

Business Story R-3.7



Contents

1.	Abo	ut thi	is Guide	4
	1.1.	Doc	ument History	4
	1.2.	Ove	rview	4
	1.3.	Targ	et Audience	4
2.	Intro	oduci	ng BDB Story	4
	2.1.	Intro	oduction	4
	2.2.	Prer	equisites and Supported Devices	4
3.	Gett	ting S	tarted with BDB Story	5
	3.1.	Forg	ot Password Option	7
4.	Crea	ating	a Business Story	9
	4.1.	Sele	cting a Data Source	9
	4.2.	Desi	gning a New View	10
	4.2.	1.	Dimension Profiling	11
	4.2.2	2.	Datastore Merge at View Level	13
	4.2.3	3.	Measure Summary	17
	4.2.4	4.	Series Properties	18
	4.2.	5.	Formula Field Editor	21
	4.3.	Stor	yboard	25
	4.3.	1.	Data Search Bar (NLQ)	26
	4.3.	2.	Shared Views	30
	4.3.	3.	Alert Center	30
	4.3.4	4.	Change Theme	34
	4.3.	5.	Export	35
	4.3.	6.	Options Assigned to a View	37
	4.4.	Data	a Interactions/Exploration	39
	4.4.		Automatic Data Drill	
	4.4.		Actions	
	4.4.		Order by and Limit	
	4.4.4		Manual Sort	
	4.5.		ing a Slicer	
	4.6.		lying Filters	
	4.6.		View Specific Filter	
	4.6.		Global Filter	
	4.6.	3.	Measure Filter	59



	4.6.4	4. Custom View Filter	62
	4.6.5	5. Like and Not Like Operation in Filter	64
	4.7.	Comments	65
5.	Chai	rts & Properties	67
	5.1.	Mixed Chart	67
	5.2.	Column Stack Chart	70
	5.3.	Line Chart	73
	5.4.	Bar Chart	77
	5.5.	Bubble Chart	79
	5.6.	Area Chart	81
	5.7.	Pie Chart	83
	5.8.	Scatter Plot Chart	84
	5.9.	TreeMap Chart	85
	5.10.	Semi Gauge Chart	86
	5.11.	KPI Tile	88
	5.12.	KPI Comparative Tile	88
	5.13.	KPI Sparkline	92
	5.14.	Map Chart	93
	5.15.	Data Grid	95
	5.16.	Metric Summary	96
	5.17.	R Server Visual	96
	5.18.	Pareto Chart	97
6.	Opti	ions	98
	6.1.	Modifying a Document	99
	6.2.	Renaming a Story Document	99
	6.3.	Deleting a Business Story	100
	6.4.	Copying and Moving a Business Story	100
	6.5.	Adding/Removing a Story Document to/from Favorites	102
	6.6.	Properties	104
	6.7.	Move To	107
7.	Sign	ing Out	109



1. About this Guide

1.1. Document History

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

Product Version	Date (Release date)	Description
BizViz Business Story 2.0	February 21 st , 2016	The first release of the document
BizViz Business Story 2.1	May 25 th , 2016	Updated document
BizViz Business Story 2.5	November 9 th , 2016	Updated document
BizViz Business Story 2.5.3	March 16 th , 2017	Updated document
BizViz Business Story 3.0	August 31 st , 2017	Updated document
BizViz Business Story 3.0	October 26 th , 2017	Modified document
BizViz Business Story 3.2	February 2 nd , 2018	Updated document
BizViz Business Story 3.5	April 15 ^{th,} 2018	Updated document
BizViz Business Story 3.5.1	July 5 th , 2018	Updated document
BizViz Business Story 3.6	August 20 th , 2018	Updated document
BizViz Business Story 3.7	October 10 th , 2018	Updated document

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

1.2. Overview

This guide covers:

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

1.3. Target Audience

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

2. Introducing BDB Story

2.1. Introduction

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

2.2. Prerequisites and Supported Devices

- \circ $\,$ A browser that supports HTML5 $\,$
- Operating System: Windows 7



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

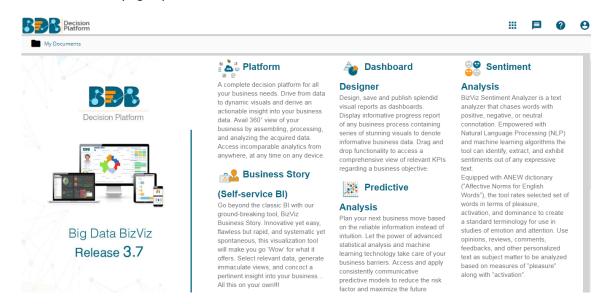
3. Getting Started with BDB Story

This section covers how to access the Story using the BDB Platform.

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

Welcome	
to BDB Decision platform	
Big Data Pipeline Framework	Decision Platform
Dashboard Designer	
ETL (Self-Service Data Preparation)	Email * user@bdb.ai
Geospatial Analysis (Location	Password *
Intelligence)	
Predictive and Prescriptive Workbench	Auth Type Enterprise
• Play (Beta Release)	Forgot your password ?
Self-Service BI (Business Story)	Continue
Social Media Browser	
Sentiment Analysis	
• Survey	
	Copyright © 2015-2018 BDB (BizViz Technologies Pvt Ltd)

iv) BDB Platform homepage opens.

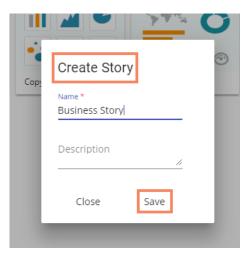


- v) Click on the 'App' menu button
- vi) Select the 'Story' plugin from the app menu.





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



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

My Documents 🗙					*
					👫 Order By: Name
	BI Story 🌣	Business Story 🗢	Published Das 🌣	Sample Folder	

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



space to create a story document.

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

My Documents 🕻	
Create Folder	
Link a URL	
Create Geospatial	
Create Story	- h

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

3.1. Forgot Password Option

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

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

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

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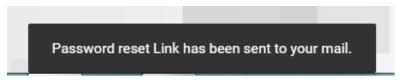
- iii) Users get redirected to a new window
- iv) Provide the email id that is registered with BDB to send the reset password link
- v) Click the 'Continue' option





Having trouble signing in? To reset your password, enter the email address you use to sign in to BizViz. This can be your email address associated with your account. Email * Sign in

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



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



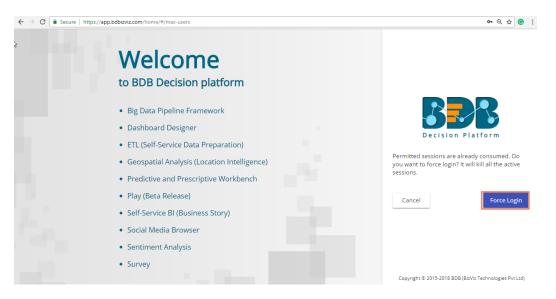
You've confirmed own	ership of the BizViz
Assessment Desert view in	
Account, Reset your p	assword now to regain
access. New Password *	
•••••	
Confirm New Password *	
••••••	

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

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



4. Creating a Business Story

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

4.1. Selecting a Data Source

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

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

My Documents > Business Story >			Ξ	0
				4
	Data Store	×		
	sam	<u>(</u>		
	WS 15 sample	~		
	WS sample	~		
	SampleMergedDataStores	~		
	Sample Flat File Data Store	~		
	Sample Data Store	\odot		
	sampleBS	~		
	sampletest28ds	4		

4.2. Designing a New View

This page explains the steps to create a new view.

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

My Documents >	Business Story ゝ							0
Sample Data Store	Summar	/ /	Dimensions / Measures [Drag and Drop Dimension or Measure Here]	Slicer [Drag and Drop Dimension Here]	Chart	Propertie	es 💉	•
Abc Name Abc Gender Abc Source Abc ReferralOf	i							¢\$ ▼ ←
Abc Designation Abc Team Abc PreviousOrganis	i i i		∽^`,		•	* :		
Abc Skills Abc Month	i i	[Select Dime	ension or Measure to Visualize D	Data]	**			
Abc JoinningStatus Abc CurrentStatus ALL DATA STORE	$\frac{i}{f_x}$	-	chart from right hand side pane	-	Σ	B _R		

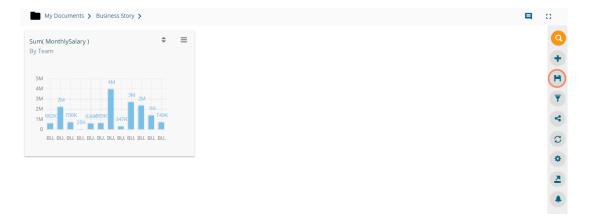
- ii) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).
- iii) A graphical view (based on the selected dimensions/measures) gets created and displayed instantly. (The mixed chart type opens by default)

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

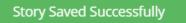


My Documents > Business	Story >					0
😂 Sample Data Store	Sum(MonthlySalary) By Team		Slicer [Drag and Drop	Chart	Properties	P
Search Dimensions / Measures Q	Summary	↔ Team 🗙 123 Sum(Mon : 🗙	Dimension Here]			
Abc Comments i						08
Abc CandidateId i	5M			=		T
Abc Year i						
Abc ExpectedJoinnin	4M	4M				-
Abc BillStartDate i						
123 PreviousCTC	ЗМ	3M			≡%	
123 OfferedCTC	2M	211				
123 ExperiencePerCTC	2M		1M	≡% &√	🔆 📑	
123 MonthlySalary	1M756	638 BU 13	749K			
123 UsdBilling		Sum(MonthlySalary) 637,501			Sk 📫	
123 CurrentMonthlyPayment	0 BU1 BU10 BU1	BU12 BU13 BU2 BU4 BU5 BU6 BU7	BUS BU9			
ALL DATA STORE f_r	22.0010 001	11.1 11.1 11.1 10.4 00.5 00.0 00.7				

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



vii) A success message appears to convey that the recent story has been saved.



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

4.2.1. Dimension Profiling

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

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



🥃 Sample Data Store									
Search Dimensions / Measures ${f Q}$									
Abc Name	i								
Abc Gender	i								
Abc Source	i								
Abc ReferralOf	i								
Abc Designation	(i)								
Abc Team	i								
Abc PreviousOrganis	i								
Abc Skills	i								
Abc Month	i								
Abc JoinningStatus	i								
Abc CurrentStatus	i								
ALL DATA STORE f_x									

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

Data Profile	×
Count(Designation)	
By Designation	
	MOVE TO DESIGN
ige chart i on right i	

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

Sample Data Store	Count(Designation) By Designation	Cha	art Proper	rties
arch Dimensions / Measu		Anno Designation X 123 Count(De 1 X	i II	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
• Gender				
 Source 	i ANS Consultant Analytics Manager Associate OA Engineer Associate Software Engineer Big Data Developer Business Analyst Data Architect			
 ReferralOf 	i DevOps Engineer DevOps Mahager		4	
 Designation 	Lead Software Engineer	7		
c Team	i Operation Analyst Project Manager OA Architect OA Engineer	12 4 CONTRACTOR OF	▶ =%	
PreviousOrganis	i OA Lead OA Manager RFP Analyst Senior Architect			
⊳ Skills	i Senior Development Manager Senior OA Engineer	24	»	
Month	Senior Software Engineer Software Developer Software Engineer Solution Specialist	29		
 JoinningStatus 	Sr Bi Déveloper Sr Big Data Developer Sr QA Engineer Sr Softwaré Developer Technical Architect	² 3 ₄ 7		
 CurrentStatus 	i IOS Developer	1 10 20 30 40 50 60 70 80		



- V) Users can apply the various modification options to the view from the Design page (E.g., The below given image displays the modified view after applying a view filter and applying them in the ascending order).
 - **Dimensions / Measures** Chart Count(Designation) Properties By Designation Designation 🗙 123 Count(De... 🛔 🗶 Summary ☆ **General Settings** Style Cluster Associate Software Engineer Base Type Plain Lead QA Enginee \$ 0(1 Order Lead Software Engineer Senior Software Engineer Order By count(Designation) QA Architect 0 Limit Associate QA Engineer Exclude from QA Enginee Global Filter Senior QA Enginee Show Data Label 0 5 10 15 20 25 Enable
- vi) Click the 'Save' 🛄 option from the Design New page.

vii) The selected view gets saved to the Storyboard a success message appears to convey the same viii) Click the 'Save' option provided on the Storyboard to save the recent updates in the story.

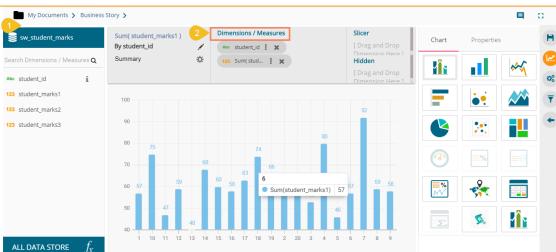
um(MonthlySalary)	÷ :		unt(Designation)			\$ ≡	=		
y Team		Ву	Designation						
5M 4M			Associate Softw. 📑 1 .ead QA Engine. 📑 1						(
4M 3M 2M 3M 2M		- L	ead Software E. 📒 1 ienior Software. 💻 2						
2M	1M 749K	A	QA Architect	4					
1M 662K 756K 6381665K -347K		s	QA Engineer enior QA Engin.		18	3			
BU.	BU. BU.		0	10	20	30			

4.2.2. Datastore Merge at View Level

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

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





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

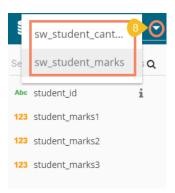
sw_student_marks	5	Sum(student_marks1) By student_id	Dimensions / Measures Arx. student id : *	Slicer [Drag and
Search Dimensions / Me	asures Q	Summary	Data Store	× n
Abc student_id	i		4 sw	and Q Ision
123 student_marks1		100		
123 student_marks2			Sw_NLP 🗸	ų
123 student_marks3		90	Sw_nlp_hiring_data 🗸 🗸	ų
		80 75	Sw_student library 🗸	r
		70	Sw_student_total marks 🗸 🗸	p
		60 - 57 - 59	Sw_nlp_hiring_data 1 🗸 🗸	5 9
		50 47	sw_student_canteen	P V
			sw_student_marks	Y
3 ALL DATA STORE	f_x	40	13 14 15 16 17 18 19 2 20 3 4	5 6 7 8

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

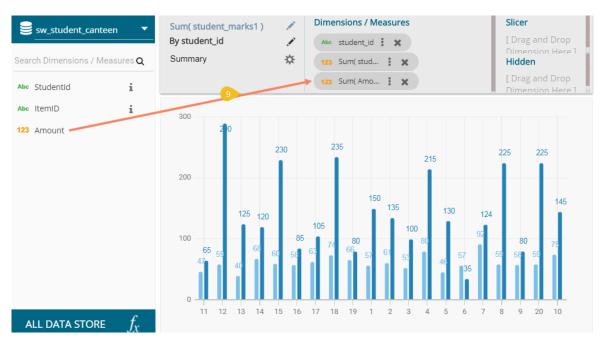
	Ale student id	Drag and I
	sw_student_canteen	and I
	Select the related field and click on Merge to continue	t.
6	Relation Studentid	·
59		59
4		



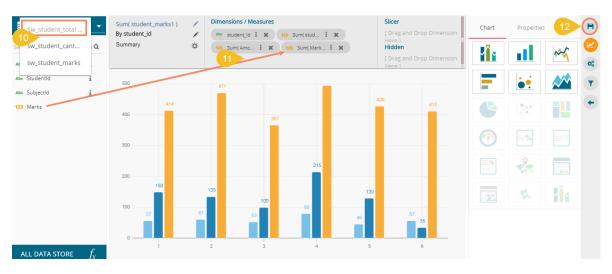
viii) The selected datastore gets added to the datastore space, and a drop-down icon appears to choose any one datastore out of the given choices.



ix) Drag and drop a measure from the newly added Data Store to create a comparative view



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



xiii) The view gets saved on the storyboard.



xiv) Click the 'Save' icon from the storyboard to save the entire story.

$ \begin{array}{c} $	My Documents > Business Story >				E
$\begin{array}{cccccccccccccccccccccccccccccccccccc$		\$ ≡			
200 150 132 100 51 130 100 55 535 00 460 535 00 100 57 65 460 535 00 100 57 65 100 55 100 55 100 100 100 100 100 100	400 411 367 4 5 418	412			
	200 150 135 100 e0 40 100 571 61 53 e0 40 0				
	1 2 3 7 3				

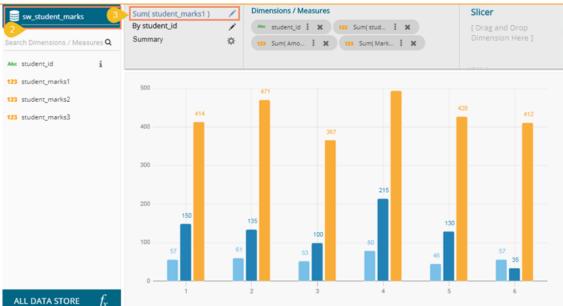
Note:

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



- 2) All the merged data store will be accessible for that view even in the 'Edit' mode.
- 3) Users can change the title of a Saved View title by opening the Design New page of the view via the 'Edit' option.



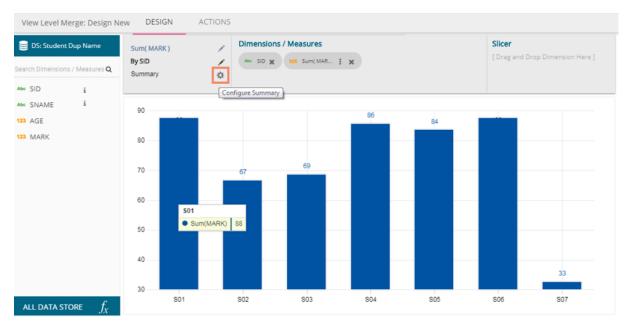


b. The Merged Data Stores do not get saved in the 'All Data Store' menu, so to add the subsequent new view based on merged data stores into the same business story the users need to merge the data stores yet again.

4.2.3. Measure Summary

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

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



- iv) A window pops-up.
- v) Set the following details:
 - a) Show Summary: Enable or disable the summary option
 - b) Measure: Select a measure from the drop-down menu
 - c) Aggregation: Select an aggregation type from the drop-down menu
 - d) Format Type: Select a format type from the drop-down menu



- e) Currency Type: Select a currency symbol from the available choices
- f) Precision: Select a number to up to what the precision value can be displayed

vi) Click the 'DONE' option.

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

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



4.2.4. Series Properties

The users can configure and modify various measure related properties through the Series Properties window.

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



Dimensions /	Measur	es		
Abc Gender	: x	123 Sum(Expe	: ×	123 Sum(Expe 🚺 🗙

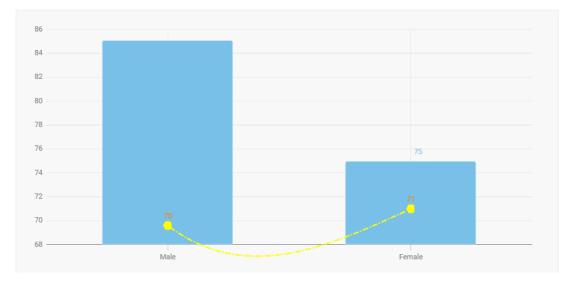
- iii) Users can set the following properties from a pop-up window for a mixed chart with two measures dragged on the workspace:
 - a. Aggregation: Select an aggregation option from the drop-down menu (the given choices are: Sum, Min, Max, Variance, Mean, Standard Deviation, Cumulative Sum)
 - b. Display Name: Enter the title for the measure to be displayed in the data label
 - c. Series Type: Choose a series type format for the selected measure
 - d. Point Shape: Select a point shape from the drop-down menu (the given choices are: Cross, Cube, Hexagon, Point, Quad, Star, Triangle)
 - e. Line Type: Select a line type from the drop-down menu (the given choices are: Straight, Dot, Dash, Dash1)
 - f. Axis: Select an axis out of the given choices (users need to enable 'Secondary Value Axis' to get 'Axis' option in the Series Properties window)
 - g. Color: Select the color of the chart presentation from the given menu
 - h. Data Label Color: Choose a color for data label from the given menu
 - i. Data Label Position: Select a position to display the data label (the given choices are: Top, Middle, Bottom)
 - j. Filter Options: Click the 'Filter' icon to access the dimensions and measures to apply filter condition on the displayed data.
- iv) Click the 'APPLY' option.

Note: The below given image displays Series Properties for the Mixed chart type secondary axis.

Series Prope Experience	rties:	×
Aggregation	Sum	•
Display Name		
Series Type	h. 🔎	
Point Shape	Hexagon	•
Line Type	Dash1	•
Axis	ЕЭ	
Color	#151500	
Data Label Colo	rff8000	_
Data Label Position	Тор	· ·
Filter Options	τ	
	CANCEL	APPLY



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



Note:

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

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

Sum(salary)	~
By Team	1
Summary	☆

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

lcon	Name	Description
+	Back	Redirects the users on the storyboard page
T	View Filter	Opens the view specific filter panel
	Design	Redirects the users to the Design workspace
O _S	Actions	Redirects the users to the Actions tab
H	Save View	Saves and adds the newly designed view to the Storyboard
	Comments	Allows users to describe the story
Cl or #	Full Screen/Reduce Size	Displays the full-screen view OR Reduces the display of the screen

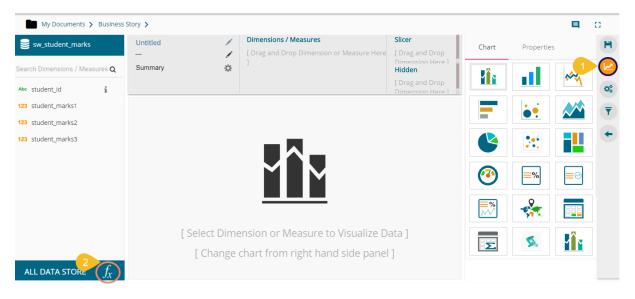


4.2.5. Formula Field Editor

A formula field editor has been provided on the Design New page to create and add a calculated field in the selected datastore. The Formula Field Editor window offers two options 'Formula' and 'Range' for users. Users can access the icon for Formula Field from the 'DESIGN' tab beside the 'ALL DATA STORE' option.

4.2.5.1. Creating a Formula

- i) Navigate to the 'DESIGN' tab after selecting a data store to design a new view.
- ii) Click the 'Formula Field Editor' f_{x} icon.



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

	🖍 🛛 [Drag and Drop	Dimension or Measu	ure Here [Drag and Drop	Char
3 Create Formul	а			* 1
			Fields	
FORMULA	RANGE		student_id	
	Leval	Save as	student_marks1 student_marks2	
Formula Name *	Record Level	 Measure 	✓ student_marks3	
			Operators	
Formula Expression			Equal to	
i officiale expression			Not Equal to	
1			Greater than Greater than or equal to	
			Less than	115
			Less than or equal to	= ?
			Functions	8.8
			toLowerCase	18
			toUpperCase	
			substring trim	2

- iv) Users need to provide the following information to create a formula field:
 - a. Navigate to the 'FORMULA' tab (opens by default)
 - b. Formula Name: Give a title to the formula field
 - c. Type: Select an option from the drop-down menu to decide on the type of the Formula Field
 - i. Dimension
 - ii. Measure

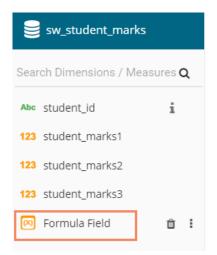


- d. Fields: All fields from the selected data store list in this window. Users can select the required fields by tapping on them.
- e. Operators: All the available operations list in this window. Users can select the required operations to add to complete the formula.
- f. Functions: All the available functions list in this window. Users can select the required functions to apply it to the chosen field.
- v) Click the 'SAVE' option to save the formula.

E.g. The following image displays a new formula field 'Formula Field' created using the student_marks1, student_marks2, and student_marks3 fields from the data store. The * (multiplication) and / (division) operations are used to create the current Formula Expression.

Create Formula	×
FORMULA RANGE 2 Formula Name * 3 Level 4 Save as Formula Field Record Level • Measure	Fields student_id student_marks1 student_marks2 student_marks3 Operators
<pre>Formula Expression [student_marks1]*[student_marks2]/[student_marks3]</pre>	/ % + String Concatenation Assignment Functions
	tan sin sqrt abs round if else

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



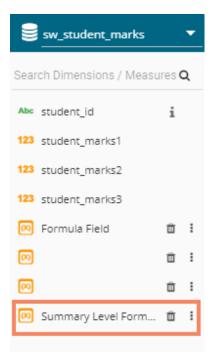
Note: Users can also create a formula field choosing 'Summary Level' as a level option from the formula field editor window.

- 1) Navigate to the 'Formula' tab
- 2) Choose 'Summary Level' from the Level drop-down menu
- 3) Select a 'Save as' option
- 4) Enter a Formula Expression using the Fields and Operators
- 5) Click the 'SAVE' option



	Abc student_id	X 123 Sum(stud	×	[Drag and Drop Dimension Here
Create Form	ula			×
FORMULA Formula Name * Summary Level Forr		evel Summary Level 🛛 🔻	Save as Measure 🗸	Fields student_marks1 student_marks2 student_marks3 @Formula Field @ @undefined
Formula Expression	n rksl]*[student_n	arks2]		Operators * / % + -
7				CANCEL SAVE

6) A new Formula Field gets created and added to the list of dimension and measure

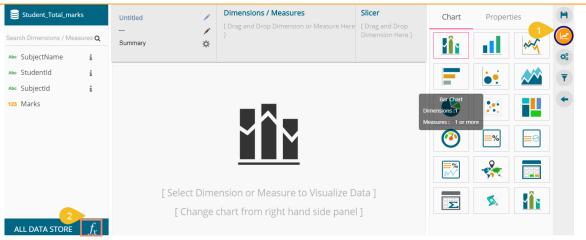


4.2.5.2. Creating a Range

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

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





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

n 3 Create Formu	[Drag and Drop Dimension or I Ila	Measure Here] [Drag and Drop Dimension
FORMULA 4	RANGE	6 Measure Marks	
8 Name A B	From 91 75	To 100 90	÷
7 ADD ROW			CANCEL SAVE

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

Student_Total_marks							
Search Dimensions / Meas	ures Q						
Abc SubjectName	i						
Abc StudentId	i						
Abc SubjectId	i						
10 Marks							
🕅 Grade	÷						

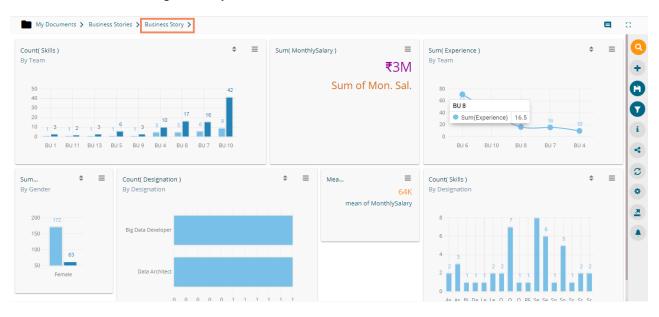


Note: If users move to storyboard without saving the designed view a pop-up window appears to confirm whether the changes for the views need to be saved to the story or not. Click 'YES' using the message window to save the view changes.



4.3. Storyboard

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



lcon	Name	Description
9	Data Search Bar	Searches the queried data from the selected data store
+	Create New View	Redirects users to the Design workspace to design a new view
Θ	Save Story	Saves story with all the added views
T	Global Filter	Filters data from the multiple views saved on the storyboard
i	Applied Filter	Displays the list of applied filters on the selected story
4	Shared Views	Redirects users to select and add the available shared view(s) to the storyboard
C	Refresh Views	Refreshes the story with all the existing views
•	Change Theme	Displays various themes to be applied to the story
	Export	Exports the story as CSV, XLSX, PDF, PPT format



	Alert Center	Redirects to schedule an alert for the story
Ę	Comments	Redirects to add a description about the story
C or #	Full Screen/Reduce Size	Displays the Storyboard in the full-screen or reduces the storyboard screen

4.3.1. Data Search Bar (NLQ)

The AI-based **Search** helps users to quest for specific data all through the selected datastore and instantly displays the query results. The users can further save these search results to the current storyboard to instantly build an insightful data story.

- i) Navigate to the Storyboard (At least one view needs to be created using the Design tab to access the Storyboard).
- ii) Click the 'Data Search' bar.



iii) The Data Search page opens with the following icons:

Icons	Name	Function
Q	Search	Searches the inserted query from the selected data store
()))	Select Data Store	Prompts users to select Sample Data Store or choose from the list of Data Stores
×	Close NLP Dialogue	Closes the Data Search window

iv) Users get autosuggestions when they start typing a query in the Data Search bar.

My Documents > Business Stor	ies 🗲 Busines	s Story	>				0
Count(Designation) By Team	\$	=					Q +
mean of the Month			×	Q	Sample Data Store	()))	×
mean of the Month							
mean of the Monthvalue							
mean of the Monthlysalary							
	[Conv	vers	ational A	nalyt	ics: Ask questions about your data]		



- After typing your specific query click the 'Search' \mathbf{Q} icon. V)
- The search result instantly reflects beneath the search bar. vi)

My Documents > Business Stories >	Busines	s Story	•						0
Count(Designation) By Team	¢	≡							Q +
mean of the Monthlysalary			XQ	L			Sample Data Store	()))	×
Mean Of Monthlysalary .					Ø	Ø		0	
Measure					Total	0 min of MonthlySalary	321 max of MonthlySala		
mean(MonthlySalary)					74.70K	@ 17M sum of MonthlySalary		Ø 5K ary	

- vii) Click the 'Add to story' con.
 viii) The selected view gets added to the storyboard.

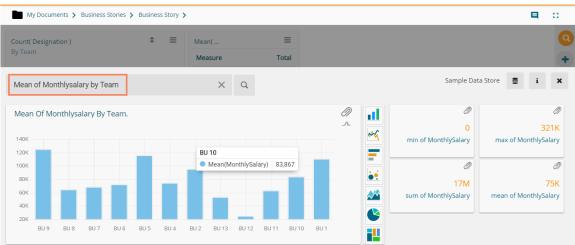
My Documents > Business Stories > B	usiness Stor	у >		
unt(Designation)	\$ ≡	Mean(≡	
Team		Measure	Total	
60		mean(MonthlySalary)	74.70K	
10 27 38 35 22				
0 <u>12 12</u> 6 1 7 3	6			
BU,	. BU.			

- ix)
- Users can drill deeper into the selected data store by using the Data Search bar with proper data

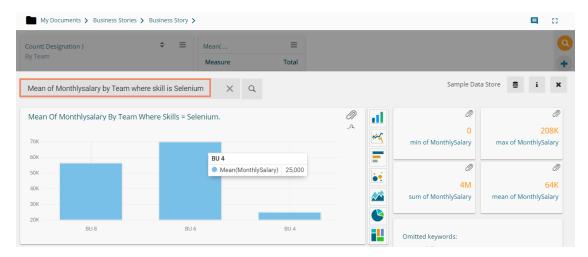
queries.

- Refer to the following images to see how instantly the searched data gets displayed with deeper queries:
- Query 1: 'Mean of Monthly Salary by Team'- Displays team wise monthly salary





Query 2: 'Mean of Monthly Salary by Team where Skill is Selenium' - Displays team wise monthly salary for those employees having Selenium skills



Query 3: 'Mean of Monthly Salary by Team where skill is Selenium and Designation is QA Architect' – Displays team wise records of QA Architects' monthly salary who know Selenium

Mean of Monthlysalary by Team w	here skill is Selenium and design 🛛 🗙	(Q		Sample Da	ta Store 🛢 i
Mean Of Monthlysalary By Team	And Designation Where Designation =	= Qa Architect And Skills	= Selenium. 📫		
8U 8 A Architect	BU 6 QA Architect			125K min of MonthlySalary	163 max of MonthlySala
				Ø	
				579K	145
				sum of MonthlySalary	mean of MonthlySala
				Omitted keywords:	
				• skill • lead	

Note:

a. The instantly created view gets displayed in a default charting component based on the inserted search query, users can switch to any other visualization option using the charting panel provided on the search page.



My Documents > Business Stories >	Business Story 🖒		E 0
ount(Designation) y Team		≡ al	
Mean of Monthlysalary by Team	× Q	Sample Data Store	i X
Mean Of Monthlysalary By Team.	BU 10 Mean(MonthlySalary) 83,	367 Ø	@ 321K nax of MonthlySalary @ 75K
40K	8U 5 BU 4 BU 2 BU 13 BU 12 BU 11	BU 10 BU 1	an of MonthlySalary

- b. Click the 'Like' 📫 icon to save the searched query into the database.
- c. Click the 'Information' i icon to display all the saved search suggestions from the database along with a list of dimensions and Measures from the selected Data Store.

Mean of Monthlysalary by Team where skill is Selenium a $$ X $$ Q	Sa	ample Data Store 🛢 🚺 🗙
Search suggestions	Data store information]
Q mean of the Monthlysalary	Abe Name	123 PreviousCTC
Q sum Offeredctc	Abe Gender	123 OfferedCTC
Q Mean of Monthlysalary by Team where skill is Selenium	Abc Source	123 ExperiencePerCTC
	Abc ReferralOf	123 MonthlySalary
	Abc Designation	123 UsdBilling
	Abc Team	123 CurrentMonthlyPayment
	Abc PreviousOrganisation	123 MonthValue

- d. Other views close to the searched query also get displayed (on the right). Users can add any of the suggested views to the current storyboard by using the 'Add to Story' icon provided for the view.
- e. Users can change the data store by using the Data Store sicon provided on the Data Search page. The users get two choices to choose from: 1) Sample Data Store and 2) Choose- to choose from the available list of Data Stores.

a Store		×
Select	Data	Store
· ·		Store
² Choos	e	
2 Choos	e Data e	Store



4.3.2. Shared Views

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

i) Click the 'Shared Views' sicon on the storyboard.

ount(Designation)	\$	≡	Mean(≡	
Team			Measure	Total	
60			mean(MonthlySalary)	74.70K	
40	38 35				
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	22				
BU. BU. BU. BU. BU. BU. BU. BU. BU.	J. BU. BU. BU. BU.				

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



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

My Documents > Business Stories > Business Story		E	13
Count(Designation) By Team	Mean(Measure Total	\$ ≡	Q +
60 40 38 35	mean(MonthlySalary) 74.70K Associate Softw. 1 Lead QA Engine. 1 Lead Software E. 1 Serior Software. 2		H T
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	QA Architect 4 Associate QA En. QA Enginer Senior QA Engin.	10 18 23	4
BU.	0 10	20 30	0
			•

4.3.3. Alert Center

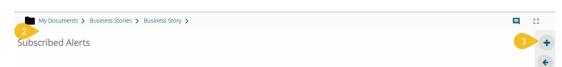
The alert center triggers alerts based on the lower threshold and upper threshold values for the defined dimension or measure.

i) Click the 'Alert Center' 👇 icon on the Storyboard.



My Documents > Business Stories > Business Stor	ry >				E	0
Count(Designation)	Mean(≡	Count(Designation)	≡		9
By Team	Measure	Total	By Designation			+
60	mean(MonthlySalary)	74.70K	Associate Softw. 1 Lead QA Engine. 1			H
40 27 22			Lead Software E. 1 Senior Software. 2 QA Architect 4			T
20 12 12 7 3 6			Associate QA En. 10 QA Engineer 18 Senior QA Engin. 23			4
0 BU. BU. BU. BU. BU. BU. BU. BU. BU. BU.				30		C
						•

- ii) A new page opens prompting to subscribe alerts.
- iii) Click the 'Create New Alert' 💼 icon



- iv) A new window will pop-up to display a list of the available data stores.
- v) Users need to select a datastore containing time dimension from the list.

Subscribed Alerts			
4	Alert		*
	sample	Q	
5	Sample Flat File Data Store		
	sampleBS		
	sampletest28ds Sample Flat File Data Store		[Select Data store having time dimension] [Select Dimension or Measure to watch]

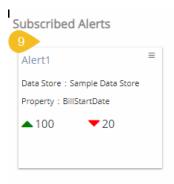
- vi) The following fields display to fill the required information when selecting a data store (data source):
 - a. Title: Give a title to the created alert
 - b. Dimension/Measures: Select a dimension or measure from the drop-down list
 - c. Aggregation: Select an aggregation type from the drop-down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



Alert		- I ·
Sample Data Store		8
Title	Alert1	
Dimensions / Measures	Abi BillStartDate 🗸	
Aggregation	Count 👻	
Time Field	ExpectedJoinningDate 👻	
Schedule Intervals	Daily	
Lower Threshold	20	
Upper Threshold	100	
Max Good Value		0

Note:

- a. Users can enable the 'Aggregation' field only after selecting a Dimension/Measure field from the drop-down menu.
- b. By enabling the 'Max Good Value' option the order of colors in the Semi-Gauge changes from 'green-yellow-red' to 'red-yellow-green' on the displayed Semi-Gauge.
- ix) The newly created alert gets added to the Subscribed Alert page.



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

Subscribed A	lerts	
10		
Alert1	(MA)	Edit
Data Store : Sar	×	Remove
Property : BillSta	irtDate	
Property : BillSta	rtDate ▼2()
		D

Note:

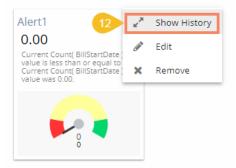
- a. Click the 'Edit' option to modify the inserted Alert information.
- b. Click the 'Remove' option to remove the subscribed alert.



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

My Documents 🗲 Busin	ess Stories 🗲 Business Story
1 Alerts	
	_
Alert1	=
0.00	
Current Count(BillStartDate) value is less than or equal to Current Count(BillStartDate) value was 0.00.	20.
õ	
Subscribed Alerts	_
Alert1	≡
Data Store : Sample Data St	t
Property : BillStartDate	
▲100 ▼20	

xii) Users can click 'Show History' option for the triggered alert.



Note:

- a. Choosing the 'Edit' option redirects users to modify the inserted values for Alert.
- b. A Click on the '**Remove**' option redirects users to remove the subscribed Alert together with the triggered alert.

xiii) A page opens displaying the information of previously triggered alerts.



My Documents > Business Stories > Business Story					-
Alert1					×
Current Count(BillStartDate) value is less than or equ	ual to 20. Current Count(BillStartDate) value v	vas.			
4.00		(13)	Date	Sum(Value)	
3.50			12/20/2018, 12:20:46 AM	0.00	
2.29					
3.00					
2.50					
2.00					
1.50					
1.00					
0.50					
0	12:20:46 AM				
12/20/2018,	12.20.40 Am				

4.3.3.1. Applying Filter Condition to Alert

The user can apply a filter condition data before configuring the information

- i. Click the 'Filter' icon
- ii. Choose a filter condition from the displayed filter panel
- iii. Click the 'Apply' icon

ert		
er (<i>⊙≎</i> ×	
der	-0	
	Q	
le	\checkmark	
		0

- iv. The Alert configuration screen reopens.
- v. Click the 'Save' icon to save the modified Alert.

4.3.4. Change Theme

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

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



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

My Documents > Business Stories > Business Story	>			£3
Count(Designation) \blacklozenge \equiv By Team	Mean(= Measure Total	Count(Designation) By Designation	\$ ≡	Q +
60 40 27	mean(MonthlySalary) 74.70K	Associate Softw. 1 Lead QA Engine. 1 Lead Software E. 1 Senior Software. 2		H T
		QA Architect 4 Associate QA En. 10 QA Engineer 5 Senior QA Engin.	23	4
BU.		0 10 20	30	C
				٠
				2
				۰

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

My Documents > Business Stories > Business Story >				11
Count(Designation) 🗧 🗮 By Team	Mean(Measure	Count(Designation) $\Leftrightarrow \equiv$ By Designation	Q +	
60 40 27 20 6 12 12 7 3 8 5 4 38 35 6 6 6 8 0 8 0 8 0 8 0 8 0 8 0 8 12 7 8 12 7 8 12 7 8 12 7 8 12 7 8 12 7 8 13 13 15 15 10 10 10 10 10 10 10 10 10 10 10 10 10	mean(MonthlySalary)	74.70К	Associate Softw. 1 Lead QA Engine. 1 Senior Software. 2 QA Architect 4 Associate QA En. 10 QA Engine. 23 Senior QA Engin. 23 0 10 20 30	H T S
				0 3 4

4.3.5. Export

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

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



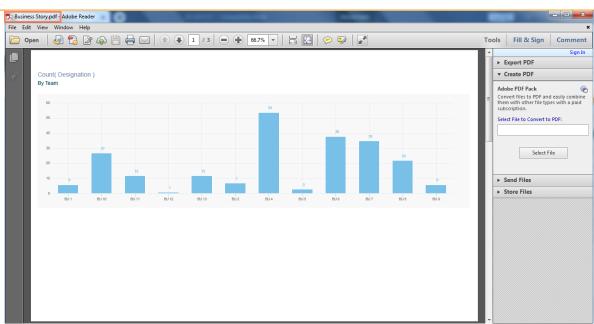
My Documents > Business Stories > Business Story				
Count(Designation) By Team	\$ ≡	Mean(MonthlySal	By Designation	Q
60 514		mean(MonthlySalary) 74.70	Associate Software E.	
			Lead QA Engineer	
40 38 35			Lead Software Engin. 1 Senior Software Engi. 2	Y Y
27	22		QA Architect	
20 12 12 7			Associate QA Engine. 10 QA Engineer 18	0
			Senior QA Engineer 23	•
BU 1 BU, BU, BU, BU, BU 2 BU 4 BU 5 BU 6 BU 7	BU 8 BU 9		0 5 10 15 20 25	
				Export as
				CSV XLSX PDF
🔁 Business Story.pdf 🔷 🖬 Business S	itory.xlsx	Business Story.csv 🔷		Show all X

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

Au	ioSave 💽 🖪 🍤 🤆 🕫				Business Stor	y - Excel					Sign in	b –	٥	×
File	Home Insert Page Layout	Formulas Data R	teview Vie	w Help		what you want	to do						🖻 Shar	re
Past				b Wrap Text ∃ Merge & Cen' 1t		al % 9 58 ⊰ Number	Condition Formattin	nal Format as g = Table = Styles	Cell Inse Styles *	rt Delete Format	J Fill •	Sort 8	k Find & * Select *	~
A14 * : × √ fx avg_MonthlySalary									^					
	А	В	С	D	Е	F	G	н	I	J	К	L	M	
10	38	BU 6												
11	35	BU 7												
12	22	BU 8												
13	6	BU 9												
14	avg_MonthlySalary													
15	74726.00448													
16	Designation	count_Designation												
17	Associate Software Engineer	1												
18	Lead QA Engineer	1												
19	Lead Software Engineer	1												
20	Senior Software Engineer	2												
21	QA Architect	4												
22	Associate QA Engineer	10												
23	QA Engineer	18												
24	Senior QA Engineer	23												
25 ∢	Business Story						: 4							v Þ

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





4.3.6. Options Assigned to a View

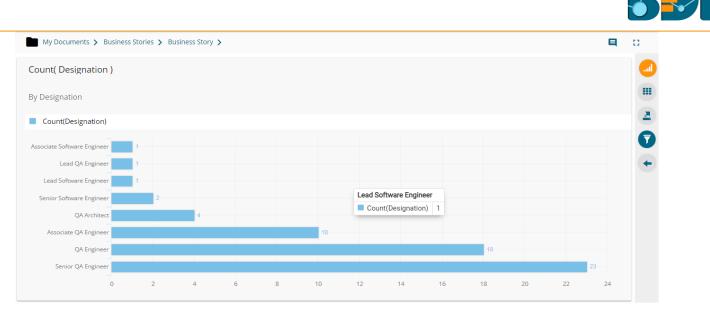
The following options supported by a view can be accessed from the Storyboard.

4.3.6.1. Analyze

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

Count(Designation) By Designation	Q Analyse
-)	🇨 Edit
Associate Softw. 🗧 1	
Lead QA Engine. 🚪 1	🗙 Remove
Lead Software E. 📒 1	
Senior Software. 📃 2	
QA Architect 4	
Associate QA En. 10	
QA Engineer	18
Senior QA Engin.	23
0 10	20 30

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



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

Option	Name	Description
al	Chart	Displays data in the chart view
	Grid	Displays data in the grid view
	Export	Exports the Story as CSV/XLSX/PDF format
Ţ	View Filter	Displays filter panel to apply or edit view specific filter conditions
+	Back	Redirects back to the storyboard

4.3.6.2. Edit

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

Count(Designation	on)		Q	Analyse
			AND	Edit
Associate Softw.	1		_	
Lead QA Engine.	1		×	Remove
Lead Software E.	1			
Senior Software.	2			
QA Architect	4			
Associate QA En.		10		
QA Engineer			18	
Senior QA Engin.			2	3
C)	10	20	30

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

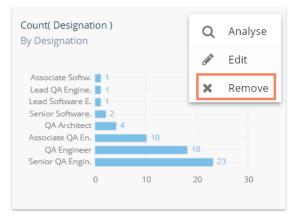


bec ReferralOf i Lead QA Engineer 1 bec ReferralOf i Lead Software Engineer 1 bec Designation i Senior Software Engineer 2	Sample Data Store	Count(Desi			ensions / M			• ••		Chart	Properties
Style Cluster Style Cluster Base Type Plain Designation I Senior Software Engineer 1 QA Architect 4 PreviousOrganis I QA Engineer 10 Skills I QA Engineer 10 Skills I QA Engineer 10 Skills I Count(Designation) 1	arch Dimensions / Measu	res		**	Designation 3	¢ 123	Count(De	: ×		General Set	ttings
a Gender i Associate Software Engineer 1 a ReferralOf i b Lead QA Engineer 1 b Lead Software Engineer 1 c ReferralOf i b Lead Software Engineer 1 c ReferralOf i c ReferralOf i b Lead Software Engineer 1 c ReferralOf i c	• Name	i									
e Source i Lead QA Engineer 1 Lead Software Engineer 1 Lead Software Engineer 2 Lead Software Engineer 2 Senior Software Engineer 2 QA Architect 4 PreviousOrganis i QA Engineer 10 Skills i QA Engineer 18	Gender	i Associato Soft	ara Fagiacar							Style	Cluster 🔻
e ReferralOf i Lead Software Engineer 1 Order Orde	Source	i								Base Type	Plain 🔻
e Designation i Senior Software Engineer 2 Lead Software Engineer Order By count(Designation) e PreviousOrganis i QA Architect 4 Count(Designation) 1 e Skills i QA Engineer 10 Limit 0 e Month i QA Engineer 18 Exclude from	ReferralOf	i								Order	
PreviousOrganis i QA Architect Count(Designation) O Skills i QA Engineer 10	Designation	i		2			Lead Softw	are Engineer		Order	
PreviousOrganis i Associate QA Engineer IO Imit O Skills i QA Engineer 18 Exclude from Exclude from	Team			2				-		Order By	count(Designation)
Skills i QA Engineer 18 Exclude from	PreviousOrganis			4							0
QA Engineer 18 Exclude from	Skills		QA Engineer			10				Limit	
	Month		QA Engineer					18		Exclude from	
JoinningStatus i		Senio	QA Engineer						23		

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

4.3.6.3. Remove

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



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

		tware E. 📕 1 oftware. 📕 2	
I	Do you want to remove thi	s view ?	1
I			10
	NO	YES	

vi) The selected View gets removed from the storyboard.

4.4. Data Interactions/Exploration

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



4.4.1. Automatic Data Drill

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

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

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

etting Data	Data Type Definition	3 Hierarchy Definition	Batch Query	5 Data Restrictions	6 Schedule Data Refresh
Fields		Hierarchy Definition			+
Abc Name	e	Team — Designatio	n — Name —	1	×
Abc Gend	ler	Drill Def _T 2			
Abc Source	ce	L ExpectedJoinningDate:	ExpectedJoinningDa month	te: - ExpectedJoinningD	Date: X
Abc Refer	ralOf	•			•
Abc Desig	gnation				
	-				
PREVIOUS					CANCEL NEXT

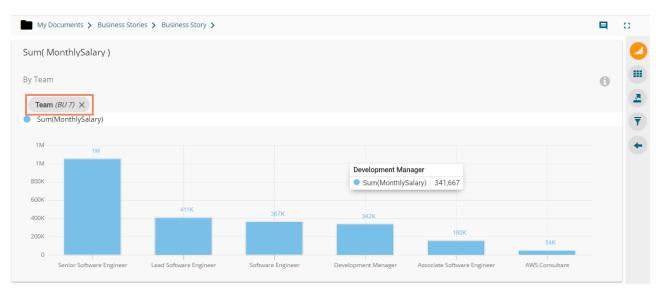
- vi) Select the data store with the defined drill path to create a new view.
- vii) Select the dimension for which the drill path has been defined and drag to create a view.
- viii) Click 'Save' option 🗎 to save the view on the Storyboard.

曼 Sample Data Store		um(MonthlySalary) r Team	1	Dimensio	ons / Measures		×		and Drop	Chart	Properties	
earch Dimensions / Measu	ures Q S	ummary	\$					Dimen	sion Here]	General Set	ttings	
▶ ExperienceCate	i											
comments	i									Style	Cluster	•
 CandidateId 	i 5	M								Order	⊘ ↓1 ↓F ≑	
□ Year	i 4	4M										
c ExpectedJoinnin	i .									Order By	sum(MonthlySalary)	•
 BillStartDate 		MM									0	
3 PreviousCTC	1		2M BU							Limit		
	2		•	Sum(Monthly	Salary) 665,418							
3 OfferedCTC		м — — —		75	6K 749K 665K					Exclude from Global Filter		
3 ExperiencePerCTC		M		13	6K 749K _{665K}	662K	638K	347K		Show Data		
3 MonthlySalary		0							25K	Label		
ALL DATA STORE	0	-	BU 7 BU 10) BUS BU	11 BU 9 BU 2	BU 1	BU 13	BU 5	BU 12	Enable		

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



xi) Click on a team to display the designation wise break up for the selected team (E.g., The following image displays designations for the *Team BU-7*).



xii) Click on a designation to see the names of the employee (E.g., the following image displays names of all the Senior Software Engineers inside the Team BU-7).





Note:

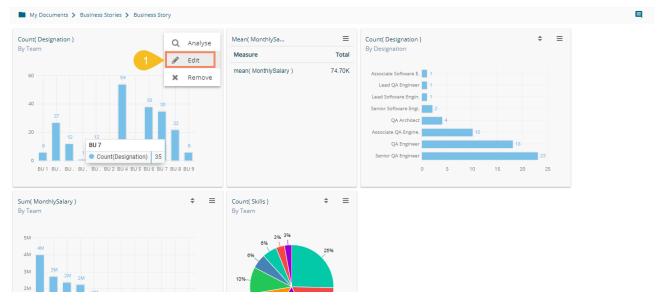
- a. Users can also define a hierarchy for the date dimensions using the 'Hierarchy Definition' tab of a datastore and avail the drill-down functionality for a saved view that contains the same date field.
- b. Users can also open a saved view via the 'Analyze' option.

4.4.2. Actions

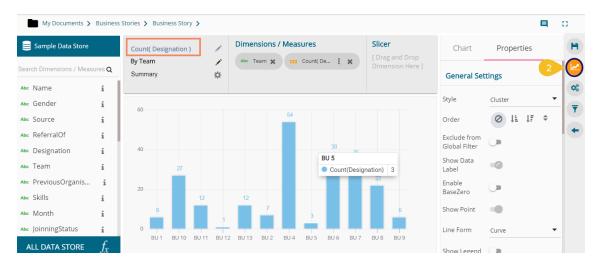
The Action tab includes various actions to be applied to a designed view.

4.4.2.1. Interactions

- The 'Interactions' option is a next level of applying the Global Filter. The suggested new feature
- enables users to select multiple views of the storyboard to filter based on a specific view. By default,
- on a single click, all the views permitted for interactions get filtered.
- i) Navigate to the Storyboard.
- ii) Select 'Edit' view from the 'Options' \equiv menu.



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





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



- viii) Users get redirected to the Storyboard with a pop-up message stating that the storyboard
 - views are updated.

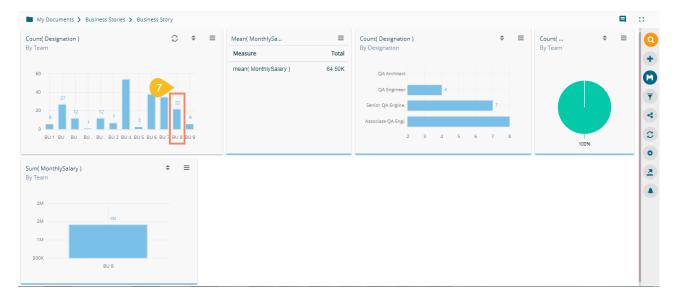
team.

ix) Select any one-dimension value from the view which was selected to develop a dependency, the

other views get filtered accordingly.

E.g., By selecting BU 8 from the parent view, all the integrated views display the data





4.4.2.2. Web Socket

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



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

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

My Documents > Business Stories > Business	ss Story 🖒	E C
Action Settings	WebSocket	(•
Click based interactions on other views	By enabling the Websocket functionality users will be able to get the latest updated data from the data source.	2
f(x) Custom Fields Create custom fields from view	ws://businessstory.com/websocket/ws	Available Views
4 WebScocket Custom Websocket Settings	Message * 5	 Count(Designation) By Team Mean(MonthlySalary)
	Enable View Restrictions.	Count(Designation) By Designation
		6 APPLY

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

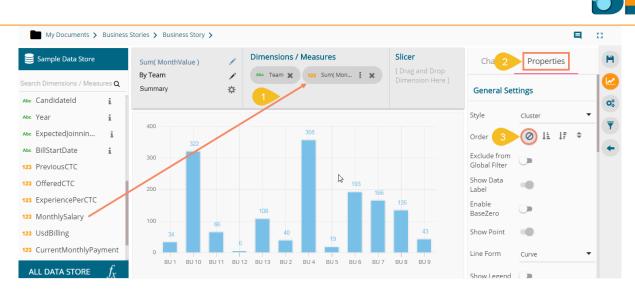
Note:

- a. The 'ACTIONS' tab also contains 'Custom Fields' option to be applied on the KPI Comparative tile. Please refer description given for KPI Comparative Tile to understand the 'Custom Fields' functionality.
- b. By enabling the 'Enable View Restriction' the views listed under 'Available Views' get disabled.

4.4.3. Order by and Limit

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

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



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

My Documents >	Business	Stories 🗲 B	Busine	s Story	>												a 0
Sample Data Store		Sum(Mo By Team		alue)				eam 🗙	/ Meas	ures Sum(Ma		~	Slice [Drag	r g and Drop	Chart	Properties	
Search Dimensions / Measu	ires Q	Summary				×	ADC 1	eann 🗶		Sorri(Ivio	0 :	×	Dime	nsion Here]	General Set	ttings	
Abc CandidateId	i																-
Abc Year	i	400													Style	Cluster	_
ExpectedJoinnin	i	400	358												Order	4	÷
bc BillStartDate	i	300		322											Order By	ever (Marshh) (alua)	
23 PreviousCTC														5	order by	sum(MonthValue)	-
23 OfferedCTC	- 1	200 —			193	166									Limit	0	
23 ExperiencePerCTC	- 1					100	135	100									
23 MonthlySalary	- 1	100						108	66						Exclude from Global Filter		
23 UsdBilling	- 1									43	40	34	19	6	Show Data	-	
23 CurrentMonthlyPayr	ment	0												6	Label		
ALL DATA STORE	f_x	E	BU 4	BU 10	BU 6	BU 7	BU 8	BU 13	BU 11	BU 9	BU 2	BU 1	BU 5	BU 12	Enable BaseZero		

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



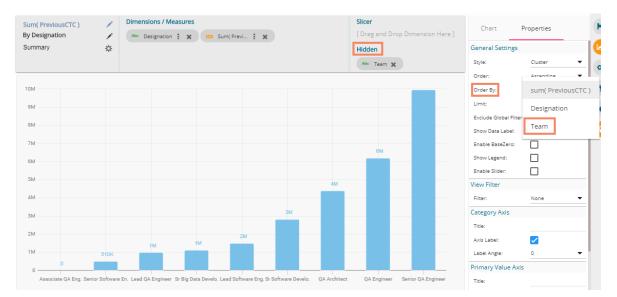
My Documents > Busines	s Stories > Business Story Sum(MonthValue)	Dimensions / Measures	Slicer	Chart	Properties
Search Dimensions / Measures Q	By Team Summary	▲ Abec Team ★ 123 Sum(Mon : ★	Dimension Here]	General Set	ttings
Abo Year	400			Style	Cluster 🔻
⊯ ExpectedJoinnin i	358			Order	⊘ ↓1 ↓7 ≑
be BillStartDate 1		322		Order By	sum(MonthValue)
23 PreviousCTC	300	_		order by	
3 OfferedCTC				Limit	5
3 ExperiencePerCTC	200 —	193			
3 MonthlySalary	200	BU 10 166 Sum(MonthValue) 322		Exclude from Global Filter	
3 UsdBilling		Sum(woninValue) 322	135	Show Data	
3 CurrentMonthlyPayment	100			Label	-
ALL DATA STORE f_x	BU 4	BU 10 BU 6 BU 7	BU 8	Enable BaseZero	•

Note:

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

My Documents > Business Stories > Business Stories	× >						0
Count(Designation) 🗧 🗄	Mean(Measure	≡ Total	Count(Designation) By Designation	\$ ≡	🕈 By Team	≡	
100 50 6 7 12 12 7 3 3 5 22 6 5 4 3 3 5 22 6 5 4 5 5 4 5 5 5 4 5 5 5 5 5 5 5 5 5 5 5 5 5	mean(MonthlySalary)	74.70K	Associate Sof. 1 Lead OA Engl. Senior Softwa. 2 QA Architet 4 QA Englineer Senior QA En. 0 10	18 23 20 30			
Sum(MonthlySalary) By Team							0 0
6M 4M 4M - ^{3M} 2M 2M 2M 2M - ^{1M} / 56/K406656628398477555K							2
B.							

c. Hidden Dimension: The dragged dimension as the 'Hidden' category gets added to the 'Order By' drop-down menu from where the user can apply it on the current view to represent data in the selected order.

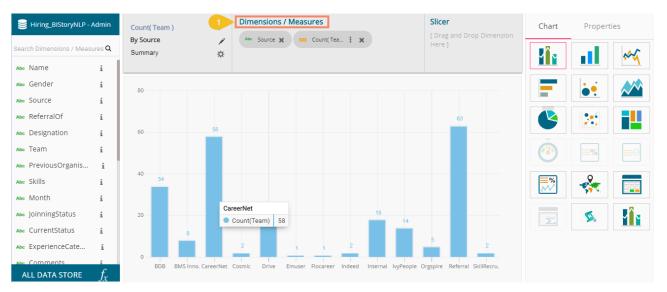




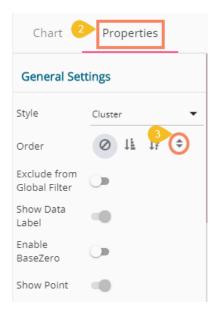
4.4.4. Manual Sort

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

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

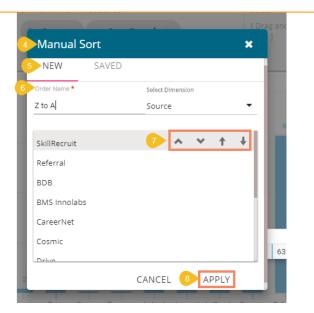


- iv) Open the chart properties
- v) Click the 'Manual Sort' option



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







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

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



Manual Sort					×	Dra
NEW 1 SAVE	ED					
Select Dimension	Se	ect Order				
Source	2 Z	to A			•	_
SkillRecruit		~	~	1	÷	I
Referral						H
Orgspire						H
IvyPeople						
Internal						
Indeed						
Clocaroor					_	4
	CANCE	S/	AVE &	APP	LY	

iv) The selected saved order applies to the view

4.5. Adding a Slicer

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

- i) Drag and drop one dimension and one measure to the 'Dimensions/ Measures' column using the DESIGN tab.
- ii) Drag and drop another dimension as 'Slicer.'
- iii) The slices get displayed in the created view based on the second-dimension value via a column chart (by default)

E.g., The following image shows designation wise salary for teams BU 4, BU 6, BU 7, and BU 10 through Mixed Chart.

My Documents > Busines	s Stories > Business Story >					Ę	13
Sample Data Store	Sum(MonthlySalary) By Team	1 Dimensions / Meas	Sum(Mon : x	Slicer	Chart	Properties	H
Search Dimensions / Measures Q	Summary	*		in beighten a	General Set	ttings	
Abc Gender					Style	Cluster	•
Abc Source	ЗМ 2М				Order	⊘ 11 IF ≑	₹
Abc Designation i	Ĩ				Order By	sum(MonthlySalary)	•
Abc Team i	2M					4	\$
Abc PreviousOrganis i		1M 1M	1		Limit		_
Abc Skills i	1M 713K	732K	7κ 43<u>₩</u>κ	497K	Exclude from Global Filter		
Abc JoinningStatus	321K	²⁶⁷ 268К	342K	2001,238K	Show Data Label	-	
Abc CurrentStatus i ALL DATA STORE f_x	0 BU 4	BU 6	BU 7	BU 10	Enable BaseZero		

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



4.6. Applying Filters

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

4.6.1. View Specific Filter

- i) Click the 'Filter' 🔽 icon from the design mode of a view.
- ii) A filter panel opens with the list of available filter values.
- iii) Select a Dimension to display a list containing all the sub-dimensions.
- iv) Select sub-dimension(s) by check marking the box.
- v) Click the 'Apply' ricon.

My Documents > Business	Stories > Business Story >								Ξ. 0	
Sample Data Store	Count(Designation) By Designation Summary	/ / ¢		ns / Measu gnation	×	[[dden 2 Drag and Dra mension H 3	Filter Construction	-0	H 2
Abc Name i							4	In		00
Abc Gender i	Associate Software Engineer	1						Search	9	0
Abc Source	Lead QA Engineer							Associate QA Engineer		V
Abc ReferralOf i	Lead Software Engineer							Lead Software Engineer		+
Abc Designation i	Senior Software Engineer	2						Sr Software Developer		
Abc Team i	QA Architect		4	oftware Er	•		5	QA Architect	~	
Abc PreviousOrganisati	Associate QA Engineer		Cour	nt(Designat	ion) 2			Sr QA Engineer		
Abc Skills	QA Engineer					18		Development Manager		
Abc Month i	Senior QA Engineer						-23	Sr Big Data Developer		
Abc JoinningStatus i	0		5	10	15	20	25			
ALL DATA STORE $f_{\!X}$								Data Scientist		

vi) The view gets filtered as per the applied filter condition(s).

My Documents > Busine	ess Stories > Business Story >	•								0
Sample Data Store	Count(Designation) By Designation	1	Dimensions / Me Abc Designation			[lidden Drag and Drop	< Chart	Properties >	H
Search Dimensions / Measures Q	Summary	☆	123 Count(De	i x			imension Here]	General Settings		
Abc Name i								Style: Base Type:	Cluster	Q ₀
Abc Gender i Abc Source i								Order:	Ascending	
Abc ReferralOf								Order By: Limit:	count(Designa	-
Abc Designation	QA Architect			4				Exclude Global Filter:		
Abc PreviousOrganisati 1								Show Data Label: Enable BaseZero:		
Abc Skills								Show Legend:		
Abe Month i								Filter:	None 🔻	
ALL DATA STORE f_x	2 3	3	4	4	5	5	6 6	Category Axis		

vii) If the selected filter condition is 'Not In,' then the view displays all the not selected dimensions.



My Documents > Bu:	iness Stories 🗲 Business Story	>				■ ::
Sample Data Store	Count(Designation) By Designation	1	Dimensions / Measures	Slicer [Drag and Drop	Filter Designation	⊘ ≈ ⊨
Search Dimensions / Measures	Q Summary	☆	123 Count(De : 🗙	Dimension Here Hidden		
Abc Name				[Drag and Drop Dimension Here		•
Abc Gender	10				Search	۹ 🎽
Abc Source	10				Associate QA Engineer	
Abc ReferralOf	8		· · · · · · · · · · · · · · · · · · ·		Lead Software Engineer	
Abc Designation		7	7 QA Arch		Sr Software Developer	
Abc Team	6	_	Cour	t(Designation) 4	QA Architect	
Abc PreviousOrganisati					Sr QA Engineer	~
Abc Skills	4	_	4			
Abc Month					Development Manager	~
Abc JoinningStatus	2			2	Sr Big Data Developer	~
ALL DATA STORE	Associate QA Engin.	Lead Software	e Engi. Sr Software Develo. QA Architect	Data Scientist	Data Scientist	

Note:

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

from the available list.

	← <u>≥</u> ₹ ₩
Filter	√ 2 x
st	Q
joining_status	
current_status	

b. Users need to click '**Apply**' button while enabling or eliminating the view specific filter values to reflect the

same in the displayed chart.

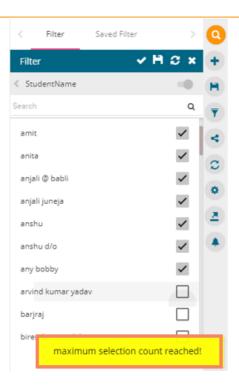
- c. Users can insert, modify, or remove a view specific filter via 'Analyse' option.
- d. The View Filter becomes ineffective when the selected view is inserted into a story, and the Global Filter is

it is applied to it.

e. The maximum selection for the Filter condition is restricted to 10. The users get a notification when they select

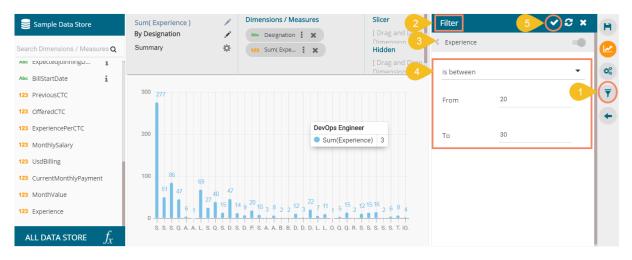
the permitted number of the filter condition.





4.6.1.1. Measure based View Filter

- Users can add a view filter based on the 'Measures' values.
- i) Open the Filter panel on the Design New page.
- ii) All the selected Dimensions and Measures get listed.
- iii) Select a measure as a filter value.
- iv) Select a condition from the drop-down menu.
- v) Click the 'Apply' icon.



vi) The view gets modified according to the selected filter value.



My Documents > Business	Stories > Business Story	>				E	
Sample Data Store	Sum(Experience) By Designation		Designation	Slicer [Drag and Drop	Chart	Properties	Ħ
Search Dimensions / Measures ${f Q}$	Summary	‡ 123	Sum(Expe 🚦 🗙	Dimension Here 1 Hidden			N 🕑
ADC ExpectedjoinningD 1				[Drag and Drop Dimension Here 1			¢ŝ
Abc BillStartDate 1							
123 PreviousCTC	22						
123 OfferedCTC							-
123 ExperiencePerCTC	22					<u>.</u>	
123 MonthlySalary							
123 UsdBilling	21						
123 CurrentMonthlyPayment					= %	•	
123 MonthValue	21				2. V	🦘 🔛	
123 Experience				20			
	20	DevOps Manager	Developme	ent Manager	Σ.	S	
ALL DATA STORE $f_{\!X}$							

Note: the same set of steps can be followed to apply Global filter based on the Measure values.

4.6.1.2. Date based View Filter

The users can apply Date based View Filter selecting the Date Values from the Data Store. Users

can provide two kinds of conditions on the Date values.

i. Between

- i) Click the filter icon from the Design page.
- ii) Select a Date field as a filter condition.
- iii) Choose the 'Between' option from the drop-down menu.a. Provide 'From' and 'To' dates.
- iv) Click the 'Apply' icon.



v) The selected view gets filtered.



Sample Data Store	Sum(UsdBilling) By Designation	1	Dimensions / Measures	Slicer [Drag and Drop Dimensi	Filter	✓ 3 ×
h Dimensions / Measures Q		\$	- nesiluation 1 K (133 2nul(1208-1 K	Hidden	< ExpectedJoinningDate	-0
Name i				[Drag and Drop Dimensi 1	Between	•
Sender i	4K	_				
ource i	4K				From 1/1/2017	
ReferralOf i					1712017	Ŧ
Designation 1	4K				To 1/31/2017	
ieam i	зк ——		QA Manage			÷
PreviousOrganisati 1	зк ———		 Sum(Usc 	Billing) 4,000		
ikills i						
Nonth i	ЗК ———					
pinningStatus i	ЗК ———					
lurrentStatus i	зк ——			3K		
xperienceCategory i						
omments i	2K		214			
andidateld 1	2К ——					

- ii. Relative
 - i) Navigate to the Filter panel from the Design page
 - ii) Select a Date field as the filter condition.
 - iii) Choose the 'Relative' option from the drop-down
 - a. Insert a period by selecting the required values. E.g., the below given image displays 'Last 2 years' as the selected time condition.
 - iv) Click the '**Apply**' icon. Note:
 - a. Users get 'Last' and 'This' under the drop-down menu to select the previous or present time zone.
 - b. There are 4 categories of time pointers provided in another drop-down menu which allows the users to select a value out of Years/ Months/Weeks/Days.

My Documents 🗲	Business	Stories > Business Story >								0
曼 Sample Data Store		Sum(UsdBilling)	- C.	Dimensions / Me		Slicer	Filter	~	æ×	H
Search Dimensions / Meas	ures Q	By Designation Summary	*	Abs Designation		Dimension Here Hidden	< ExpectedJoinningDate			
Abc Name	i					[Drag and Drop Dimension Here	Relative		•	¢¢
Abc Gender	i	150K								T
Abc Source	i	121K					Last 🔻 2	Years	•	1
Abc ReferralOf	i				Business Analyst					+
Abc Designation	i	100K			 Sum(UsdBilling) 	0				
Abc Team	i									
Abc PreviousOrganisati	i	50K								
Abe Skills	i	36R8K								
Abe Month	i	^{15K} tok	(12K9K12K9K6	1K8K6K _ 5K-24 _ 5	к ₀ 4К3К4К _{2К} 3К4К _{2К} 5	(6K5K-24-24/5K-3K				
Abc JoinningStatus	i	0 1 1 1 1 1 1 1	TTTT							
ALL DATA STORE	f_x	S. S. S. Q. A. A. L. S.	Q. S. D. S. E	D. P. S. A. A. B. B. E), D. D. L. L. O. Q. Q. R. S	. S. S. S. S. T. IO.				

v) The selected view gets filtered based on the applied conditions.

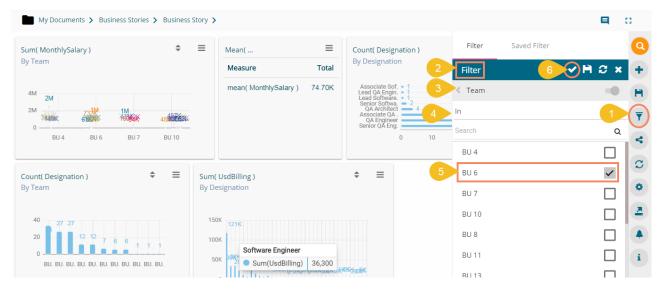


My Documents > Business	Stories > Business Story >	\triangleright			E
Sample Data Store	Sum(UsdBilling) By Designation	Dimensions / Measures Abc Designation : *	Slicer [Drag and Drop	Chart Pr	roperties
Search Dimensions / Measures ${f Q}$	Summary	☆ 123 Sum(UsdB : ★	Dimension Here 1 Hidden	General Settings	
Abc Name i			[Drag and Drop Dimension Here]	Style:	Cluster 🔻
Abc Gender i				Order:	None 🔻
-	150K			Exclude Global Filter:	
Abc Source i	121K			Show Data Label:	
Abc ReferralOf				Enable BaseZero:	
Abc Designation	100K			Show Point:	
Abc Team i				Line Form:	Curve 🔻
Abc PreviousOrganisati i				Show Legend:	
Abc Skills 1	50K 36K 38K	26K		Enable Slider:	
Abc Month i	23K 15K	10K 12K		View Filter	
-		0 0 0 4K 4K 2K 3K 4K	2K ^{5K 6K 5K} 2K 2K ^{5K}	Filter:	None 🔻
Abc JoinningStatus 1	0 Sen. Sof. Sen. QA. Ass.	Ass. Lea. QA. De. AW. Bus. De. De. Lea. Op. Pro. QA.	RFP. Sen. Sen. Sen. Sol. Sr Q. Tec.	Category Axis	
ALL DATA STORE $f_{\!X}$				Title:	

Note: The same set of steps can be used to apply Global filter based on the date values.

4.6.2. Global Filter

- i) Click the 'Global Filter' 🚺 icon on the Storyboard.
- ii) A filter panel opens with the list of filter values.
- iii) Click on a Dimension to display a list containing all the sub-dimensions.
- iv) Select 'In' or 'Not In' option from the drop-down menu to apply the filtering condition. (E.g., the below given image displays 'In' as the selected option so that the story gets filtered as per the selected sub-dimension(s).
- v) Select sub-dimension(s) using checkmark(s).
- vi) Click the 'Apply' icon.



vii) The concerned views on the Storyboard get customized as per the applied Global Filter condition.



My Documents > Business Stories > E	usiness	Story 🕽	•				0
Sum(MonthlySalary)	\$	≡	Mean(🗧	Count(Designation) 🗧 🚍	🗢	≡	
By Team			Measure Total	By Designation	By Team		
2M 1M 500K 0 BU 6			mean(MonthlySalary) 72.10K	Lead QA Engin. 1 Lead Software. 1 Senior Softwa. 2 QA Architect 2 QA Enginee 1 Senior QA Eng. 1 0 5 10 15 20			+
Count(Designation) By Team	=		(UsdBilling) esignation	◆ ≡			v 0
2 1		30 20	19K				•
1BU 6		10	К 8К 3К 4КК 0	IK 2K			

viii) By selecting the 'Not In' option the story (views) gets filtered by not selected filter conditions (E.g., the below given image displays the story displaying without BU 6 dimension.)

My Documents > Business Stories > Business	ess Story 💙							E	5
um(MonthlySalary)	\$	■ Mean(Mont	≡	Count(Designation)		Filter	Saved Filter		
Team		Measure	Total	By Designation		Filter		v H α ×	
4M		mean(MonthlySalary)	75.30K	Associate Softw. Senior Software .		< Team		-	
2M 2M				QA Architect 2 QA Engineer	. [Not In		•	
7 3K 1M 39 16 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	538K			Senior QA Engineer Associate QA En.	4	Search		۹	
0 10 10 10 10 10 10 10 10 10 10 10 10 10	BU 8	-			4 5 6	BU 4			
						BU 6		~	
unt(Designation)	≡	Sum(UsdBilling)		\$ ≡		BU 7			
Team		By Designation				BU 10			
40		150K				BU 8			
20		118K				BU 11			
7 6 6	1					BU 13			
0BU7 BU. BU4 BU. BU. BU2 BU1 BU9 BU5 BU	J 8	50K 36K 15Kk3 ^{KB2K} 7K8K28H6K8K46K05K25K05K0	1016-010-54			BU 2			
		010-4101-0302K03R0	HOLEKOLEKOL	N. S. XKNON		BU 1			

Note:

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

+	4	• •	2 C T
	Ģ _{Filter}	Saved Filter	
_	Filter		✓ Ħ ᢒ ×
22	de		Q
65	Gender		
. .	Designation		
nde. O	r		

b. The global filter can be applied only to those views on the storyboard where the filter values are used as dimensions.



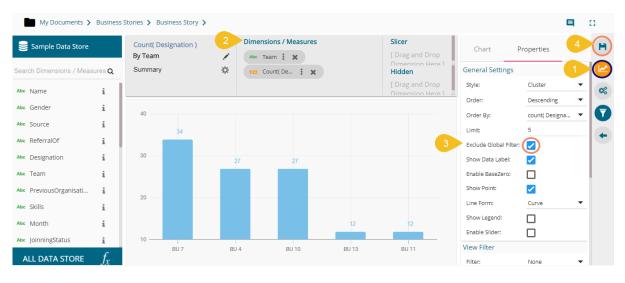
- c. Global filter when applied to various views on a storyboard, subdues the view specific filter values.
- d. Users can insert views created via different data stores on one Story Board. By default, the Global filter panel displays all the available filter values across the data stores.

4.6.2.1. Exclude from the Global Filter

The Global filter values are applied to all the available views on a storyboard. Users can exclude a specific

view from the Global Filter effect by selecting the 'Exclude from the Global Filter' option.

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



iv) Users get redirected to the Storyboard.

v) Click the 'Filter' option and select a global filter condition (E.g., the below given image displays BU

- 10 and BU 11 Teams selected with the 'In' filter condition).
- vi) Click the 'Apply' icon.

My Documents > Business	Stories > Busine	ss Story 🕽	,					E	0
um(MonthlySalary)	\$	≡	Mean(≡	Count(Team)	Filter	Saved Filter		
y Team			Measure	Total	By Designation	Filter	$\overline{\mathbf{C}}$)∺ æ ×	•
4M 2M			mean(MonthlySalary)	74.70K	Senior QA Eng. QA Engineer Associate QA . 10	< Team		-	
2M 732K ¹¹ 321 46K 674954	1 < ³ 160K ⁽ 3#34k				QA Architect 4 Senior Softwa. • 2 Associate Sof. • 1 Lead QA Engin. • 1 Lead Software. • 1	In			• (
0	BU 7	_			Lead Software. • 1 0 10	Search		Q	2
						BU 7			
ount(Designation)	≑ ≡	Sum	(UsdBilling)		\$ ≡	BU 10		\checkmark	
/ Team			esignation			BU 8			
		Ser	nior Software .		121K	BU 11		~	
40 27 27 27 20	12 12		ior QA Engine. 38K ftware Engine. 36K			BU 13			
0			Ad Software E. 26K QA Engineer 25K			BU 2			
BU7 BU4 BU10 BU	13 BU 11		oftware Deve. 🛑 18K sociate Softw. 🛑 15K			DU 1		_	

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



m(MonthlySalary) Team	\$ ≡	Mean(Measure Total	Count(Team) By Designation	\$ E	■ ◆ By Team	Ξ
600K 400K 200K 0 0 BU 10 BU 10 BU 10	Luc	Measure Total mean(MonthlySalary) 77.40K	Data not available !			
unt(Designation)		m(UsdBilling) Designation	\$ ≡			
40 27 27 27 20 12 12		Ir Software Deve. Sr QA Engineer Sr Big Data Deve. Project Manager BK Senior Software. K				

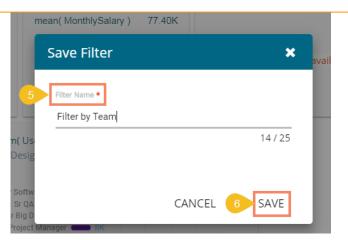
4.6.2.2. Saving a Global Filter

- i) Click the 'Global Filter' icon.
- ii) The global filter panel opens.
- iii) Select the filter conditions by check marks. E.g. In this Case, team BU 10 and BU 11 are the selected as filter conditions.
- iv) Click the 'Save' icon.

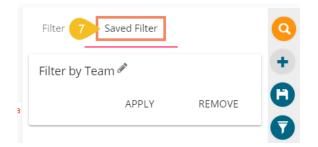
	Saved Filter		9
2 Filter		ע י € א	+
3 Team		-	6
In		1	7
Search		Q	
BU 6			T
BU 7			4
BU 10		\checkmark	C
BU 8			٠
BU 11		~	
BU 13			

- v) A new 'Save Filter' window opens.
 - a. Provide a Filter Name in the 'Save Filter' pop-up window.
 - b. Click the 'SAVE' option.





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



Note: The users can see all the applied Global Filters conditions by clicking the '**Applied Filter**' icon from the storyboard.

My Documents > Business Sto	ories 🗲 Business S	itory >							0
Sum(MonthlySalary) By Team 1M 500K 0 BU 6	€ 27755K BU 10	≡	Mean(Measure mean(MonthlySalary)	E Toptions 70.90K	Count(Team By Designatio QA Enginee Associate OA QA Architee Lead QA Engi Lead Softwar Senior Softwa	2 1 2 4 1 2 4 1	Applied Filter Team • in : BU 6,BU 10 Skills • in : Selenium,Java	1	0 4 E 9 - V
Count(Designation) By Team	\$ ≡	By De	UsdBilling) signation vr QA Engine.			Sum(Experient By Gender			•

4.6.3. Measure Filter

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

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



🥃 Sample Data Store	Sum(Experience) By Gender	Dimension: Abc Gende	s / Measures		Slicer [Drag and Drop	Chart I	Properties	H
Search Dimensions / Measures Q	Summary		Expe i 🗙		Dimension Here 1 Hidden	General Settings		
ADC ExpectedjoinningD 1		123 Min(E	Exper I 🗙		[Drag and Drop	Style:	Cluster	• 08
Abc BillStartDate			2		Dimension Here 1	Order:	None	•
123 PreviousCTC	800					Exclude Global Filter		₹
123 OfferedCTC						Show Data Label:		-
123 ExperiencePerCTC	600					Enable BaseZero:		
123 MonthlySalary						Show Point:		
	400	_				Line Form:	Curve	•
123 UsdBilling						Show Legend:		
123 CurrentMonthlyPayment	200		173	2		Enable Slider:		
123 MonthValue	200					View Filter		
123 Experience						Filter:	None	-
	0	Male		Female		Category Axis		
ALL DATA STORE $f_{\rm v}$						Tisley		

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

	Dimensions / Geries Prope experience	
3	Aggregation	Sum 🔻
	Display Name	
	Series Type	h. N
	Color	CANCEL 4 APPLY

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

Series Properties: experience	×
Color	_
Data Label Color	_
5 Filter Options	
CANCEL	APPLY

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



∞ Ger	nder : 🗙	123 Sum(Expe : 🗙		L L He
23 Sun	Series Exper	s Properties: ience	×	
	Filter	8	⊘ ≈ ×	
6	🗙 Skills			
	In		•	
	Search		۹	
	Seleniur	n		
	Java			
			_	

ix) The screen displaying the Filter icon re-opens, click the 'APPLY' option.

ic Ger	nder İ 🗙 123 Su	m(Expe : 🗙	[[He
3 Sur	Series Prope Experience	rties: 🗙	Hi
	Data Label Colo		
	Data Label Position	Тор 🔻	
	Filter Options	T	
		CANCEL 9 APPLY	

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

Sum(Experience) By Gender Summary	// *	Dimensions / Me Abc Gender : 123 Sum(Expe	🗙 123 Sum(Expe : 🗙	Her Hid	ag and Drop Dimension e 1 den ag and Drop Dimension
700					
600					
500			Male		
400			 Sum(Experience) Sum(Experience)_Skills([object Object]) 	699 110	
300					
200			172		
100		110		8	8
0					
		Male	Fema	ale	



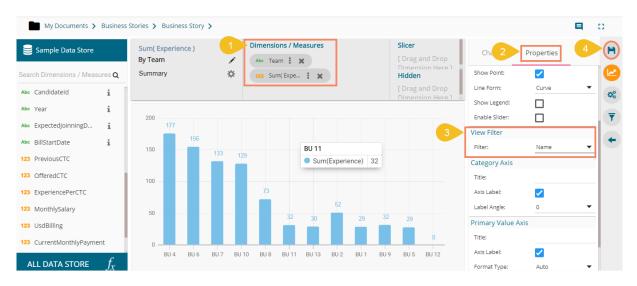
4.6.4. Custom View Filter

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

i) Create a view by drag and drop of the desired dimension and measure (By default, the Mixed chart gets

selected to represent the selected data)

- ii) Open the 'Properties' tab.
- iii) Select the 'View Filter' option using the Properties panel. (In this case, filter condition is 'Name')
- iv) Click the 'Save' option to save the view on the storyboard.



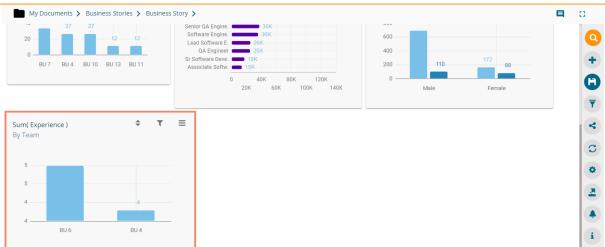
v) Access the view from the storyboard and click the 'Filter' icon.

- vi) Select a filter value.
- vii) Click the 'Apply' icon.

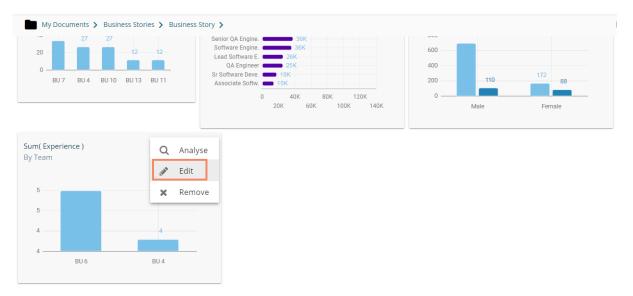
My Documents > E	Business Stories 🗲 Business S	tory >	0
20	27 12 12 12 12 12 12 12 12 12 12 12 12 12 1	Senior QA Engine. 38K Lead Software E. 26K QA Engineer 26K Software Verse. 18K Associate Softw. 15K 0 40K 80K 20K 60K 100K Male Female	 + • • •
200 150 7 156 133 129			v 0 v
100 7 50 7 8U. BU. BU. BU. BU. B	Sudharshan Reddy 6		2 4 i

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





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



x) The custom filter condition does not remain effective when the view opens in the Design mode.





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

4.6.5. Like and Not Like Operation in Filter

The users can enable filter and look up for specific dimensions via the Data Type Definition step for a Data Store. All the selected (enabled) dimensions list with the sub-values, while for the disabled ones no sub-values appear. This operation applies to both Local and Global filters.

i) Navigate to the Data Type Definition page for a Data Store (the following image displays the Data Type Definition page for the Sample Data Store where Dimensions like Gender, Referral of and Designation are enabled for the filter lookup function, but Name, Source, and Team are disabled from the filter lookup.

	2						6
Getting Data	Data Type Def	finition	Hierarchy Definition	Batch Que	iry	Data Restrictions	Schedule Data Refresh
Dimension	าร		Measures			Time	
Name	123	9	PreviousCTC	Abc 🕓	*	ExpectedJoinningDate	Abc 123
Gender	123 (Ð	OfferedCTC	Abc 🕓		BillStartDate	Abc 123
Source	123	9	ExperiencePerCTC	Abc 🕓			
ReferralOf	123	Ð	MonthlySalary	Abc			
Designation	123 🤇	Ð	UsdBilling	Abc 🕓			
Team	123	Ð .	CurrentMonthlyPayment	Abc 🕓	-		

- ii) Create a story based on the same data store and save it with a relevant view.
- iii) Access the filter panel and select any of the disabled Dimension value. (E.g., Source dimension is selected from the Filter panel.)
- iv) Users do not get a list of the sub-dimensions.
- v) Choose 'Like' operation from the drop-down menu
- vi) Provide Value manually for the selected Dimension (E.g., BDB is the value provided for the Source dimension)
- vii) Click the 'Apply' icon.

My Documents > Business Stories > B	Business	Story >							5	0
Sum(MonthlySalary)	\$	≡	Mean(≡	Count(Desig	gnation)	Filter	Saved Filter		9
By Team			Measure	Total	By Designati	ion 🧧	Filter	6	×	Ŧ
4M2M			mean(MonthlySalary)	74.70K	Associate So Lead QA Engi Lead Softwar Senior Softw QA Archite	of. 1 in. 1 re. 1	Source			G
2M 731M 1M 3446K 616042K 48	BARTEUK				Senior Softw QA Archite Associate QA QA Engine Senior QA En		Like			(7
0 BU 4 BU 6 BU 7 E	BU 10				Senior QĂ En	g 0 10	Value	5 BDB		(v
						1	_			c
Count(Designation)	≡		UsdBilling) esignation		≑ ≡					
,			0							
40 27 27		15	121K							
		10	- 0.017							ī
BU.		51	3K 8886K 25K 26K	SKOARNIKSKIKS	5RISISER BK					-

viii) The story (views) gets filtered as per the applied filter value.



Sum(MonthlySalary) By Team 600K 400K 200K 0 100K 100K 100K 80 10 80 10 80 7	◆ 75K		Mean(≡ Measure Total mean(MonthlySalary) 71.70K	Count(Designation) By Designation QA Engineer	3 4	5	≎ ≡ By Team
Count(Designation) By Team 4027 204 04 BU 10BU 7	\$ ≡	By D 20 15 10	SK BK				

ix) Select 'Not Like' as the filter operation.

Filter	Saved Filter		9
Filter		v⊨c×	+
< Source		-	6
Not like		•	A
Value	BDB		
			~

x) The Story (views) gets filtered as per the not entered values of the dimension.

Sum(MonthlySalary) By Team	\$	=	Mean(Measure	≡ Total	Count(Designation) By Designation	\$	=	 By Team	\$ ≡	
4M 2M 1M 1M 2M	<u>афаяз</u> к ви в		mean(MonthlySalary)	75.30K	Associate Sof, * 1 Lead GA Engin. * Senior Softwa. * 2 QA Architect 4 Associate QA. Senior GA Eng. 0 10 2	<u> </u>	D			G T
Count(Designation) By Team	≡		UsdBilling) signation		\$ ≡					*
40 27 20 12 12 7 6 6 1 1	1	150	121K							2
BU.	L	50	19/6/ 2010	ଖାହାରାଖାହାଚି	вкакущк					

Note: The 'Like' and 'Not Like' operations can also be performed using the Local filter panel.

4.7. Comments

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

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



My Documents > Business Stories > Business Story >			
Sum(MonthlySalary) By Team	Mean(■ Measure Total mean(MonthlySalary) 70.90K	Count(Team) $\Rightarrow \equiv$ By Designation Senior OA Eng. OA Engineer Associate OA. OA Engineer Associate OA. Categories of the senior Software of	U → E By Team

- 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

2		
		0
Oescription for the current	Story	
	,	

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

E	0
Me Description for the current Story	X Just now
Message	>

Note:

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



5. Charts & Properties

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

5.1. Mixed Chart

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

Best situation to use Mixed Chart: To compare multiple categories

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

Variations of this chart-The following are the variations for this chart:

- 1. Use stacked Column charts: Multiple categories can be clubbed together on top of each other which makes addressing multiple questions easier.
- 2. Use columns side by side: Comparison between multiple categories becomes easier instead of toggle between charts and data.
- **3.** Add color for quick insight: Where displaying columns with colors allows users to pay immediate attention to the essential tasks.

Properties:

- i) General Settings
 - a. Style: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
 - b. Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort: Users need to sort the dimensions by using the indicator signs manually By selecting an order, users will be required to configure the following fields:
 - i. Order By- Select a value option from the drop-down menu to order sequence of the data
 - ii. Limit- Set a number to display the requested data by this limit
 - c. Exclude Global Filter: The view will be excluded from the Global Filter condition by putting a checkmark in the box
 - d. Show Data Label: Data label gets displayed by using a checkmark in the given box
 - e. Enable Base Zero: Base value gets presented from Zero by providing a checkmark in the box
 - f. Show Point: Enable the Show Point option by using a checkmark in the given box
 - **g.** Line Form: Select a line format from the drop-down menu (the provided choices for this field are: Curve and Segment)
 - h. Show Legend: Provide a checkmark in the box to display Legend. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend i. Enable Slider: Provide a check mark in the box to enable the slider
- ii) View Filter
 - **a.** Filter: Select a filter condition using the drop-down menu (E.g., 'Source' is the selected filter condition in the following image).



Sum(Experience) By Gender Summary	✓ Dimensions / Measures ✓ Ame Gender : ★ 123 Sum ☆ 123 Sum(Expe : ★	Expe : X Slicer [Drag and Drop Dimension Here 1 Hidden	Chart Pr	roperties
78 Su 76 74 72	m(Experience) 85 m(Experience)_Skills([object Object]) 70 75	[Drag and Drop Dimension Here 1	Style: Order: Exclude Global Filter: Show Data Label: Enable BaseZero: Show Point: Line Form: Show Legend: Legend Style: Legend Orientation:	Cluster None Curve Curve Fixed Vertical
68	ale Female		Legend Checkbox: Enable Slider: View Filter Filter:	Source 💌

iii) Category Axis

- a. Title: Provide a title for the axis
- b. Axis Label: Enable the Category Axis label by putting a checkmark in the box.
- c. Label Angle: Select a display angle for the axis label.
- iv) Primary Value Axis
 - a. Title: Provide a title for the Primary Value Axis
 - **b.** Axis Label: Enable the Primary Value Axis label by putting a checkmark in the box.
 - c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - **d. Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - e. Precision: Set the after-decimal value (It displays up to 5 precision)
- v) Secondary Value Axis

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

- a. Enable: Put a checkmark in the box to enable the Secondary Value Axis
- b. Title: Provide a title for the Secondary Value Axis
- c. Format Type: Select a desired format type from the drop-down menu
- d. Currency Type: Select a desired currency symbol from the list
- e. Precision: Set the after-decimal value (It displays up to 5 precision)

Note: When the selected Format Type is 'Percentage', you don't get the 'Currency Type' field.

Sum(Experience) By Gender Summary	Dimensions / Measures Image: Sum (Expe i x) Image: Sum (Expe i x)	Slicer [Drag and Drop Dimension Here 1 Hidden [Drag and Drop Dimension Here 1	Chart Category Axis Title:	Properties
86		Dimension Here I	Axis Label: Label Angle:	✓
84			Primary Value Av	kis
82			Axis Label:	 Image: A set of the /li>
80			Format Type: Currency Type:	Auto
76		75	Precision:	0
74	Male Sum(Experience)	85	Secondary Value	Axis
72	Sum(Experience)_Skills([object Object])	70	Enable: Title:	
68			Format Type:	Auto 👻
	Male Fe	male	Currency Type: Precision:	None



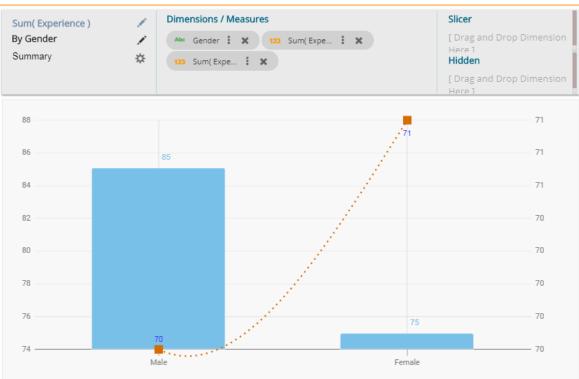
Users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart

- a. Access Secondary Value Axis using the 'Properties' tab and enable it.
- b. Click 'Series Properties' [‡] provided next to the measure name
- c. A new window opens
- d. Configure the required details:
 - i. Aggregation-select an aggregation using the drop-down menu (By default, it will show the second aggregation type that is 'Sum')
 - ii. Display Name- provide a name to be displayed in the legend
 - iii. Series Type- select a series type to display the secondary value
 - iv. **Point Shape:** Select a point shape using the drop-down menu
 - v. Line Type: Select a line type using the drop-down menu
 - vi. Axis-select an axis to display the values of the second measure
 - vii. Color- select a color for the series
 - viii. Data Label Color-select a color for the Data Label
 - ix. Data Label Position: Select an option using the drop-down icon
 - x. Filter Options: Access the list of dimensions and measures to apply filter condition(s)
 - xi. Click the 'APPLY' option

Series Prope Experience	rties:	×
Aggregation	Sum	
Display Name		
Series Type	h. M	
Point Shape	Cube	-
Line Type	Dot	-
Axis	E 🔳	
Color	#d66c00	
Data Label Colo	r 2 #3333117	
Data Label Position	Тор	•
Filter Options	τ	
	CANCEL	APPLY

- e. Navigate to the 'Properties' tab
- f. The selected changes can be seen in the secondary value axis of the view.





5.2. Column Stack Chart

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

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

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

Variations of this chart

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

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

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

Properties:

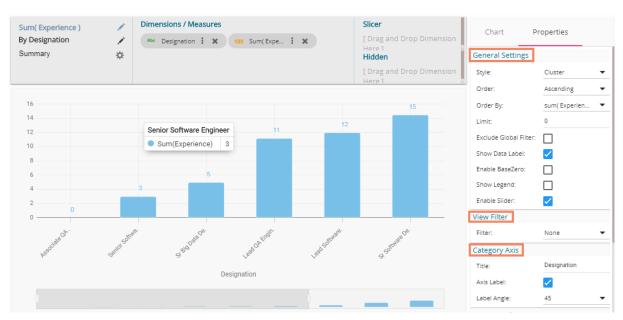
- i) General Settings
 - **a. Style**: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
 - b. Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users need to sort the dimensions by using the indicator signs manually) By selecting an order, users will be required to configure the following fields:
 - i. Order By- Select a value option from the drop-down menu to order sequence of the data
 - ii. Limit- Set a number to display the requested data by this limit



- c. Exclude Global Filter: The view will be excluded from the Global Filter condition by putting a check mark in the box
- d. Show Data Label: Data label gets displayed by using a checkmark in the given box
- e. Enable Base Zero: Base value gets presented from Zero by putting a checkmark in the given box
- f. Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is Fixed. Users need to select an option out of the given choices using the drop-down menu.
 - 1. Vertical
 - 2. Horizontal
- iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend g. Enable Slider: Provide a check mark in the box to enable the Slider.

ii) View Filter

- **a.** Filter: Select a filter condition using the drop-down menu (E.g., 'None' option is the selected as a filter condition in the following image)
- iii) Category Axis
 - **a.** Title: Provide a title for the axis. (E.g., 'Designation' is the title for the category axis displayed in the following view)
 - **b.** Axis Label: Enable the category axis label by putting a checkmark in the box
 - c. Label Angle: Select a display angle for the axis label. (the provided choices for this field are: 0, 45, 90 angles)



iv) Primary Value Axis

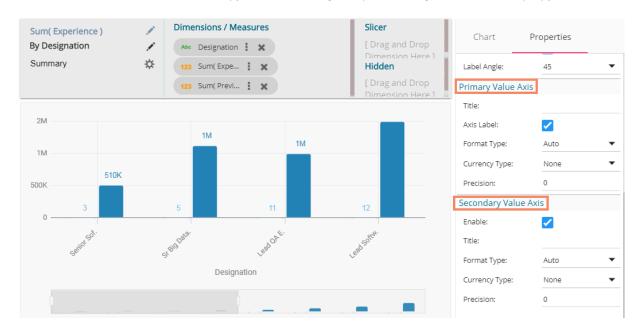
- a. Title: Provide a title for the Primary Value Axis
- b. Axis Label: Enable the Primary Value Axis label by turning on the radio button
- c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
- **d. Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
- e. Precision: Set the after-decimal value (It displays up to 5 precision)

v) Secondary Value Axis

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

- a. Enable: Put a checkmark in the box to enable the Secondary Value Axis
- b. Title: Provide a title for the Secondary Value Axis
- c. Format Type: Select a desired format type from the drop-down menu
- d. Currency Type: Select a desired currency symbol from the list





Note: When the selected Format Type is 'Percentage,' you don't get the 'Currency Type' field.

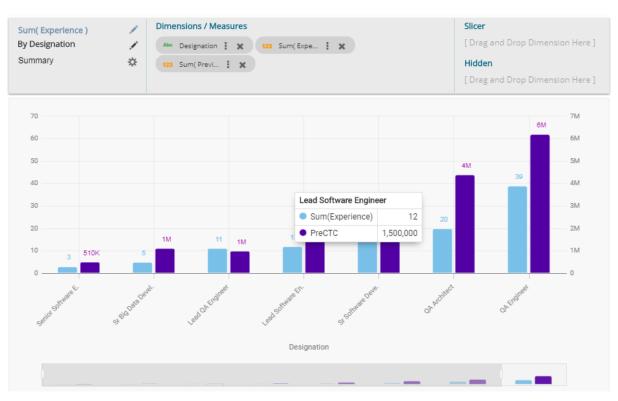
Users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart

- a. Access Secondary Value Axis using the 'Properties' tab and enable it.
- b. Click 'Series Properties' ^a provided next to the measure name
- c. A new window opens
- d. Configure the required details:
 - i. **Aggregation**-select an aggregation using the drop-down menu (By default, it will show the second aggregation type that is 'Sum')
 - ii. Display Name- provide a name to be displayed in the legend
 - iii. Series Type- select a series type to display the secondary value
 - iv. **Point Shape:** Select a point shape using the drop-down menu
 - v. Line Type: Select a line type using the drop-down menu
 - vi. Axis-select an axis to display the values of the second measure
 - vii. Color- select a color for the series
 - viii. Data Label Color-select a color for the Data Label
 - ix. Data Label Position: Select an option using the drop-down icon
 - x. Filter Options: Access the list of dimensions and measures to apply filter condition(s)
 - xi. Click the 'APPLY' option



Series Prope PreviousCTC	rties:	×	
Aggregation	Sum	-	l
Display Name	PreCTC		ł
Axis	ЕЭ		I
Color	#5200a3		ł
Data Label Colo	r #a300a3		
Data Label Position	Тор	-	
	CANCEL	APPLY	
11th	allingth		Ther

- e. Navigate to the view
- f. The secondary value axis reflects the selected changes.



5.3. Line Chart

Line chart connects individual numeric data points to create a sequence of values. They are primarily used to display

trends over a period.

Best Situation to use Line Charts:



View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

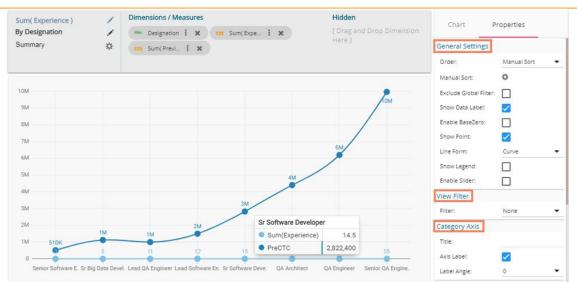
Variations of this chart

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

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

- i) General Settings
 - a. Style: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
 - b. Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users need to sort the dimensions by using the indicator signs manually) By selecting an order, users will be required to configure the following fields:
 - i. Order By- Select a value option from the drop-down menu to order sequence of the data
 - ii. Limit- Set a number to display the requested data by this limit
 - (If the user selects 'Manual Sort' as ordering option, they get an icon clicking which the Manual Sort window appears)
 - **c. Exclude Global Filter**: The view will be excluded from the Global Filter condition by putting a checkmark in the box
 - d. Show Data Label: Data label gets displayed by using a checkmark in the given box
 - e. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box
 - f. Show Point: Enable the Show Point option by using a checkmark in the given box
 - **g.** Line Form: Select a line format from the drop-down menu (the provided choices for this field are: Curve and Segment)
 - **h.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend i. Enable Slider: Slider gets displayed by putting a checkmark in the box
- ii) View Filter
 - **a.** Filter: Select a filter condition using the drop-down menu
- iii) Category Axis
 - a. Title: Provide a title for the axis
 - **b.** Axis Label: Enable the category axis label by using a checkmark in the box
 - c. Label Angle: Select a display angle for the axis label





iv) Primary Value Axis

- a. Title: Provide a title for the Primary Value Axis
- **b.** Axis Label: Enable the Primary Value Axis label by using a checkmark in the box
- c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
- **d. Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
- e. Precision: Set the after-decimal value (It displays up to 5 precision)

v) Secondary Value Axis

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

- a. Enable: Put a checkmark in the box to enable the Secondary Value Axis
- b. Title: Provide a title for the Secondary Value Axis
- c. Format Type: Select a desired format type from the drop-down menu
- d. Currency Type: Select a desired currency symbol from the list
- e. Precision: Set the after-decimal value (It displays up to 5 precision)

Note: When the selected Format Type is 'Percentage,' you don't get the 'Currency Type' field.





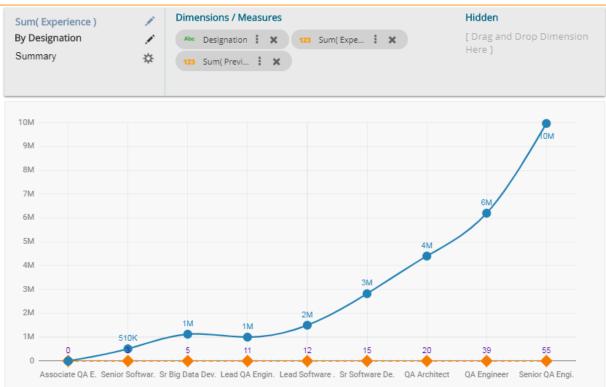
Users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart

- a. Access Secondary Value Axis using the 'Properties' tab and enable it.
- b. Click 'Series Properties' provided next to the measure name
- c. A new window opens
- d. Configure the required details:
 - i. Aggregation-select an aggregation using the drop-down menu (By default, it will show the second aggregation type that is 'Sum')
 - ii. Display Name- provide a name to be displayed in the legend
 - iii. Series Type- select a series type to display the secondary value
 - iv. Point Shape: Select a point shape using the drop-down menu
 - v. Line Type: Select a line type using the drop-down menu
 - vi. Axis-select an axis to display the values of the second measure
 - vii. **Color** select a color for the series
- viii. Data Label Color-select a color for the Data Label
- ix. Data Label Position: Select an option using the drop-down icon
- x. Filter Options: Access the list of dimensions and measures to apply filter condition(s)
- xi. Click the 'APPLY' option

Series I Experie	Properties: ence		×
Aggrega	tion Sum	-	
Display	Experier Name	ce	- 1
Point Sh	ape Quad	-	
Line Typ	e Dash	-	
Axis	E	-	- 1
Color	#15	7600	1
Data La	bel Color#52	00a3	-
Data La Position	Bottom	-	
	CANC	EL APPL	Y

- e. Navigate to the 'Properties' tab
- f. The selected changes can be seen in the secondary value axis of the view.





5.4. Bar Chart

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

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

Examples:

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

Variations of this chart:

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

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

- i) General Settings
 - a. Style: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
 - **b.** Base Type: Select a base type option from the drop-down (the provided choices for this field are: Plain, Rectangle, Chevron)
 - c. Order: Select a sequence for displaying information using the drop-down
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users need to sort the dimensions by using the indicator signs manually) By selecting an order, users will be required to configure the following fields:
 - iii. Order By- Select a value option from the drop-down menu to order sequence of the data
 - iv. Limit- Set a number to display the requested data by this limit



- **d. Exclude Global Filter**: The view will be excluded from the Global Filter condition by putting a checkmark in the box
- e. Show Data Label: Data label gets displayed by using a checkmark in the given box
- f. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box
- **g.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend

Sum(MonthlySalary)	1	Dimensions / Me	easures		Hidden	Chart Pr	roperties
By Designation		Abc Designation	i ×		[Drag and Drop Dimension Here]		loperties
Summary	☆	123 Sum(Mon	± ×		Dimension here j	General Settings	
		123 Sum(Offer	Ξ×			Style:	Cluster 🔻
					Sum(MonthlySalary)	Base Type:	Chevron 🔻
Senior QA Engineer					Sum(OfferedCTC)	Order:	Descending 🔹
QA Engineer			9M			Order By:	sum(Monthly5 🔻
Sr Software Developer		BM				Limit:	0
QA Architect	Sr Big	g Data Developer				Exclude Global Filter:	
Lead Software Engineer		um(MonthlySalary)	115,200			Show Data Label:	
Lead QA Engineer		um(OfferedCTC)	1,382,400			Enable BaseZero:	
Sr Big Data Developer						Show Legend:	
Senior Software Engine.						Legend Style:	Fixed 🔻
Associate QA Engineer	к					Legend Orientation:	Vertical 🔻
0	2M	4M 8M 6M	121 10M	M 14M		Legend Checkbox:	

- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu
- iii) Category Axis
 - a. Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by turning on the radio button
- iv) Primary Value Axis
 - a. Title: Provide a title for the Primary Value Axis
 - b. Axis Label: Enable the Primary Value Axis label by turning on the radio button
 - c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - d. Currency Type: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - e. Precision: Set the after-decimal value (It displays up to 5 precision)



Sum(MonthlySalary) By Designation	1	Dimensions / Measures	Hidden [Drag and Drop	Chart P	roperties
Summary	\$	123 Sum(Mon X	Dimension Here]	Legend Checkbox:	
		123 Sum(Offer 🛔 🗙		View Filter	
Senior QA Engineer 🚬	1M		Sum(MonthlySalary)	Filter:	None 🔻
QA Engineer 73			Offered CTC	Category Axis	
Sr Software Developer > 272	<i>c</i>	9M		Title:	
QA Architect		3M		Axis Label:	Image: A start and a start
				Primary Value Axis	
Lead Software Engineer				Title:	
Lead QA Engineer		Associate QA Engineer		Axis Label:	
Sr Big Data Developer		Sum(MonthlySalary) 50,000		Label Angle:	0 •
Senior Software Engine.		Offered CTC 600,000		Format Type:	Auto 🔻
Associate QA Engineer				Currency Type:	None 🔻
0	2M	4M 8M 12M 6M 10M	14M	Precision:	0
				FIELDIOIS	0

5.5. Bubble Chart

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

Best situation to use a Bubble Chart:

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

- i) General Settings
 - a. Base Type: Select a base type to display the data (the provided choices for this field are: Plain, Gradient, Ring)
 - b. Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users can manually sort the dimensions by using the indicator signs) By selecting an order, users will be required to configure the following fields:
 - i. Order By- Select a value option from the drop-down menu to order sequence of the data
 - ii. Limit- Set a number to display the requested data by this limit
 - c. Exclude Global Filter: The view will be excluded from the Global Filter condition by putting a checkmark in the box
 - d. Show Data Label: Data label gets displayed by using a checkmark in the given box
 - e. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box
 - f. Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
- iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend ii) View Filter



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

Sum(MonthlySalary) By Designation Summary	Dimensions / Measures Abc Designation : *	Hidden [Drag and Drop Dimension Here]	Chart P General Settings	roperties
		Sum(MonthlySalary)	Base Type: Order: Order By:	Gradient Descending sum(MonthlyS
2M 1M 500K	2K 267K 2004		Limit: Exclude Global Filter: Show Data Label: Enable BaseZero: Show Legend:	
0	ware De. Lead Software. Sr Big Data De. Assoc.		Legend Style: Legend Orientation: Legend Checkbox: View Filter Filter:	Fixed Vertical

iii) Category Axis

- a. Title: Provide a title for the axis
- b. Axis Label: Enable the category axis label by using a checkmark in the box
- c. Label Angle: Select a display angle for the axis label
- iv) Primary Value Axis
 - a. Title: Provide a title for the Primary Value Axis
 - **b.** Axis Label: Enable the Primary Value Axis label by using a checkmark in the box
 - c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - **d. Currency Type**: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - e. Precision: Set the after-decimal value (It displays up to 5 precision)

Sum(MonthlySalary) By Designation	Dimensions / Measures Abc Designation : *	Hidden [Drag and Drop	Chart	Properties
Summary	🗱 123 Sum(Mon : 🗴	Dimension Here]	Legend Checkbox:	
			View Filter	
		 Sum(MonthlySalary) 	Filter:	None 🔻
2M			Category Axis	
2.01			Title:	
1M			Axis Label:	
1M			Label Angle:	0 •
500K			Primary Value Axi	s
	272K 267K 208K		Title:	
0	117K 115K 67K 50K		Axis Label:	
0			Format Type:	Auto 🔻
Senior. Sr So	oftware De. Lead Software. Sr Big Data De. Assoc.		Currency Type:	None 🔻
QA Engineer	er QA Architect Lead QA Engin. Senior Softwa.		Precision:	0



5.6. Area Chart

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

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

Examples:

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

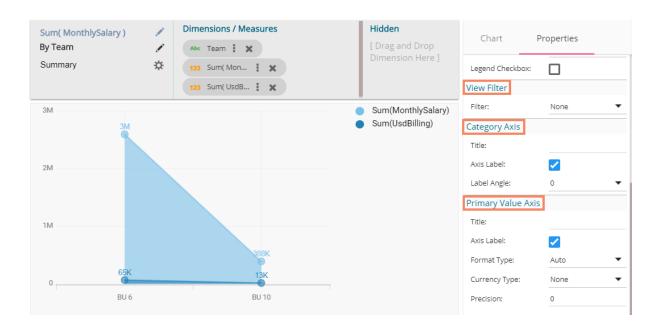
Variations of this chart: Group and Stacked Area graphs

- i) General Settings
 - a. Style: Select a style to display the data (the provided choices for this field are: Overlaid, Stacked, 100%)
 - b. Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users can manually sort the dimensions by using the indicator signs) By selecting an order, users will be required to configure the following fields:
 - i. Order By- Select a value option from the drop-down menu to order sequence of the data
 - ii. Limit- Set a number to display the requested data by this limit
 - c. Exclude Global Filter: The view will be excluded from the Global Filter condition by putting a checkmark in the box
 - d. Show Data Label: Data label gets displayed by using a checkmark in the given box
 - e. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box
 - f. Show Point: Enable the Show Point option by using a checkmark in the given box
 - g. Line Form: Select a line format from the drop-down menu (the provided choices for this field are: Curve and Segment)
 - **h.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option will be provided when 'Show Legend' is enabled and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend



Sum(MonthlySalary) By Team Summary	Dimensions / Measures	Hidden [Drag and Drop Dimension Here]	Chart P General Settings	roperties
	123 Sum(UsdB : 🗙		Style:	Overlaid 🔹
3M		Sum(MonthlySalary)	Order:	Descending 🔹
ЗМ		 Sum(UsdBilling) 	Order By:	sum(MonthlyS 🔻
			Limit:	0
2M			Exclude Global Filter:	
			Show Data Label:	
BU 10	n(MonthlySalary) 387,600		Enable BaseZero:	
	n(UsdBilling) 12,725		Show Point:	
IW			Line Form:	Segment 🔻
	388K		Show Legend:	Image: A start and a start
65K	13K		Legend Style:	Fixed 💌
0 BU 6	BU 10		Legend Orientation:	Vertical 🔻
			Legend Checkbox:	

- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu
- iii) Category Axis
 - a. Title: Provide a title for the axis
 - **b.** Axis Label: Enable the category axis label by using a checkmark in the box
 - c. Label Angle: Select a display angle for the axis label
- iv) Primary Value Axis
 - a. Title: Provide a title for the Primary Value Axis
 - b. Axis Label: Enable the Primary Value Axis label by using a checkmark in the box
 - c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - d. Currency Type: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - e. Precision: Set the after-decimal value (It displays up to 5 precision)





5.7. Pie Chart

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

Best situation to use Pie Chart:

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

Variations of this chart:

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

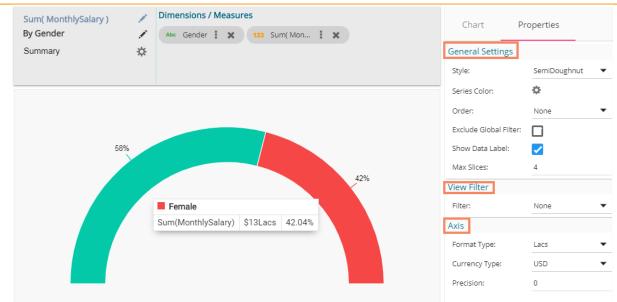
Properties:

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

iii) Axis

- a. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
- b. Currency Type: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
- Precision: Set the after-decimal value (It will show up to 5 precision)
 E.g., the below given image displays 'Sum of Monthly Salary' for Senior Software Engineer in six million rupees as selected currency type is 'rupees' and format type is 'million.'





5.8. Scatter Plot Chart

A scatter plot is a two-dimensional data visualization that uses dots to represent the values obtained for two different variables - one plotted along the x-axis and the other plotted along the y-axis.

Best Situation to use Scatter Plot Chart:

Scatter plots display correlation between two variables (x and y-axis), to compare large numbers of data points without regard to time.

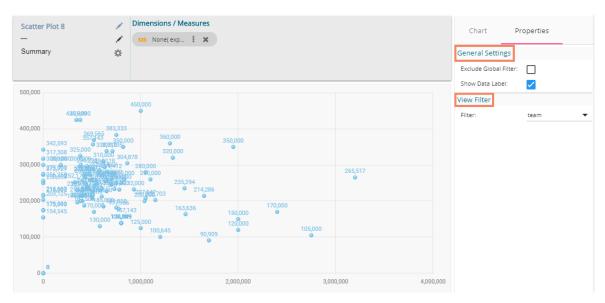
Variations of this Chart: Bubble Plot chart (3D), Density Plot (2D)

Properties:

- i) General Settings
 - a. Exclude Global Filter: Use a check mark in the given box to exclude the Global filter
 - b. Show Data Label: Use a check mark in the given box to display the data label

ii) View Filter

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





Note:

a. The users need to configure the 'Radius Field' information such as 'Measure' and 'Aggregation' to get the above-given display of the scattered points in the chart. E.g., In this case, the selected Measure value is 'previous_CTC,' and the selected Aggregation option is 'None.'

	Series Properties:							
	Data Label Position	Тор	•					
360	Radius Field							
32	Measure	previous_ctc	•	26				
03	Aggregation	None	•					
1,64		CANCEL	APPLY					

b. The Scatter Plot chart displays only Measure values with the Aggregation option selected as 'None.'

5.9. TreeMap Chart

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

Best situation to use TreeMap:

To view all the hierarchical data at one time.

Variations of this chart:

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

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



ii. By disabling the 'Gradient' option users get redirected to select 'Color' for the Treemap sections.

ii) View Filter

- a. Filter: Select a filter condition using the drop-down menu (E.g., 'None' is the selected filter condition in the following image)
- iii) Axis
 - a. **Format Type:** Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - b. **Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - c. Precision: Set the after-decimal value (It displays up to 5 precision)
 E.g., The below given image displays the Sum of Experience sliced based on Team, Designation, and Skills.

Sum(Experience) By Team	sion / Measure	Slicer Abc Team	i X Abc	Designation 🗙		Chart P	roperties
Summary	\$	Abc Skills				General Settings	
						Order:	Ascending 💌
BUG					BU 10	Order By:	sum(Experien 🔻
Senior QA Engineer Selenium	QA Engineer Selenium	O's	A Architect) elenium		Java	Limit:	0
						Exclude Global Filter:	
						Show Data Label:	~
				20		Gradient:	 Image: A set of the /li>
						Start Color:	#2ECC71
	Team		BU 6	zineer	15	End Color:	#fbe983
55	Desig	nation	QA Engineer	, neur		Position:	Center 🗸
	Skills		Selenium	,		View Filter	
	Su	m(Experience)	39	1		Filter:	None 🗸
			ead QA Enginee			Axis	
		S	elenium		Java	Format Type:	Auto 🗸
			1	11	5	Currency Type:	None 🗸
						Precision:	0

5.10. Semi Gauge Chart

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

Gauges are used in dashboards, real-time monitors, and reports. They can display Key Performance Indicators (KPIs), progress indicators, and quantity indicators. **Best Situation to use Semi-Gauge:**

To monitor any performance that contains predefined ranges

Examples:

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

- i) General Settings
 - a. **Minimum Value**: Set a minimum value to be shown on the chart (It should be less than the maximum set value)



- b. **Maximum Value**: Set a maximum value to be displayed on the chart (It should be more than the minimum set value)
- c. **Exclude Global Filter:** The view will be excluded from the Global Filter condition by putting a check mark in the box
- d. Target: Enable target by turning on the radio button
- e. Target Value: User-defined value to set a target
- f. Target Color: Set a target color
- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu

iii) Range

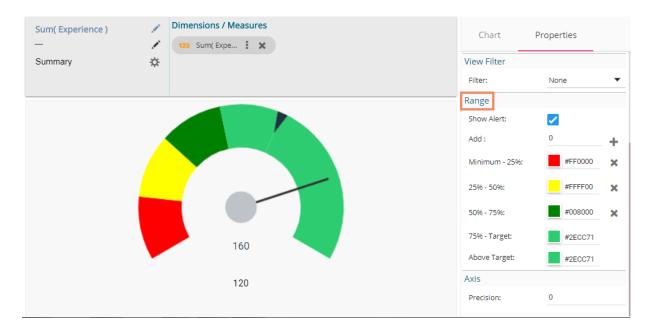
- a. Show Alert: Enable various ranges (in %) by turning on the radio button
- b. Value Color: Set a value color
- c. Base Color: Set a base color

iv) Axis

a. Precision: Set the after decimal value (It can show up to 5 precision)



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





Note:

- a. Target value should be included in the range of minimum and maximum set values.
- b. Semi-Gauge supports only one measure value. It converts the selected Dimension value into Measure as it considers only Measure values.

5.11. KPI Tile

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

Properties:

- i) General Settings
 - a. Label: Insert Label for the displayed value
 - b. Label Color: Select a label color from the menu
 - c. Label Font Size: Set the font size for the label
 - d. Value Color: Select a value color from the menu
 - e. Value Font Size: Set the font size of the displayed value
 - f. **Exclude Global Filter:** The view will be excluded from the Global Filter condition by using a check mark in the box
- ii) View Filter
 - a. Filter: Select a view filter condition from the drop-down menu

iii) Primary Value Axis

- a. **Format Type:** Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
- b. **Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
- c. **Precision**: Set the after-decimal value (It will show up to 5 precision) E.g., the below given image displays the Sum of Monthly Salary in INR where the selected Format is Lacs and Precision value is shown up to three numbers.

	Sum(MonthlySalary)	/	Dimensions / Measures		roperties
				General Settings	
				Label:	Sum of Monthly Sal.
ľ				Label Color:	#0000a3
	₹166.639Lacs			Label Font Size:	16 🔻
	Sum of Monthly Sal.			Value Color:	#ff9933
				Value Font Size:	20 🗸
				Exclude Global Filter:	
				View Filter	
				Filter:	Team 🔻
				Primary Value Axis	
				Format Type:	Lacs 🔻
				Currency Type:	Rupees 🔻
				Precision:	3

5.12. KPI Comparative Tile

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

- i) Select the 'KPI Comparative Tile' component from the list of charts
- ii) Drag a Measure value to the workspace
- iii) Click the 'Actions' icon





- iv) Select the 'Custom Fields' option from the Action Settings page.
- v) Click the 'NEW' option.
- vi) Provide a Title.
- vii) Set Value by using the value indicators or manually.
- viii) Click the **'SAVE'** option.

Acti	on Settings	Custom Fields	5 NEW
	Interactions Click based interactions on other views	6	Title
4 f (x)	Custom Fields Create custom fields from view		Salary
- Geo	WebScocket Custom Websocket Settings		2700000
			8 SAVE CANCEL

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

Acti	on Settings	Custom Fields	NEW
L	Interactions Click based interactions on other views		
f (x)	Custom Fields Create custom fields from view	salary 🖍 🛍	
	WebScocket Custom Websocket Settings		

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



Acti	on Settings	Custom	Fields			NEW
	Interactions Click based interactions on other views					
f (x)	Custom Fields Create custom fields from view	Salary	v hly Salary	ji ji	ŵ ŵ	
-	WebScocket Custom Websocket Settings					

- xi) Navigate to the 'Properties' tab using the Design icon
- xii) Configure the following properties:
 - a. General Settings
 - i. Label: Insert text to be displayed as Label
 - ii. Label Color: Select the Label color using the menu
 - iii. Label Font Size: Select the font size for the displayed label using the drop-down menu
 - iv. Exclude Global Filter: Use a check mark in the box to exclude the Global filter conditions
 - v. Show Trend: Use a check mark in the box to display the trends
 - b. View Filter:
 - i. Filter: Choose a view filter condition from the drop-down menu
 - c. Primary Value Properties:
 - i. Font Size: Select a font size from the drop-down menu
 - ii. **Format Type:** Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - iii. **Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - iv. Precision: Set the after-decimal value (It displays up to 5 precision)

Sum(Experience)		Dimensions / Measures		Chart F	roperties
	-		11	General Settings	
				Label:	
		1		Label Color:	#0000a3
				Label Font Size:	15 🔻
			071	Exclude Global Filter:	
			871	Show Trend:	
			0 12	View Filter	
				Filter:	None 🔻
			13	Primary Value Prop	perties
				Font Size:	22 🔻
				Format Type:	Auto 🔻
				Currency Type:	None 🔻
				Precision:	0

- d. Secondary Value Properties
 - i. Secondary Value: Select a custom filed from the drop-down menu
 - ii. Font Size: Select a font size from the drop-down menu
- iii. **Format Type:** Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
- iv. **Currency Type:** Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
- v. Precision: Set the after-decimal value (It displays up to 5 precision)
- vi. **Rules:** Click the icon provide to insert rules



14 Secondary Value	4 Secondary Value Properties							
Secondary Value:	Salary	•						
Font Size:	20	•						
Format Type:	Auto	•						
Currency Type:	None	•						
Precision:	0							
Rules:	¢							

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

5 Rules	* (100 to 100)	1 AA				hart I
Primary Operator	Operation	Secondary Operator	Primary Value Color	Secondary Value Color	Trend Direction	Trend color
Primary Value 🔻	less than or equal to 🔹	Secondary Value 🔻		U	p 🔻	
ADD				CAN		APPLY

xiii) The Primary and Secondary values get displayed in the selected colors with Trend directed to upward if the rule condition is met.

Sum(Experience)	Dimensions / Measures	
	🖍 🚺 123 Sum(Expe 🔋 🗶	
		871 3M 奈
		3M 🕿



xiv) Users can set multiple '**Rules**' by configuring the required fields as described above; the KPI Tile Visualization reflects the crucial changes as per the selected rule. (E.g., the following image displays another rule where the Secondary Value is selected as Greater than or equal to the Primary Value and the trend direction is downward.

Sum(Experience) 	1	Dimensions / Measures
		871 3M ≽

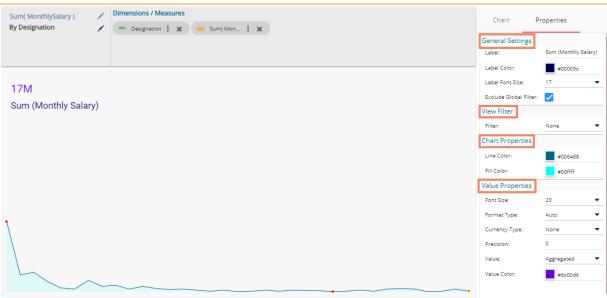
Note: The KPI Comparative Tile contains General Settings, View Filter, and Primary Value Axis like KPI Tile, but it has additional properties such as Show Trend, Secondary Value Axis, and Rule to insert comparative approach.

5.13. KPI Sparkline

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

- i) General Settings:
 - a. Label: Provide a label name by using this field
 - b. Label Color: Select a label color from the menu
 - c. Label Font Size: Set the label font size
 - d. Exclude Global Filter: Enabling this opt by a checkmark excludes the selected view from the Global Filter condition
- ii) View Filter:
 - a. Filter: Select a filter condition to be applied to the view on the storyboard
- iii) Chart Properties:
 - a. Line Color: Select a line color for the Sparkline chart
 - b. Fill Color: Select a fill color for the Sparkline chart
- iv) Value Properties:
 - a. Font Size: Set Font size of the displayed value using the drop-down menu
 - b. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - c. Currency Type: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - d. Precision: Set the after decimal value to be displayed
 - e. Value: Select an option from the drop-down menu
 - i. Aggregated
 - ii. Last
 - f. Value Color: Select a value color from the menu





5.14. Map Chart

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

Best Situation to Use Map:

To represent any information in the geographical context.

Chart Properties:

- i) General Settings:
 - a. Exclude Global Filter: Use a check mark in the box to exclude the global filter condition
- ii) View Filter:
- iii) Range
 - a. Dynamic Range: Enable or disable the dynamic range.
 - b. Min Color: Select a color for the minimum value from the drop-down menu
 - c. Max Color: Select a color for the maximum value from the drop-down menu
- iv) Region
 - a. Select Map: Select a region using the drop-down menu.





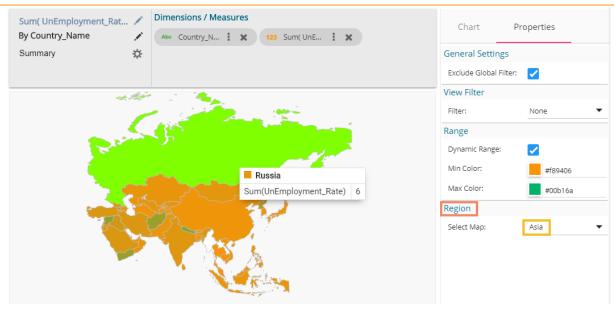
Note:

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

Sum(UnEmployment_Rat	/ Dimensions / Measures	Chart P	roperties
By Country_Name	▲ Abc Country_N ★ 123 Sum(UnE ★		
Summary	☆	General Settings	
		Exclude Global Filter:	
		View Filter	
		Filter:	None 🔻
44.0		Range	
		Dynamic Range:	
E.M.		Color:	#00b16a
		Region	
		Select Map:	WORLD 🔻
	📝 💎 💆 🛀 📖 📩 👘		
	E. S.		
	•		

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





5.15. Data Grid

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

Chart Properties:

i) General Settings

- a. Order: Users can order the displayed data by selecting an option from the given choices:
 - i. Ascending,
 - ii. Descending
 - iii. None
 - iv. Manual Sort (Users can manually sort the dimensions by using the indicator signs) By selecting an order, users will be required to configure the following fields:
 - i. Order By- Select a value option from the drop-down menu to order sequence of the data
 - ii. Limit- Set a number to display the requested data by this limit
- b. Font Size: Select a font size out the given choices (Small, Medium, Large)
- c. Bold: Use a check mark in the box to display the fonts of the heading in Bold
- d. Italics: Use a check mark in the box to apply the Italics style to display the heading
- e. Underline: Use a check mark in the box to underline the headings of the displayed data columns
- f. Font Color: Select a font color using the menu
- g. Background Color: Select a background color using the menu
- h. Exclude from Global Filter: Use a check mark in the given box to exclude the view from the Global filter condition
- ii) View Filter
 - a. Filter: Select a filter condition from the drop-down menu



ium(MonthlySalary) ly ExperienceCategory Summary		123 Sum(Mon : 123 Sum(UsdB :	X 123 Sum(Offer : X	×	General Settings Order:	operties Descending
Experiencecategory	Sum(MonthlySalary)	Sum(OfferedCTC)	Sum(PreviousCTC)	Sum(UsdBilling)	Order By: Limit:	sum(MonthlyS
2-4	6.40M	76.40M	47.90M	152.30K	Font Size:	Small
4-6	3.00M	36.10M	24.00M	72.20K	Bold:	 Image: A set of the /li>
0-2	2.10M	25.30M	9.40M	63.30K	Italics:	
10-15	2.10M	24.90M	17.50M	46.70K	Underline: Font Color:	
6-8	1.70M	20.80M	15.60M	38.80K	Background Color:	#00005c
15+	705.00K	8.50M	5.70M	16.60K	Exclude Global Filter:	
8-10	673.30K	8.10M	8.10M	19.40K	View Filter	
null	0.00	0.00	0.00	0.00	Filter:	Designation

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

5.16. Metric Summary

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

Chart Properties:

i) General Settings

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

ii) View Filter

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

Sum(PreviousCTC)	11	Dimensions / Me 123 Sum(Previ 123 Sum(Expe 123 Sum(UsdB	: × : ×	123	Sum(Offer Sum(Mon Sum(Curr	:	×		Chart Pr General Settings Measure Description:	Measure
Measure		123 Juni 0305	. ^	123	Sum cum.	•	^	Total	Summary Description: Exclude Global Filter:	Total
sum(PreviousCTC)								128.20M	View Filter	
sum(OfferedCTC)								200.00M	Filter:	None 🔻
sum(ExperiencePerCTC)								49.30M		
sum(MonthlySalary)								16.70M		
sum(UsdBilling)								409.20K		
sum(CurrentMonthlyPaymen	t)							12.30M		

5.17. R Server Visual

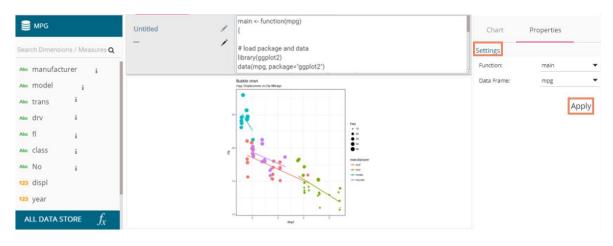
Users can see visualization based on their inserted R scripts using this charting component.

- i) Navigate to the Design New page
- ii) Select R Server Visual component to visualize the data
- iii) Write a valid R Script in the given space.



🛢 mpg data	Untitled R Script	Chart	Properties
Search Dimensions / Measures ${f Q}$			
Abc manufacturer i			
Abc model			
Abc trans i			
Abc drv i			
Abc fi i			
Abc class i			≡%
123 No			
123 displ		**	
123 year			· · ·
123 cyl	[Select Dimension or Measure to Visualize Data]		🕵 📲
ALL DATA STORE $f_{\!X}$	[Change chart from right hand side panel]		

- iv) Open 'Properties' tab
- v) Configure the below given Settings fields:
 - a. Function: Select an option from the drop-down menu
 - b. Data Frame: Select an option from the drop-down menu
- vi) Click the 'Apply' option
- vii) The canvas displays visualization based on the inserted R script.



5.18. Pareto Chart

A Pareto chart is a type of chart that contains both bars and a line graph, where individual values are represented in descending order by bars, and the line represents the cumulative average.

Best Situation to Use a Pareto Chart:

To identify the most frequent defects, complaints, or any other factor that the users can count and categorize

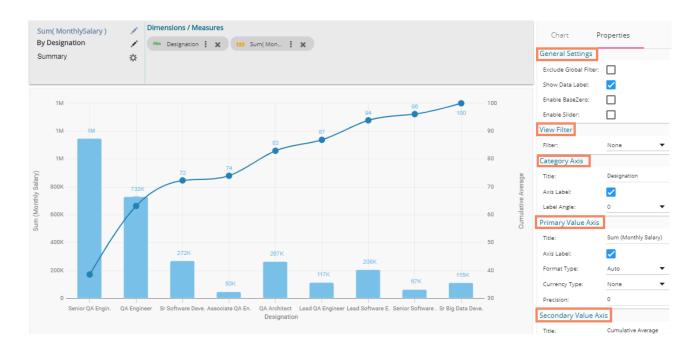
To focus on where improvement efforts will make the most impact

Variation of this Chart: Pareto Pyramid, Paired Pareto chart

- i) General Settings
 - **a. Exclude Global Filter**: The view will be excluded from the Global Filter condition by putting a checkmark in the box
 - **b.** Show Data Label: Data label gets displayed by using a checkmark in the given box
 - c. Enable Base Zero: Base gets presented from Zero by using a checkmark in the given box
 - d. Enable Slicer: the slicer gets displayed by enabling a checkmark in the given box
- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu



- iii) Category Axis
 - a. Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by using a checkmark in the box
 - c. Label Angle: Select a display angle for the axis label
- iv) Primary Value Axis
 - a. Title: Provide a title for the Primary Value Axis
 - b. Axis Label: Enable the Primary Value Axis label by using a checkmark in the box
 - c. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - **d. Currency Type**: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - e. Precision: Set the after-decimal value (It displays up to 5 precision)
- v) Secondary Value Axis
 - a. Title: Provide a title for the Secondary Value Axis (by default it displays the cumulative average of the selected measure

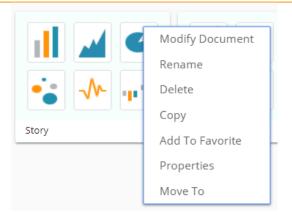


6. Options

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

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





6.1. Modifying a Document

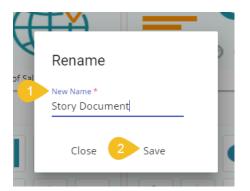
- i) Select 'Modify Document' from the story options menu
- ii) A new window to modify the story details appears
- iii) Modify the following information:
 - a. Title: Enter a title for the Business Story
 - b. Description: Describe the story (Optional)
 - c. Click the 'Save' option



iv) The chosen information for the story document gets modified

6.2. Renaming a Story Document

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





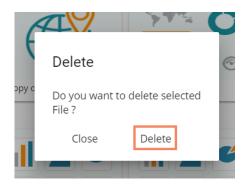
iii) A success message appears

iv) The story document gets renamed successfully

My Documents >					
III III III IIII IIII IIII IIIIIIIIIII	Business Story	Copy of Sales Geo Analysis	i i i i i i i i i i i i i i i i i i i		
Sample Story	Story Document	Test Story	test story 2		
Document renamed successfully!					

6.3. Deleting a Business Story

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



vi) The selected story document gets removed.

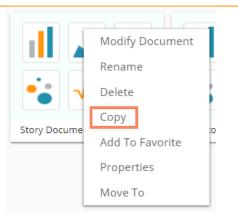
Note: The 'Delete' option is not provided to the story documents shared as the Public Documents.

6.4. Copying and Moving a Business Story

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

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

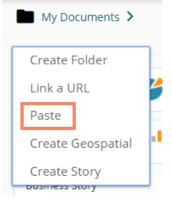




iv) Select another folder and click the 'Settings' icon Or

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

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



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

Ð	Paste	_	2
of Sal	Name * Copy of Story D)ocument	
	Close	Save	

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

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

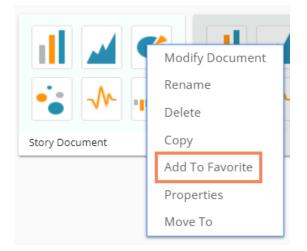


My Documents >				Search	Q = Name
Image: state	Business Story	Copy of Sales Geo Analysis	Copy of Story Document	IN I	Mobile App Story
Sample Folder	III II III III III III III IIII IIII IIII IIIII IIII IIII IIIII IIII IIII IIIII IIII IIII IIIII IIII IIII IIII IIII IIIII IIII IIII IIIIII	III III III III IIII III IIII IIII IIIIIIII	III III III III IIII III IIII IIII IIIIIIII	test story 2	

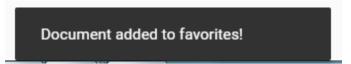
6.5. Adding/Removing a Story Document to/from Favorites

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

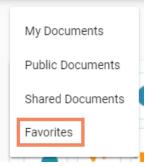
- i) Select a story document
- ii) Use the right-click to open the options menu
- iii) Select the 'Add to Favorite' option from the menu



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



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

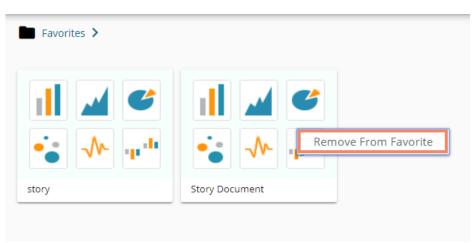


vi) The selected story document gets added to the 'Favorites' space



Favorites >	
story	Story Document

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



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



Favorites >	
•i 사 🖓	
story	
	Document removed from favorites!

6.6. Properties

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

Properties	×			
Business Story				
< Properties	Share With User Share With Group Exclud			
Created By:	Will			
Kind:	Business Story			
Where:	My Documents->Business Stories			
Created:	Tue Dec 18 2018 17:35:07 GMT+05:30 (India Standard Time)			
Modified:	Tue Dec 18 2018 17:35:07 GMT+05:30 (India Standard Time)			
Version:	3.7.0			
Open Document Link:	https://app.bdb.ai/home/#/opendocument?data=eyJ1c2 Copy			
	Anyone with the link Can view 🔻			
Description:				
Upload Image:	Choose Files No file chosen Save			
×	Image uploaded successfully!			



Note: The users can select via the Properties screen whether the other users to whom the story doc has been shared receive a view only rights, or they can edit the shared copy.

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

<	Properties	Share With	u User	Share With Group	Exclud
tes	tMigratePrd	A	> tes	tNewMigrate	*
adı	min				
Nik	itaa		••		
Shi	pra		<		
siva	an		44		
vie	- l	•			-
Close	save				

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

< Properties	Share With User	Share With Group	Exclud
Kpmg Group	Â	UserGroup	^
testUserGroup		Poweruser	
Permission			
BizViz Partners	<		
Demo Viewers	44		
ARCGroup	•		*
Close Save			



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

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

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

<	ory Document Share With User	Share With Group	Exclude User	c
Ľ	Arun	Rub		A
	Kadandale	>		
	Mahadevan	44		
,	Vineet	<		
	karthikps			
		~		-
Clo	ose Save			

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



Story D		Share With Gr	oup	Exclud	e User	C	ору То	>
admi	n		1		stMigratePro	d		•
Nikita	a			>				
Shipr	a			*				
sivan				<				
visha			1	•				
Class			·					
Close	Sa	ve						

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

	(E)
	Last 3 Notifications	V
	admin Copying Document Document copied with title Story Document successf	
le	admin Datastore Notification for Hiring_BIStoryNLP - Ad Loaded data to datastore 'Hiring_BIStoryNLP - Admin'	.c
	admin Datastore Notification for Hiring_BIStoryNLP - Ad Loaded data to datastore 'Hiring_BIStoryNLP - Admin'	
	See All	

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

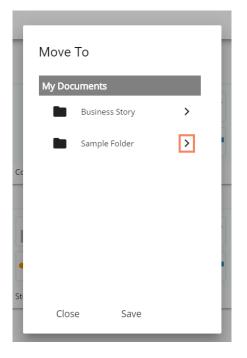
Note: If a story document is shared using this option, then the selected users have the right to modify the received story. The copied story document can be accessed from the '**Shared Documents**' space.

6.7. Move To

- i) Select a story document
- ii) Select the 'Move To' option from the context menu
- iii) A new screen pops-up with available folder options
- iv) Select a folder or subfolder



v) Click on the 'Move' > option to open a list of available sub-folders



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

Move	То		٦
← Sar	nple Folder		
•	Sample Folder	>	
-			ł
Clos	se Save		

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

Document moved successfully!

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



My Documents 👂 Sa	mple Folder 🗲	
Sample Folder	Sample URL1	Business Story

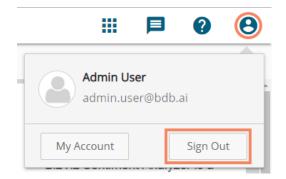
Note: 'Move To' option is not provided to the story documents shared as the Public Documents.

7. Signing Out

It is possible for a user to Sign out from the Business Story at any given stage.

Follow the below given steps to log out from the BDB Platform.

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



iv) Users successfully log out from the BizViz Platform.

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