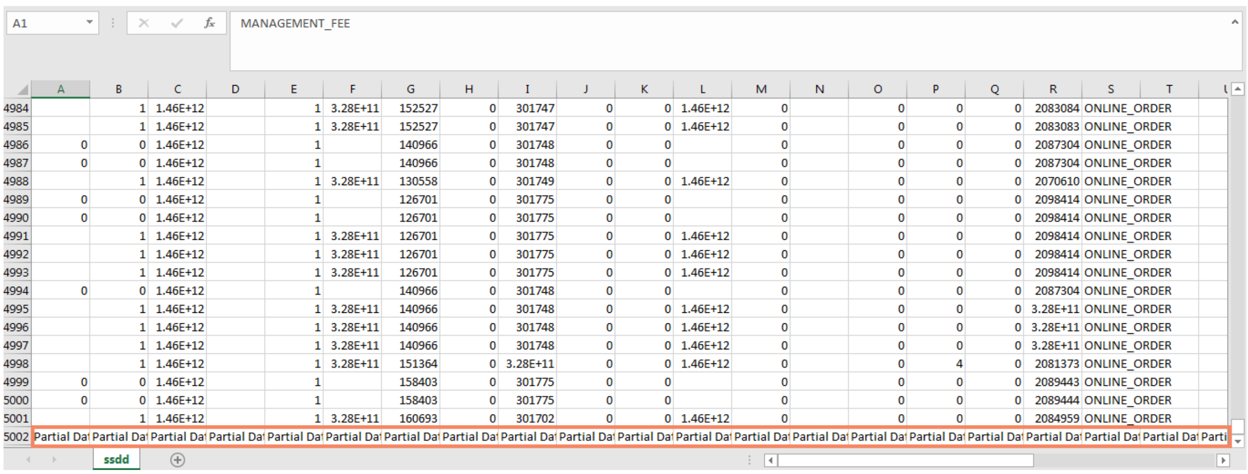
   e. Click the '**SAVE**' option

viii) A success message appears to assure that a new data set has been created
ix) The newly created Data Set gets added to the data set list



Note:

a. Users can not access any other option (NEW DATA STORE, Reconnect, Share, Edit, Delete) except '**New Data Set**' while using the CA default data connector.
b. By clicking '**NEW**' option from the Data Set form, users get sent back to the Data Connector List, and they need to click again the '**CREATE DATA SET**' option to access a Data Set form.
c. Users get only partial data downloaded if the Data Set contains records more than 5000. The downloaded document carries a notification in this regard.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
4984		1	1.46E+12		1	3.28E+11	152527	0	301747	0	0	1.46E+12	0		0	0	0	2083084	ONLINE_ORDER		
4985		1	1.46E+12		1	3.28E+11	152527	0	301747	0	0	1.46E+12	0		0	0	0	2083083	ONLINE_ORDER		
4986	0	0	1.46E+12		1		140966	0	301748	0	0		0		0	0	0	2087304	ONLINE_ORDER		
4987	0	0	1.46E+12		1		140966	0	301748	0	0		0		0	0	0	2087304	ONLINE_ORDER		
4988		1	1.46E+12		1	3.28E+11	130558	0	301749	0	0	1.46E+12	0		0	0	0	2070610	ONLINE_ORDER		
4989	0	0	1.46E+12		1		126701	0	301775	0	0		0		0	0	0	2098414	ONLINE_ORDER		
4990	0	0	1.46E+12		1		126701	0	301775	0	0		0		0	0	0	2098414	ONLINE_ORDER		
4991		1	1.46E+12		1	3.28E+11	126701	0	301775	0	0	1.46E+12	0		0	0	0	2098414	ONLINE_ORDER		
4992		1	1.46E+12		1	3.28E+11	126701	0	301775	0	0	1.46E+12	0		0	0	0	2098414	ONLINE_ORDER		
4993		1	1.46E+12		1	3.28E+11	126701	0	301775	0	0	1.46E+12	0		0	0	0	2098414	ONLINE_ORDER		
4994	0	0	1.46E+12		1		140966	0	301748	0	0		0		0	0	0	2087304	ONLINE_ORDER		
4995		1	1.46E+12		1	3.28E+11	140966	0	301748	0	0	1.46E+12	0		0	0	0	3.28E+11	ONLINE_ORDER		
4996		1	1.46E+12		1	3.28E+11	140966	0	301748	0	0	1.46E+12	0		0	0	0	3.28E+11	ONLINE_ORDER		
4997		1	1.46E+12		1	3.28E+11	140966	0	301748	0	0	1.46E+12	0		0	0	0	3.28E+11	ONLINE_ORDER		
4998		1	1.46E+12		1	3.28E+11	151364	0	3.28E+11	0	0	1.46E+12	0		0	4	0	2081373	ONLINE_ORDER		
4999	0	0	1.46E+12		1		158403	0	301775	0	0		0		0	0	0	2089443	ONLINE_ORDER		
5000	0	0	1.46E+12		1		158403	0	301775	0	0		0		0	0	0	2089444	ONLINE_ORDER		
5001		1	1.46E+12		1	3.28E+11	160693	0	301702	0	0	1.46E+12	0		0	0	0	2084959	ONLINE_ORDER		
5002	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Partial Dat	Parti

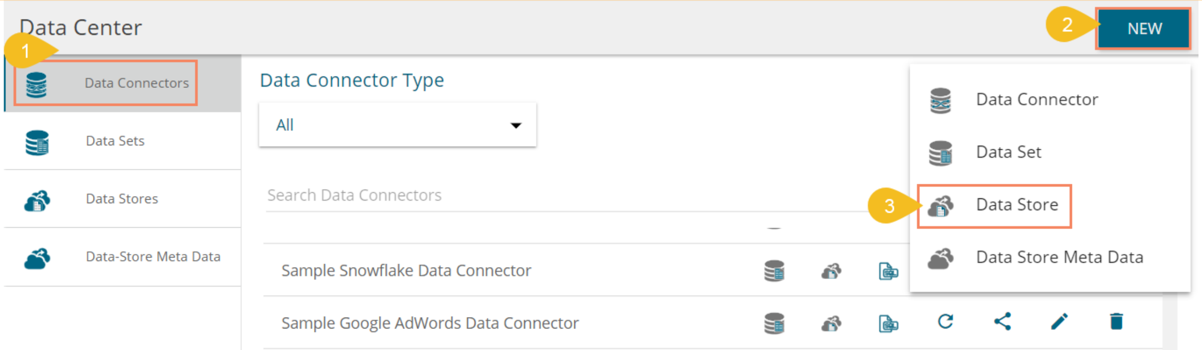
7.3. Data Store

This section describes steps to store data in a specific format that can be used to create interactive visual reports.

7.3.1. Creating a New Data Store

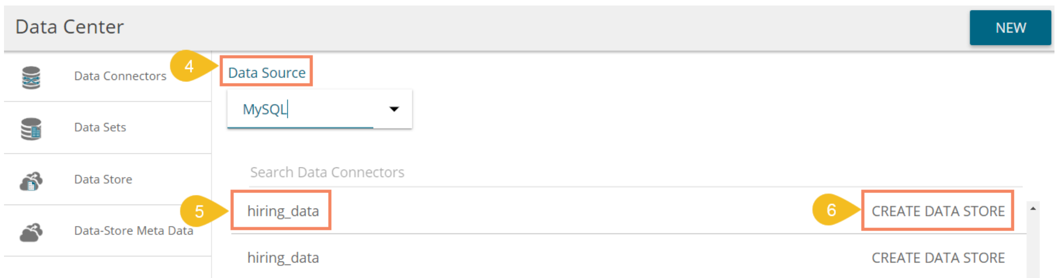
This section explains the steps to create a new data store

i) Navigate to the Data Center page
ii) Click '**NEW**'
iii) Select '**Data Stores**' from the context menu



iv) A new page opens

   a. Select a Connector Type from the '**Data Source**' filter
   b. Select a data connector from the Data Connector list
   c. Click the '**CREATE DATA STORE**' option provided next to the selected data connector

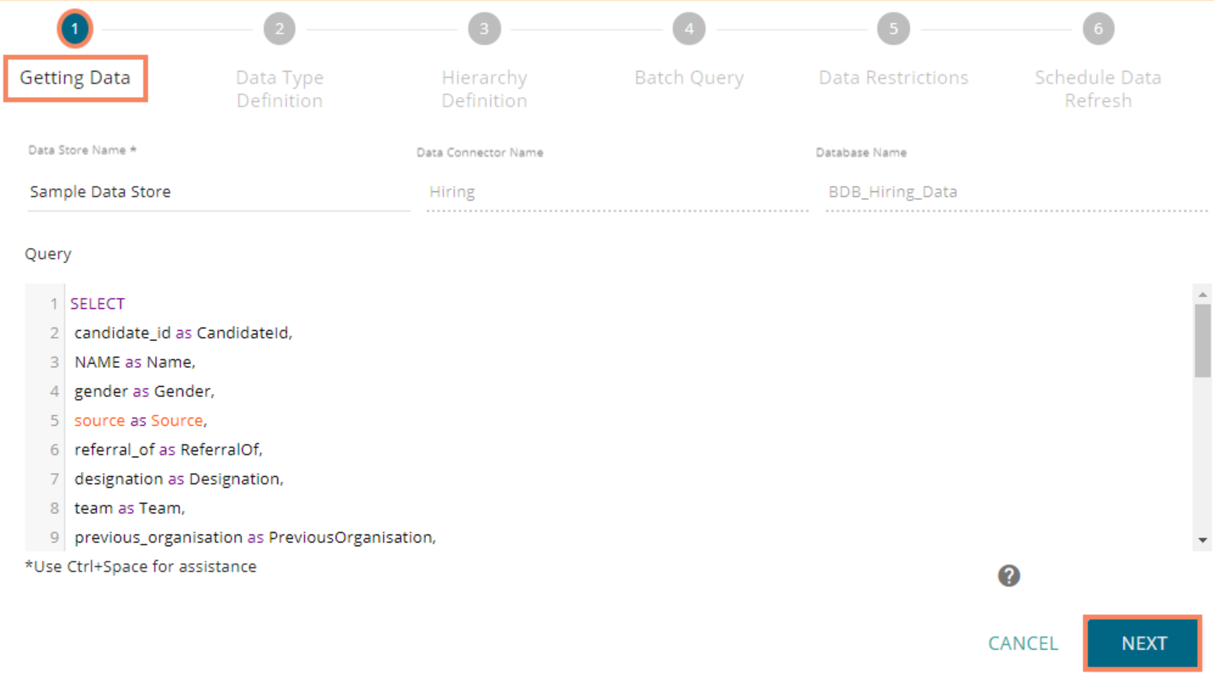


v) The 'Get Data' option opens to create a new Data Store

7.3.1.1. Getting Data

This section displays a form to create a new data store. Users need to provide the following information:

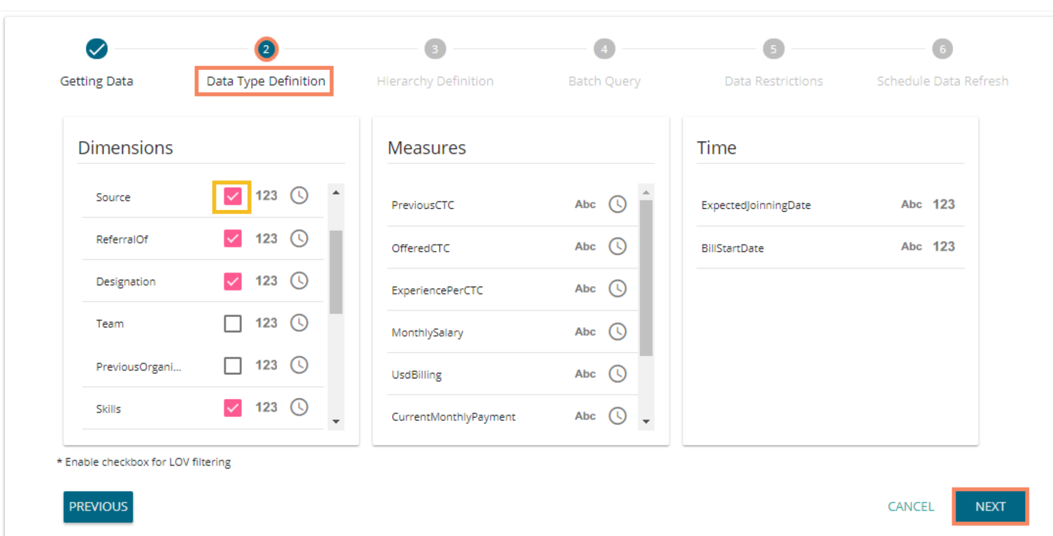
i) **Data Store Name:** Enter a name for the data store
ii) **Data Connector Name:** Name of the selected data connector displays in this field
iii) **Database Name:** Based on the selected data connector this field displays a pre-selected database name
iv) **Query:** Write the query service in the given space (Use '**Ctrl+Space**' for assistance in writing a query)
v) Proceed on the next tab by clicking the '**NEXT**' option



7.3.1.2. Data Type Definition

This tab allows users to define the data type using the selected data store. They can interchange the Dimensions, Measures, and Time fields by selecting the respected icons provided for these fields.

i) Define the required Dimensions, Measures, and Time by interchanging the categories
ii) Enable the Dimensions by using a check mark to avail LOV look up in the filter panel of the Self-service BI Report
iii) Proceed on the next tab by clicking the '**NEXT**' option



Note:

a. Users can change the categories of a dimension, measure, and time values by clicking the following options:

Options	Description
Abc	Move to Dimensions
123	Move to Measures
	Move to Time

b. Click the ‘**PREVIOUS**’ option to go back to the previous tab.
c. Users can get List of Values (LOV) in the filter panel of the BDB Self-service BI for by enabling the Dimensions from the datastore.

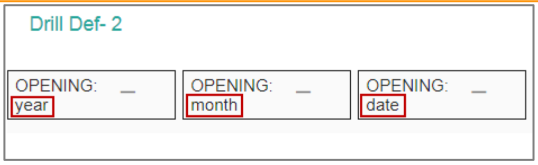
7.3.1.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

i) Click the ‘**Add**’ + option provided in the Hierarchy Definition window
ii) A new ‘**Drill Def**’ box gets added
iii) Drag and drop the dimensions or time options to define a hierarchy
iv) Proceed to the next tab by clicking the ‘**NEXT**’ tab

Note:

a. Click the ‘**PREVIOUS**’ option to go back to the previous tab.
b. Click the ‘**Remove**’ option — (in the Drill Def box) to remove the defined hierarchy using the selected option.
c. The ‘**Date Drill**’ functionality is available for the Time dimensions. By default, the Time dimensions can be split into Year>Month>Date hierarchy.
Users can define the date drill by dragging once a time dimension into a ‘**Drill Def**’ box.
E.g., Hierarchy for the ‘**Opening**’ time dimension has been defined as shown below:



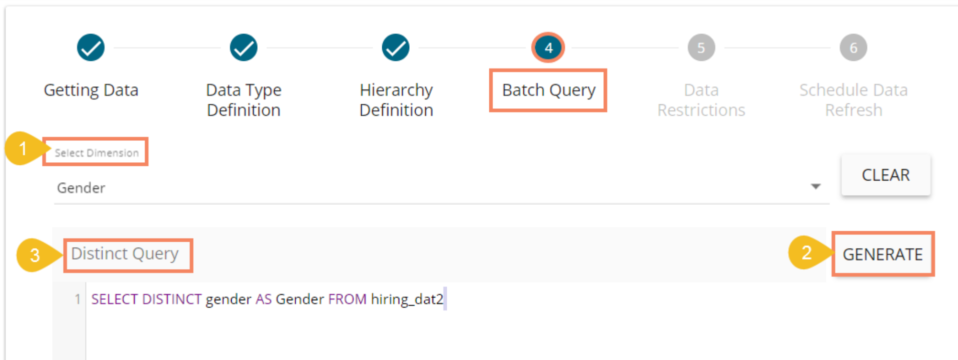
7.3.1.4. Batch Query

Split the data fetching process into different batches by generating a batch query.

i) Select a Dimension using the drop-down menu

ii) Click the ‘**Generate**’ option

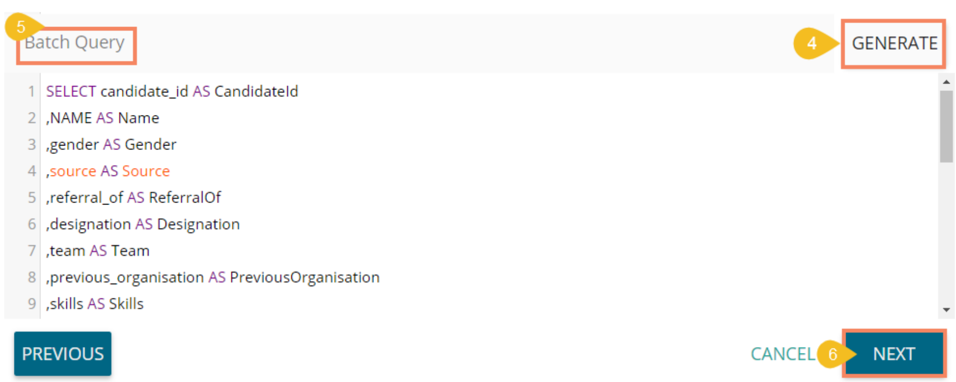
iii) Based on the selected dimension a distinct query is generated (in the below-given box) Users can edit the distinct query as per their requirement



iv) Click the ‘**Generate**’ option provided for the ‘**Batch Query**’ option

v) The original query generates with the distinct query specifications to fetch data

vi) Proceed to the next tab by clicking the ‘**NEXT**’ tab



7.3.1.5. Data Restriction

Configure the ‘**Data Restrictions**’ settings to restrict a user-level view of the data store.

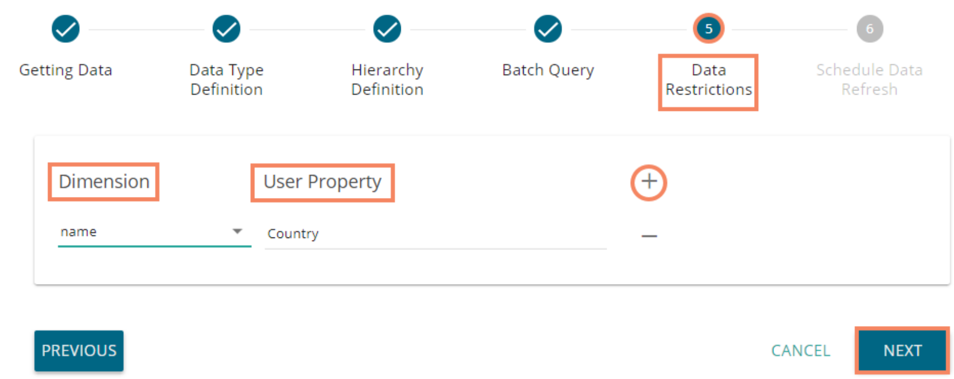
i) Click ‘**Add**’ + to add a new box for inserting the data restriction parameter

ii) Fill in the following information:

a. **Dimension**: Select a dimension using the drop-down menu

b. **User Property**: Enter user/group specific custom field

iii) Click the ‘**NEXT**’ option to proceed to the next tab



Note: The Administrator can restrict access to data for a specific user by configuring the User Property via the ‘**Data Restriction**’ tab. **E.g.,** If for a user/user group ‘**Country**’ custom field is provided value ‘**India,**’ and the administrator passes ‘**Country**’ as User Property while creating a data store. Users for whom ‘**India**’ was selected as the value for the ‘**Country**’ custom field can access data regarding India only.

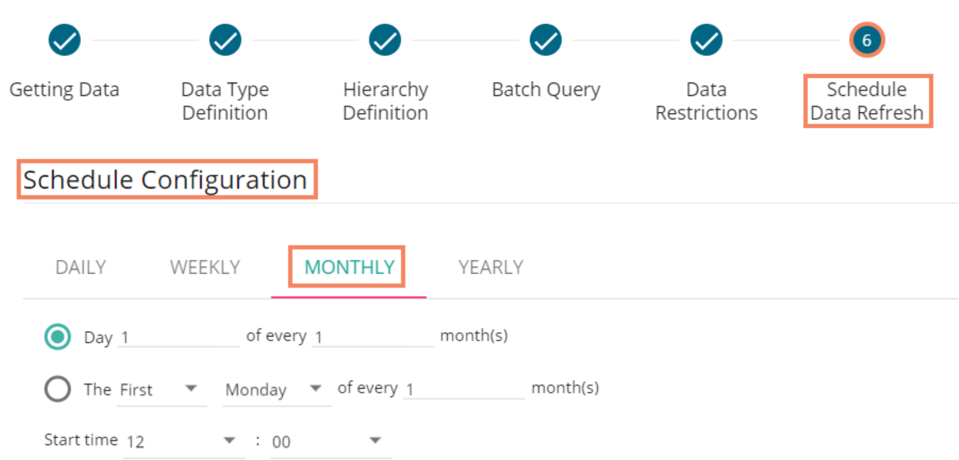
7.3.1.6. Schedule Data Refresh

Users can schedule a data refresh interval via the ‘Schedule Data Refresh’ tab.

i) The following options are provided to refresh the data:

a. Daily
b. Weekly
c. Monthly
d. Yearly

ii) Select any one option from the above-given list to set the data refresh interval

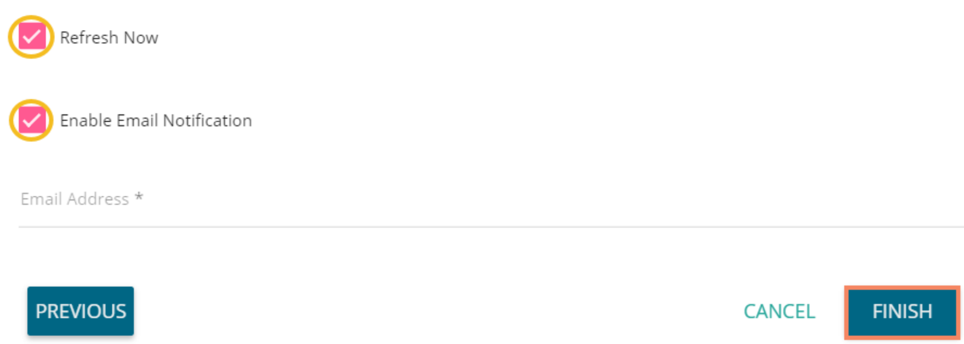


iii) Select the '**Refresh Now**' option by enabling the box to refresh the data store immediately after it gets created.

iv) Enable Email Notification by enabling the option

v) Provide the Email Address on which you want the notification email to be sent

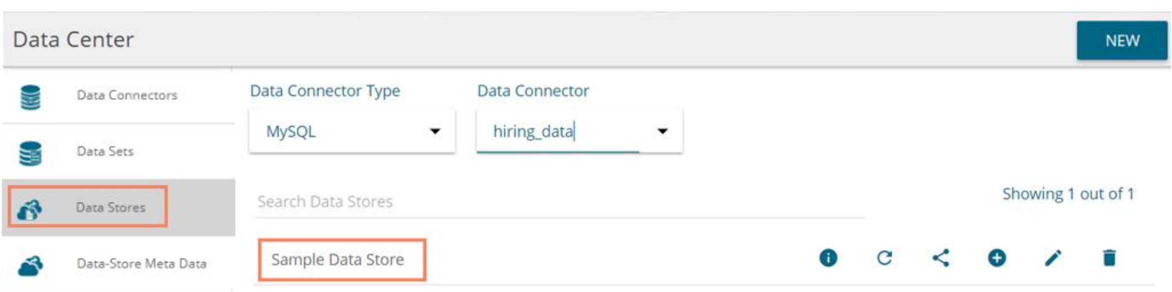
vi) Click the '**FINISH**' option to complete the data store creation process



vii) A message will pop-up to confirm that the data store configuration has been saved

viii) The Data Store List opens

ix) A new data store gets created and added to the displayed list



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

7.3.2. Creating a New Data Store Using a Flat File Data Connector

Step 1- Getting Data

i) Fill in the following information:

a. **Data Store Name**: Enter a data store name

b. **Data Connector Name**: Displays the preselected name of the selected data connector in this field

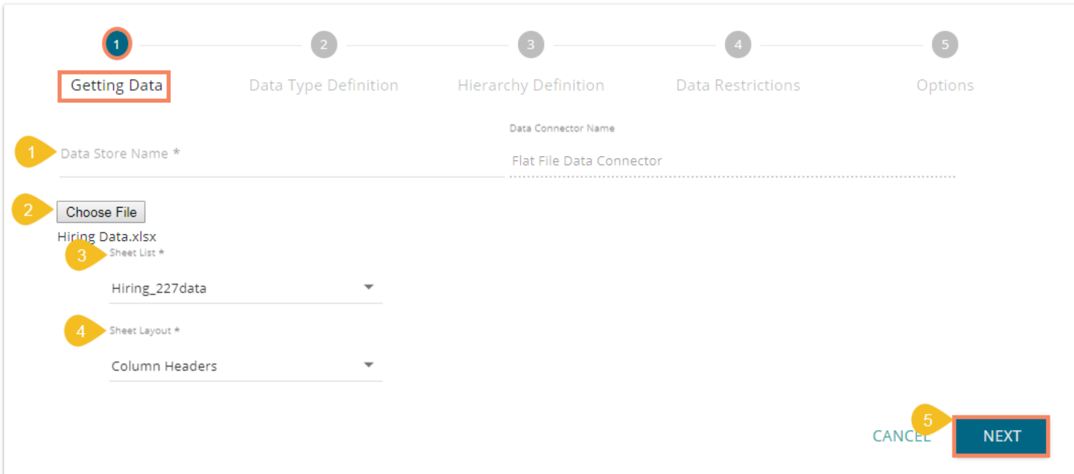
ii) Click **'Choose File'** to browse a file from the system

iii) Configure the following information in case of the Flat file with multiple sheets:

   a. Sheet List

   b. Sheet Layout

iv) Proceed to the next tab by clicking the '**NEXT**' option

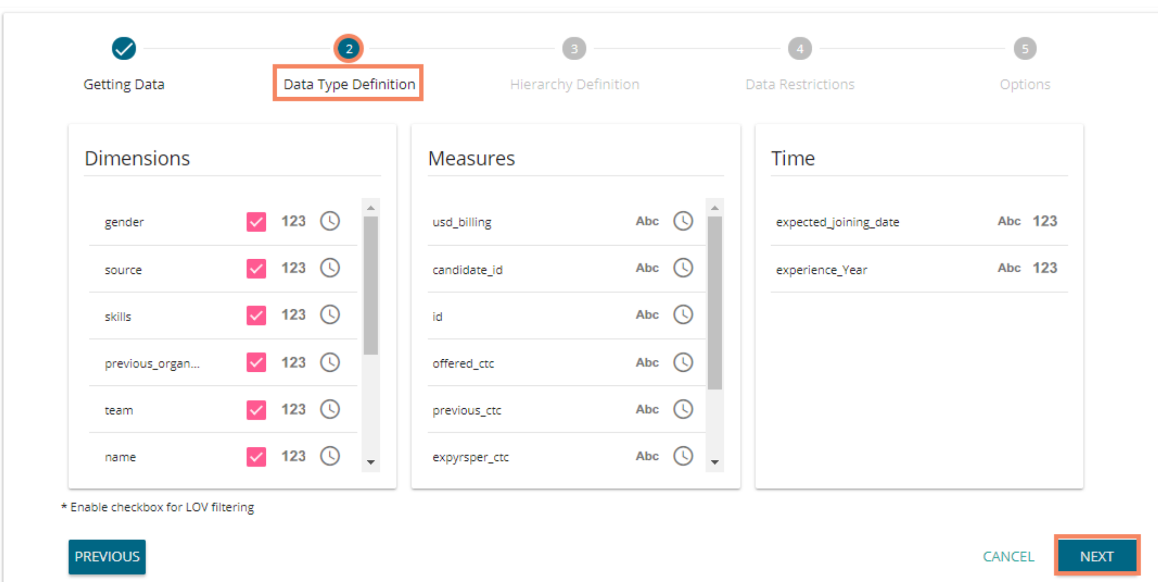


Note: Users can choose an Excel or CSV file as a file data connector.

Step 2- Data Type Definition

i) Users can define data by interchanging available Dimensions, Measures, and Time fields from the selected data store

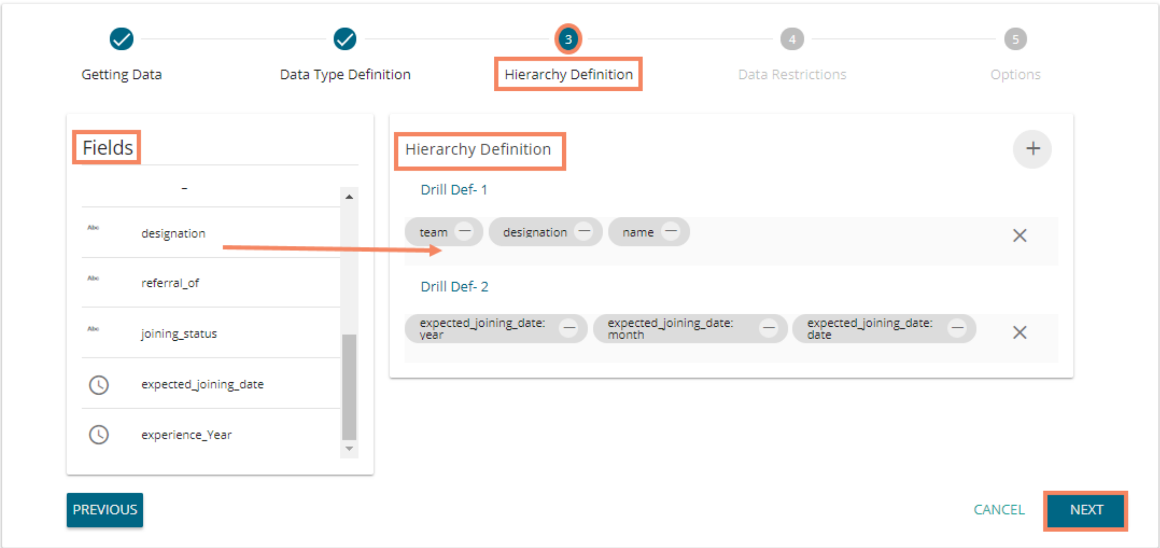
ii) Proceed to the next tab by clicking the '**NEXT**' option



Step 3- Hierarchy Definition

Define hierarchy using multiple dimensions or dropping the selecting time fields in the Drill Definition box.

i) Click the '**Add**' option + provided in the Hierarchy Definition window
ii) A new '**Drill Def**' box gets added to the screen
iii) Drag and drop the dimensions or time options to define a hierarchy
iv) Proceed to the next tab by clicking the '**Next**' option

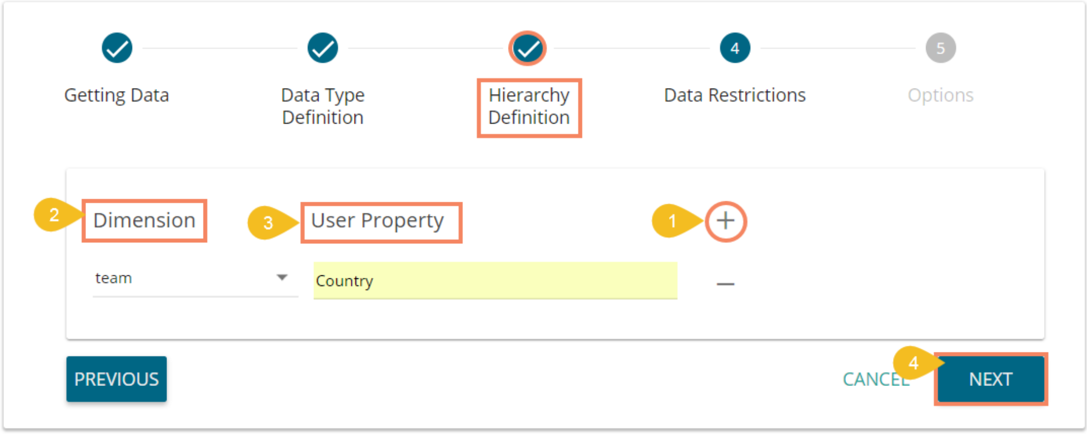


Step 4- Data Restriction

The Administrator can restrict access to data for a specific user by configuring the User Property via the '**Data Restriction**' tab.

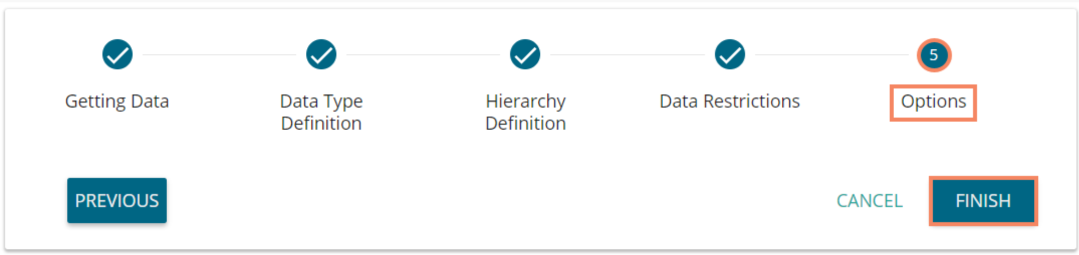
E.g., If for a user/user group '**Country**' custom field value is '**USA**' and the administrator passes '**Country**' as User Property while creating a data store. Users for whom '**USA**' was selected as value for the '**Country**' custom field can access data related only to the USA from the data store.

i) Click '**Add**' icon + to add a new box for inserting the data restriction parameter
ii) Fill in the following information:
   a. **Dimension**: Select a dimension using the drop-down menu
   b. **User Property**: Enter user property value (It should be the same as the selected dimension)
iii) Proceed to the next tab by clicking the '**NEXT**' option

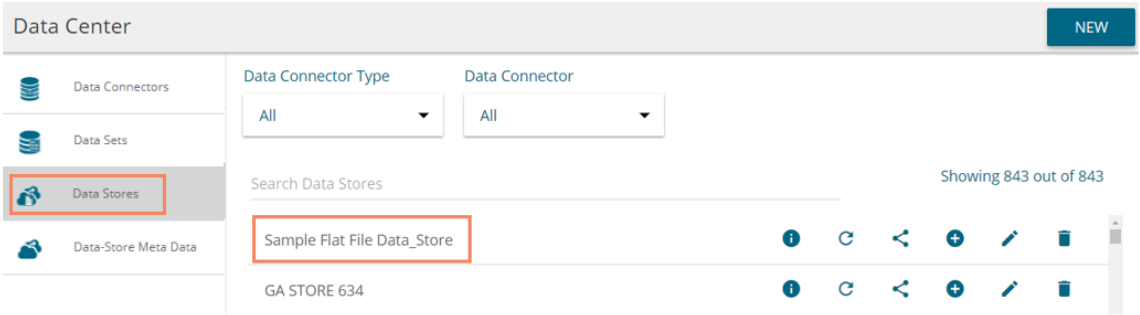


Step 5 – Options

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

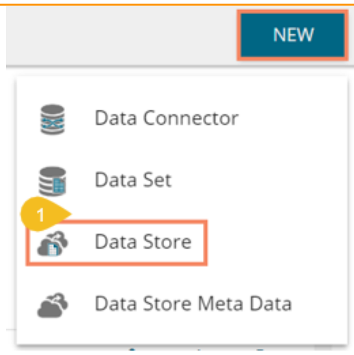


ii) The newly created data store gets added to the Data Store list

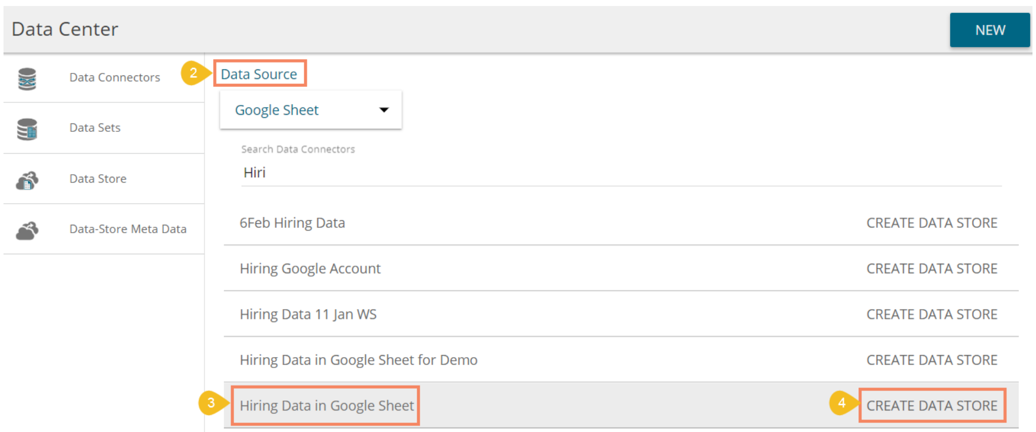


7.3.3. Creating a New Data Store Using an API Data Connector

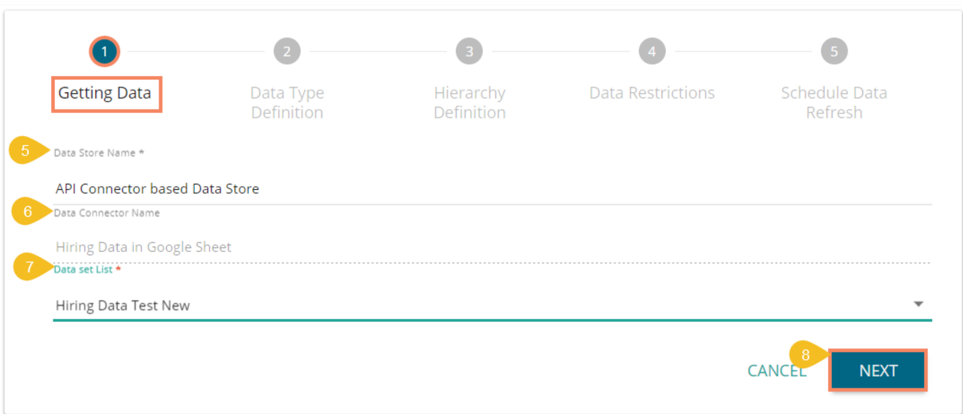
i) Select '**Data Store**' from the '**NEW**' context menu



ii) Choose an API connector type from the filter panel
iii) Select a data connector from the displayed list
iv) Click '**CREATE DATA STORE**' option

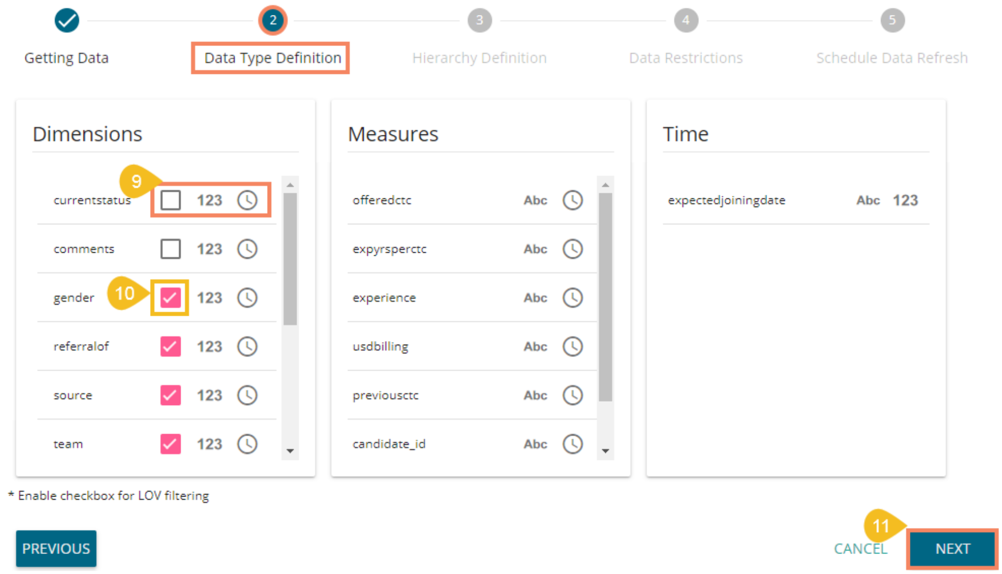


v) The '**Getting Data**' tab opens
   1. Provide a name for the Data Store
   2. Displays the name of the selected Data Connector
   3. Select a data set using the '**Data Set List**' drop-down menu
   4. Proceed to the next tab by clicking the '**NEXT**' option

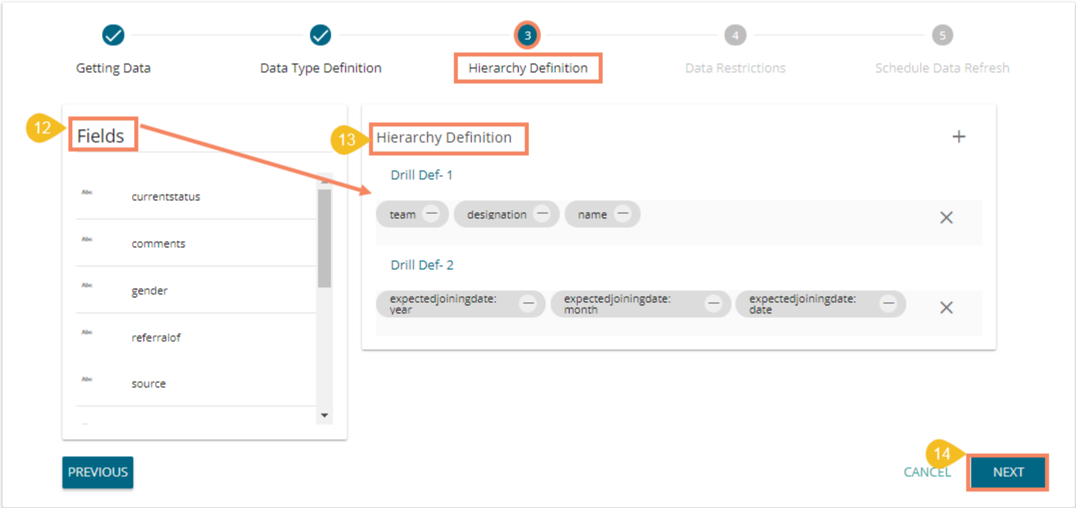


vi) The '**Data Type Definition**' tab opens
   1. Interchange the available Dimensions, Measures, and Time fields to define data

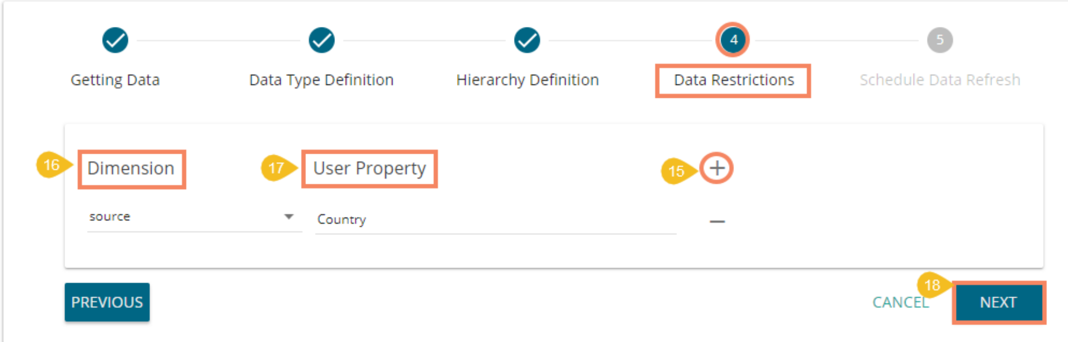
2. Enable dimension fields with a checkmark to get in the LOV of the Filter pane of the Self-service BI Report
3. ‘**NEXT**’ to proceed



vii) The ‘**Hierarchy Definition**’ tab opens
1. Add a new Drill Def. box by clicking the ‘**Add**’ icon
2. Drag and drop Dimension fields or Time field to create hierarchy (The dragged and dropped ‘Time’ fields gets divided into three level granularities, E.g., Year>Month>Date)
3. Click the ‘**NEXT**’ tab to proceed

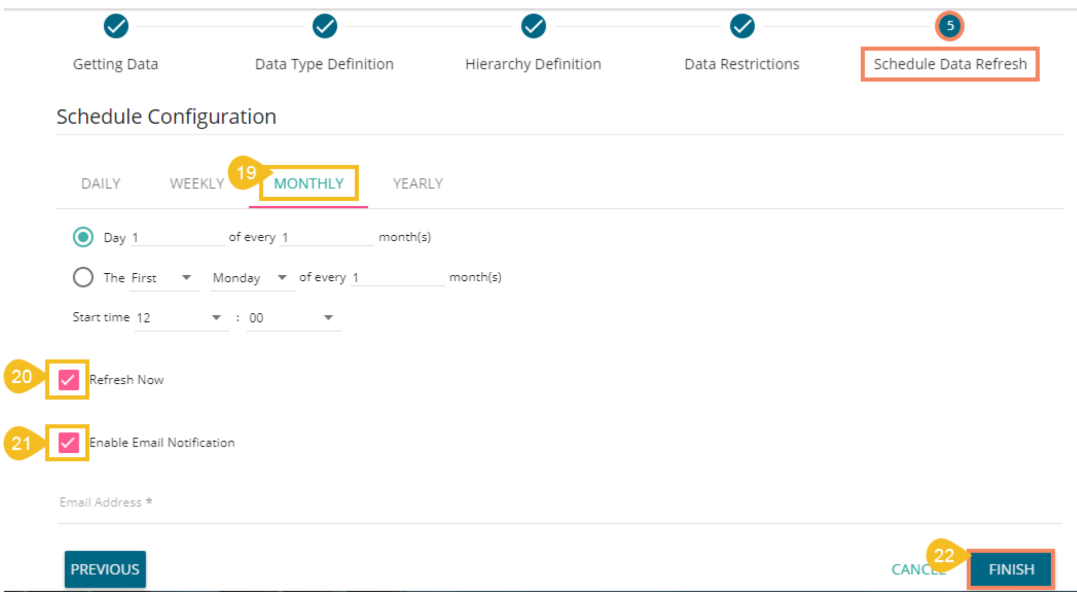


viii) The ‘**Data Restriction**’ tab opens
1. Select a Dimension from the drop-down menu
2. Enter a User Property based on the inserted custom fields of a specific user(s) or user group(s)
3. Click the ‘**NEXT**’ option to proceed



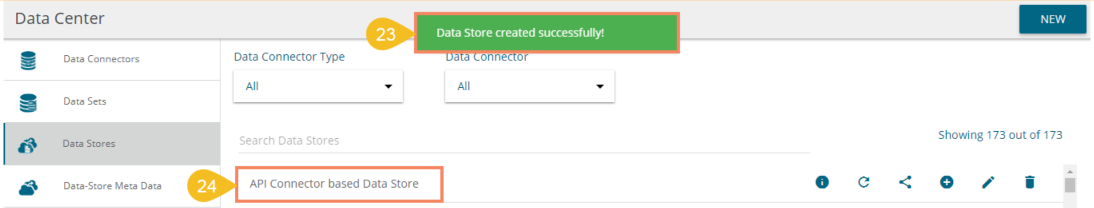
ix) The ‘**Schedule Data Refresh**’ tab opens

1. The following options are provided to refresh the data:
    a. Daily
    b. Weekly
    c. Monthly
    d. Yearly
2. Select any one option from the above-given list and configure the required information to set the data refresh interval
3. Select the ‘**Refresh Now**’ option by enabling the box to refresh the data store immediately after its creation.
4. Enable Email Notification by enabling the option
    a. Provide the Email Address on which you want the notification email to be sent
5. Click ‘**FINISH**’



x) A success message appears to inform about creation of a new data store

xi) The newly created data store gets added to the Data Stores list



Note:

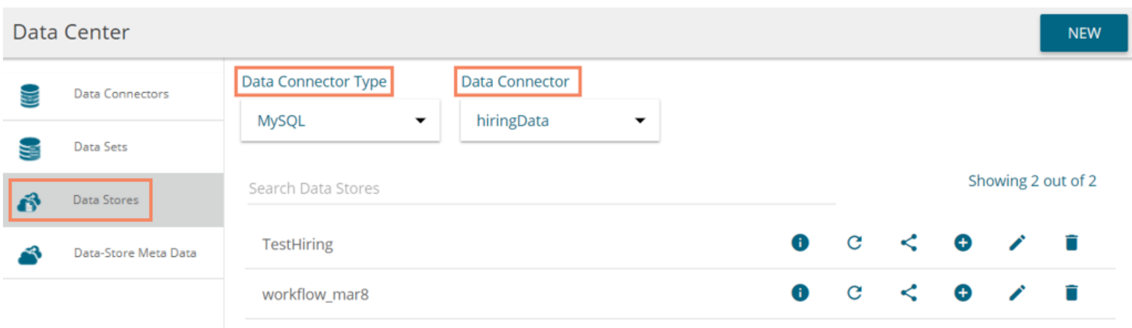
a. ‘**Getting Data**’ tab opens by default while creating a new data store.

b. Click ‘**PREVIOUS**’ to be redirected to the previous page.

c. Users can click ‘**CANCEL**’ to cancel the creation of a new data store at any step.

d. Enabling NLP service allows the ‘**Data Search**’ bar provided on the Storyboard of the Business Story to display data from the selected data store.

e. Users can filter the created data stores based on ‘**Data Connector Type**’ and ‘**Data Connector.**’

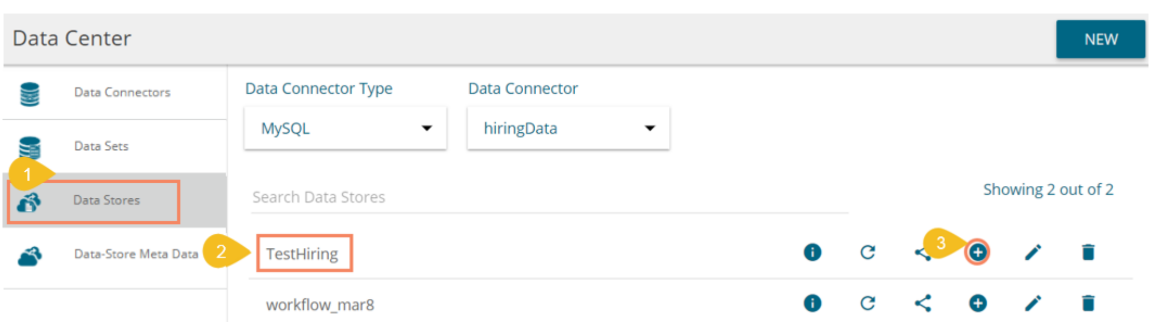


7.3.4. Adding Synonyms to a Datastore

i) Navigate to the Datastore list.

ii) Select a datastore

iii) click the ‘**Add Synonym to Datastore**’ option



iv) A new pop-up window opens

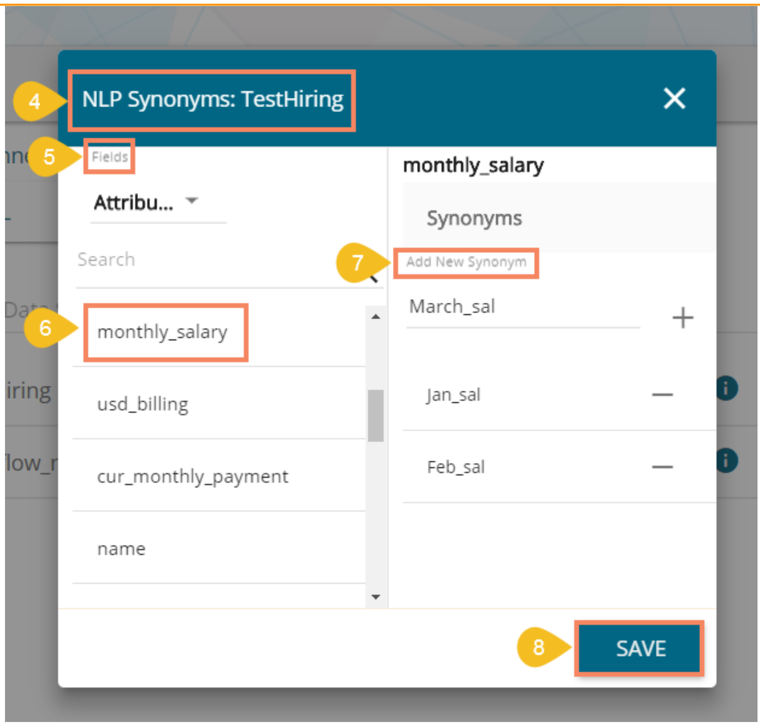
v) Select either ‘**Attribute**’ or ‘**Value**’ using the Fields drop-down

vi) Select an attribute or value from the displayed list

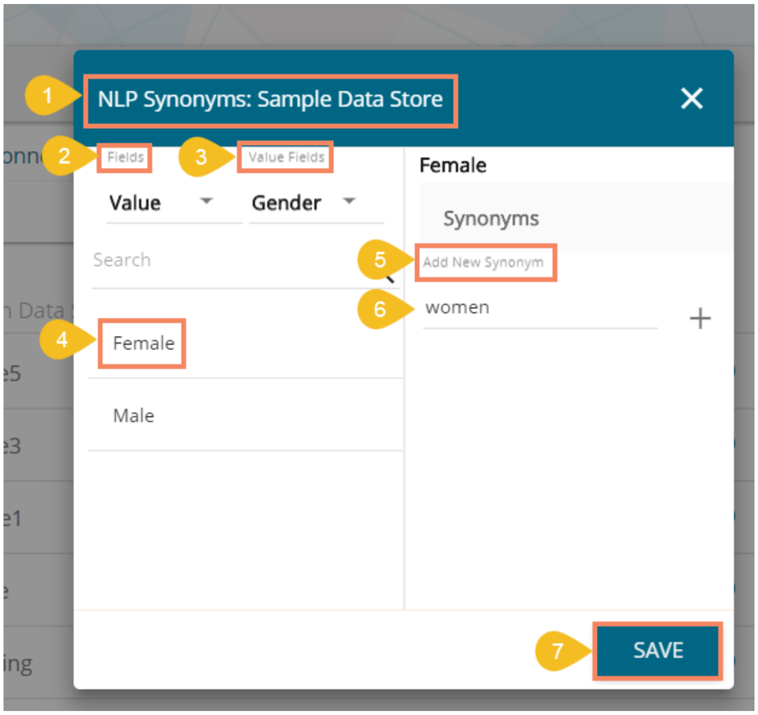
vii) The selected data element is moved to the right-side

viii) Add new Synonym below the selected data element

ix) Click ‘**SAVE**’



Note: By selecting '**Value**' as an option from the field drop-down the available values get listed under the '**Value Fields**.' The sub-values are displayed based on the selected values. Users can add synonyms based on the chosen sub-value as shown in the following image:

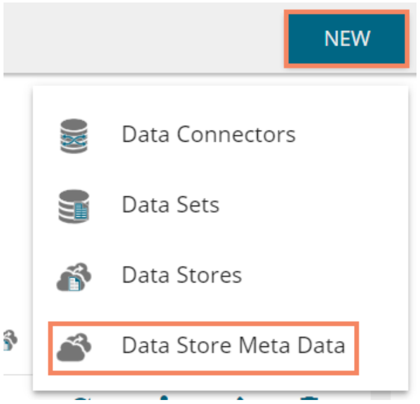


7.4. Data Store Meta Data

The Data Store Meta Data is a database created to store metadata. It is a structure/index in which the actual data can be stored/written using an application such as ETL.

i) Navigate to the Data Center page

ii) Select the '**Data Store Meta Data**' option from the '**NEW**' context menu

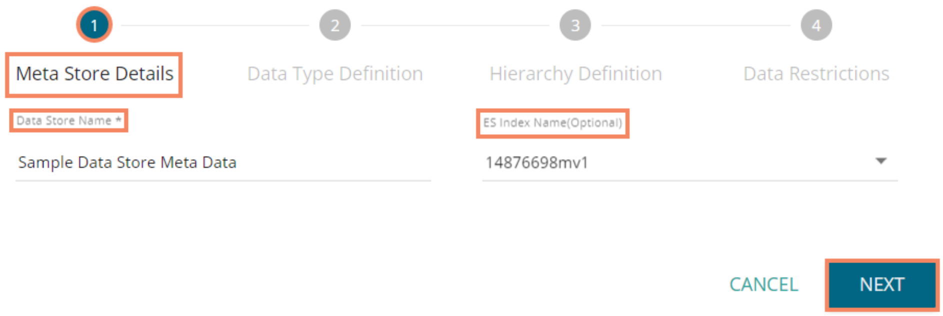


iii) A new page asking the Meta Store details opens

iv) Enter a Data Store Name

v) Choose an ES Index number from the drop-down list (optional)

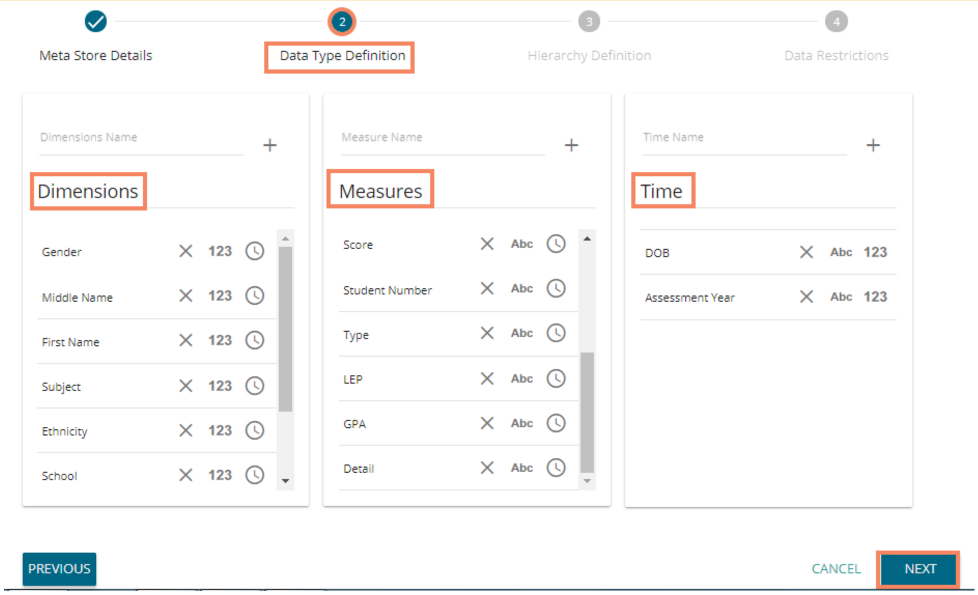
vi) Click the '**NEXT**' option



vii) Define the data type (if users have not chosen the ES index then they need to insert the fields name manually, else the fields names get selected from the chosen ES index)

viii) Users can interchange the Dimensions, Measures, and Time fields

ix) Click '**NEXT**'



Note: Users can change the categories of a dimension, measure, and time value by clicking the following options:

Options	Description
Abc	Move to Dimensions
123	Move to Measures
	Move to Time

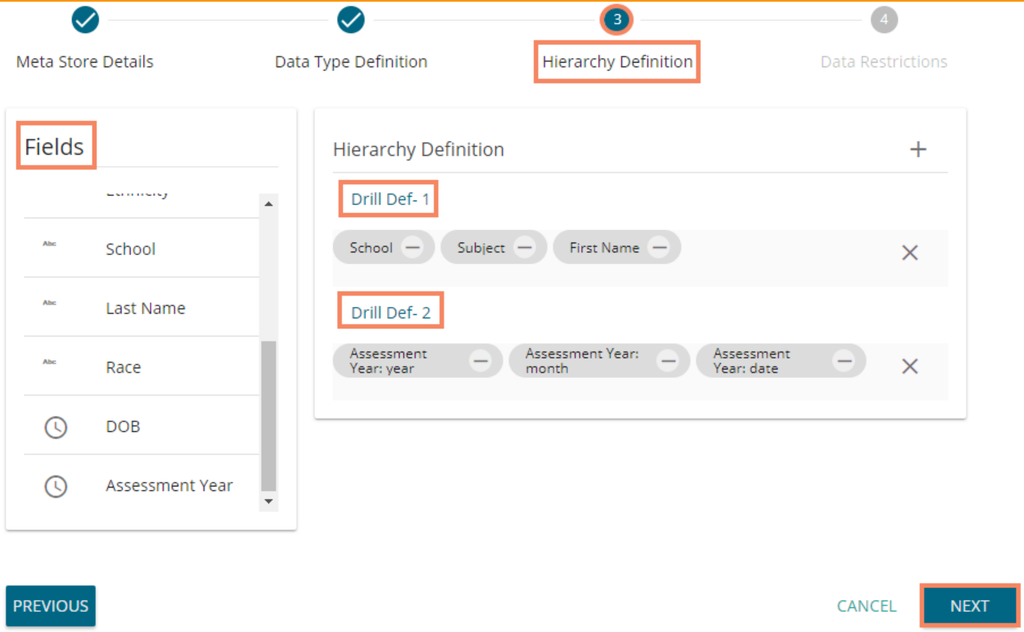
x) Define the hierarchy using Dimensions and Time dimensions

a. Click the '**Add**' option + provided in the Hierarchy Definition window

b. A new '**Drill Def**' box gets added to the page

c. Drag and drop the dimensions or time options to define a hierarchy

xi) Click the '**NEXT**' option

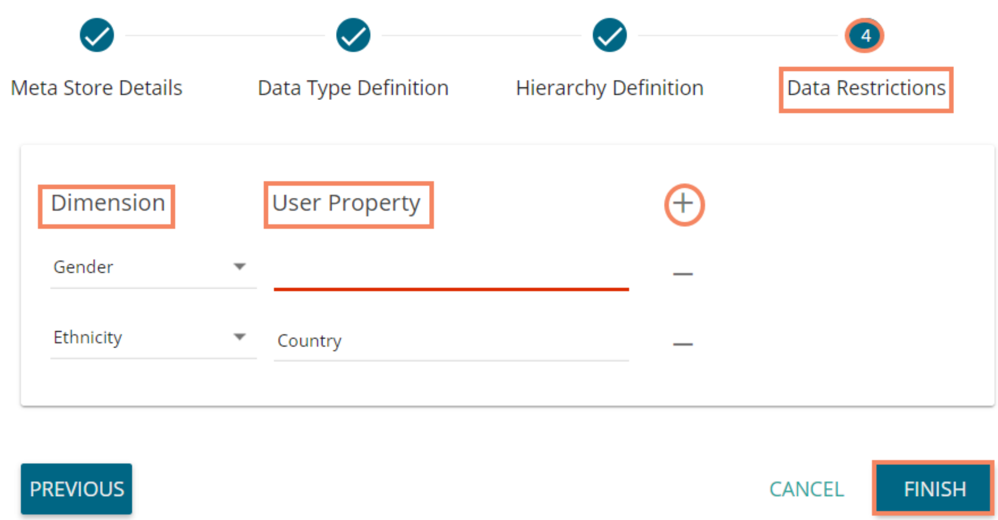


xii) The '**Data Restrictions**' page opens. The Data Restriction tab allows the user/user group to access data as per the selected '**User Property'** options

a. Select a dimension from the drop-down menu to apply filter values on the data store

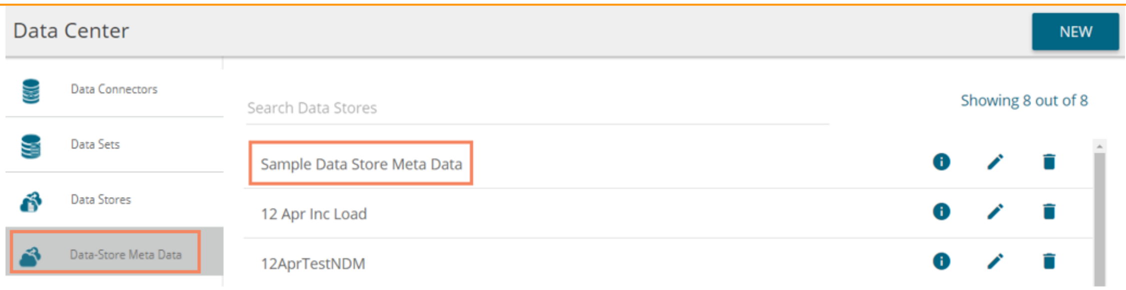
b. Enter a User Property to create a filter parameter based on the user

xiii) Click the '**FINISH**' option



xiv) A pop-up window appears to confirm that the configuration got saved.

xv) The newly created Meta Data gets added to the list displayed on the left pane of the page



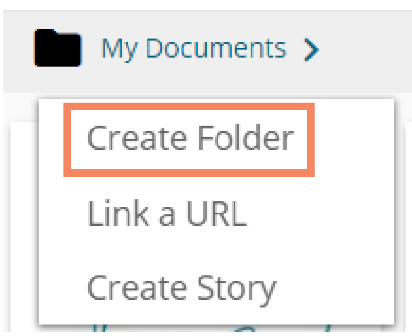
Option	Name	Task
	Latest Scheduler Status	Display the stored information via a pop-up window
	Edit	Edit the data store meta data fields
	Remove	Remove a data store metadata from the list

8. Options

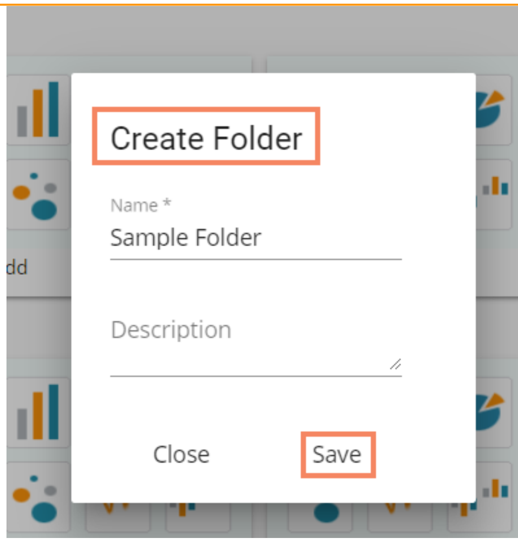
Users can access various options by using right-click anywhere on the **My Documents** or **Public Documents**.

8.1. Creating a Folder

i) Navigate to the platform home page
ii) Open ‘**My Documents**’ or ‘**Public Documents**’
iii) Right-click anywhere on the My Documents or Public Documents space
iv) A context menu opens
v) Select ‘**Create Folder**’ from the context menu

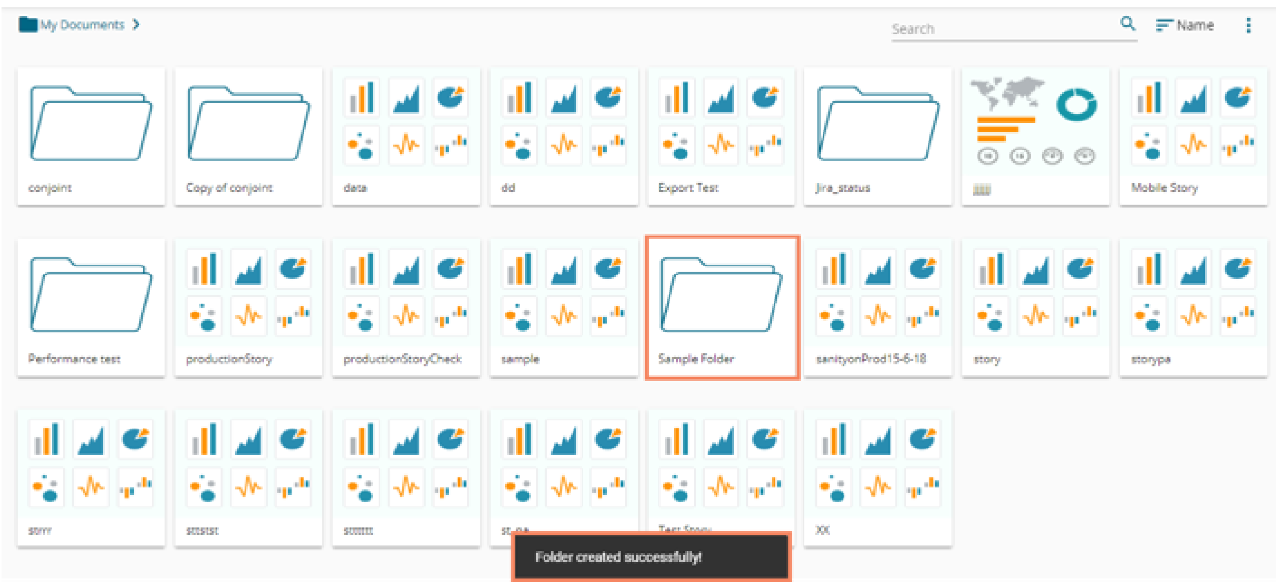


vi) A pop-up window appears
vii) Fill in the following information:
   a. **Name**: Enter a folder name
   b. **Description**: Describe the folder (optional)
viii) Click the ‘**Save**’ option



ix) A success message appears

x) The newly created folder gets added to the selected document space



- **Options Assigned to a Folder**

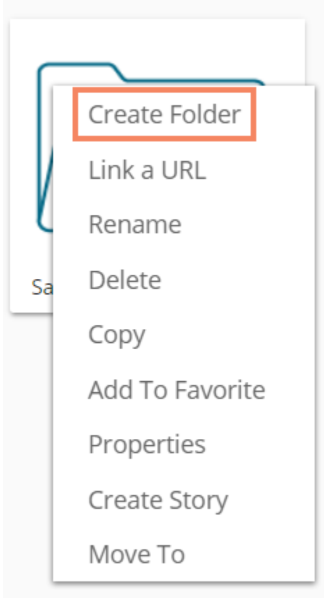
  A single folder is credited with various options. All the options provided to a folder are described over here:

8.1.1. Creating a Folder (Sub-Folder)

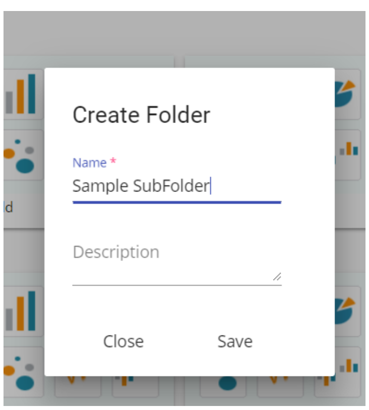
i) Select a folder

ii) Use right-click on an existing folder to display the various options

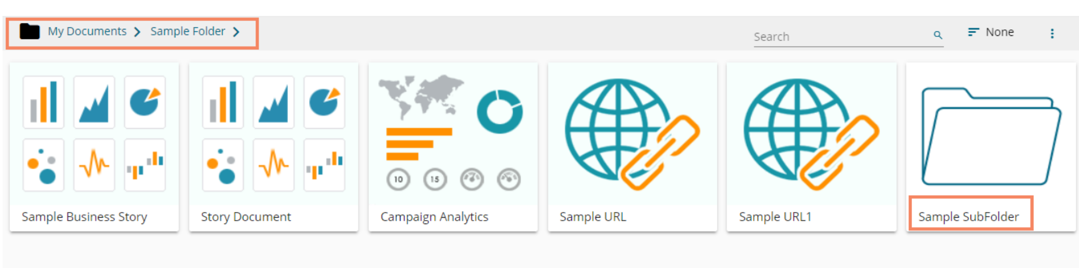
iii) Select the '**Create Folder**' option



iv) Select the ‘**Create Folder**’ option
v) A new window pops-up
vi) Fill in the following information:
  a. **Name**: Enter a folder name
  b. **Description**: Describe the folder (optional)
vii) Click the ‘**Save**’ option



viii) A success message appears for the folder creation
ix) A new (sub) folder is created inside to the selected folder



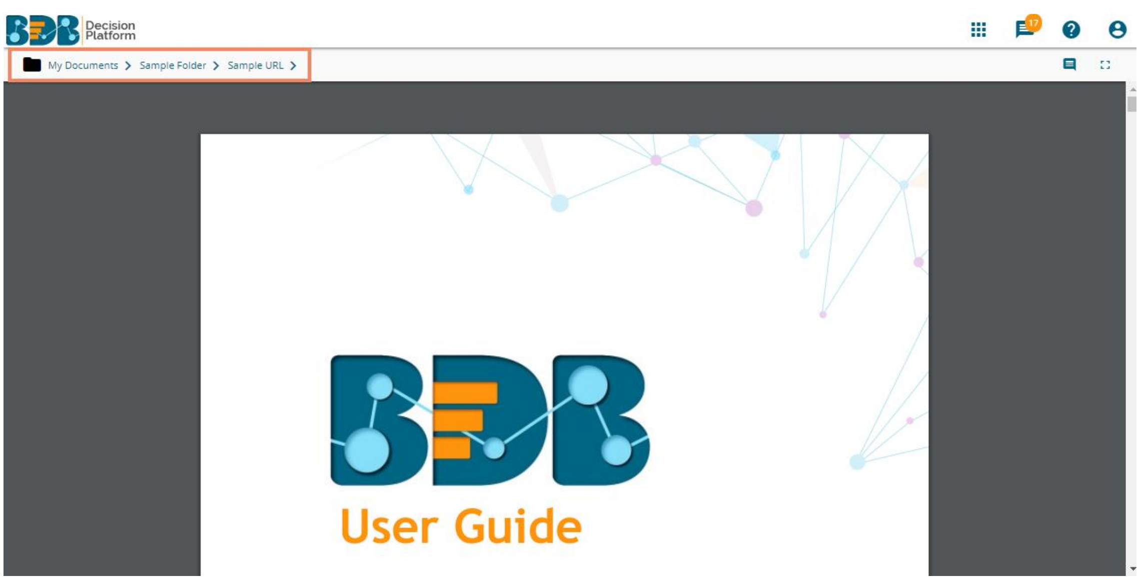
Note: Users can create multiple sub-folders under a folder.

8.1.2. Linking a URL

Users can connect a URL to the required platform documents.

i) Select a folder
ii) Use the right-click on it to display various options
iii) Select the '**Link a URL**' option
iv) A new window pops-up
v) Fill in the required information:
   a. **URL Name**: Enter a name for the URL
   b. **Type URL**: Type the URL link that you wish to add
   c. **Description**: Describe the URL (optional)
   d. **URL Parameter:** Add parameters to the linked URL (Optional)
vi) Click the '**Save**' option

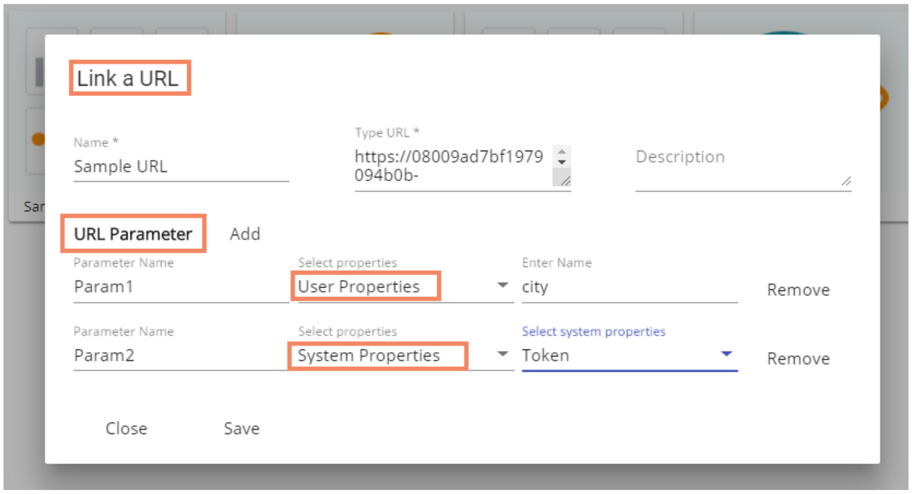
vii) The URL gets linked to the selected folder



8.1.2.1. Adding or Removing a URL Parameter:

Users can add or remove parameters to the linked URL by using this option.

i) Click the '**Add**' button + to add a URL Parameter
ii) Users need to provide the required information as described below:
   1. Enter the Parameter name
   2. Select a property option using the drop-down menu
      a. User Properties: these properties can be any of the custom fields added to the user while creating the user.
      b. System Properties: All the available system properties get listed in a drop-down to pass as a parameter.
   3. This field displays only after selecting a property option via the '**User/System Properties**' drop-down menu:
      a. By selecting the '**User Properties**' option, the administrator needs to insert a valid user custom field. (E.g., In the below given image, parameter 'Param1' passes the defined value for the 'city' custom field provided for the selected user).
      b. By choosing the '**System Properties**' as an option requires the administrator to select an option from the available system properties drop-down menu (E.g., in the below given image, parameter 'Param2' passes the authentication token as system properties to link the URL).

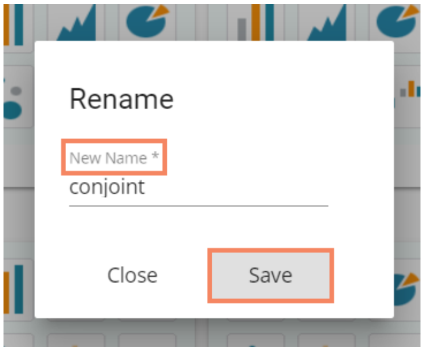


Note:

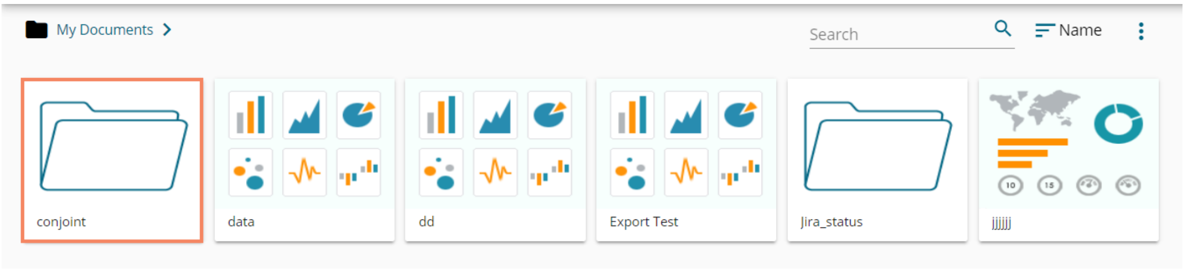
a. Users can easily connect internal URL links by using the parameters, while the external URLs requires security permission to link.
b. Users can click the 'Remove' option provided next to an added parameter to remove the parameter.

8.1.3. Renaming a Folder

i) Select a folder.
ii) Select the '**Rename**' option from the context menu.
iii) A new window appears.
   a. Enter '**New Name**' in the folder
   b. Click the **'Save**' option

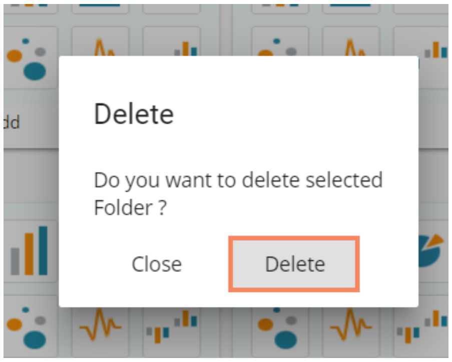


iv) The folder gets renamed.



8.1.4. Deleting a Folder

i) Select a folder.
ii) Select the ‘**Delete**’ option from the context menu.
iii) A new window appears to assure the deletion.
iv) Click the ‘**Delete**’ option.



v) The selected folder gets removed from the platform.

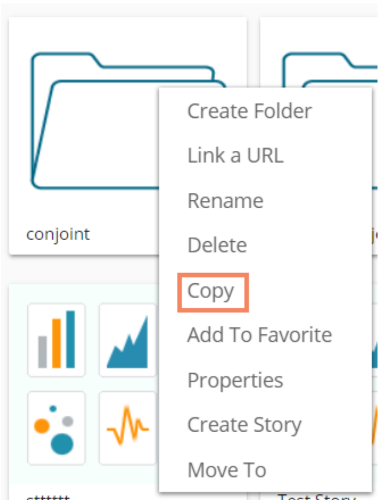
Note: The ‘Delete’ option is not available to the folders shared as the Public Documents.

8.1.5. Copying a Folder

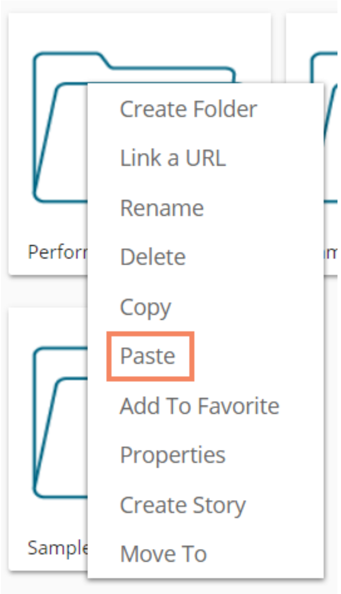
System users can copy a folder and paste it to a different folder.

i) Select a folder

ii) Select the '**Copy**' option from the context menu

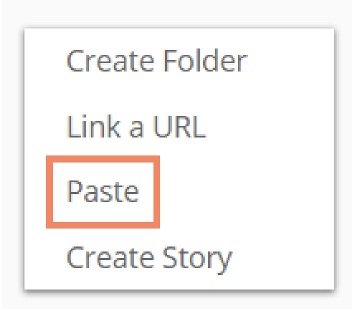


iii) Select another folder and use the right-click or use the right click to get the '**Paste**' option



Or

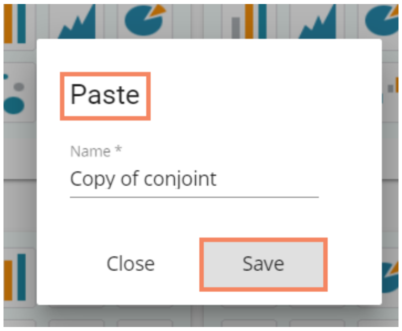
Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere on the blank space to get the '**Paste**' option



iv) By selecting the 'Paste' option, a message window appears

v) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the folder (E.g., *conjoint* gets a new name *Copy of conjoint*)

vi) Click the '**Save**' option



vii) A Message pops-up to assure that the copied folder has been pasted successfully with a different name

E.g., The following image shows that a folder 'conjoint' from '**My Documents**' is named *Copy of conjoint* and has been posted next to the original one in the same document space.

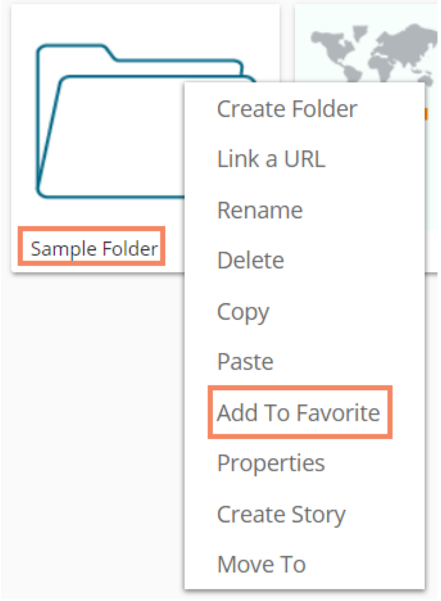
8.1.6. Adding/Removing a Folder to/from Favourites

The user can add a folder to or remove it from the Favorites.

i) Select a folder

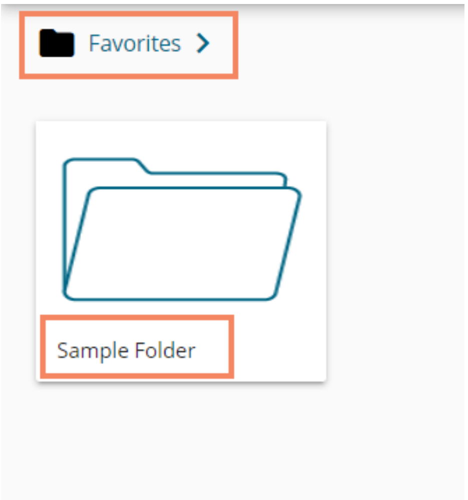
ii) Use the right-click to get the list of folder options

iii) Select the '**Add to Favorite**' option



iv) A message appears, "**Folder added to favorites**!"

v) The selected folder gets added to the '**Favorites**' document space



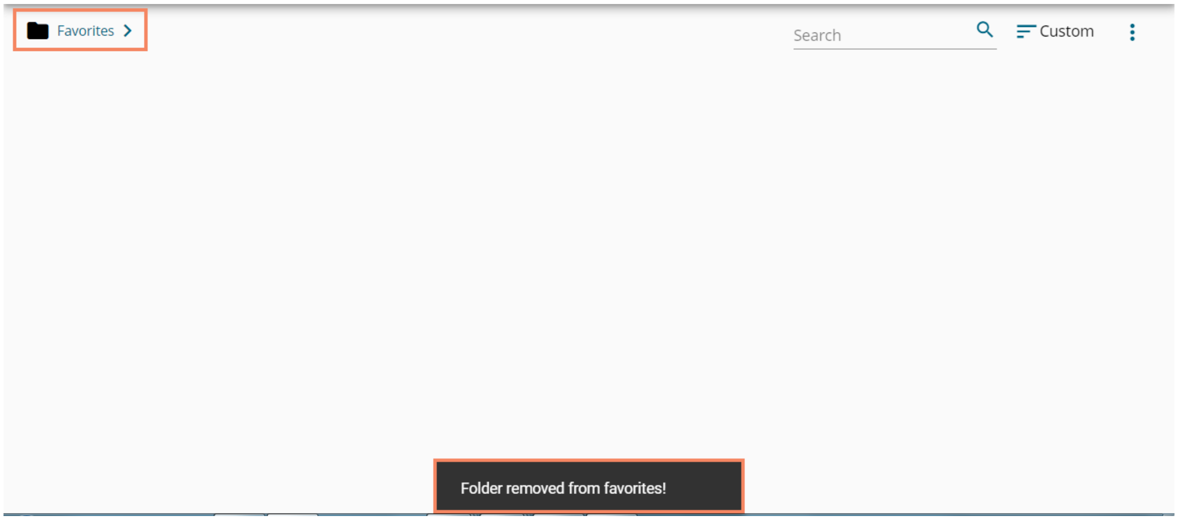
vi) Open the '**Favorites**' documents space

vii) Navigate to the folder you wish to remove

viii) Use the right-click on it to get the '**Remove from Favorites**' option

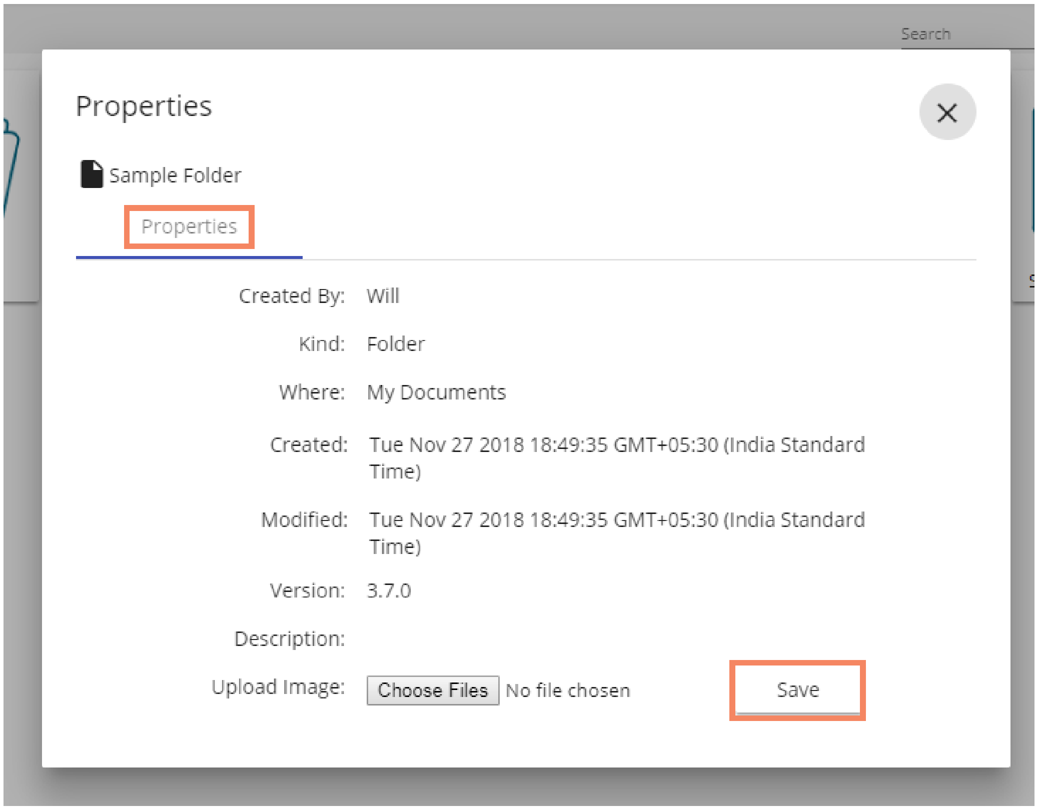
ix) Click the '**Remove from Favorites**' option

x) A message, "**Folder removed from favorites**!" appears on the screen and the selected folder gets removed from the '**Favorites**' document space



8.1.7. Properties

i) Select a folder
ii) Use the right-click to display the options credited to a folder
iii) Select the '**Properties**' option
iv) The folder properties open
v) Click the 'Save' option

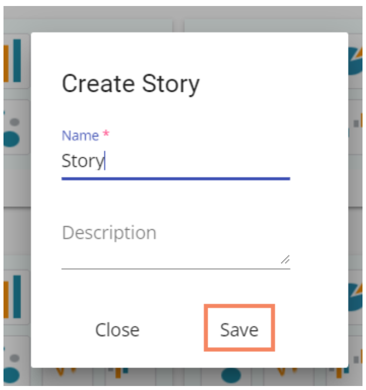


vi) A success message appears stating, “the image updated successfully!”

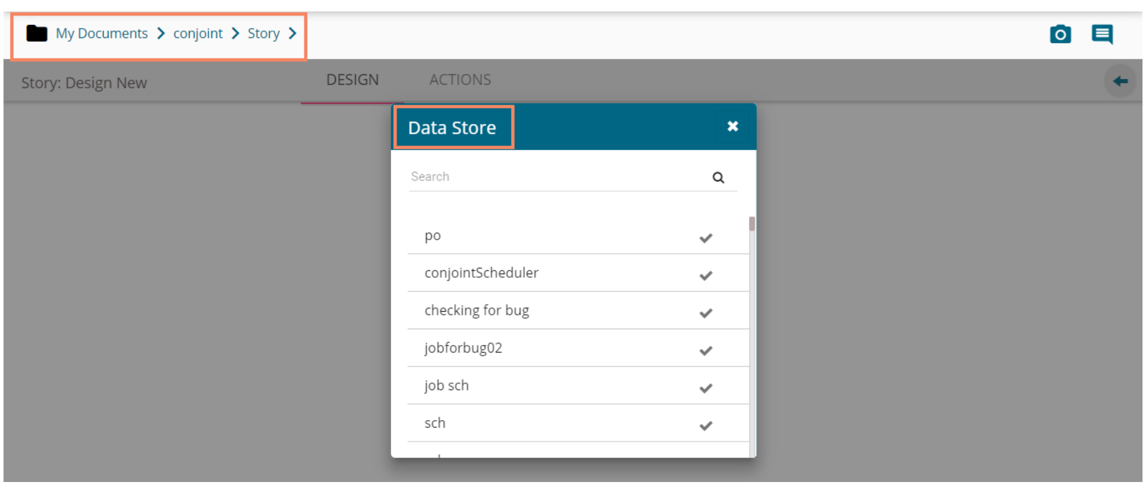
Note: Click ‘**Close**’ option to close the folder properties.

8.1.8. Creating a Story

i) Select a folder
ii) Use the right-click to display various options credited to a folder
iii) Select the ‘**Create Story**’ option from the options menu list
iv) A new window pops-up pop-up
v) Fill in the required information:
   a. **Title**: Enter a title for the story document
   b. **Description:** Describe the story document (optional)
vi) Click the ‘**Save**’ option

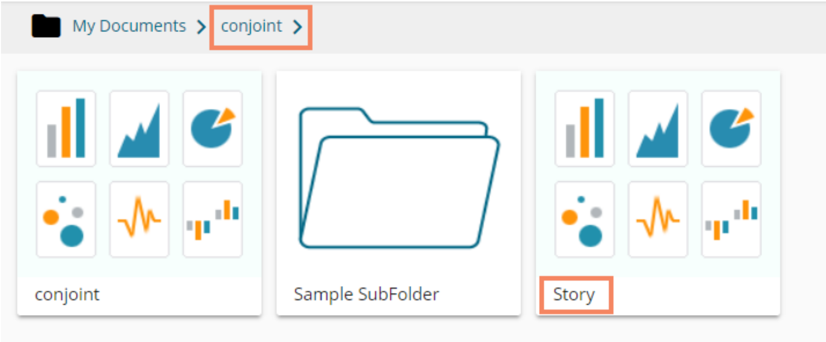


vii) Users are directed to the following page of the story to select a data store



viii) Users can close the Data Store list by clicking the 'Close' ✖ icon and then navigate back to the folder

ix) The Story document gets added to the selected folder



8.1.9. Moving a Folder

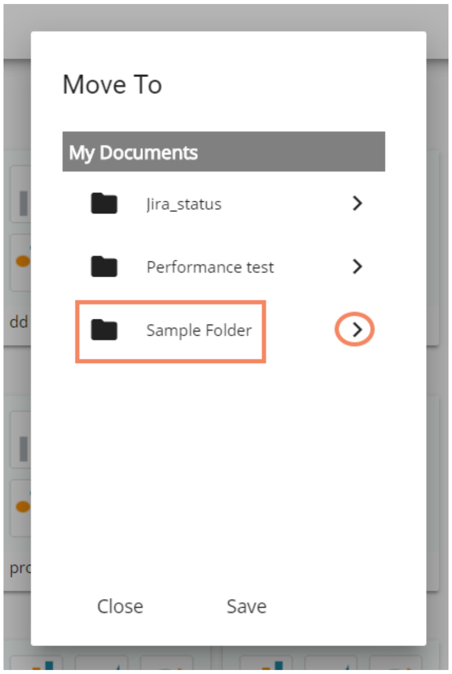
i) Select a folder

ii) Select the '**Move To**' option from the context menu

iii) The 'Move To' window appears displaying the available folders

iv) Select a folder

v) Click the '**Move**' > icon

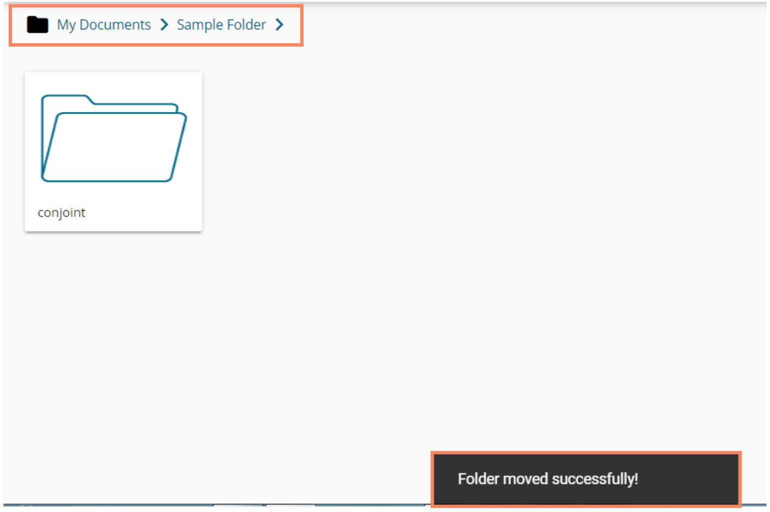


vi) Users get redirected to the next screen

vii) Click 'Save'

viii) A success message appears

ix) The users can open the target folder to check about the recently moved folder



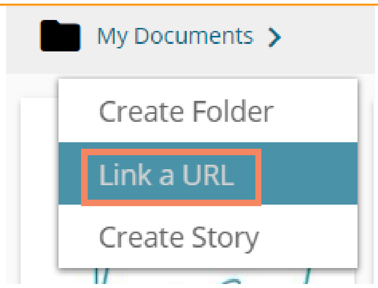
Note: The '**Move To**' option is not available to the folders shared as the Public Documents.

8.2. Linking a URL

Linking a URL functionality enables users to connect the URLs with the chosen folders.

i) Use the right-click anywhere at the blank space on the 'My Documents' or 'Public Documents.'

ii) Select the '**Link a URL**' option.

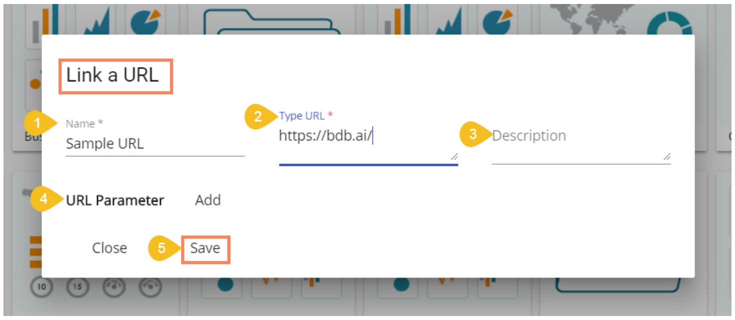


iii) A new window appears.

iv) Fill in the required information:

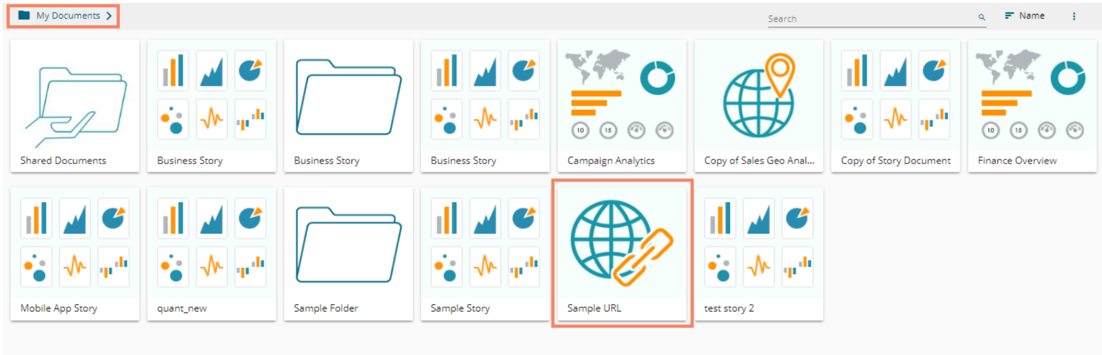
   a. **URL Name**: Enter a name for the URL
   b. **Type URL**: Type the URL link that you wish to add
   c. **Description**: Describe the URL (optional)
   d. **URL Parameter (Optional)**

v) Click the '**Save**' option.

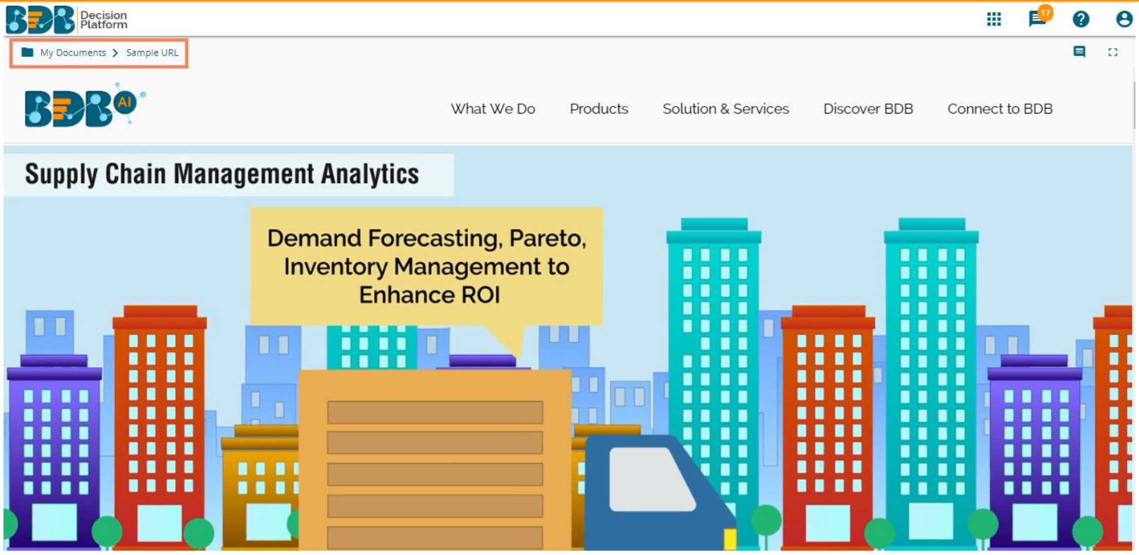


vi) A success message appears.

vii) The linked URL document gets added to the selected document space.



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



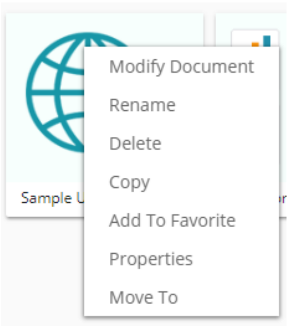
- **Options Assigned to a URL**

8.2.1. Modifying a Document (URL information)

i) Select a linked URL document.

ii) Use the right-click on the Link URL for options.

iii) A context menu opens with all the related options.



iv) Select the ‘**Modify Document**’ option.

v) A pop-up window appears.

vi) Modify the following information:

a. URL Name

b. URL Link

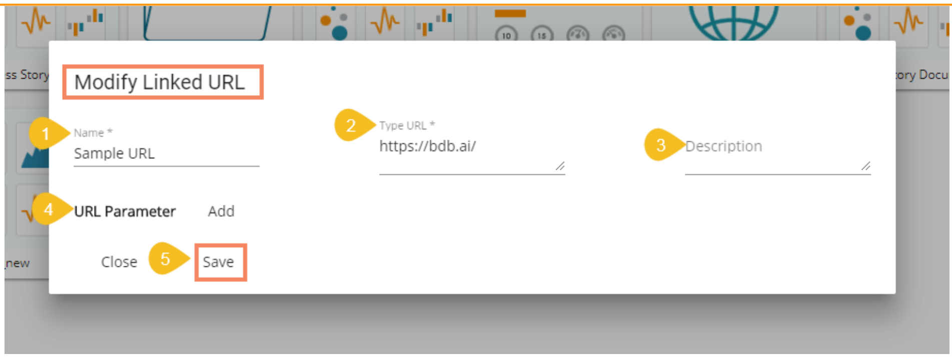
c. Description

d. URL Parameter

i. Click the ‘**Add**’ button to add the URL Parameter.

ii. Click the ‘**Remove**’ button to remove the inserted URL Parameter.

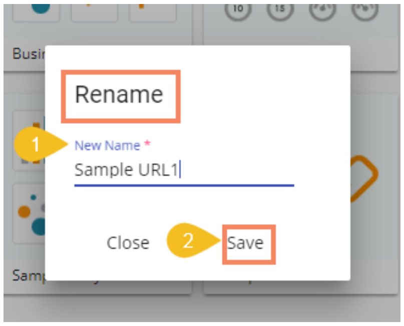
vii) Click the ‘**Save**’ option.



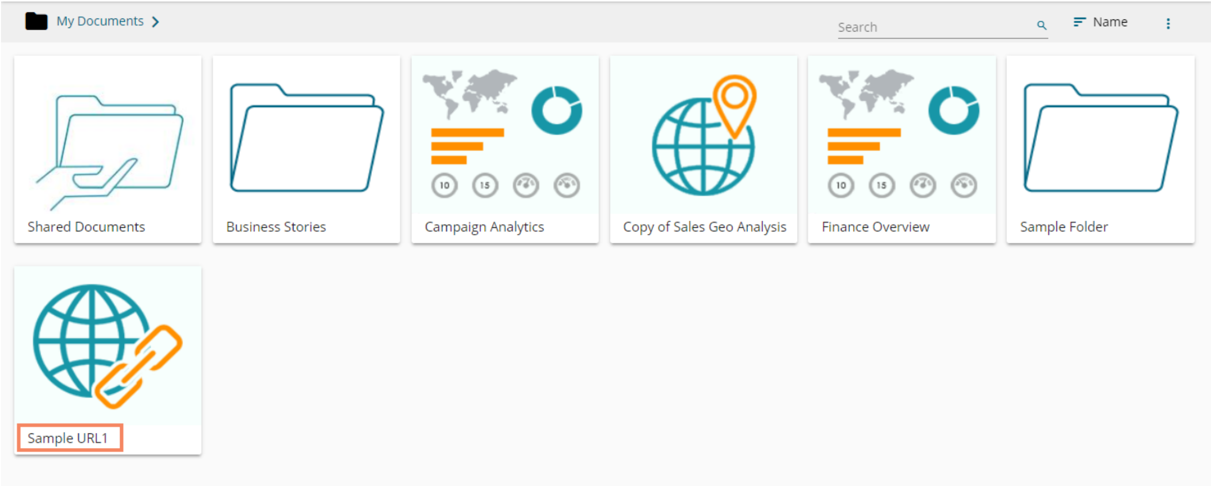
viii) The modified URL Link gets saved.

8.2.2. Renaming a URL Document

i) Select a linked URL document.
ii) Select the '**Rename**' option from the context menu.
iii) A new window appears.
iv) Enter a New Name for the URL document.
v) Click the '**Save**' option.

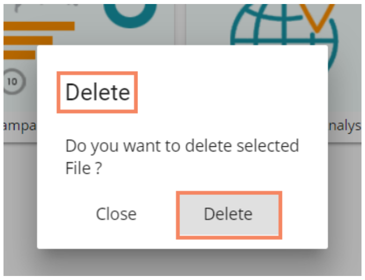


vi) The linked URL document is renamed.



8.2.3. Deleting a URL Document

i) Select a linked URL document.
ii) Select the '**Delete**' option from the context menu.
iii) A pop-up window will appear to confirm the deletion.
iv) Click the '**Delete**' option.



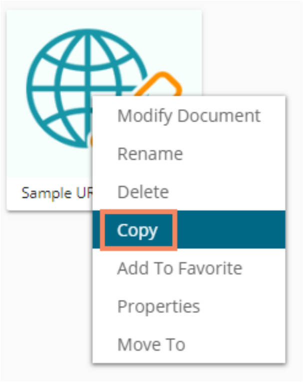
v) The selected URL file gets removed.

Note: The '**Delete**' option is not available for the link URL created or shared as the Public Documents.

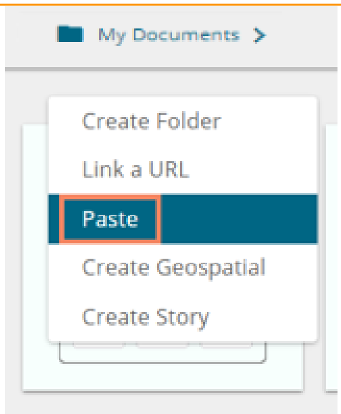
8.2.4. Copying a URL Document

It is possible to copy a link URL and paste it into a different place.

i) Select a linked URL document.
ii) Select the '**Copy**' option from the context menu.



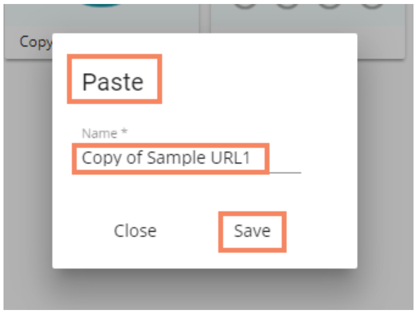
iii) Select another folder and use the right-click.
Or
iv) Navigate to '**My Documents**' or '**Public Documents**' and use right-click on the blank space.
v) A context menu appears with the '**Paste**' option.
vi) Select the '**Paste**' option.



vii) A new window appears.

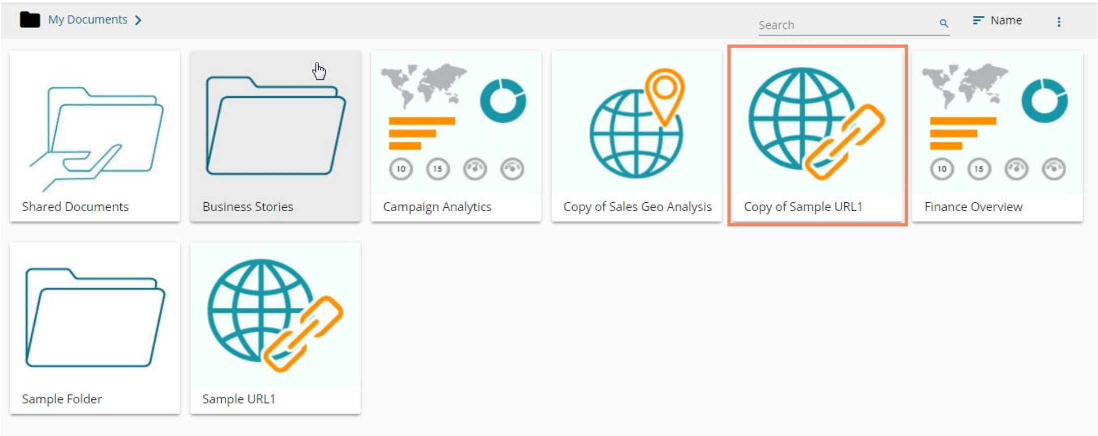
viii) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the folder (E.g., Sample URL 1 gets a new name *Copy of Sample URL 1*).

ix) Click the '**Save'** option.



x) A success message appears.

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

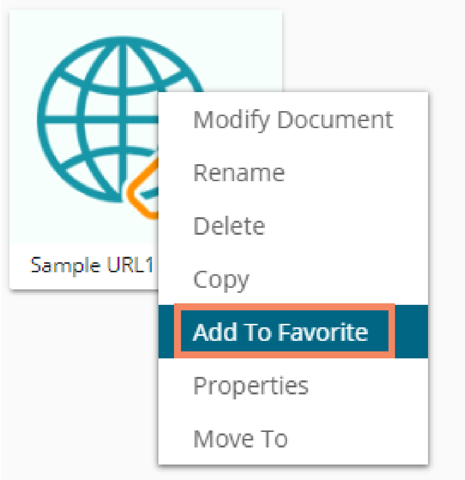


8.2.5. Adding/Removing a URL Document to/from Favorites

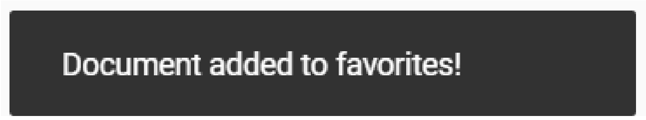
Users can add a URL document to or remove it from the '**Favorites**' section.

i) Select a linked URL document.

ii) Select the '**Add to Favorites**' option from the context menu.

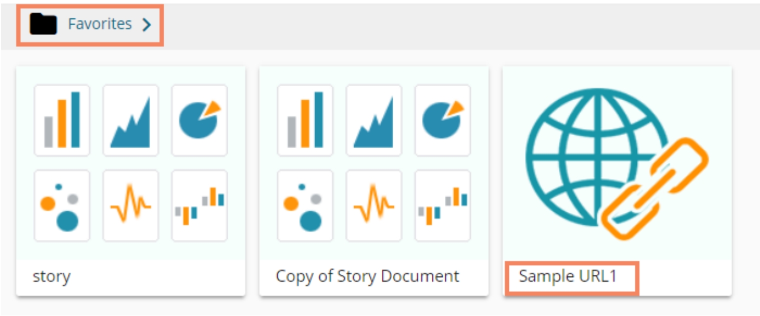


iii) A message, "**Document added to favorite!**" appears.



iv) The selected link URL is added to the '**Favorites**' section.

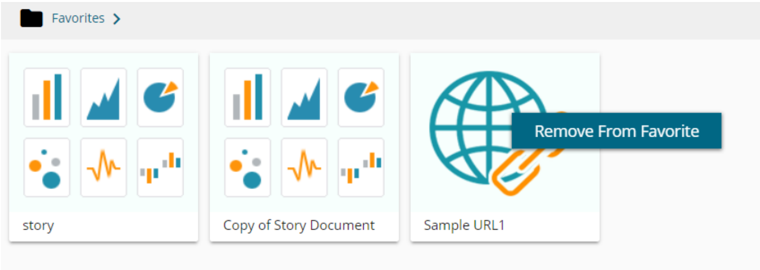
v) Open the '**Favorites**' section for documents.



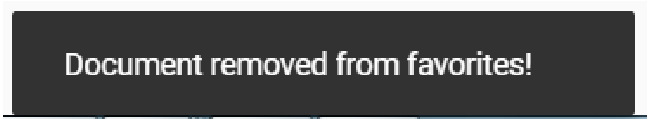
vi) Navigate to the link URL you wish to remove from the '**Favorites**' section.

vii) Use right-click on the URL to get the remove option.

viii) Click the '**Remove** From Favorite' option.



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



x) The URL file gets removed from the '**Favorites**' section.

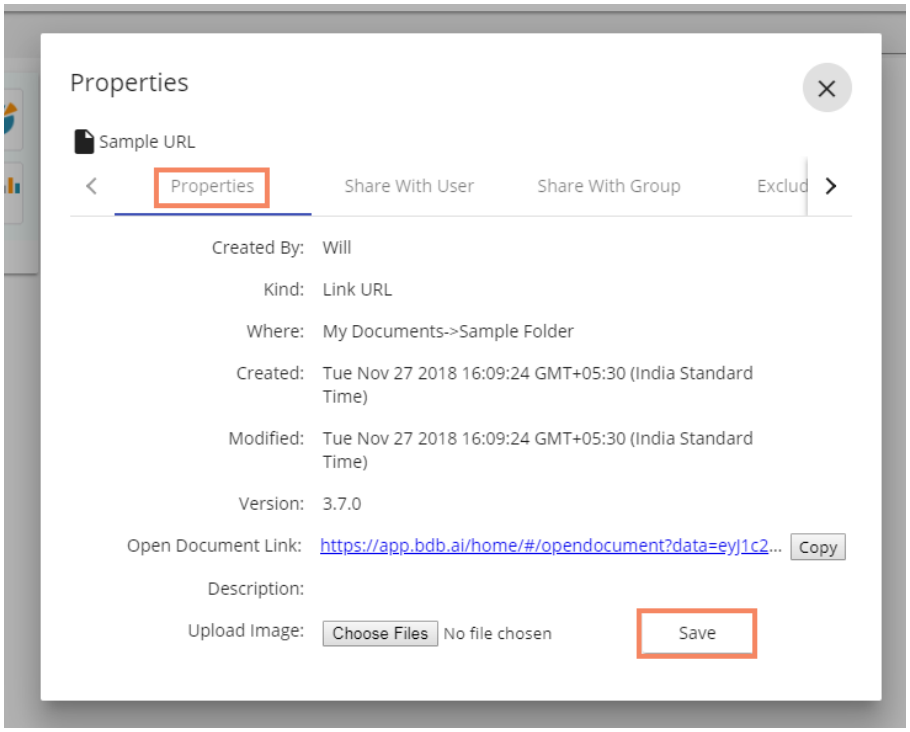
8.2.6. Properties

i) Select a linked URL document.

ii) Select the '**Properties**' option from the context menu.

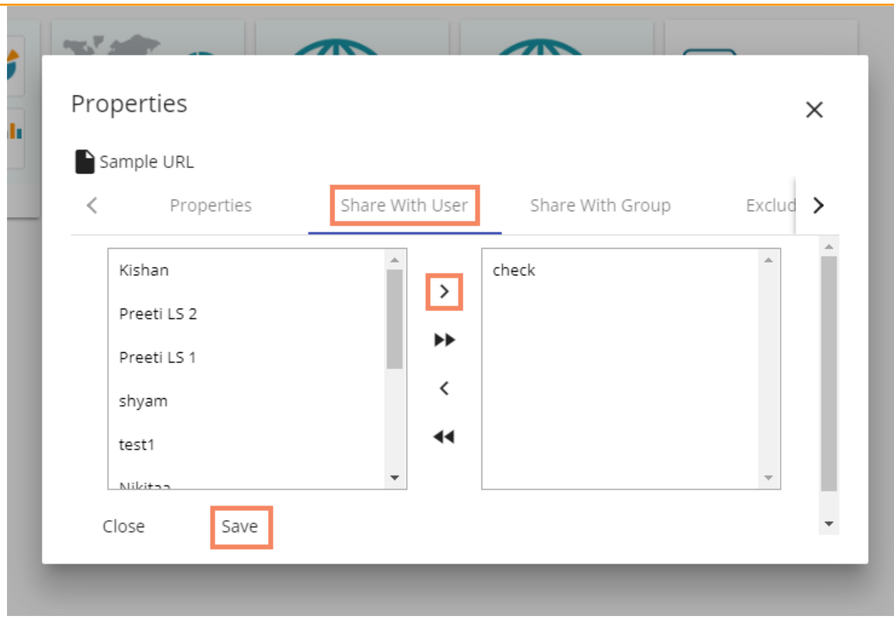
iii) The 'Properties' window appears with four options.

a. **Properties:** Properties of the linked URL documents is displayed.

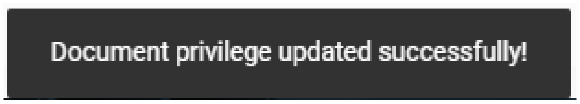


b. Share With User: The linked URL document is shared with the selected user(s).

1. Select '**Share With User'** on the Properties window.
2. Select a user or all the users and move to the space given on the right side. **(Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)**
3. Click the '**Save**' option.

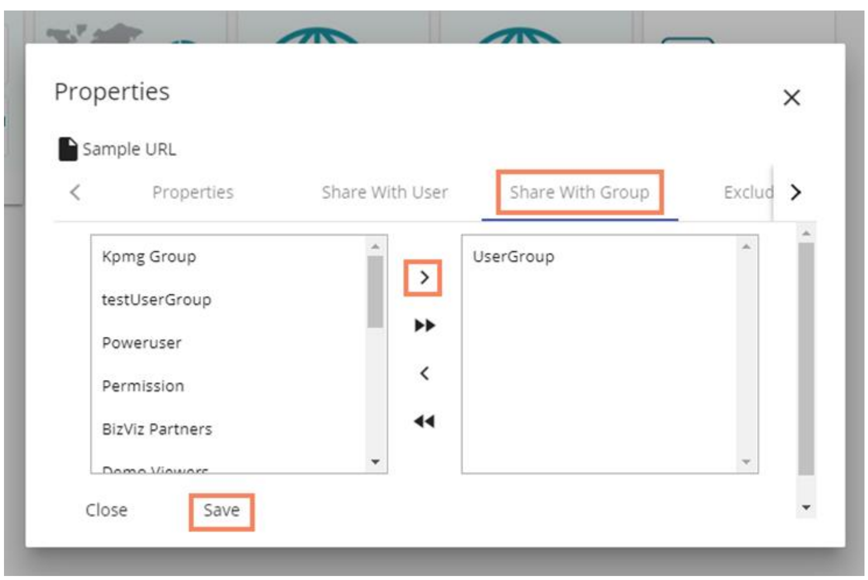


4. A success message appears stating that the document privilege is updated.

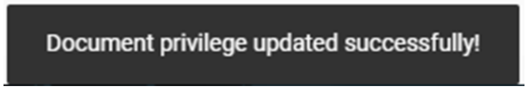


5. The document gets shared with the selected user(s).

c. **Share With Group:** The linked URL document can be shared with the selected group.
   1. Select the **'Share With Group'** option from the Properties window.
   2. Select one group or all the groups and move to the space given on the right side. (Use the single arrow to move one group and double arrows to move all the groups.)
   3. Click the '**Save**' option.



4. A success message appears stating that the document privilege is updated.

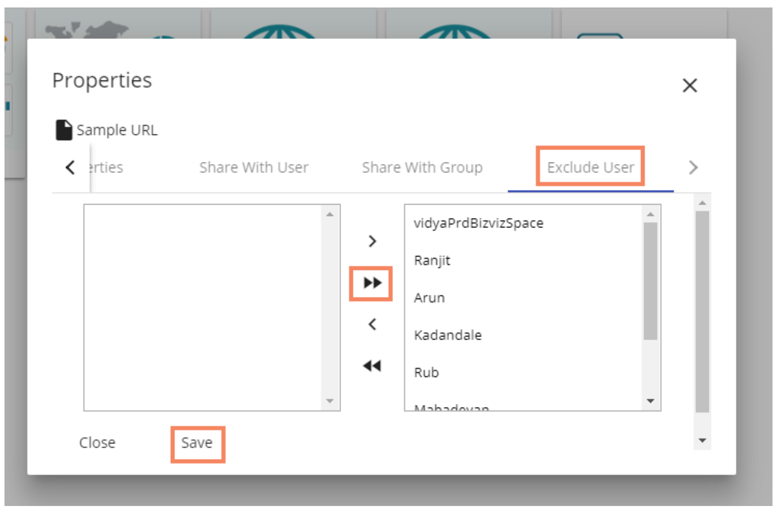


5. The document gets shared with the selected group(s).

Note: If a URL file is shared with the user(s) or group(s) using the 'Share With' option, then it opens as a view only copy for the selected user or selected user group.

d. Exclude User: The selected user cannot access the linked URL file.

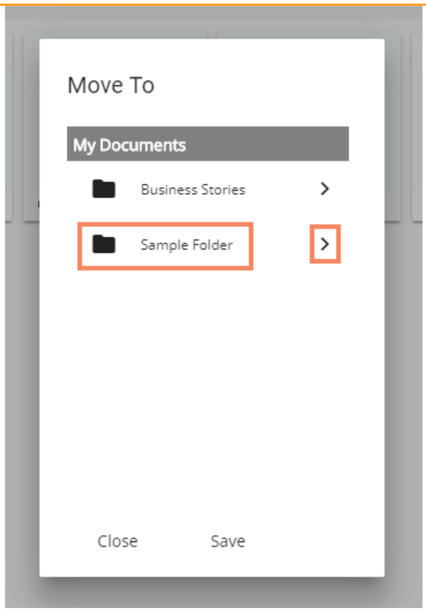
1. Select **'Exclude User'** on the Properties pop-up screen.
2. Select and move a user or all the users to the space given on the right side using the arrows.
3. Click the **'Save'** option.



4. A success message appears, and the document privilege gets updated to exclude the selected user(s).

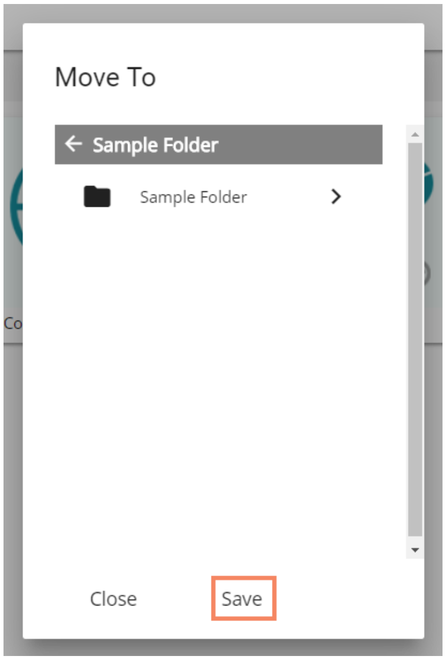
8.2.7. Moving a URL File

i) Select a linked URL document
ii) Select the '**Move To**' option from the context menu
iii) The '**Move To**' window appears displaying the available folders
iv) Select a folder
v) Click the '**Move**' > icon

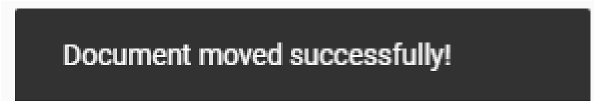


vi) Users get redirected to the next screen

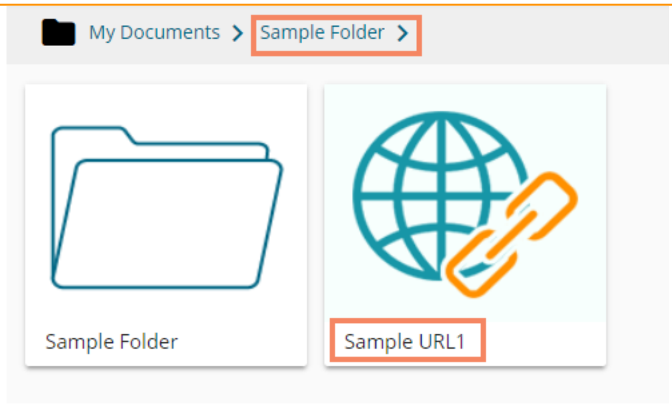
vii) Click 'Save'



viii) A success message appears



ix) The desired URL is moved to the selected space

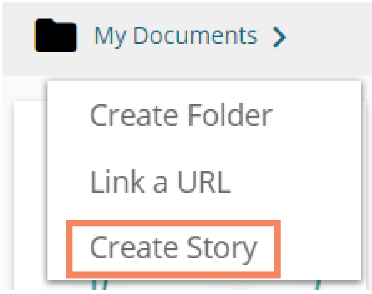


8.3. Creating a Story

i) Navigate to '**My Documents**' or '**Public Documents**'

ii) Right-click anywhere on the My Documents or Public Documents blank space

iii) Select the '**Create Story**' option from the context menu



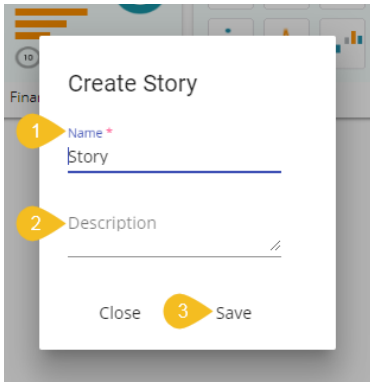
iv) A pop-up window appears

v) Fill in the following information:

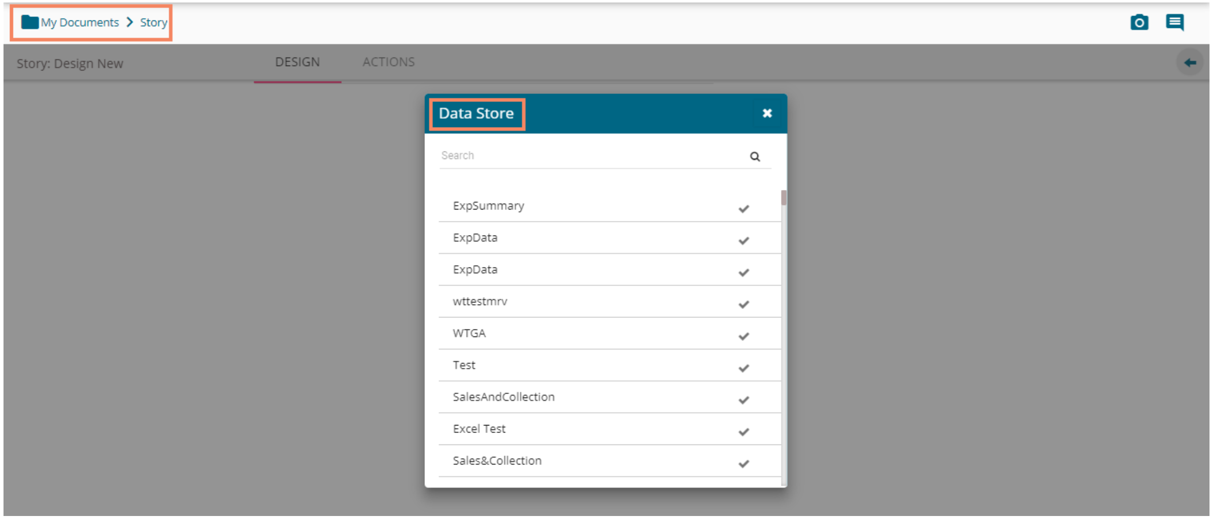
a. **Title**: Enter a title for the story document

b. **Description**: Describe the story document (optional)

vi) Click the '**Save**' option

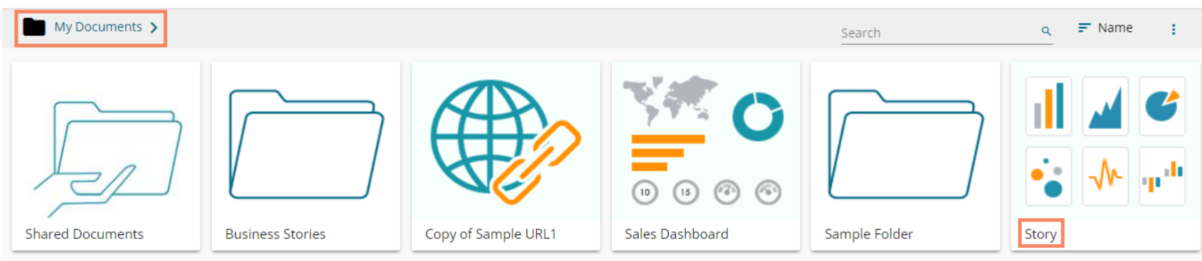


vii) The story document gets created and the following page opens



viii) Users can close the Data Store list by clicking the ‘Close’ icon and then navigate back to the ‘My Documents’ space

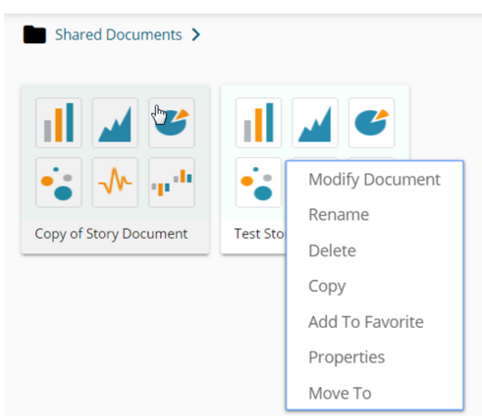
ix) The Story document gets added to the My Documents space.



Note:

a. Please refer to the Business Story (Self-Service BI) User Guide for more details on the Story option.

b. The credited options are assigned only for the shared documents which are shared to the users via the ‘**Copy To**’ option. The documents shared through ‘Share With’ option do not display any option by using the right-click over them. (E.g., The ‘Copy of Story Document’ is shared using the ‘Share With’ option whereas the ‘Test Story’ document is shared using the ‘Copy To’ option in the following image.)

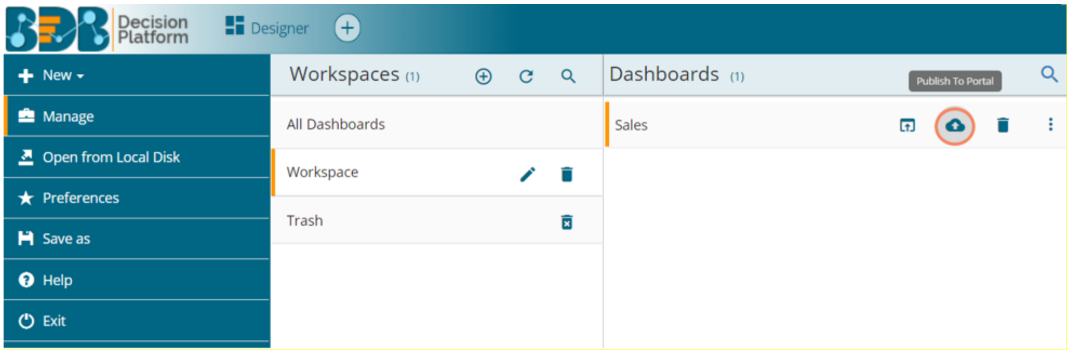


8.4. Published Dashboard on the BizViz Platform

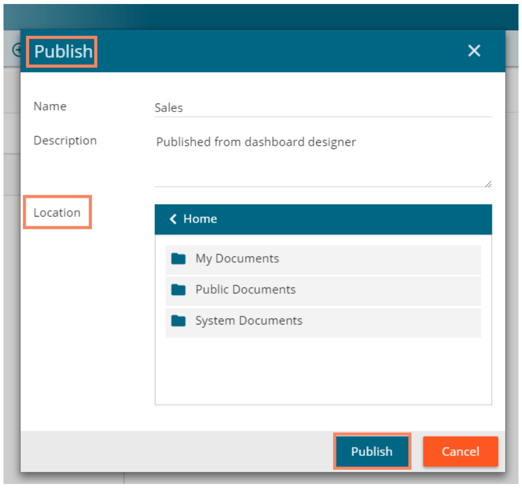
The user can publish various analytics dashboards to the BDB Platform homepage via the '**Publish to Portal**' option provided in the Dashboard Designer plugin.

i) Users need to navigate to the dashboard list provided in a workspace.

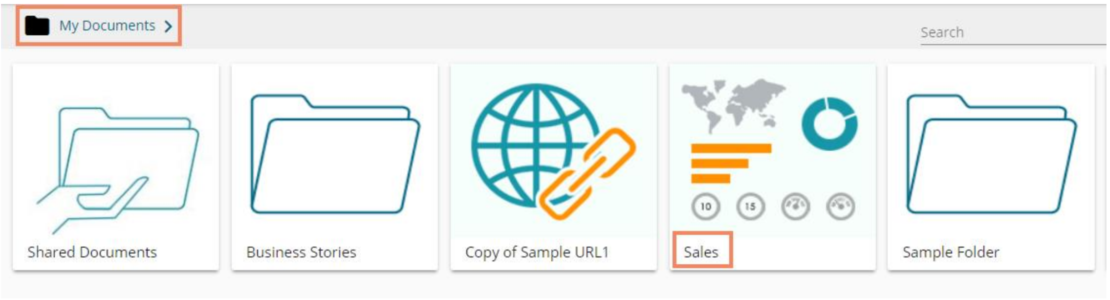
ii) Access the 'Publish to Portal' option from the list of Dashboards.



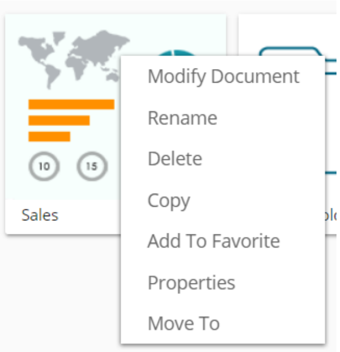
iii) Users are redirected to a new wizard to configure the location to publish the selected dashboard.



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



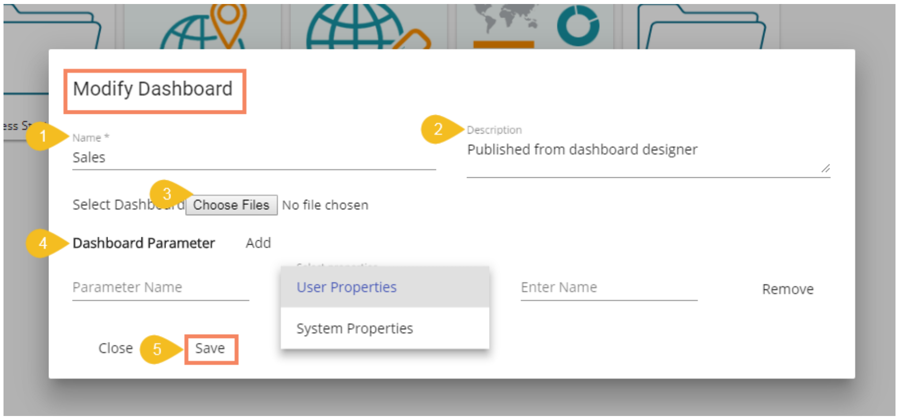
- **Options Assigned to a Published Dashboard**
  i) Navigate to the platform homepage
  ii) Open '**My Documents**' or '**Public Documents**'
  iii) Select a published dashboard on the My Documents or Public Documents
  iv) Use a right-click on the published dashboard to open various credited options in a context menu



8.4.1. Modifying a Dashboard

This section explains step by step process to modify an existing dashboard.

i) Select a dashboard
ii) Use the right-click on it to display various options
iii) Select the '**Modify Document**' option
iv) A pop-up window appears
v) Fill in the following information:
   a. **Name: Enter name for the dashboard**
   b. **Description:** Describe the dashboard (optional)
   c. **Select Dashboard:** Upload a dashboard from the local drive (The dashboard should be in a BVZ file format)
   d. **Dashboard Parameter:**
      i. Click the '**Add**' option to add a new dashboard parameter
      ii. Click the '**Remove**' option to remove the added dashboard parameter
vi) Click the '**Save**' option

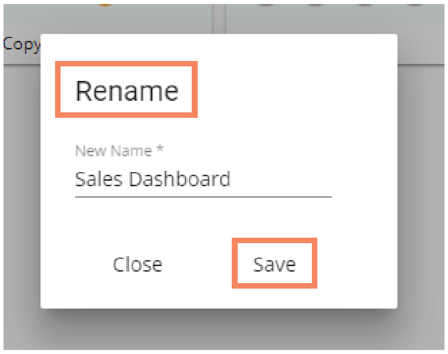


vii) A message appears to assure that the required data got updated

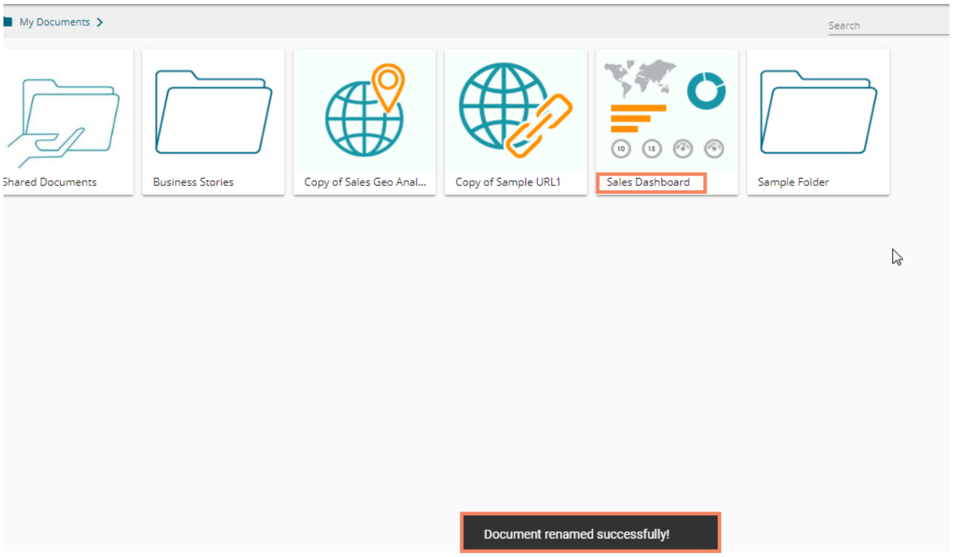
8.4.2. Renaming a Dashboard

Administrators can change the name of an existing dashboard

i) Select a dashboard
ii) Select the '**Rename**' option from the context menu
iii) A new window appears
iv) Enter a new name for the dashboard
v) Click '**Save**'



vi) A message appears to assure the action.
vii) The selected dashboard gets renamed

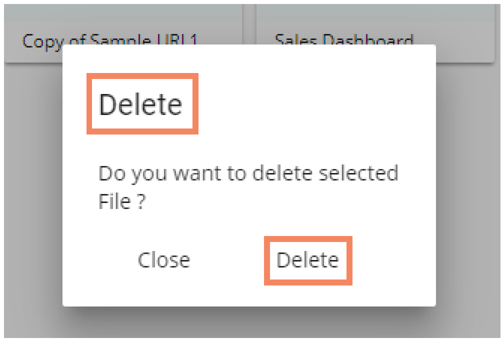


8.4.3. Deleting a Dashboard

Administrators can remove a dashboard by following the given steps:

i) Select a dashboard
ii) Select the '**Delete**' option from the context menu

iii) A new window pops-up to confirm the deletion
iv) Click the '**Delete**' button

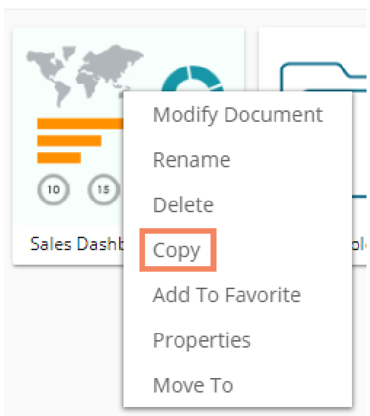


v) The selected dashboard gets deleted

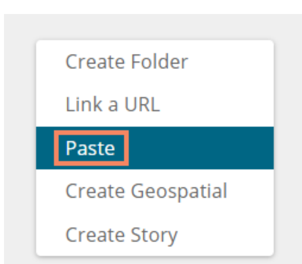
8.4.4. Copying and Moving a Dashboard

Administrators can copy an existing dashboard and paste it at any chosen place within My Documents or Public Documents of the platform.

i) Select a dashboard
ii) Select the '**Copy**' option from the context menu



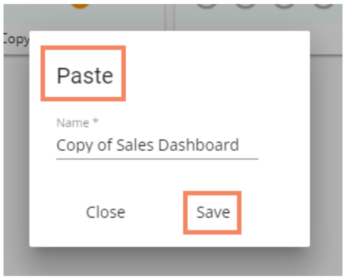
iii) Select another folder and open the menu with the credited options
Or
iv) Navigate to '**My Documents**' or '**Public Documents**' and right-click anywhere on the blank space
v) A context menu appears with the '**Paste**' option
vi) Select the '**Paste**' option



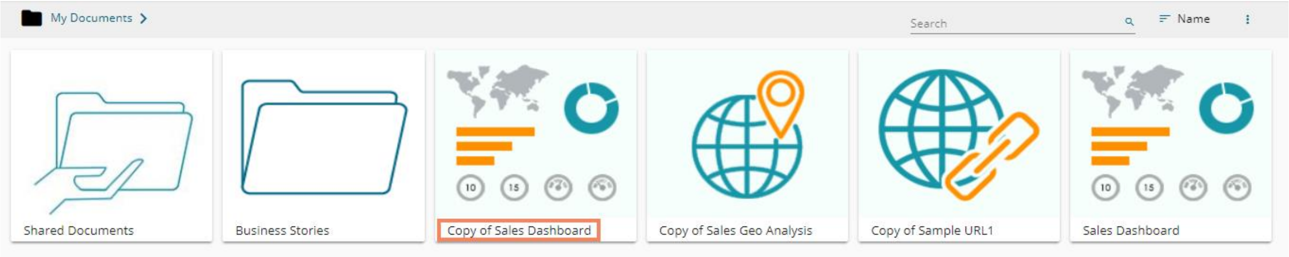
vii) A pop-up window appears

viii) The **Name** mentioned in the pop-up window shows prefix '**Copy of-**' before the original name of the dashboard (E.g., *Sales Dashboard* gets a new name *Copy of Sales Dashboard*)

ix) Click '**Save**'



x) The selected dashboard gets copied with a different name

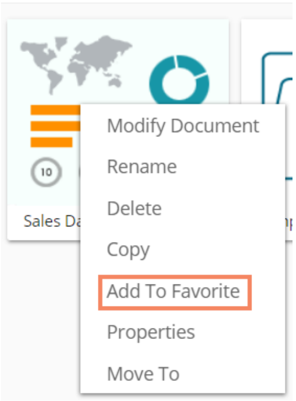


8.4.5. Adding/Removing a Dashboard to/from Favorites)

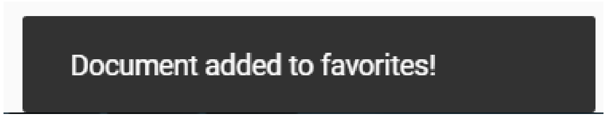
Administrators can add a dashboard to or remove it from the '**Favorites**' section

i) Select a dashboard

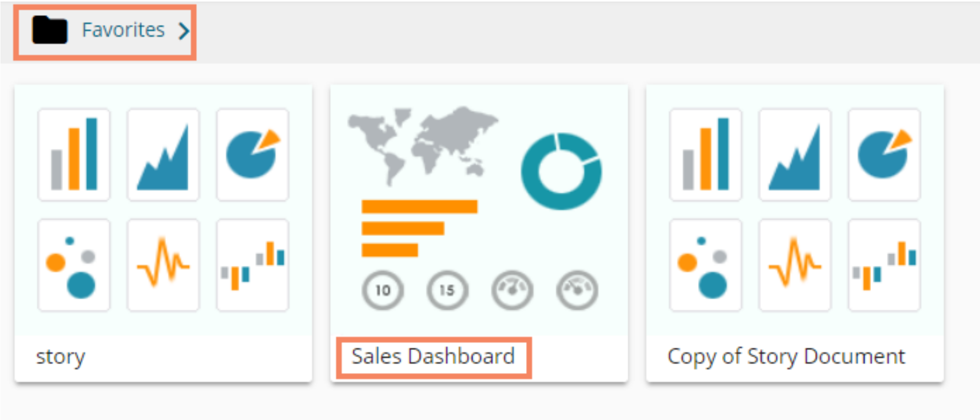
ii) Select the '**Add to Favorites**' option from the context menu



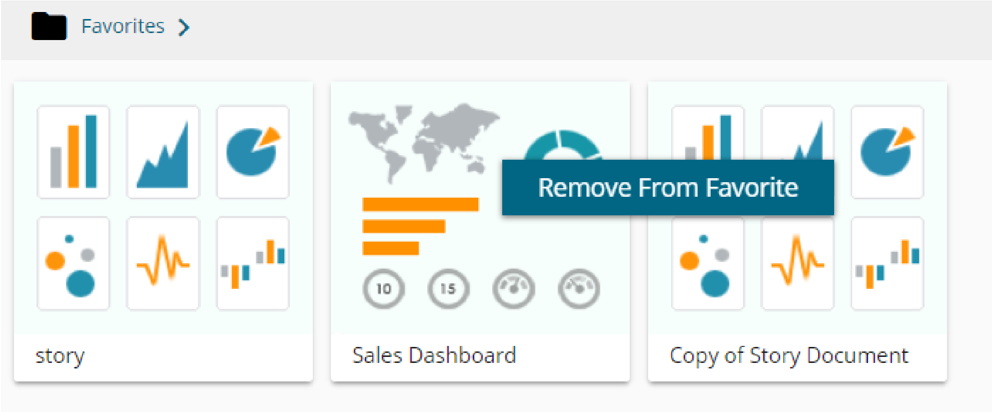
iii) A pop-up window appears with a message, "**Document added to favorites!**"



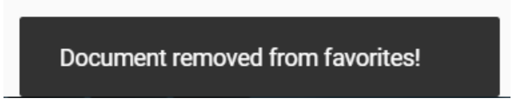
iv) The selected dashboard gets added to the ‘**Favorites**’ section



v) Open the ‘**Favorites**’ section
vi) Use right-click on the dashboard to get the remove option
vii) Click the ‘**Remove From Favorite**’ option



viii) A pop-up window appears with a message, “**Document removed successfully**!”

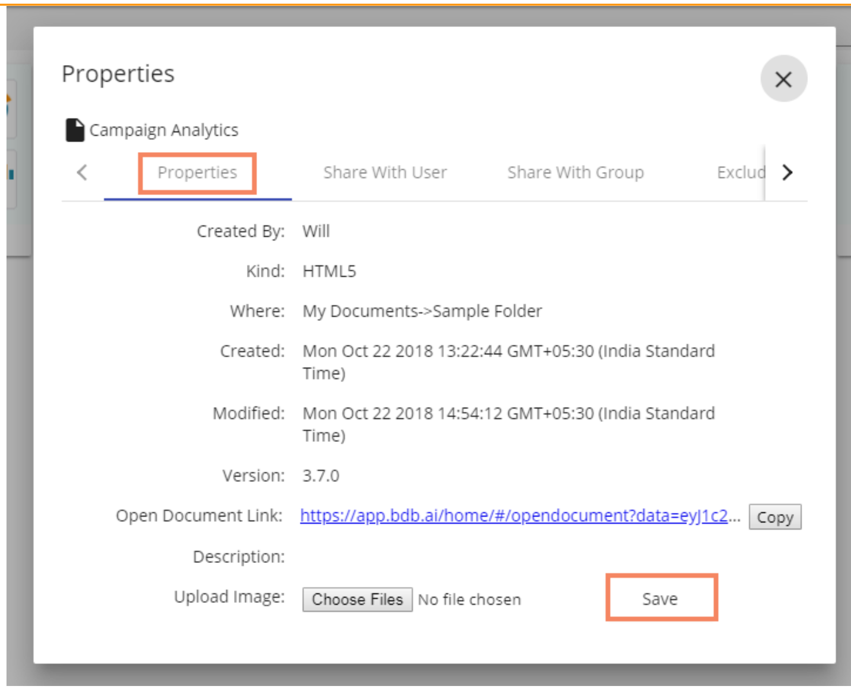


ix) The dashboard gets removed from the ‘**Favorites’**

8.4.6. Properties

Users can access the properties details of a selected dashboard by using this option.

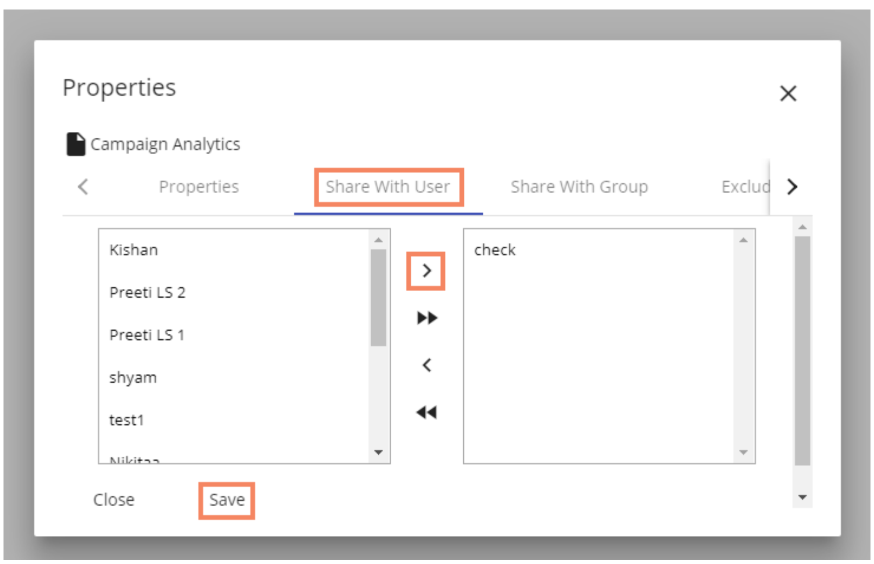
i) Select a dashboard.
ii) Select the ‘**Properties**’ option from the context menu
iii) The Properties window appears with four options
   a. **Properties:** Displays dashboard properties



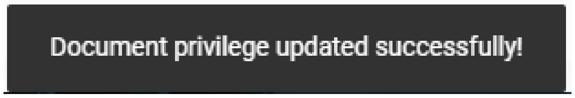
Note: Users can copy the document URL link by clicking the 'Copy' option given in the Properties window.

b. Share With User: The dashboard gets shared with the selected user(s).

1. Select '**Share With User'** on the Properties window
2. Select a user or all the users and move to the space given on the right-side
   (Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)
3. Click the '**Save**' option



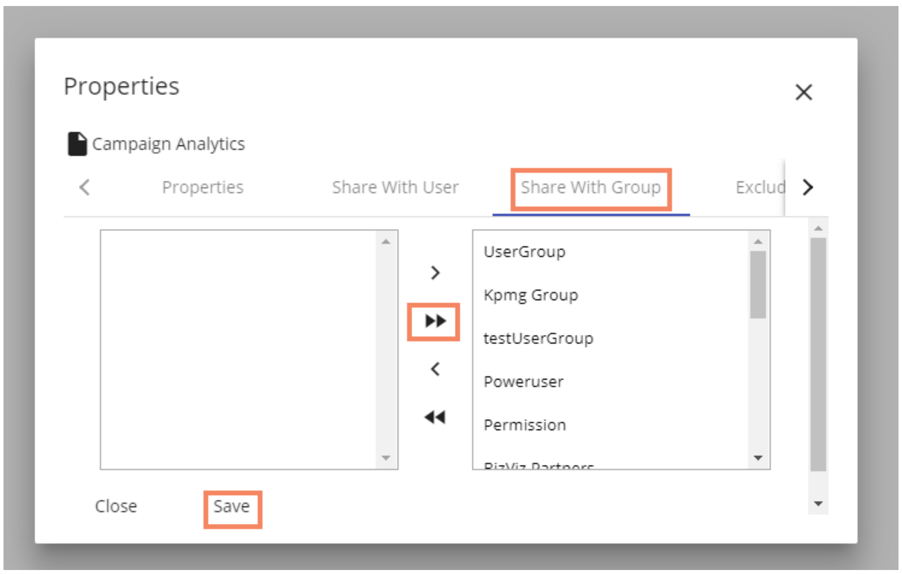
4. A success message appears stating that the document privilege is updated.



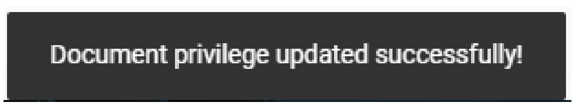
5. The dashboard gets shared with the selected user(s).

c. **Share With Group:** The dashboard gets shared with the selected group(s).

1. Select '**Share With Group**' on the Properties window
2. Select a group or all the groups and move to the space given on the right-side **(Use the single arrow icon to move only one group. Use the double arrows icon to move all the groups.)**
3. Click the '**Save**' option



4. A success message appears stating that the document privilege is updated



5. The dashboard gets shared with the selected group(s)

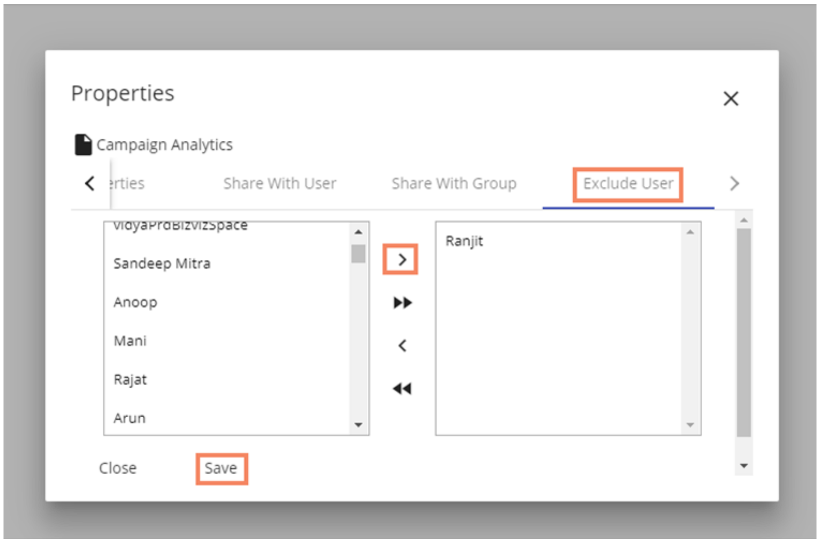
Note: If a dashboard document is shared using this option, then the selected users and user groups receive a view only copy.

d. Exclude User: The user gets excluded from the rights to access a dashboard**.**

1. Select the '**Exclude User'** option on the Properties window
2. Select a user or all the users and move to the space given on the right-side **(Use the single arrow icon to move only one user. Use the double arrows icon to**

move all the users.)

3. Click the '**Save**' option



4. A success message appears, and the document privilege gets updated to exclude the selected user(s)

8.4.7. Moving a Dashboard

Administrators can move a dashboard from one folder or document space (E.g. 'My Documents') to another folder or document space.

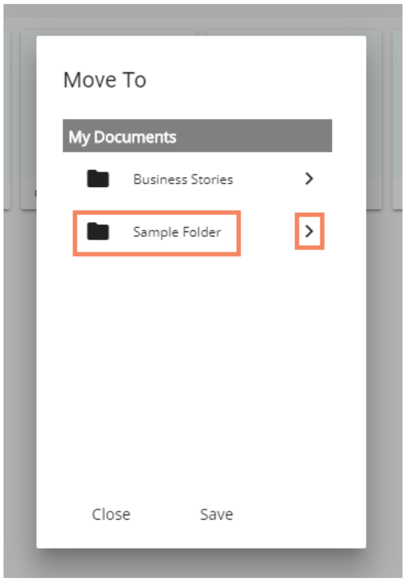
i) Select a dashboard.

ii) Select the '**Move To**' option from the context menu

iii) The '**Move To**' window appears displaying the available folders

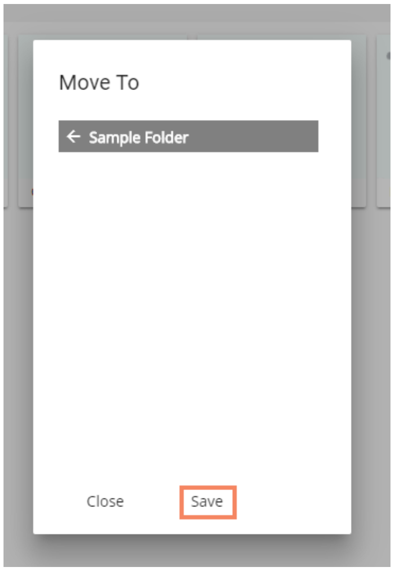
iv) Select a folder

v) Click the '**Move**' > icon



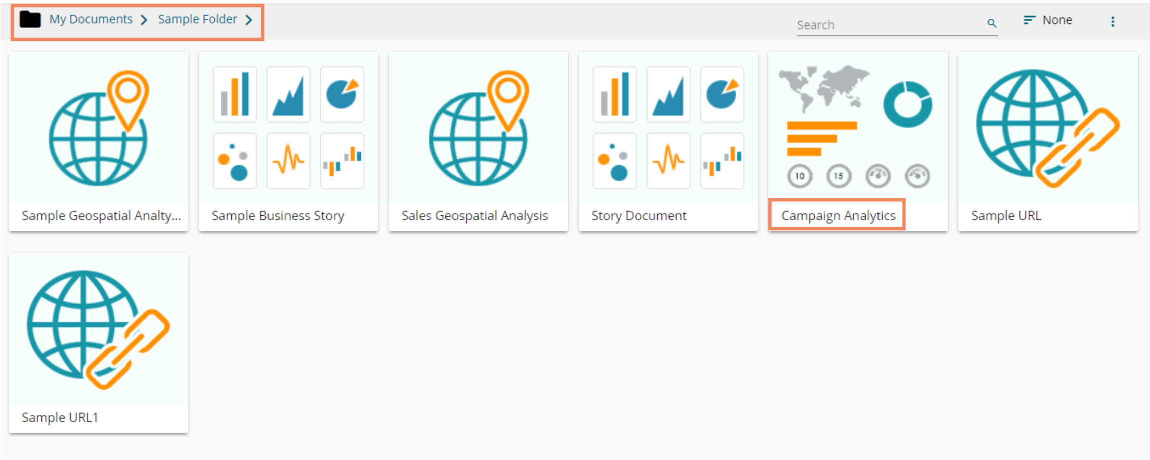
vi) Users get redirected to the next screen

vii) Click 'Save'



viii) A success message appears

ix) The dashboard gets moved to the selected space

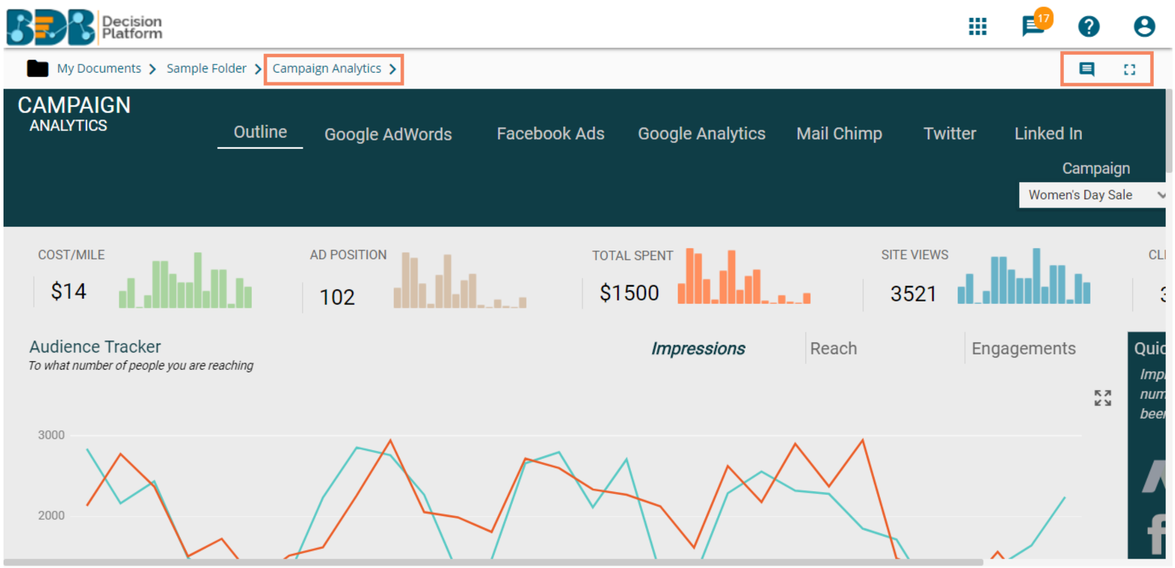


Note: To view a dashboard, use a click on the selected dashboard.

a. **The following options are provided on a dashboard screen to facilitate users:**

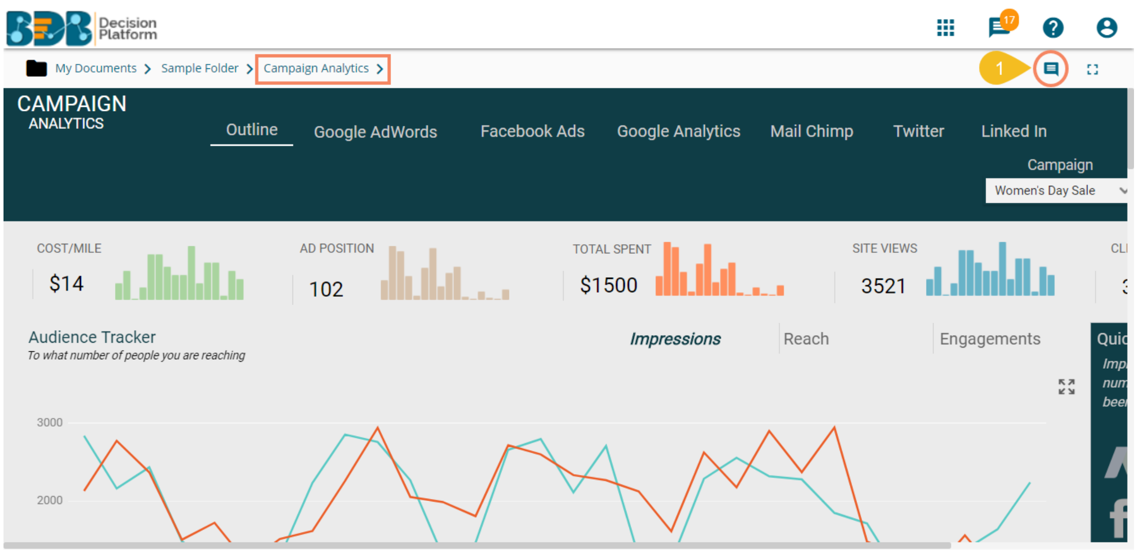
- **Comments**: Explain the dashboard or insert feedback comments.

- **Full Screen/ Reduce Size**: View the dashboard in full screen or reduce the dashboard screen size.

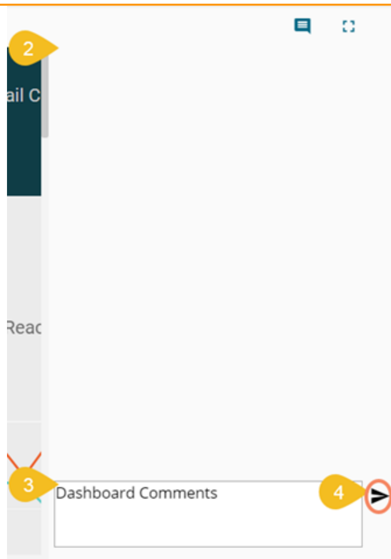


b. Steps to Insert a Comment

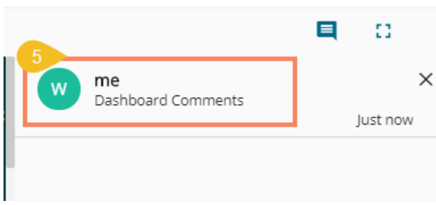
i) Click the '**Comments**' icon from the Dashboard Header panel.



ii) A new window 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) Displays the entered comment in the ‘**Comments**’ window.



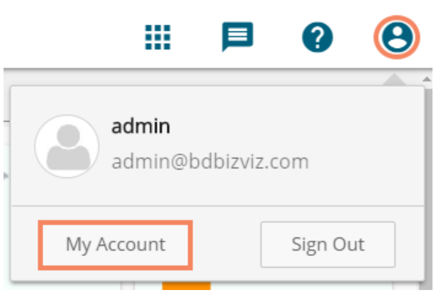
Note:

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

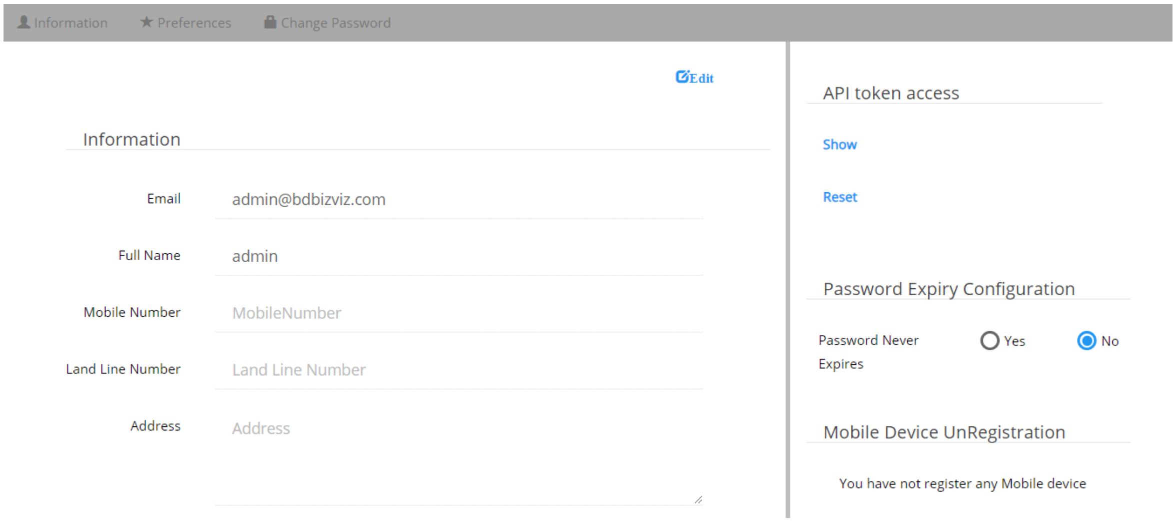
9. My Account

This section covers three options to manage settings for a user account.

i) Navigate to the Platform homepage
ii) Click the ‘**User**’ icon
iii) Details of the user display in a window
iv) Click the ‘**My Account**’ option



v) Users are directed to the following window:



Note: By clicking the user icon, the '**Information**' tab opens by default.

9.1. Information

This module displays personal information about the user.

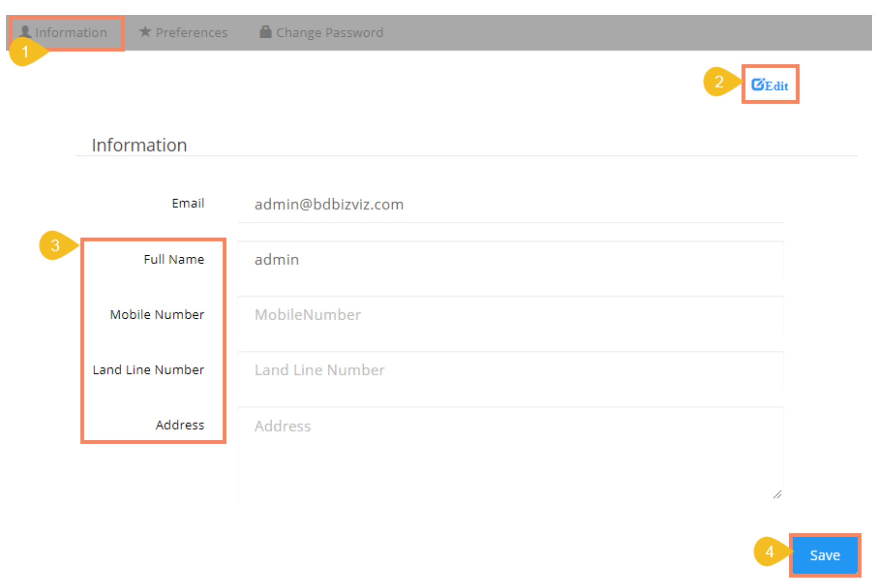
i) Click '**Information**' on the My Account menu row

ii) Click the 'Edit' option

iii) The following details display

- Email (not editable)
- Full Name
- Mobile Number
- Land Number
- Address

iv) The user can modify/change the required details except for the email and Click the '**Save**' option



v) The user information gets saved

Note:

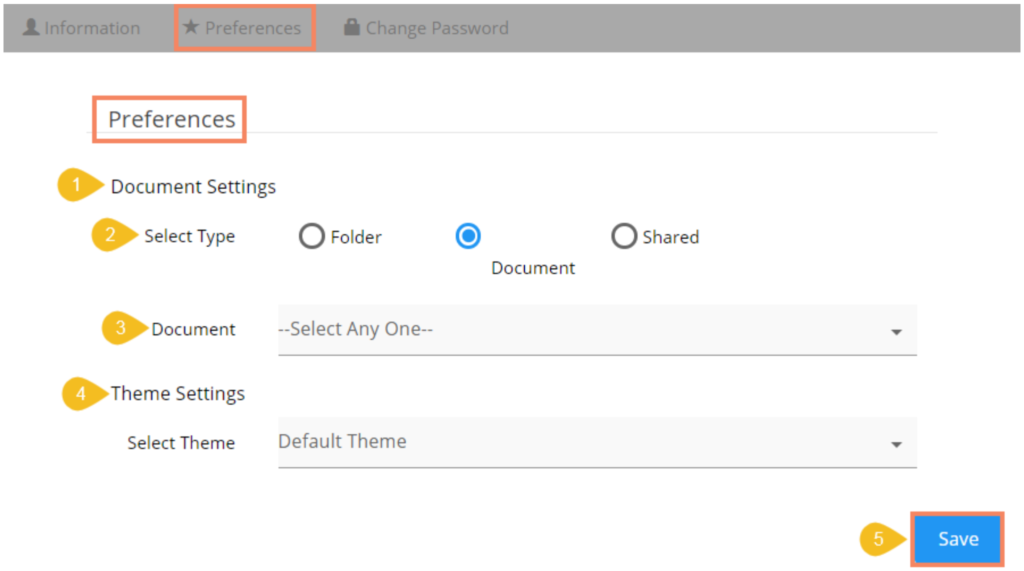
a. It is mandatory to click '**Edit**' option to enter/modify the user information.
   Steps to edit the Information:
   Click '**Edit**' -> Modify/ Change the details -> Click '**Save**'
b. Users can modify the other profile information except for the Email by using the '**Information**' tab.

9.2. Preferences

The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

i) Click '**Preferences**' on the My Account menu row
ii) The '**Document Settings**' options appear
iii) Use a radio button to select either of the choices out of: '**Folder**' or '**Document'**
iv) As per the selected choice, a drop-down menu is launched
v) Select a file or document from the respective drop-down menu
vi) Select a theme from the drop-down menu
vii) Click '**Save**'
viii) A pop-up message appears to assure that the preferences have been updated

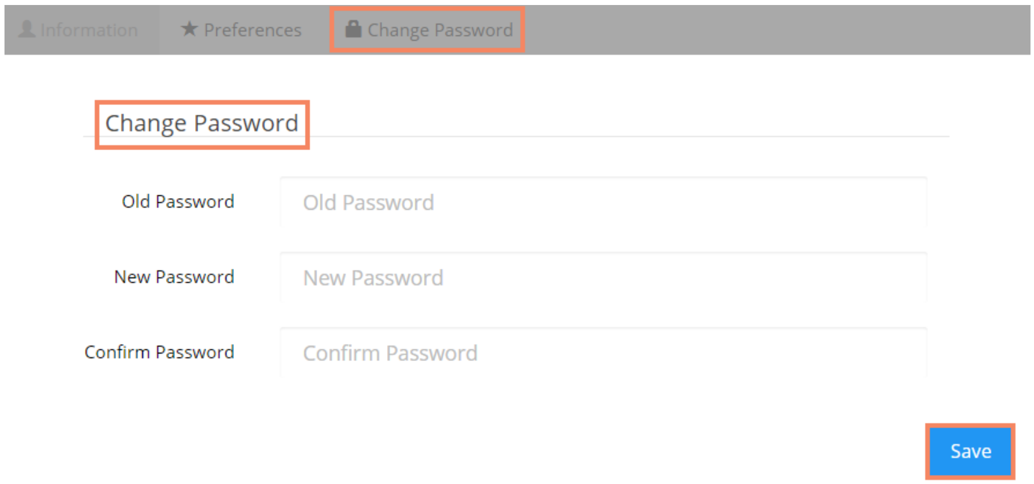


Note: Folders and documents are displayed to the users as per the set preferences by the administrator

9.3. Changing Password

The user can reset the password for his account using this segment.

i) Click '**Change Password**' on the My Account menu row.
ii) A new page opens.
iii) Enter '**Old Password**,' '**New Password,**' and '**Confirm Password**' (the newly set password).
iv) Click the '**Save**' option.



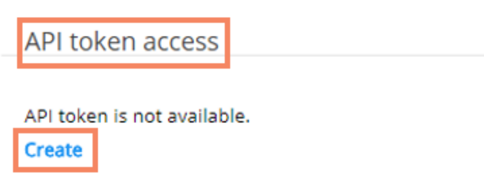
v) The password gets changed.

9.4. Other Related Options

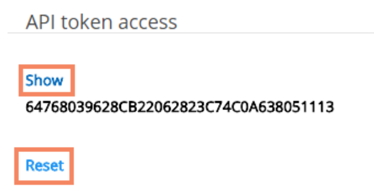
The API Token and Mobile Device access codes are displayed in the right pane of the '**My Account**' page. The Password Configuration can be accessed via the same page.

a. API Token

- It is an authentication token that is used to expose document as an open document.
- API token can be accessed and reset using the '**My Account**' option.
  a) Click the '**Create**' option

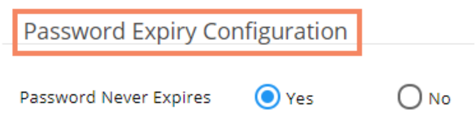


  b) A new API token is created
  c) The following details appear after creating an API token
     a. Show: By clicking this option the API token is displayed
     b. Reset: By clicking this option the API token gets reset



b. Password Expiry Configuration

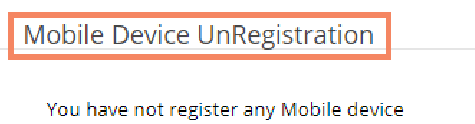
- Password expiry limit can be configured via this option.
- Users need to select either of the choices for the '**Password Never Expires**' option out of: '**Yes**' or '**No**' and click the '**Save**' option



Note: By selecting 'Yes' via the password expiry configuration section, the user's password will never get expired.

c. Mobile Device Deregistration

A user can access only one mobile app at a time, to configure another mobile device he must deregister the registered mobile app. The 'Mobile Device UnRegisration' option helps the user to deregister the registered mobile device.



Note: Users need to register the mobile device through the mobile app.

10. Securing Platform: Authentication

BizViz Platform is provided with some authentication features to keep it secure all the time.

10.1. Enterprise

Enterprise authentication is the default authentication method for the BizViz platform; it is automatically enabled when you first install the system - it cannot be disabled. The BizViz platform maintains user and group-specific information within its database while adding or managing users and groups. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BizViz platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server. You do not have to configure or enable Enterprise authentication. However, users can opt for another authentication option to meet their organization's security requirements.

10.2. Windows AD

The Windows AD security enables you to map user accounts and groups from your AD 2008 user database to the BizViz platform. It also allows the system to verify all logged on requests that specify AD Authentication. Users are authenticated against the AD user database and have their membership in a mapped AD group verified before the BizViz platform grants them an active session. You can use the plug-in to configure updates for the imported AD groups.

10.3. Clarity

Security in CA Clarity PPM has two aspects: i) securing the application and, ii) securing its data. The security mechanism and control are the same for both.

a. **Securing the Application**: It verifies that the correct users have access to the appropriate application functionality. This type of clarity security controls user access and capabilities.
   E.g., An administrator gets more rights than an end user.

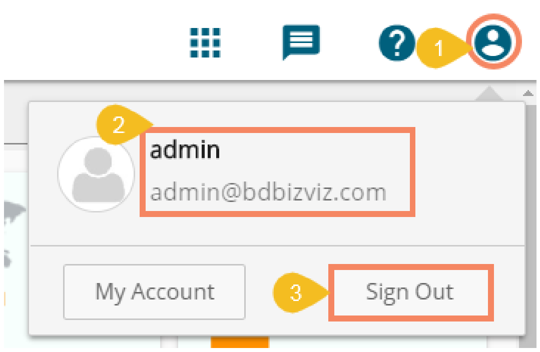
b. **Securing the Application Data:** It verifies that resources have access only to the assigned data.
   E.g., everybody should be able to see the platform page, but with their assigned projects and functionalities.

Note: Users can change the authentication options can through the administration module.

11. Signing Out

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

i) Click the '**User**' icon on the Platform home page.
ii) The user details appear.
iii) Click the '**Sign Out**' option.



iv) Users can successfully sign out from the **BDB Platform.**

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