

Admin Guide

Platform R-4.0

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1. About this Guide

1.1. Document History

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

Product	Version	Date (Release date)	Description
BDB Platform	1.0	June 9 th , 2015	First Release of the Document
BDB Platform	2.0	February 18 th , 2016	Updated Document
BDB Platform	2.1	May 11 th , 2016	Updated Document
BDB Platform	2.5	November 9 th , 2016	Updated Document
BDB Platform	2.5.1	January 3 rd , 2017	Updated Document
BDB Platform	2.5.3	March 16 th , 2017	Updated Document
BDB Platform	3.0	August 31 st , 2017	Updated Document
BDB Platform	3.0	October 31 st , 2017	Modified Document
BDB Platform	3.2	February 2 nd , 2018	Updated Document
BDB Platform	3.5	April 15 th , 2018	Updated Document
BDB Platform	3.6	August 20 th , 2018	Updated Document
BDB Platform	3.7	October 10 th , 2018	Updated Document
BDB Platform	3.8	December 1 st , 2018	Updated Document
BDB Platform	4.0	December 31 st , 2018	Updated Document

1.2. Overview

This guide covers:

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

1.3. Target Audience

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

2. Introduction

2.1. Introducing the BDB Platform

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

Customers having multiple branches can efficiently manage data by creating a single space for each branch within this platform. They can also view the information collected from multiple branches

via dashboards and BI Stories. They can use Data Preparation and Predictive Analysis to prepare and organize their existing data to gain actionable insight into their business.

2.2. Supported Web Browsers

The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

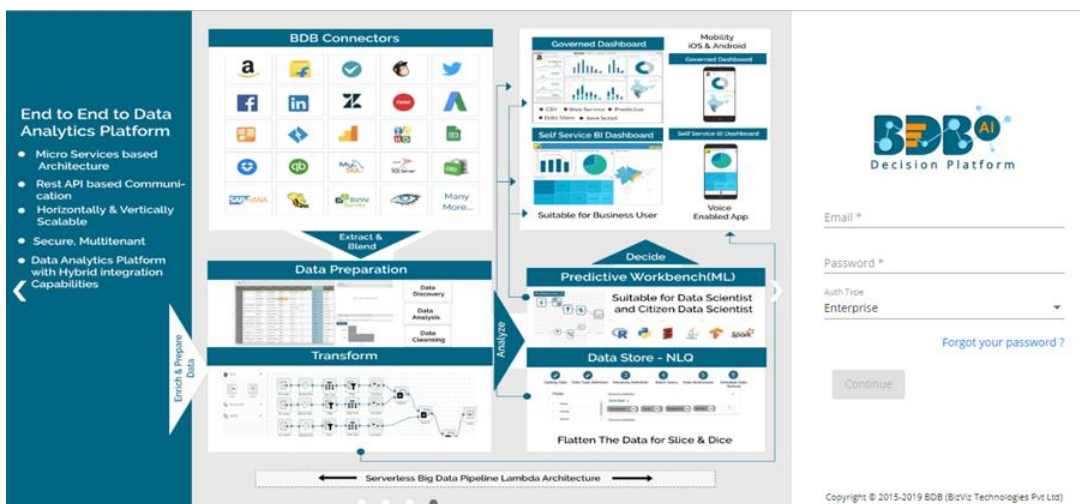
Mozilla Firefox/ Firefox ESR	Latest Version
Microsoft Internet Explorer	11
Microsoft Edge	Latest Version
Apple Safari	10
Google Chrome	Latest Version (recommended web browser)

3. Getting Started with the BDB Platform

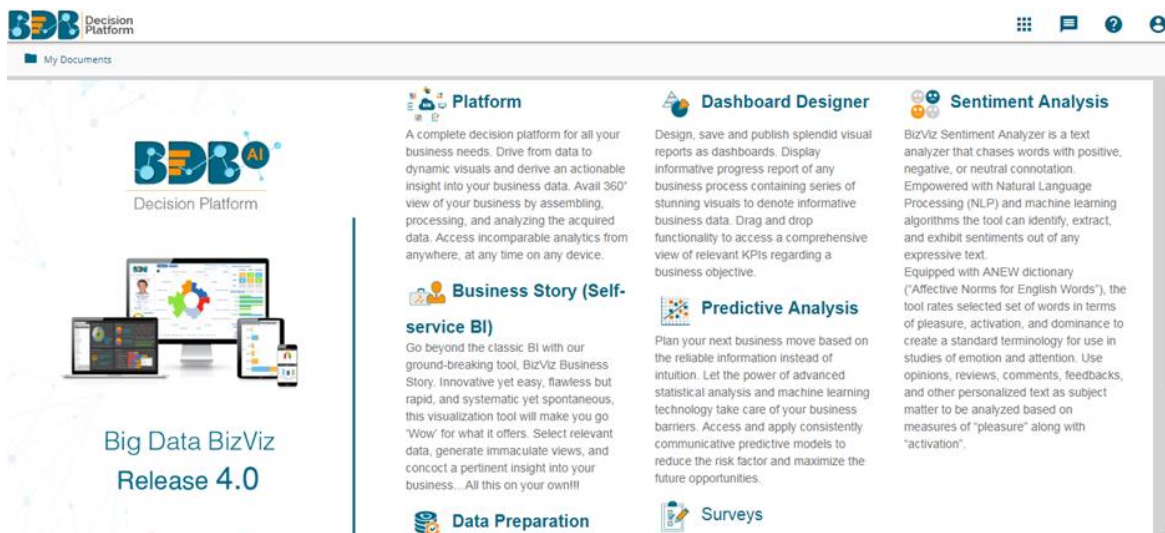
3.1. Accessing the BDB Platform

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

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



- iv) BDB Platform homepage opens.
- v) Users get redirected to the BDB Platform homepage.



Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

3.1.1. Forgot Password Option

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

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

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- iii) A new window opens.
- iv) Provide the email id that is registered with BDB to send the reset password link.
- v) Click '**Continue**' option.



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 *

admin@bdb.ai

[Sign in](#)

Continue

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

Password reset Link has been sent to your mail.

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



Reset Password

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

New Password *

Confirm New Password *

Continue

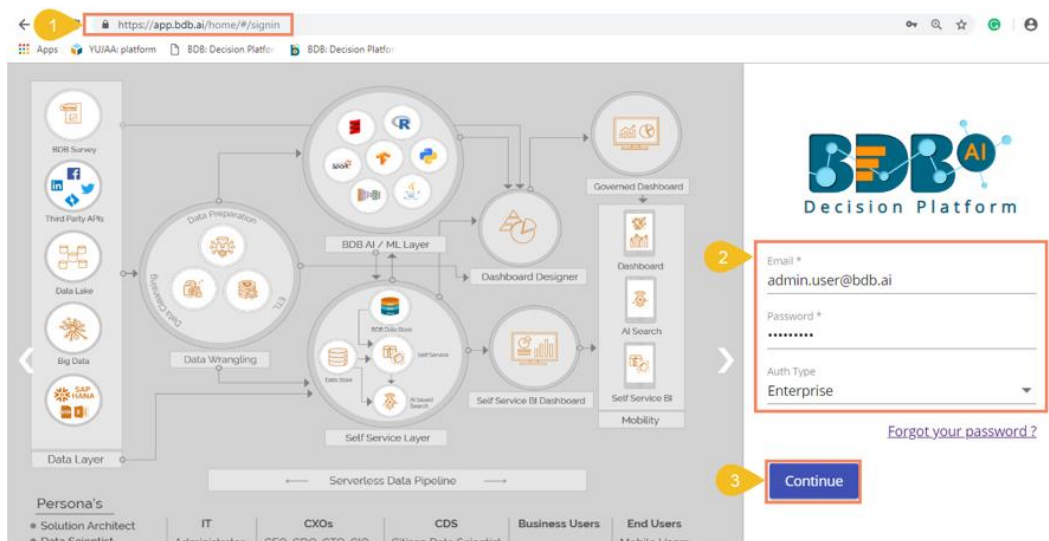
Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)

- xii) The password for the selected BDB account gets reset.

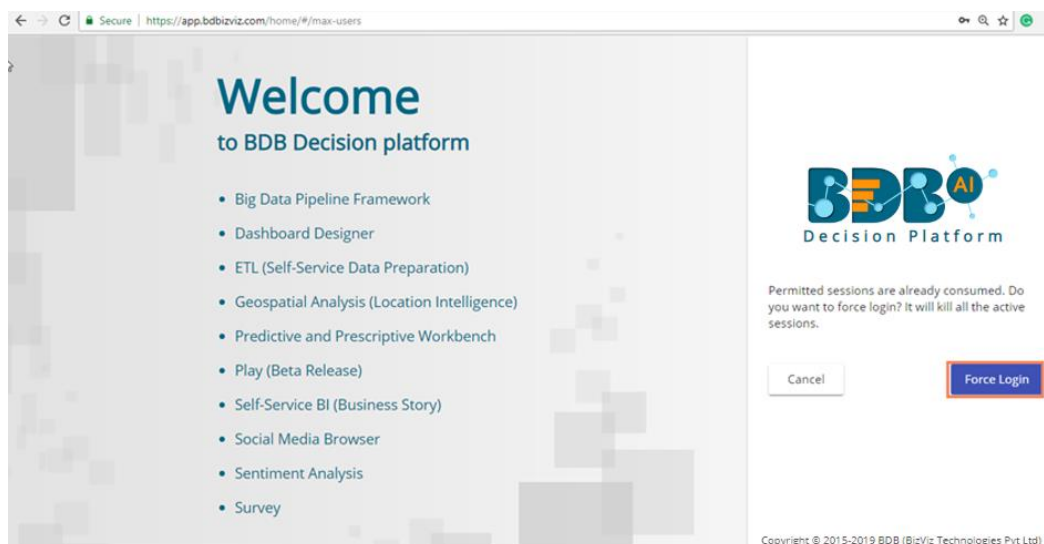
3.1.2. Force Login

The 'Force Login' functionality has been introduced to control the number of active sessions up to three. The users can access only 3 sessions at a time when they 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.

- i) Navigate to the BDB Platform Login page.
- ii) Enter the valid credentials to log in.
- iii) Click the 'Continue' option.



- iv) The user will get the following message if the user already consumes the permitted active sessions (3 sessions at a time).
- v) Click the 'Force Login' option.



- vi) A warning message appears that the currently active sessions get killed for the user and the user has redirected to the log in a page of the BDB Platform.


Note: The user can successfully login to the BDB Platform after selecting the **'Force Login'** option to log in the platform.

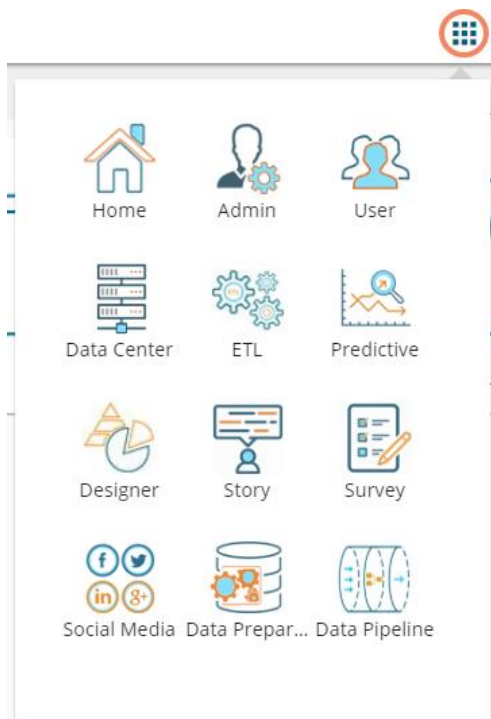
3.2. Platform Homepage

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

3.2.1. Apps Menu

The Apps Menu button displays all the available applications.

- i) Navigate to the Platform homepage
- ii) Click the **'Apps'**  icon
- iii) All the available plugin applications are displayed




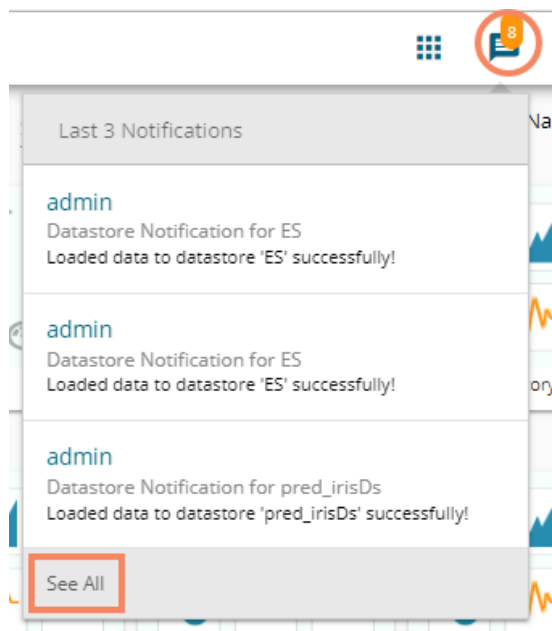
Note: Users can select and open various applications by using the specific App icon provided under the **'Apps'** menu window.

3.2.2. Notification Option

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

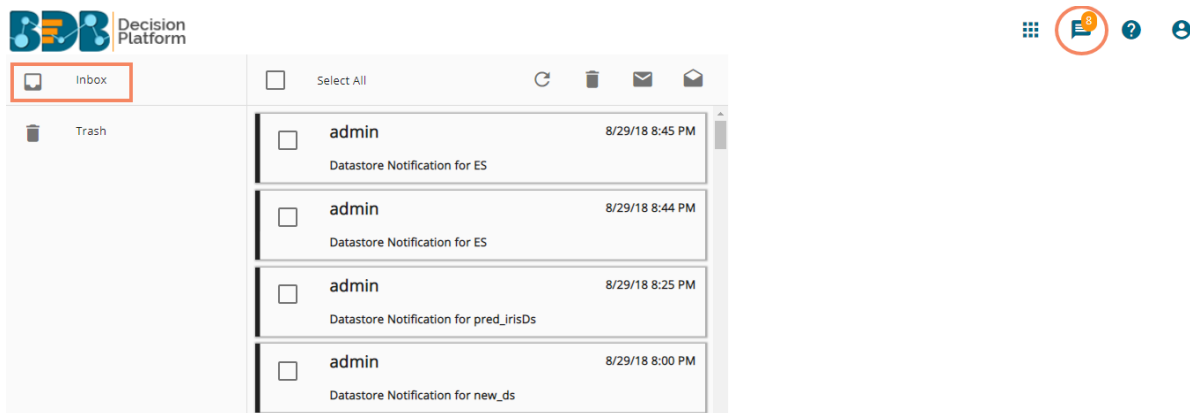
By default, Inbox and Trash folders are provided.

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

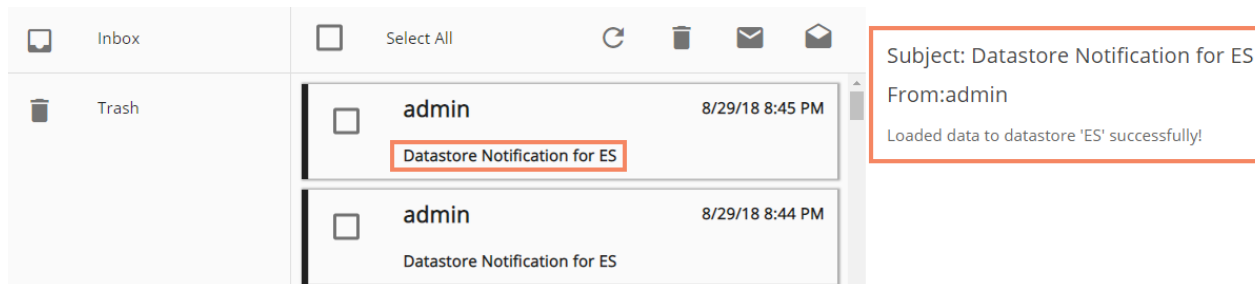


v) Users get redirected to the notification **'Inbox'** page (by default)

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



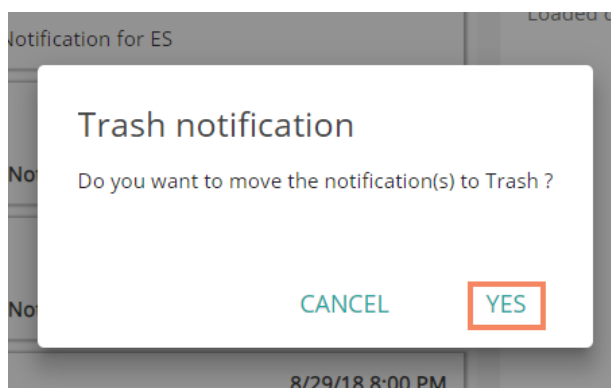
vi) Click on a notification message from the 'Inbox' folder to get the details of the selected message



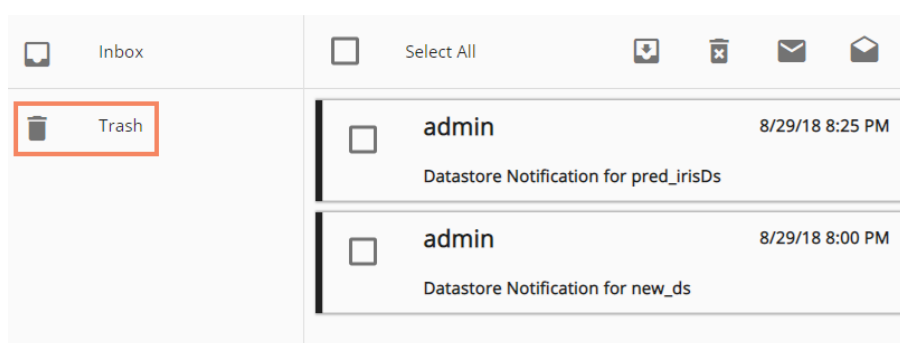
Icons provided on the inbox window:

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

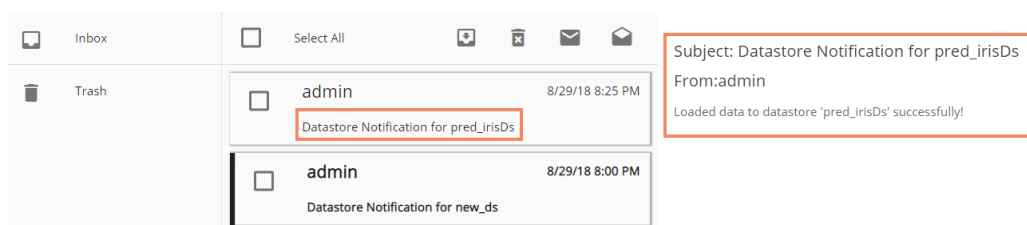
- vii) Click the 'Trash' icon from the header panel of the notification inbox
- viii) A message window appears to confirm the action of moving the selected notification to Trash.
- ix) Click 'YES' to move the notification(s) to Trash.



- x) Click to open the list of messages from the 'Trash' folder



- xi) A click on a notification message from the 'Trash' folder opens the message details



Icons provided on the Trash-box window:

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

Note: Alert messages display while performing the following actions:

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

3.2.3. Help Menu

The users can access the help documents via this menu.

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

BDB Documentation and Help


Version 3.8 ▼


Release 3.8

USER GUIDES

- [• Business Story](#)
- [• Predictive Workbench](#)
- [• Platform Administrator Guide](#)
- [• Social Media Browser](#)
- [• Sentiments Analysis](#)
- [• Survey](#)
- [• Dashboard Designer](#)


3.2.4. User Menu

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

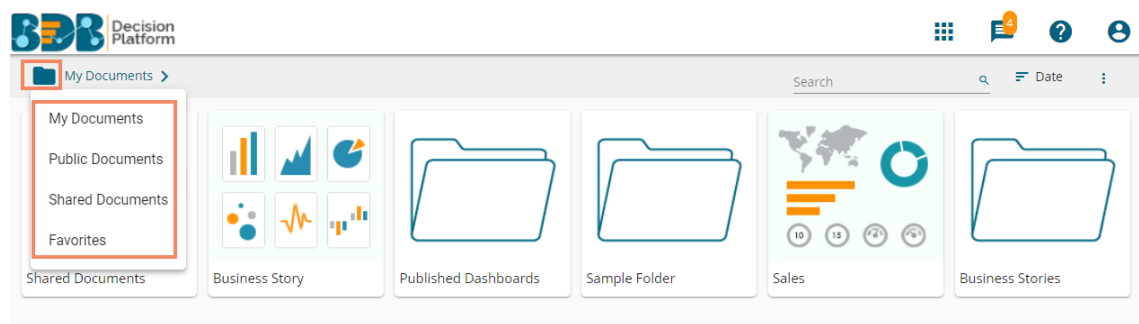
- i) Navigate to the Platform homepage
- ii) Click the 'User'  option
- iii) Displays the following options:
 - a. **My Account:** Displays account details of the logged in user
 - b. **Sign Out:** Helps to sign out from the Platform

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

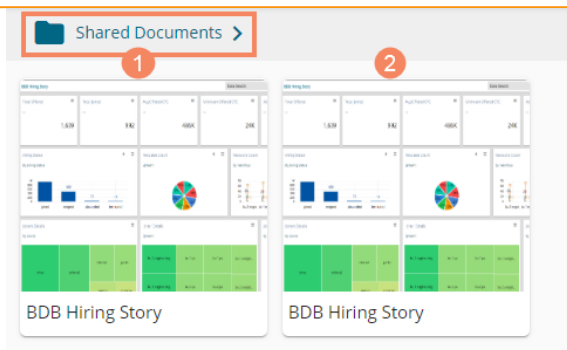
3.2.5. Available Documents

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

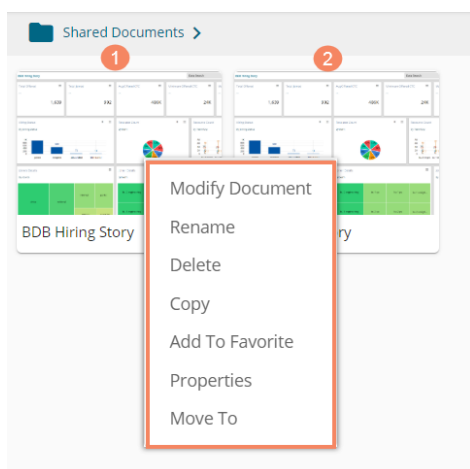
1. My Documents
2. Public Documents
3. Shared Documents
4. Favorites



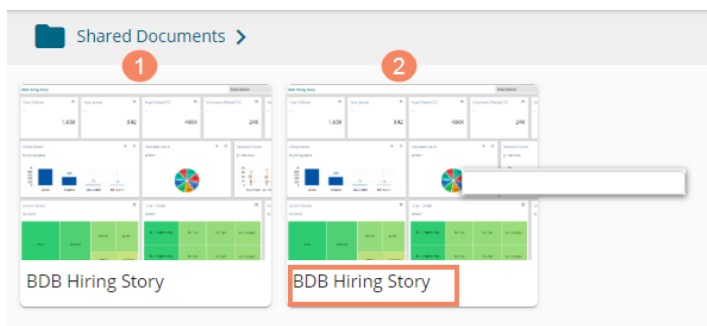
- **My Documents**
 - 'My Documents' lists all the documents created by the user or assigned to the user
 - The documents are displayed as thumbnails
- **Public Documents**
 - The 'Public Documents' folder is available to all users
 - Users can view documents shared by others
- **Shared Documents**
 - The documents shared by users can be part of the 'Shared Documents'
 - The users receive view only copy of the documents which are shared using the 'Share With' option.
 - The documents shared via 'Copy To' option contains all the edit permissions for the users. E.g., In the below given image the same dashboard BDB Hiring Story is shared using 'Share With' and 'Copy To' options.



The Dashboard shared using the **'Copy To'** option gets all the permissions to modify it.



The Dashboard shared using the **'Share With'** option gets view only permission.

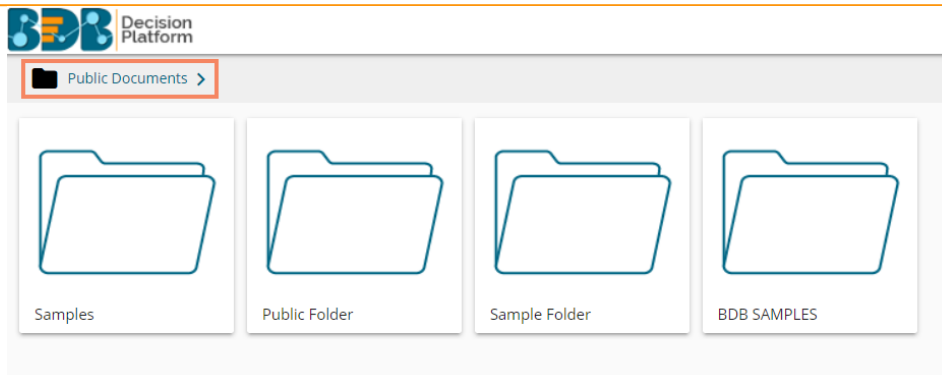


- **Favorites**

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

Note:

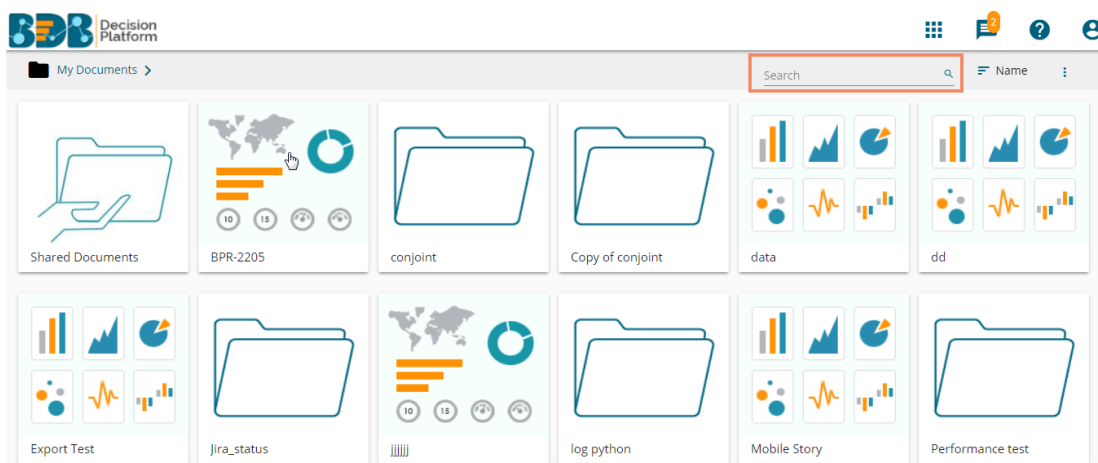
- a. The **'My Documents'** space opens by default while opening the BDB Platform homepage.
- b. The users are provided with some sample folders and documents by default. E.g., the following image displays the sampled folders available in the Public Documents.



3.2.6. Navigation Bar

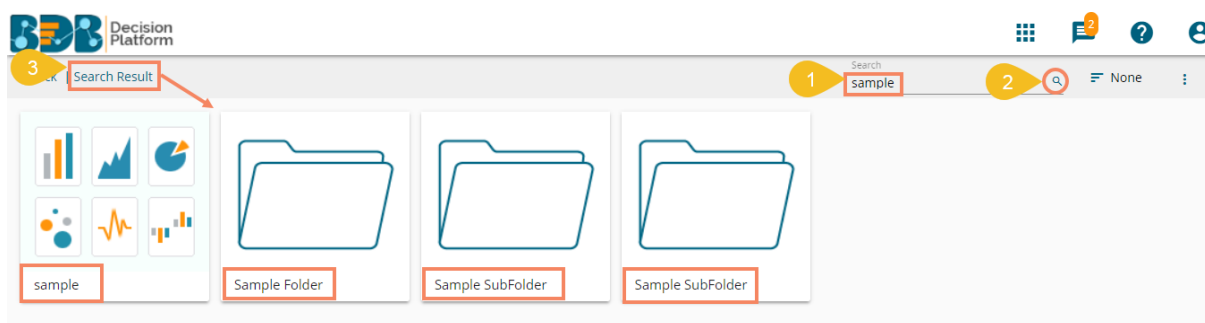
The administrator can search for a specific document by typing the title of the document in the Navigation bar.

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



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

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



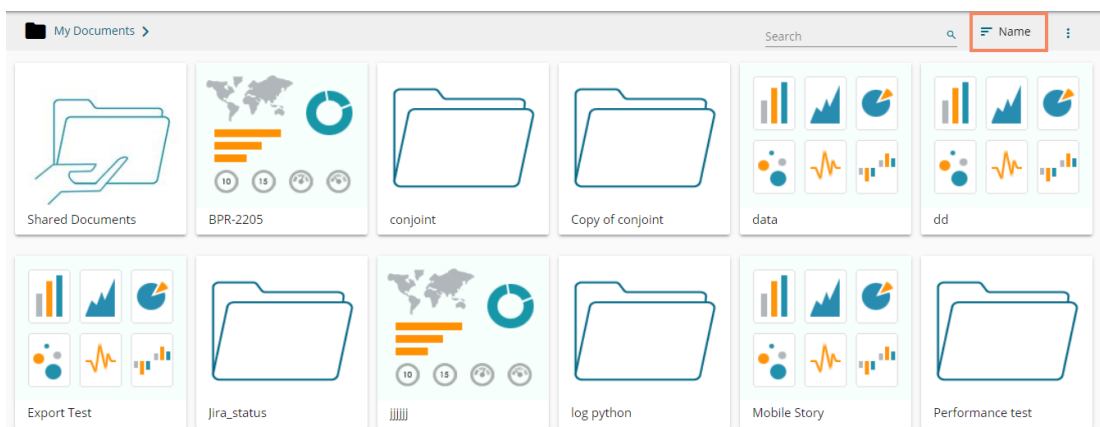
3.2.7. Ordering Documents

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

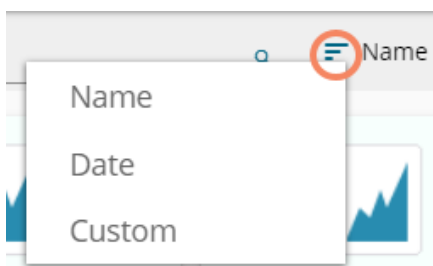
The following options are provided to display the available documents on the platform homepage:

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

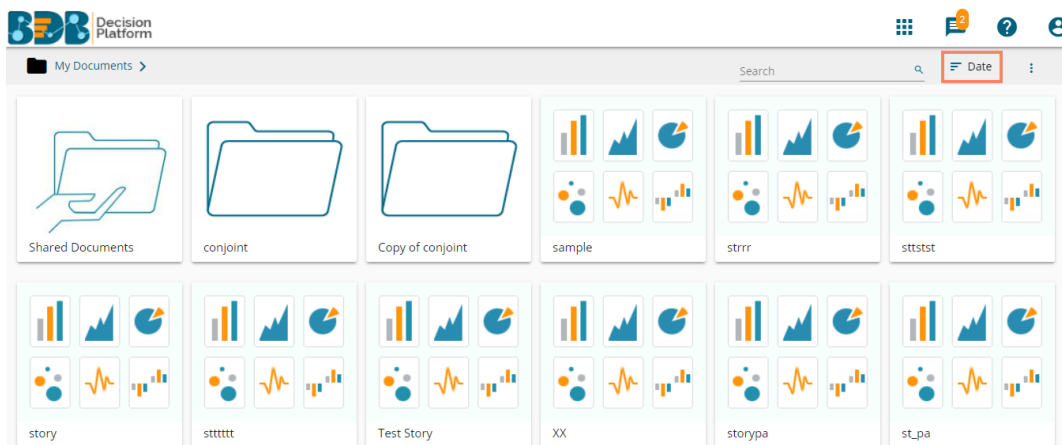
i) Click the 'Order By' icon on the platform homepage.



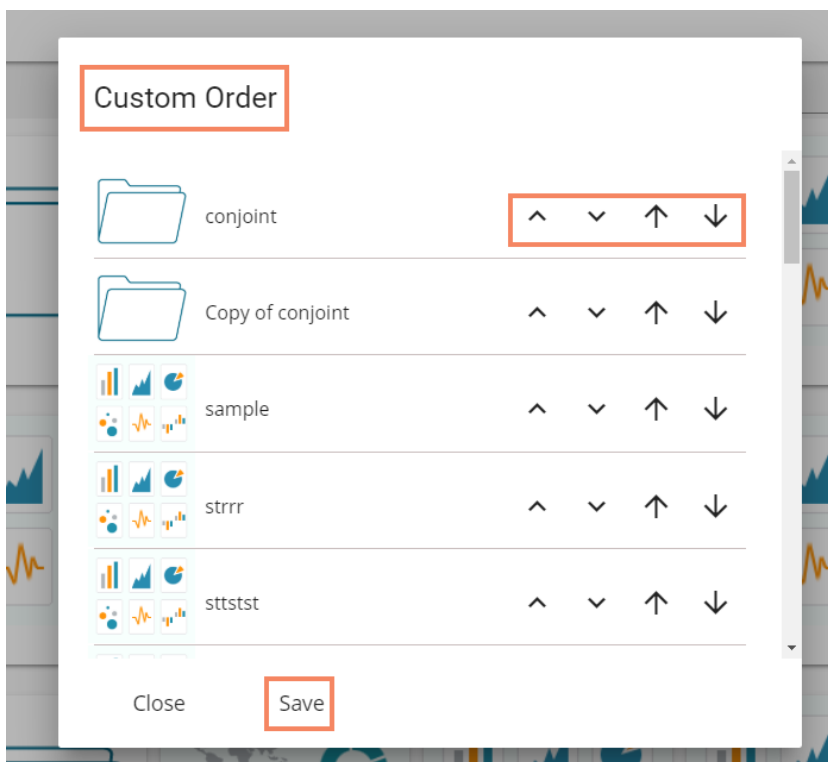
- ii) A context menu opens with the following sorting options:
- a. Name: Sort documents by their name in ascending or descending order (Ascending is the default order)
 - b. Date: Sort documents by date by using this option
 - c. Custom: Manually drag and change the order of documents



- iii) Select an option from the context menu
- iv) The platform documents get sorted as per the selected order, E.g., The following image shows documents ordered by date

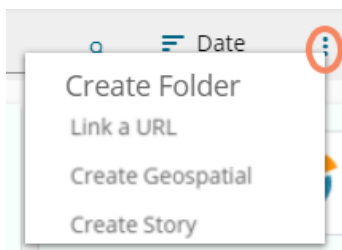


- v) Users can set a customized order of the document by choosing the 'Custom' order option
- vi) By selecting the 'Custom' option, the user gets directed to a new window
- vii) Set a customized order of displaying the available documents or folders by using the given arrows
- viii) Click the 'Save' option to save your selected order of display



Note:


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

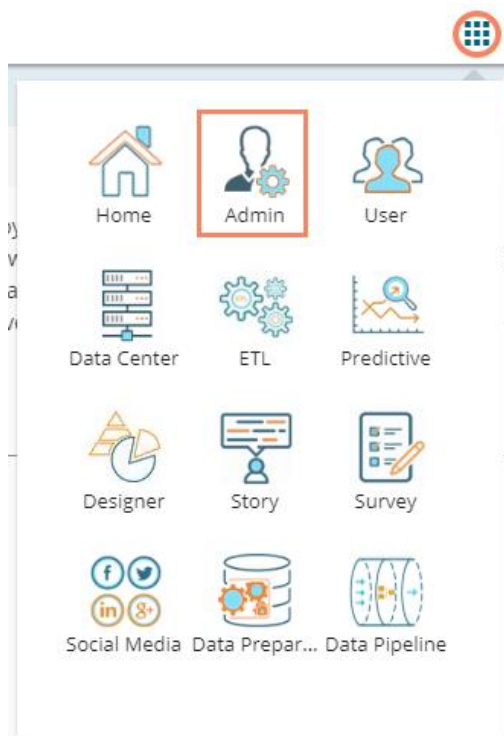


4. Administration

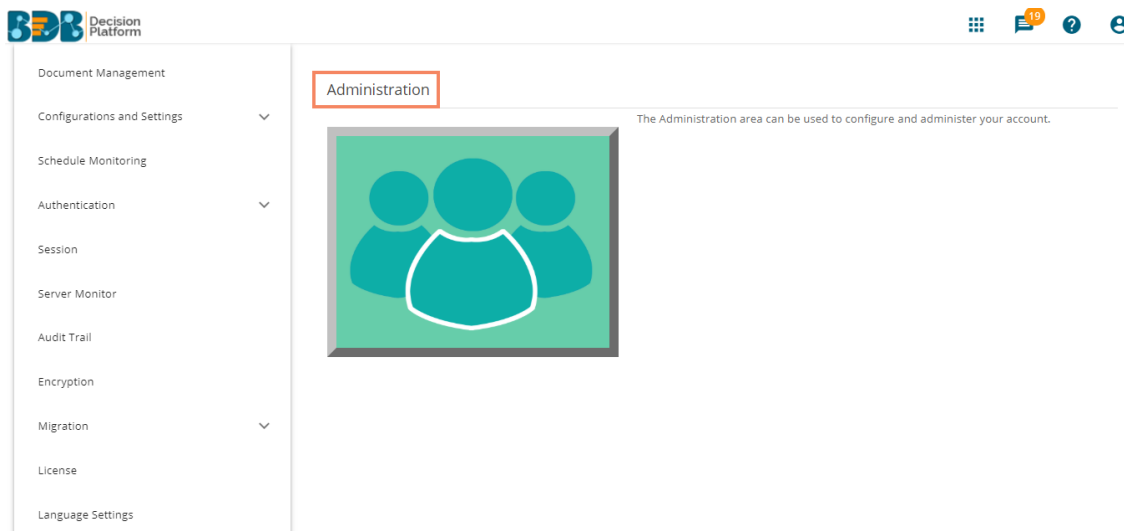
The Administrator manages the entire BDB Platform through this module. It controls all the general and user-specific configuration settings for various plugin applications provided in the platform.



4.1. Accessing the Administration Module

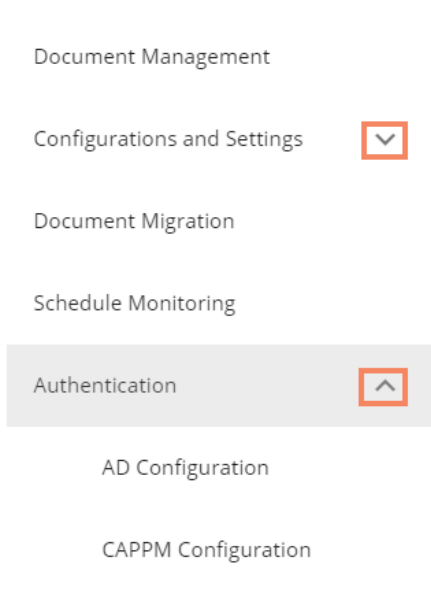
- i) Navigate to the Platform home page.
- ii) Click the 'Apps'  icon.
- iii) A menu appears containing all the available plugins.
- iv) Select and click the 'Admin' plugin.



- i) Users get directed to the 'Administration' page
- ii) A panel containing various administration options displays on the left side of the page



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



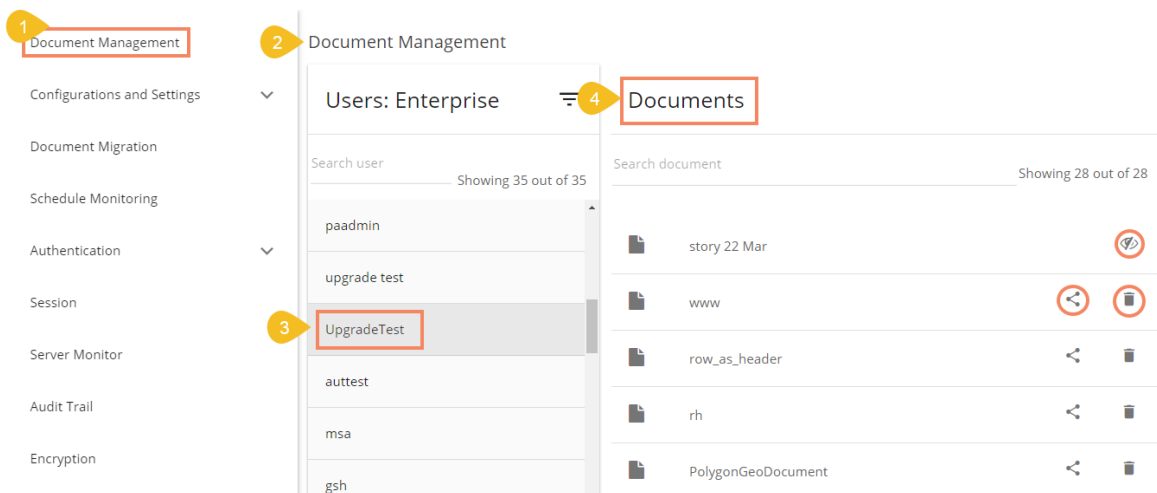
4.2. Administration Options

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

4.2.1. Document Management

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

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



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

Note:

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

4.2.2. Configurations and Settings

This section covers configuration details for various platform plugins.

4.2.2.1. Email Settings

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

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

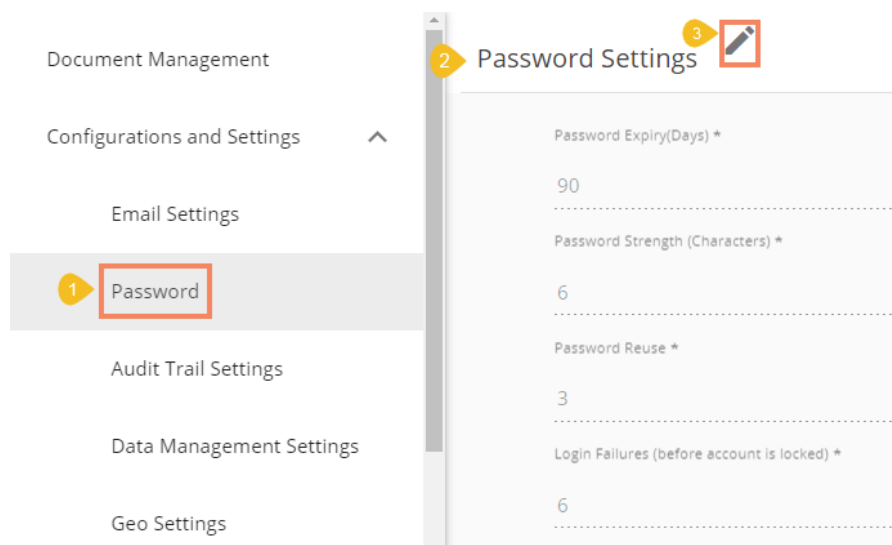
Email Server Configuration

SMTP Host *	smtp.emailsrvr.com
SMTP Port *	23
Encryption Type	TLS 2 / 4
From *	support@bdbbizviz.com
Password *
User Name	projectadmin@bdbbizviz.com

CLEAR
SAVE

4.2.2.2. Password

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



- d. By clicking the **'Edit Configuration'** option users are enabled to fill in the following information:
 - **Password Expiry:** Set password validity (in days)
 - **Password Strength:** Set password length (6 to 16)
 - **Password Reuse:** Set a limit to restrict the user from using an old password (last 3 passwords cannot be reused)

- **Login Failures (No. of User Login Failure):** Set the number of chances provided to the user for logging in with wrong passwords (Maximum login chances provided to the user are 3. The user account gets blocked, if a user enters the wrong password more than 3 times.)
- e. Click **'SAVE'** to save the settings
- f. Click **'CLEAR'** to erase the entered configuration details

Password Settings

Password Expiry(Days) *
120

Password Strength (Characters) *
6

Password Reuse *
5

Login Failures (before account is locked) *
5

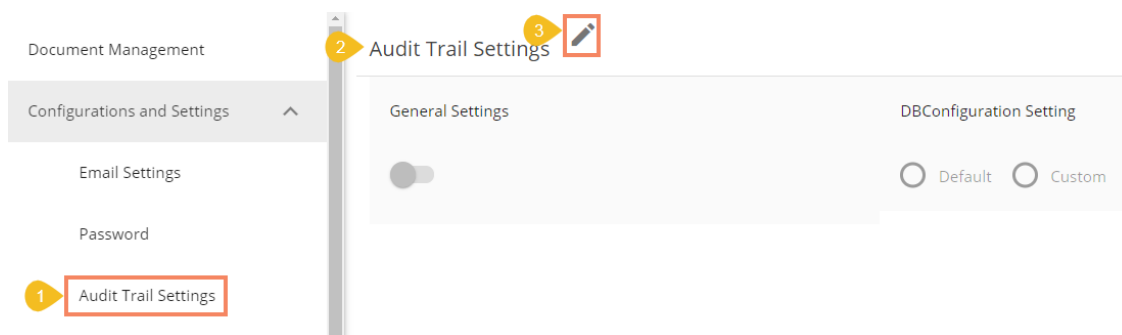
CLEAR SAVE

Note:

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

4.2.2.3. Audit Trail Settings

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

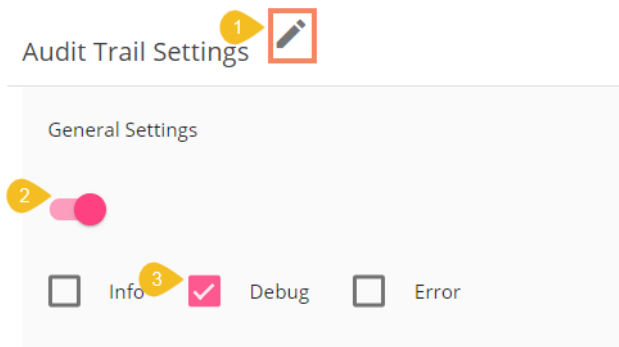


This section contains two options:

- **General Settings**

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

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



- c. Click **'SAVE'**

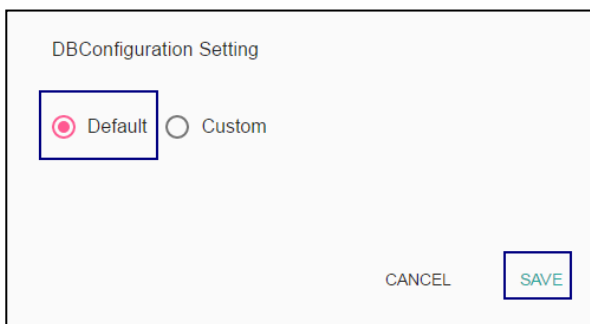


Note: There is a single **'SAVE'** button provided for both the Audit Trail options.

- **DB Configuration Settings**

This section is provided to configure the Database/ BizViz Repo Database settings. There are 2 ways to configure database settings:

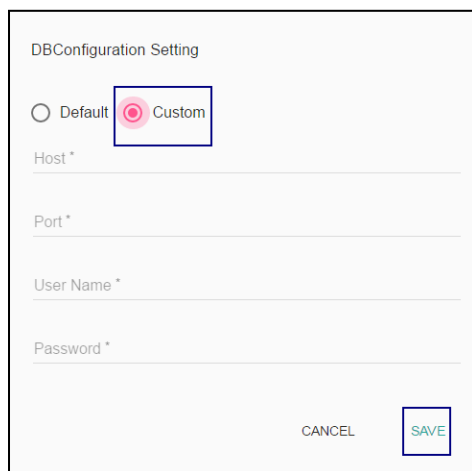
- a. **Default**
 - i. Select **'Default'**
 - ii. Click **'SAVE'**



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

- b. **Custom**
 - i. Select **'Custom'**
 - ii. Fill in the following information:
 - Host

- Port
 - User Name
 - Password
- iii. Click **'SAVE'**



DBConfiguration Setting

Default Custom

Host *

Port *

User Name *

Password *


CANCEL SAVE

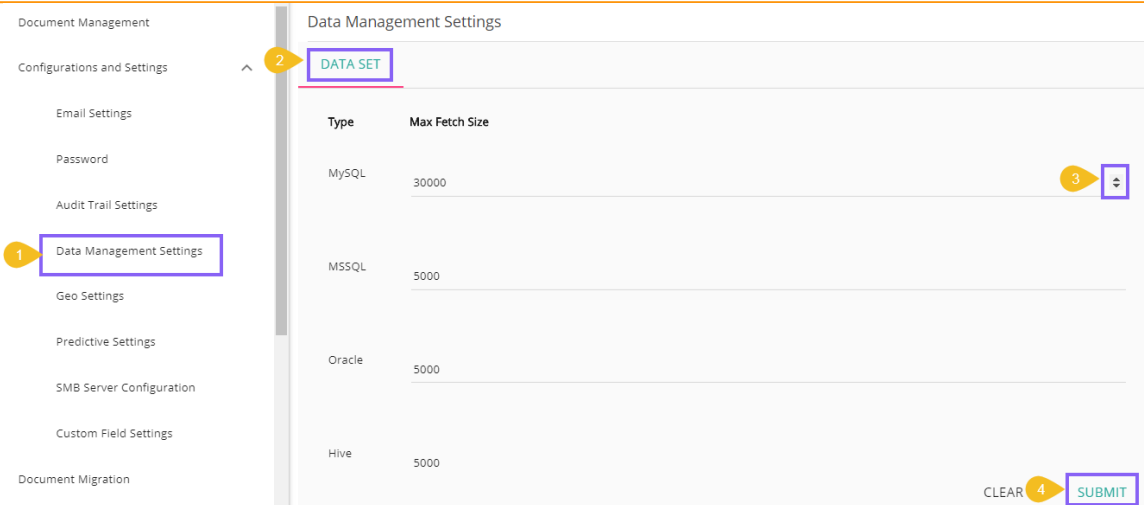
- iv. The metadata gets stored in the configured database

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

4.2.2.4. Data Management Settings

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

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



Note: Click 'CLEAR' to undo the selected values.

4.2.2.5. Geo Settings

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

- i) Google Settings
- ii) Leaflet Settings

- **Google Settings**

a. Fill in the following information:

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

Google Settings

Map Type *

google

Map Key *

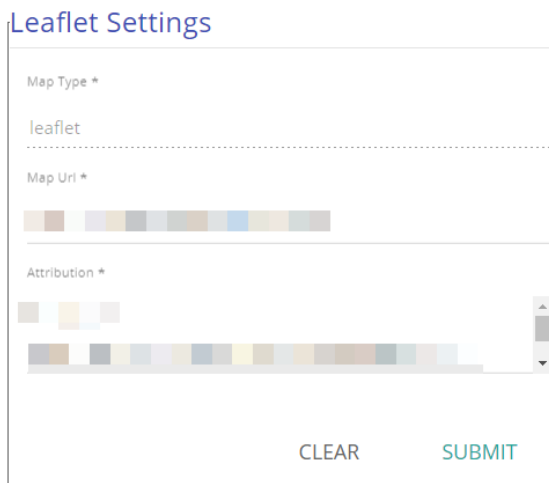
CLEAR SUBMIT

- **Leaflet Settings**


a. Fill in the following information:

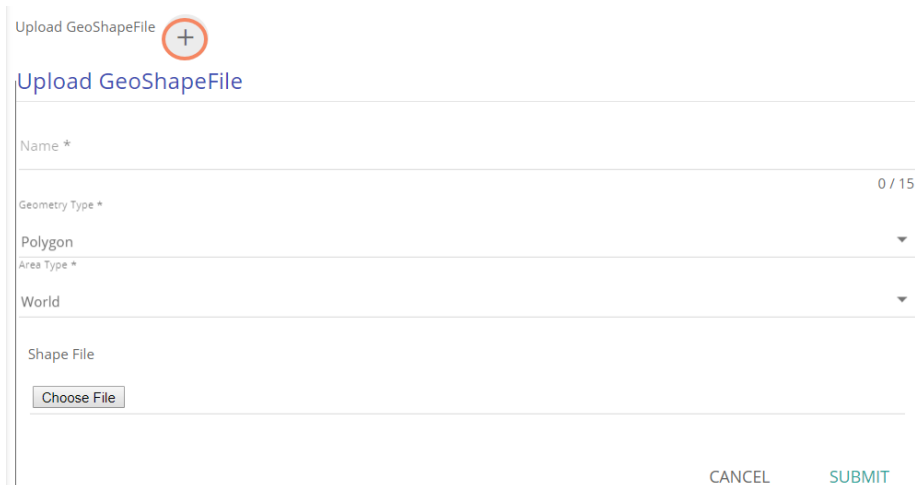
- i. **Map Type:** Displays the preselected map type
- ii. **Map Url:** URL of the selected map (provided by the open-source vendors)

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



The screenshot shows a form titled "Leaflet Settings". It contains three main sections: "Map Type *" with a dropdown menu showing "leaflet"; "Map Uri *" with a text input field containing a URL; and "Attribution *" with a text input field containing attribution text. At the bottom of the form are two buttons: "CLEAR" and "SUBMIT".

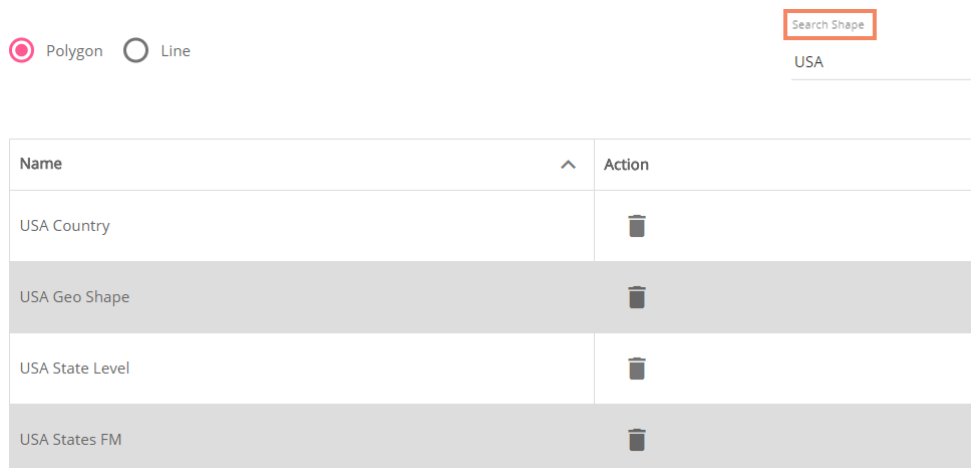
- **Uploading a Geo Shape File**
 - a. Click **'Add'**  button provided next to the **'Upload a Geoshape File'** option
 - b. **The 'Upload Geo Shape File' fields appear**
 - c. Enter the following information:
 - i. **Name:** Title of the map
 - ii. **Geometry Type:** Select any one Geometry type from the drop-down menu (out of **'Polygon'** or **'Line'**)
 - iii. **Area Type:** Select an area-type using the drop-down menu
 - iv. **Shape File:** Browse a shapefile from the system and upload (Only **'json'** and **'js'** formats are supported)
 - d. Click **'SUBMIT'**



The screenshot shows a form titled "Upload GeoShapeFile". At the top left, there is a button with a plus icon. The form contains several fields: "Name *" (text input), "Geometry Type *" (dropdown menu with "Polygon" selected), "Area Type *" (dropdown menu with "World" selected), and "Shape File" (text input with a "Choose File" button). At the bottom right of the form are two buttons: "CANCEL" and "SUBMIT".

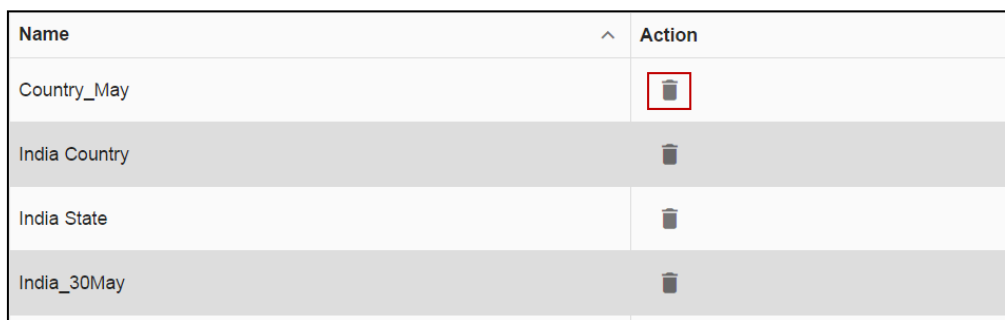
- e. A message will pop-up to assure that the file has been uploaded
- f. Displays all the uploaded Geo Shapefiles in the list format
- g. Select a Geometry Type using the check-box

- i. Polygon
- ii. Line
- h. Use **'Search Shape'** space to search a Geo Shapefile

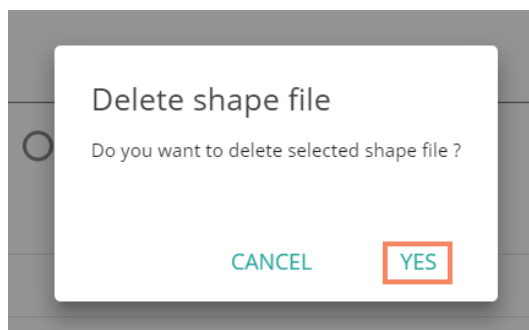


- **Deleting a Geo Shape File**

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



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

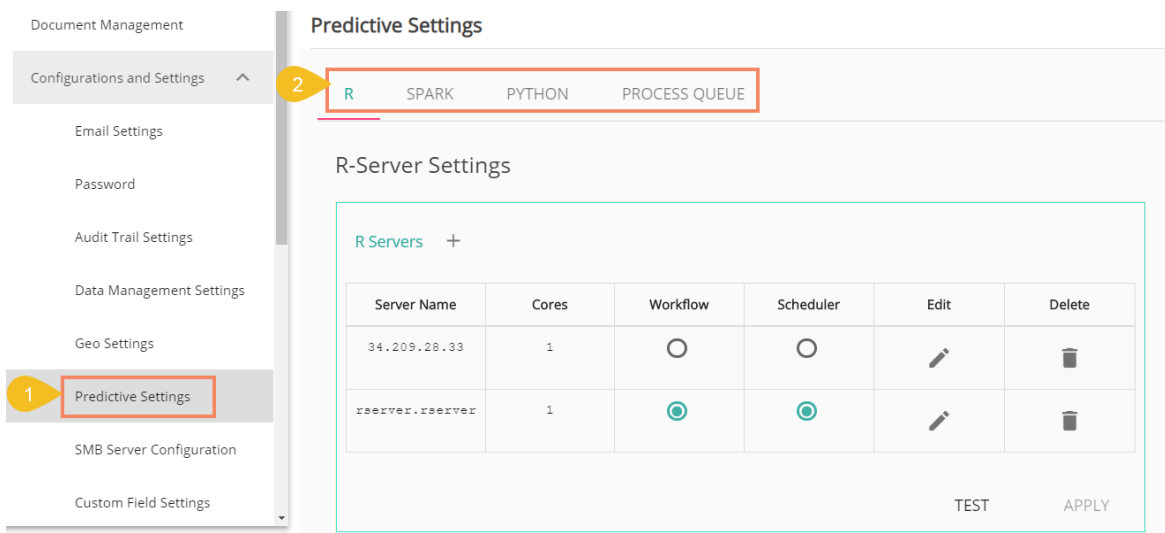


- e. The selected Geo Shapefile gets removed from the list

4.2.2.6. Predictive Settings

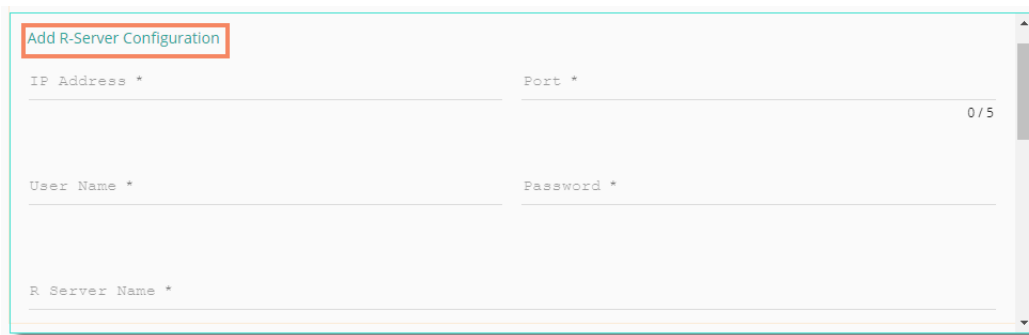
This section explains the R-Server Configuration and Predictive Spark App Settings details for the Predictive Analysis plugin of the BizViz Platform.

- a. Click the '**Predictive Settings**' option from the list of '**Configurations and Settings**' admin options
- b. Displays various Predictive Settings horizontally on the right side of the screen as displayed below:



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

- a. Navigate to the '**Predictive Settings**' admin option
- b. Click the R tab
- c. Users get redirected to the R Server Settings page
- d. Click '**Add**' icon given for the R server
- e. A scrollable '**Add R-Server Configuration**' window opens
- f. Provide the following information to configure a new R server:
 - i. IP Address: IP address of the R-server
 - ii. Port: R-Server's port number
 - iii. User Name: Enter a username to log in to the R- server
 - iv. Password: Enter the password for the above username
 - v. R Server Name: Provide the R- Server address



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

- viii. R Working Directory: Provide the relevant link to access R-Working Directory
- ix. Enable Parallel Processing- Select this option by using a check mark in the box
- x. Set as Default: Select this option by using a check mark in the box
- g. Click **'TEST'** to verify the R-Server connection
- h. A message will pop-up to assure about the connection
- i. Click the **'SAVE'** option to save the verified R-server configuration details

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

Server Name	Cores	Workflow	Scheduler	Edit	Delete
172.31.42.225	1				

Note:

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

R-Server Settings

Server Name	Cores	Workflow	Scheduler	Edit	Delete
172.31.42.225	1				

TEST APPLY

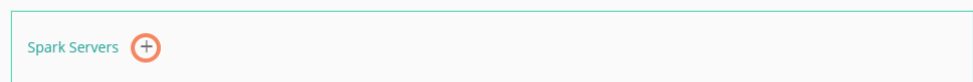
- a. The Administrator can configure multiple R-Servers, but the process execution happens on a single server at a time.
- b. Click **'CLEAR'** to erase the information from the R-Server configuration fields.
- c. The admin needs to provide a working directory while configuring the R server and users should be given read and write permission to that directory.

- **Spark Server Settings**

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

- a. Navigate to the **'Predictive Settings'** admin option
- b. Select the **'Spark'** tab
- c. The Spark Server Settings page opens
- d. Click **'Add'** icon to add a new Spark server confirmation

Spark Server Settings



- e. A new window **'Add Spark Server Configuration'** opens
- f. Provide the following information:
 - i. Host: Host address of the Spark server
 - ii. Port: Spark server's port number
 - iii. User Name: Enter a username to log in to the Spark server
 - iv. Password: Enter the password for the above username

Add Spark Server Configuration

Host *	Port *
<input type="text"/>	<input type="text" value="0/5"/>
User Name *	Password *
<input type="text"/>	<input type="password"/>

- v. Spark Server Name: Provide Spark Server Address
- vi. Jetty Confirmation URL: Provide Jetty confirmation URL link

Spark Server Name *

Jetty Configuration URL *

- vii. Application: Provide the application name
- viii. Protocol: Select a protocol option by using the radio option
- ix. Click **'TEST'** to verify the connection
- x. A message will pop-up to assure about the connection
- xi. Click **'SAVE'**

Application *


Protocol HTTP HTTPS

CANCEL TEST SAVE


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

- **Python Server**

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

- a. Navigate to the **'Predictive Settings'** admin option
- b. Select the **'Python'** tab
- c. The Python Server Settings page opens
- d. Click **'Add'**  icon to add a new Spark server confirmation

Python Server Settings

Python Servers 

- e. The **'Add Python Server Configuration'** window opens
- f. Provide the following information:
 - i. Host: Host address of the Spark server
 - ii. Port: Spark server's port number
 - iii. User Name: Enter a username to log in to the Spark server
 - iv. Password: Enter the password for the above username

- v. Python Server Name: Provide Python Server Address
- vi. Elastic Search Port: Provide the elastic search port number

- vii. Web Socket URL: Provide the web socket URL link
- viii. Visualization URL: Provide the Visualization URL link
- ix. Protocol: Select a protocol option by using the radio option
- x. Click **'TEST'** to verify the connection
- xi. A message will pop-up to assure about the connection
- xii. Click **'SAVE'**

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

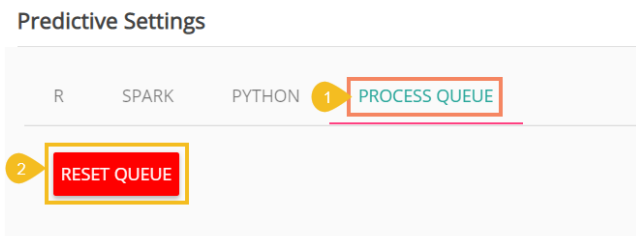
Server Name	Default	Edit	Delete
172.31.42.225	<input checked="" type="radio"/>		

Note:

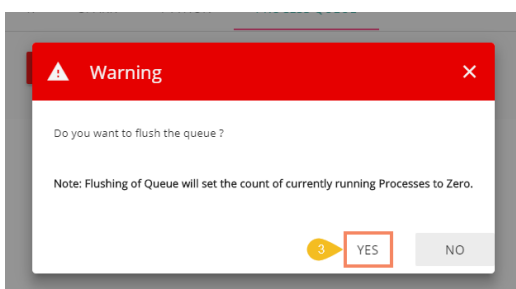
- a. Click the **'Edit'** icon to modify an existing python server configuration
- b. Click **'CLEAR'** to erase the Python App Configuration details.

- **Process Queue**

Users can reset the Predictive process queue by clicking the ‘RESET QUEUE’ option from this page.



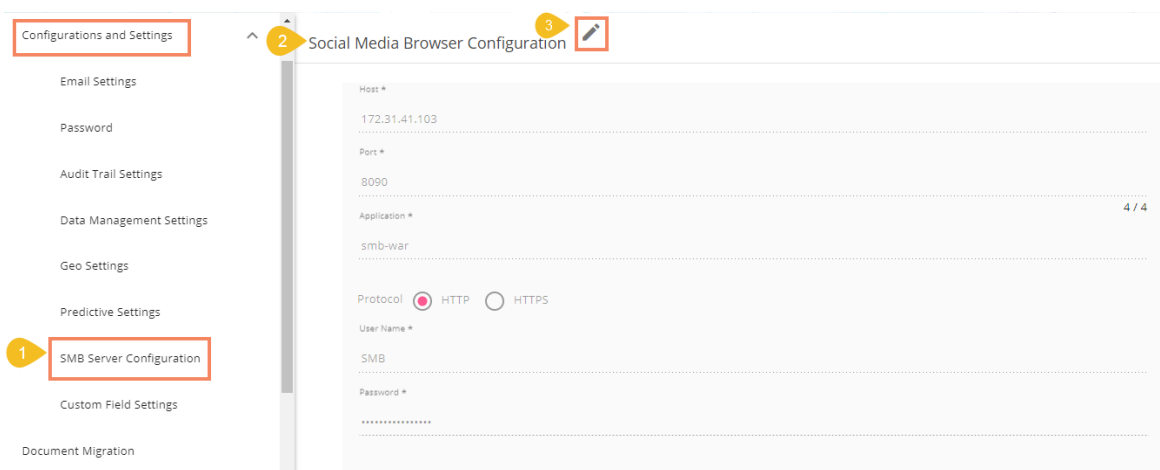
The users get a warning message in which choosing ‘YES’ sets the count of currently running processes to Zero for the Predictive Workbench.



4.2.2.7. SMB Server Configuration

This section covers Social Media Browser configuration details.

- Click the ‘**SMB Server Configuration**’ from the ‘**Configuration and Settings**’ list.
- The ‘**Social Media Browser Configuration**’ fields appear
- Click the ‘**Edit**’ icon

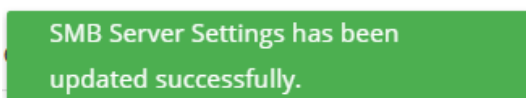


- Fill in the following information to configure the Social Media Browser settings:
 - Host
 - Port
 - Application
 - Protocol
 - User Name

- vi. Password
- e. Click the **'SAVE'** option

The screenshot shows a configuration form for SMB Server. The fields are: Host (172.31.41.103), Port (8090), Application (smb-war), Protocol (radio buttons for HTTP and HTTPS, with HTTP selected), User Name (SMB), and Password (masked with dots). At the bottom right, there are 'CLEAR' and 'SAVE' buttons.

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

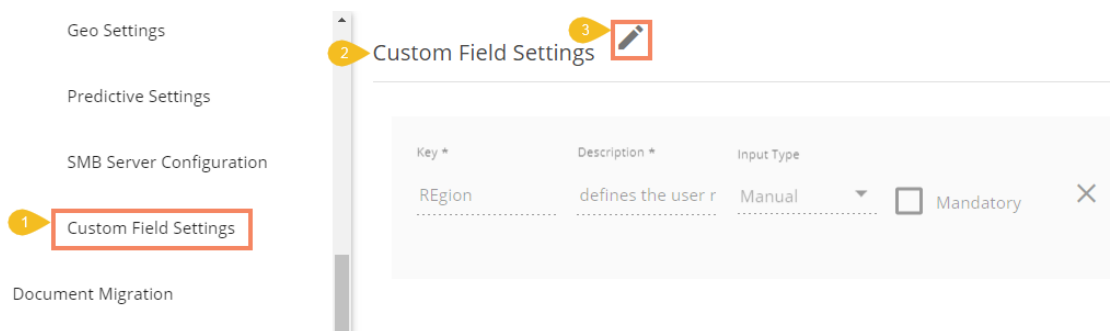


Note: Click **'CLEAR'** to erase the existing SMB Server Configuration details.

4.2.2.8. Custom Field Settings

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

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



- d. Click **'ADD FIELD'** to add a new custom field
- e. Provide the following information for each custom field:
 - i. Key: Provide the key value of the custom field

- ii. Description: Describe the inserted key
 - iii. Input Type: Select an input option from the drop-down menu
 - 1. Manual: By selecting this option, users need to fill the field manually
 - 2. User Lookup: By selecting this option, users need to choose from a drop-down menu
 - iv. Mandatory: Use checkmark in the given box to make the inserted custom field mandatory
- f. Click the **'SAVE'** option to save the inserted custom fields

Custom Field Settings

Key *	Description *	Input Type	Mandatory	Remove
Region	defines the user r	Manual ▼	<input type="checkbox"/> Mandatory	✕
Nationality	defines the user r	Manual ▼	<input type="checkbox"/> Mandatory	✕

ADD FIELD
CLEAR
SAVE

Note:

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

4.2.2.9. Migration SFTP Settings

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

- i) Users can modify the following SFTP server details by clicking the **'Edit'** option:
 - a. Host
 - b. Port
 - c. Username
 - d. Password
 - e. Start Path

- ii) Users need to click the 'TEST' option after modifying the SFTP Server details

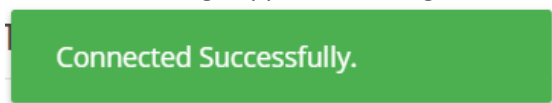
Migration SFTP Settings

The screenshot shows a form titled "Migration SFTP Settings" with the following fields:

- Host *: 34.216.48.232
- Port *: 21
- UserName *: ftpuser (2 / 4)
- Password *: [masked]
- Start Path *: /home/ftpuser

 At the bottom right, there are three buttons: "CLEAR", "TEST" (highlighted with a red box), and "SAVE".

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

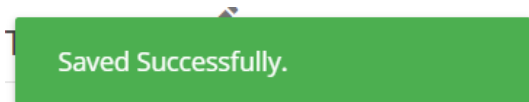


- iv) Click 'SAVE' to save the settings

Migration SFTP Settings

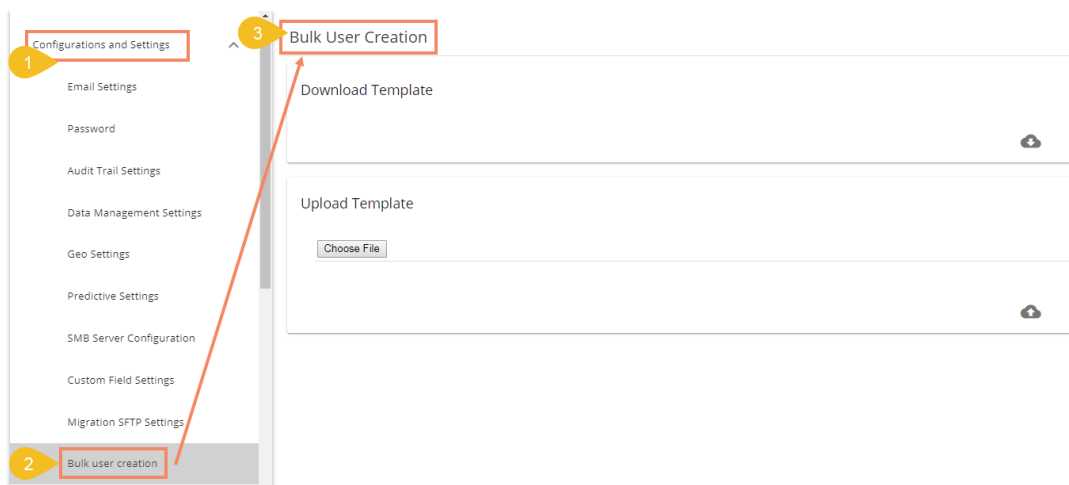
This screenshot is identical to the previous one, showing the "Migration SFTP Settings" form with the same fields and values. In this version, the "SAVE" button at the bottom right is highlighted with a red box.

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

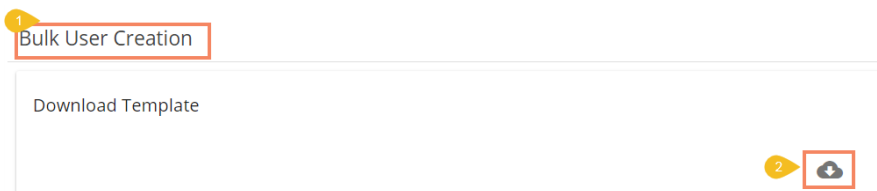


4.2.2.10. Bulk User Creation

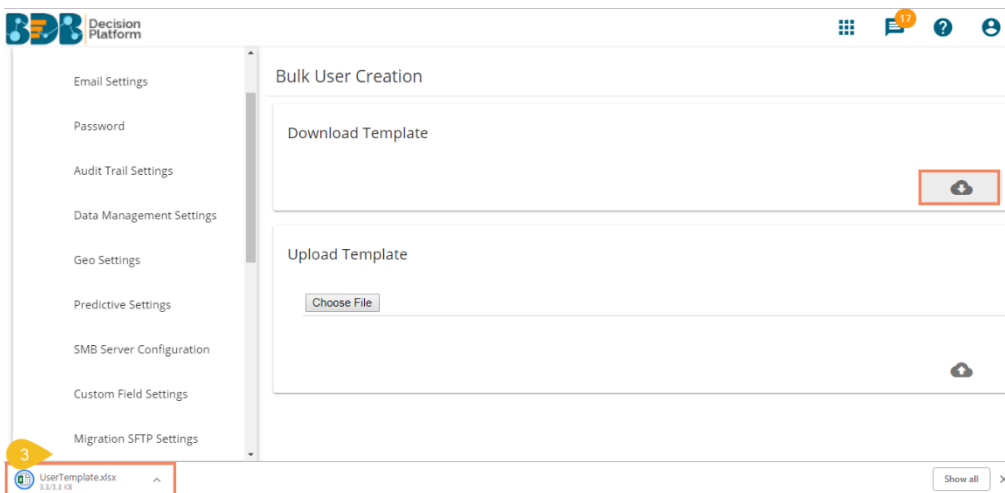
The current option provided under the 'Configuration and Settings' tab helps the administrator to create multiple users using the standard template.



- i) To download the Standard Template
1. Navigate to the 'Bulk User Creation' page
 2. Click the 'Download' icon



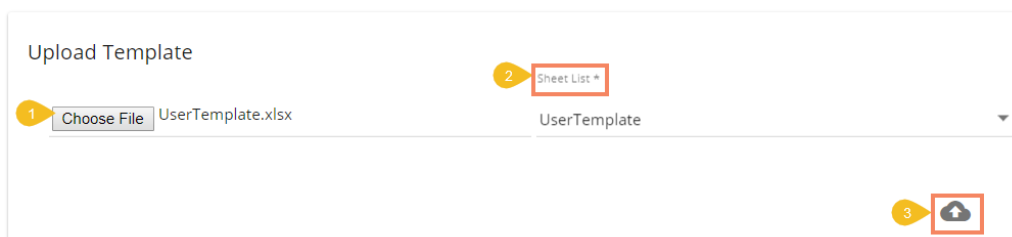
3. A model template for the bulk user creation gets downloaded



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

	A	B	C	D	E
1	Email Id	User Name	Full Name	CP	spacekey
2	user1@gmail.com	user1	User 1	1112	
3	user2@gmail.com	user2	User 2		
4	user3@gmail.com	user3	User 3		
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					

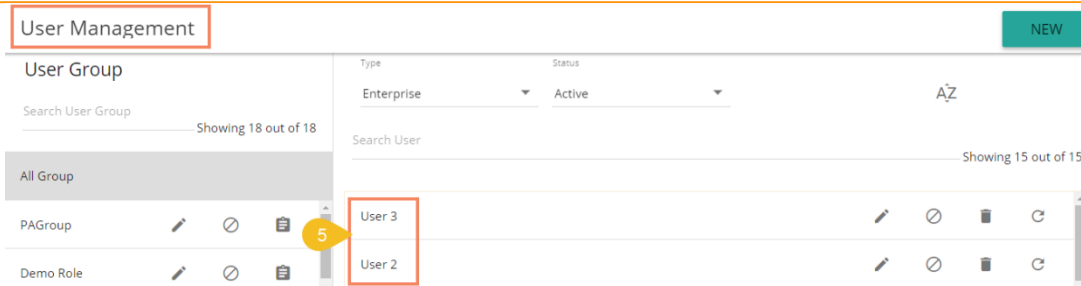
- ii) Steps to Upload a file with multiple usernames
1. Navigate to the **'Bulk User Creation'** page.
 2. Use the **'Choose File'** option to select the file with multiple usernames.
 3. Click the **'Upload'** option.



4. A success message appears to confirm the user creation.



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



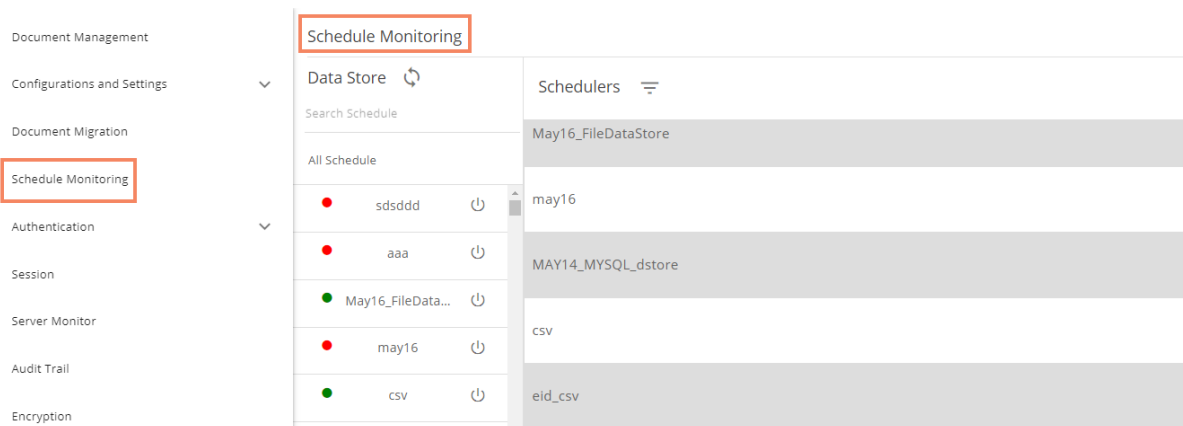
Note:

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

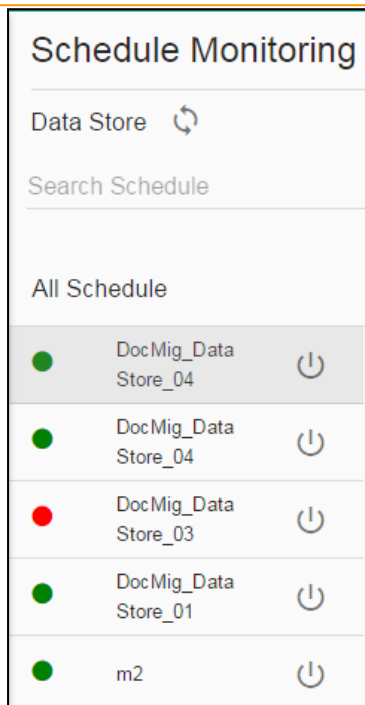
4.2.3. Schedule Monitoring Settings

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

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



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



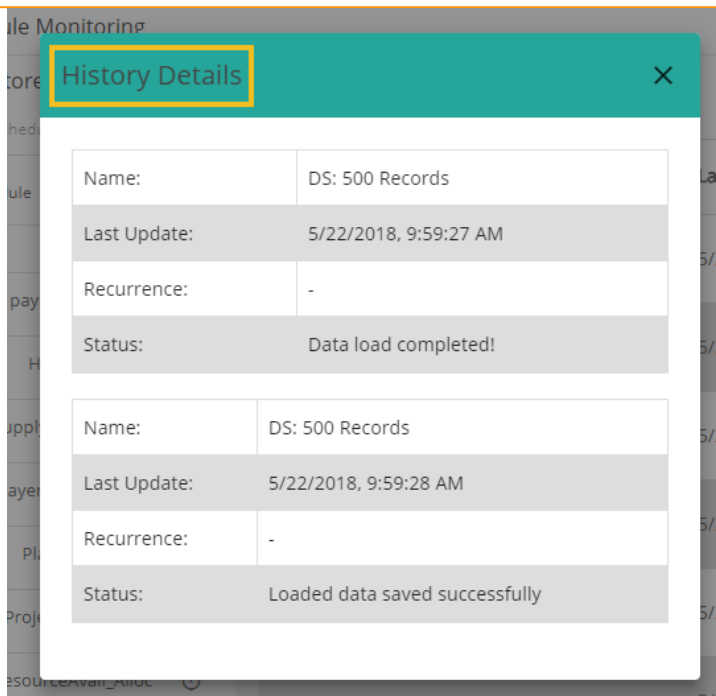
iv) Scheduler details are displayed on the right side of the screen



Schedulers

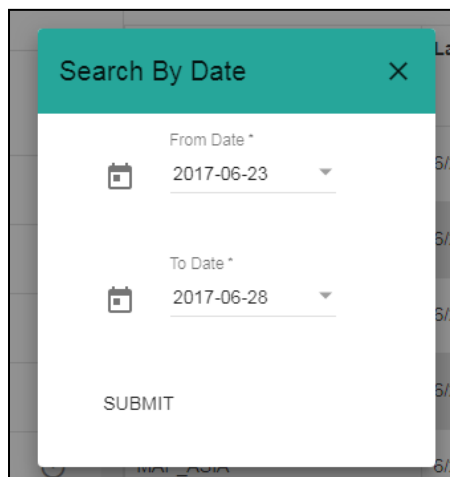
Scheduler Name	Last Updated Date	Recurrence	Status	
DS: 500 Records	5/22/2018, 9:59:14 AM	-	Refresh success	
DS: 500 Records Copy	5/22/2018, 9:58:21 AM	-	Refresh failed	
DS: 500 Records Copy	5/22/2018, 9:57:18 AM	-	Refresh failed	
Oracle_may14	5/21/2018, 2:28:24 PM	-	Refresh failed	
Oracle_may14	5/21/2018,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

Note:

- Click the **'Start/Stop'** button to start/stop the scheduler.
- Click the **'Refresh'** icon to refresh the data store(s).
- Click the **'Information'** icon to display the **'History Details'** of the selected schedule.



- d. Use the 'Filter' option  to display filtered details for the selected scheduled job.
- i) Click the 'Filter' option 
 - ii) A window appears
 - iii) Fill the required information:
 1. From Date
 2. To Date
 - iv) Click 'SUBMIT' option



- v) The filtered data gets displayed

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

4.2.4. Authentication

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

4.2.4.1. Active Directory Configuration

a. Configuration

- i) Click the '**Authentication**' option from the list of admin options
- ii) Click '**AD Configuration**' authentication option
- iii) The '**CONFIGURATION**' tab for the Active Directory Configuration opens on the right side of the page

- iv) Fill in the following information:
 - **Service Account:** Name of the Windows AD service account
 - **Password:** Secure authentication credential
 - **Host Name:** IP address of the Windows AD server
 - **Port:** Port number of Windows AD

- **Domain Name:** Enter the Domain Name
- v) Click **'SAVE'**
- vi) A message appears to confirm the action.

CONFIGURATION PARAMETERS SYNC CONFIGURATION

Service Account *

Password *

Host Name *

Port * 0 / 4

Domain Name *

CLEAR SAVE

b. Parameters

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

Active Directory Configuration

CONFIGURATION **PARAMETERS** SYNC CONFIGURATION

Parameters

First Name:

Last Name:

Description:

Added Custom Fields

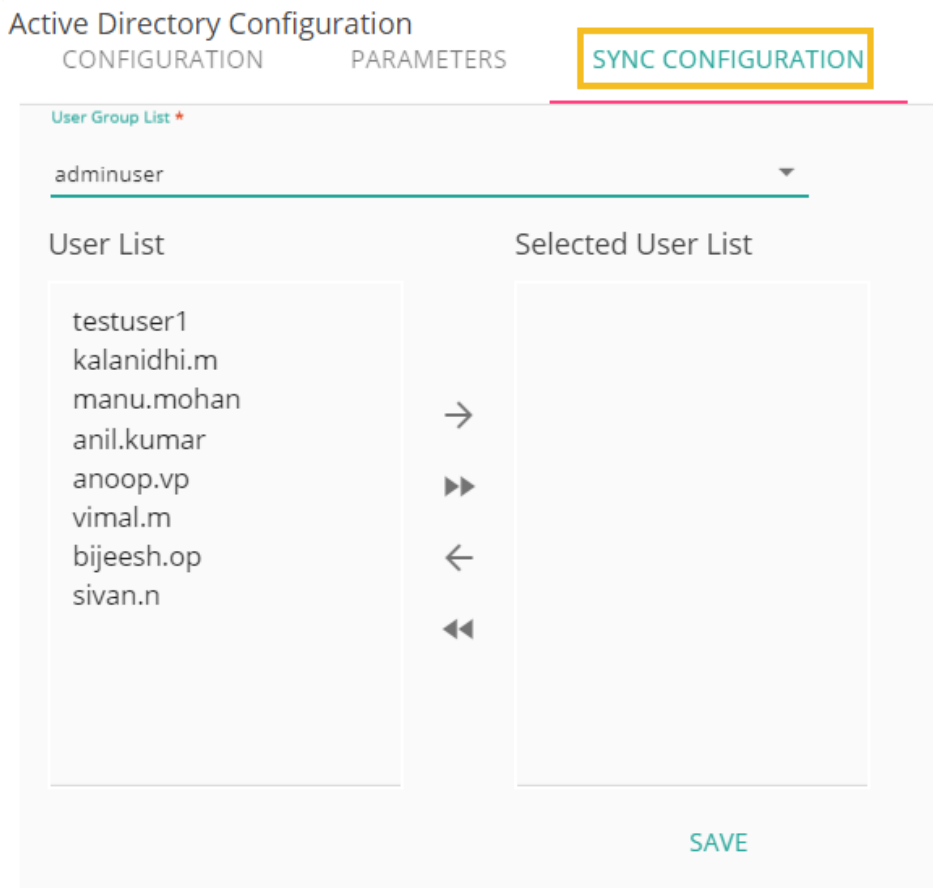
User Property	Active Directory Property
manager	manager

CLEAR SAVE

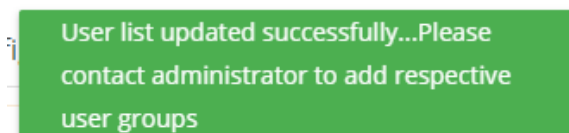
c. Sync Configuration

- i) Once you get confirmation that AD details got saved, select the **'SYNC CONFIGURATION'** tab
- ii) Select a user group using the **'User Group List'** drop-down menu
- iii) Select and move users from **'User List'** to the **'Selected User List.'**

iv) Click 'Save'




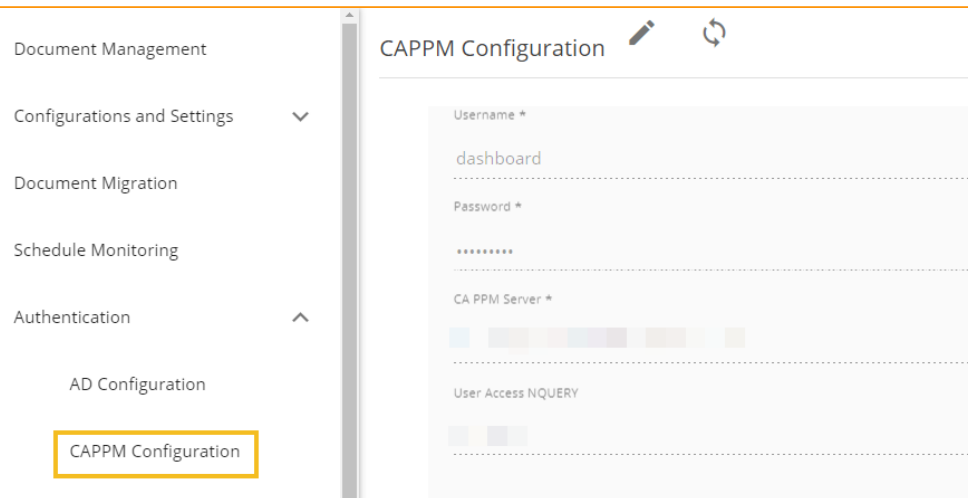
v) A pop-up message appears to confirm that the user list has been updated




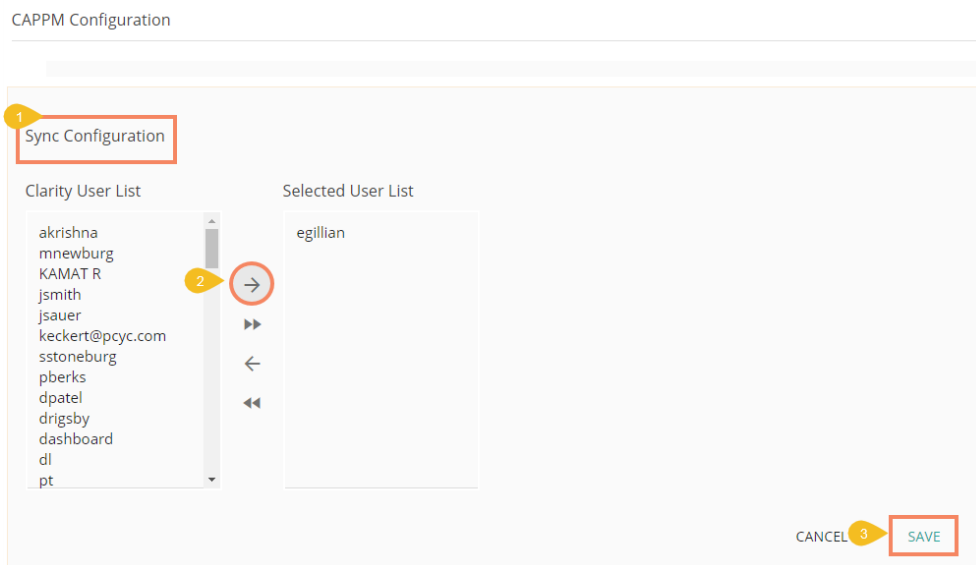
4.2.4.2. CAPP M Configuration

This section explains how to configure Clarity.

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



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



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

4.2.5. Sessions

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

- i) Click **'Sessions'** from the list of Admin options
- ii) The **'Active Admin Sessions'** page opens

Document Management

Configurations and Settings

Document Migration

Schedule Monitoring

Authentication

1 Session

Server Monitor

Audit Trail

Encryption

2 Active Admin Sessions

Search User Name

<input type="checkbox"/>	Email Id	User Name	Session Time(Minutes)
<input type="checkbox"/>	ranjit.krishnan@bdbbizviz.com	Ranjit	1
<input type="checkbox"/>	vishal.venugopal@bdbbizviz.com	vishalvenugopal	14
<input type="checkbox"/>	ajith.r@bdbbizviz.com	ajith	1
<input type="checkbox"/>	paadmin@bdbbizviz.com	paadmin	1

- iii) Click the 'Filter' icon
- A new window pops-up providing two filter options:
 - Users
 - Admins
 - Select any one filter option to launch the list of all the active sessions.

Active Admin Sessions

Users

3 Admins

Search User Name

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

Active Admin Sessions

Search User Name

5

<input type="checkbox"/>	Email Id	User Name	Session Time(Minutes)
<input type="checkbox"/>	ranjit.krishnan@bdbbizviz.com	Ranjit	1
<input type="checkbox"/>	vishal.venugopal@bdbbizviz.com	vishalvenugopal	14
4 <input checked="" type="checkbox"/>	ajith.r@bdbbizviz.com	ajith	1
<input type="checkbox"/>	paadmin@bdbbizviz.com	paadmin	1

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

4.2.6. Server Monitor

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

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

Bundle Name	Start Id	Version	State
Apache CXF Compatibility Bundle Jar	162	2.7.11	Active
camel-core	168	2.15.3	Active
camel-catalog	169	2.15.3	Active
camel-spring	170	2.15.3	Active

4.2.7. Audit Trail

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

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

Message Id	Request	Response	Audit
444bb9ba8cbb56fb7c2d7a935721553c	[Request]=[pluginService]= spacekey : 11...	null	null
7a9b413bae95670888f88b6fdc0f9a6d	[Request]=[getAllMenuContext]= spacekey ...	null	null
cca40e8ea0786a2c2cf98aba2207661f	[Request]=[getListview]= spacekey : 1113...	null	null
8ab140eb0f50cc57480a8538548b7e5e	[Request]=[pluginService]= spacekey : 11...	null	null
70623f838baa796b47a687895d4965dd	[Request]=[logout]= spacekey : 1113 , t...	null	null
a5b1af6fbbfb2c84f721953d2b314c68	[Request]=[authenticateuser]= customerke...	null	null
d7bf213ea57cdd45b8c7cac0bfcef66c	[Request]=[pluginService]= spacekey : 11...	null	null
e5c0cfb88c3016b5872288d2e63c1e0b	[Request]=[getAllMenuContext]= spacekey ...	null	null

- **Filter Audit:** Users can filter the audit log details by using the following steps:
 - i) Select a User: Select a user from the drop-down list

- ii) Enter a Start Date: Select a Start Date from the drop-down list
- iii) Enter an End Date: Select an End Date from the drop-down list
- iv) Click the '**FILTER AUDIT**' option
- v) The filtered records of the audit log display in the list

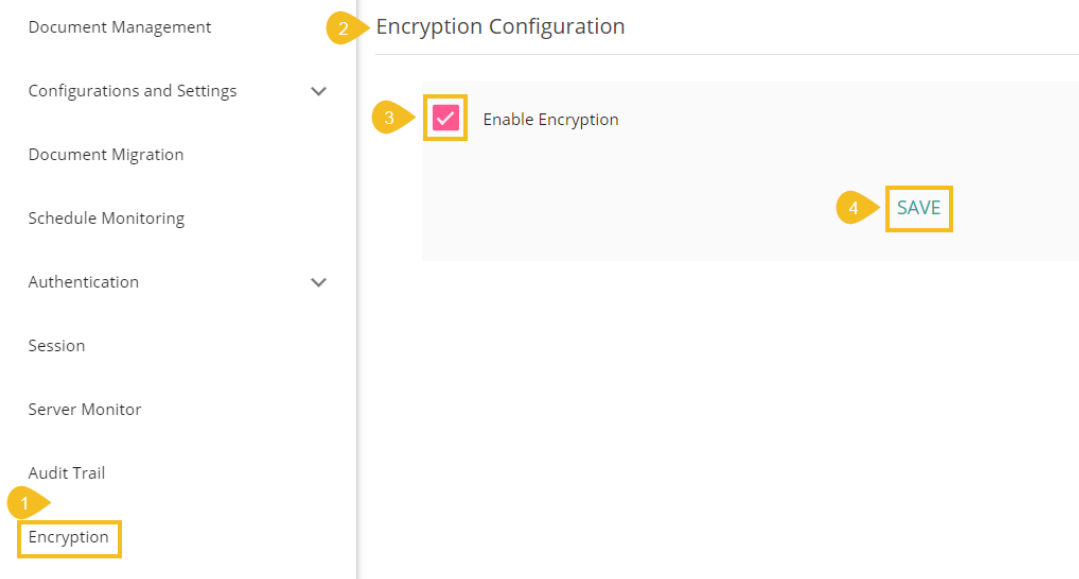
Message Id	Request	Response	Audit
9b29fc3b9bef003a64d86c95fc7c96c2	[Request]=[authenticateuser]= customerke...	null	null
e4b112831c30262f7fdaaf86454adc4a	[Request]=[authenticateuser]= customerke...	null	null
b405d370fd64117e17d986d60d738658	[Request]=[pluginService]= spacekey : 11...	null	null
09d33f4f95dde48f6de3942677246fbb	[Request]=[getAllMenuContext]= spacekey ...	null	null
7e2521736f182f9edd612f8235c7d6c2	[Request]=[getListview]= spacekey : 1113...	null	null
a23ad090f80929f51a5e9641aeaf5e37	[Request]=[getData]= spacekey : 1113 , ...	null	null
26d42692868d82a58b695acd76f7d9e4	[Request]=[getListview]= spacekey : 1113...	null	null
36c5d6ff1b4744c0c3c6579a951839e0	[Request]=[getWikiByDocId]= spacekey : 1...	null	null

4.2.8. Encryption

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

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

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



4.2.9. Migration

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

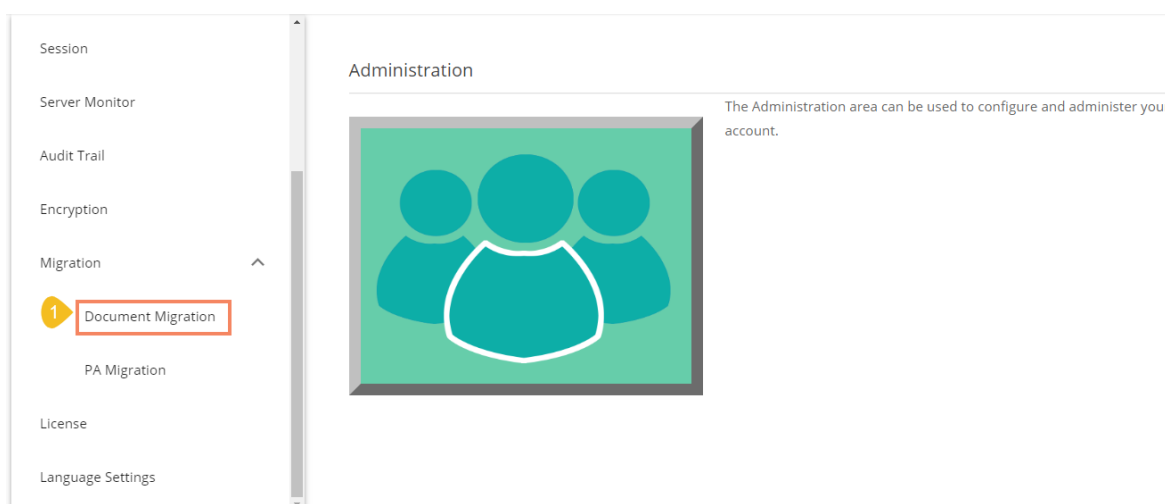
4.2.9.1. Document Migration

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

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

Steps by step for document migration:

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



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

Document Migration

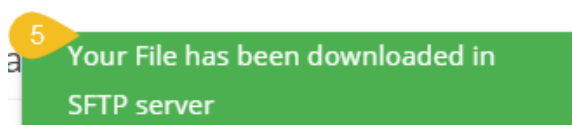
Export Section 2 EXPORT	Import Section IMPORT
Export Instructions	Import Instructions
<ol style="list-style-type: none"> 1. Click on Export Button 2. Select the Document To Migrate and download 3. Your selected document will be migrated in configured SFTP location 	<ol style="list-style-type: none"> 1. Login to the server or Space where you need to import the baf Content 2. Configure the SFTP location 3. On clicking import button, list of baf files from configured SFTP server will be displayed 4. Select the baf file to migrate & Click on "Migrate" button

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

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

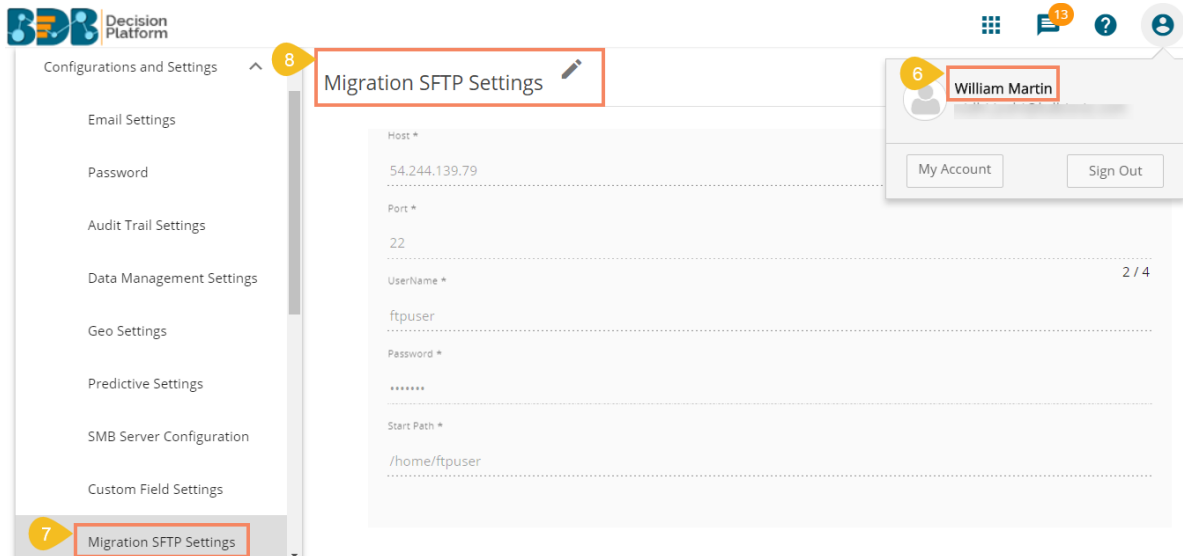
Note: Only stories and dashboards display the download icon, it does not apply to the folders.

v) A success message appears after the download process to confirm the download of the selected file in the SFTP server.

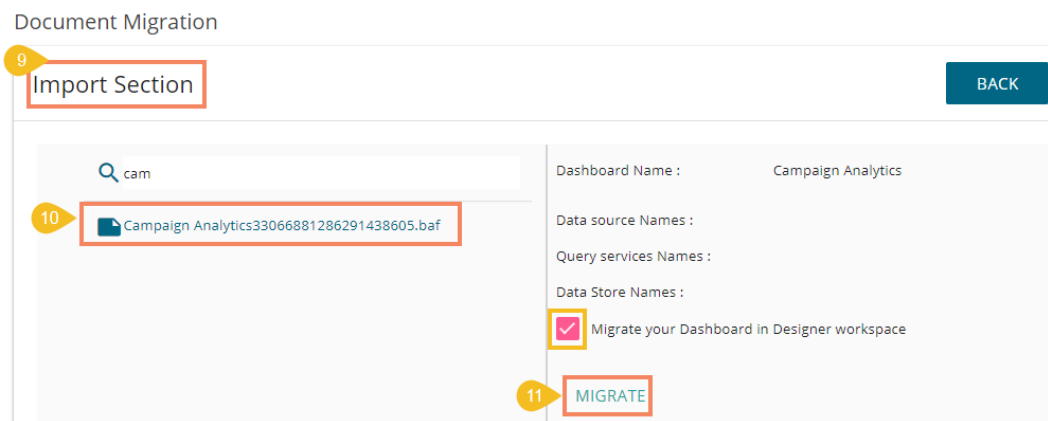


vi) Then log in as a different user to the server or space where you need to import the baf

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

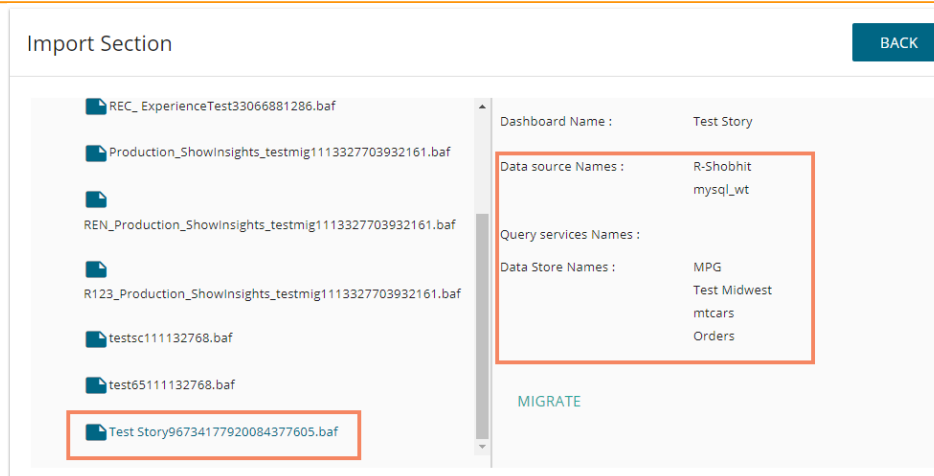


- ix) By clicking the **'Import'** button from the Document Migration page, the Import Section lists all the baf files from the configured SFTP server
- x) Search and Select the baf file you want to migrate and click on it
- xi) Click the **'MIGRATE'** option from the right-side panel displaying the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

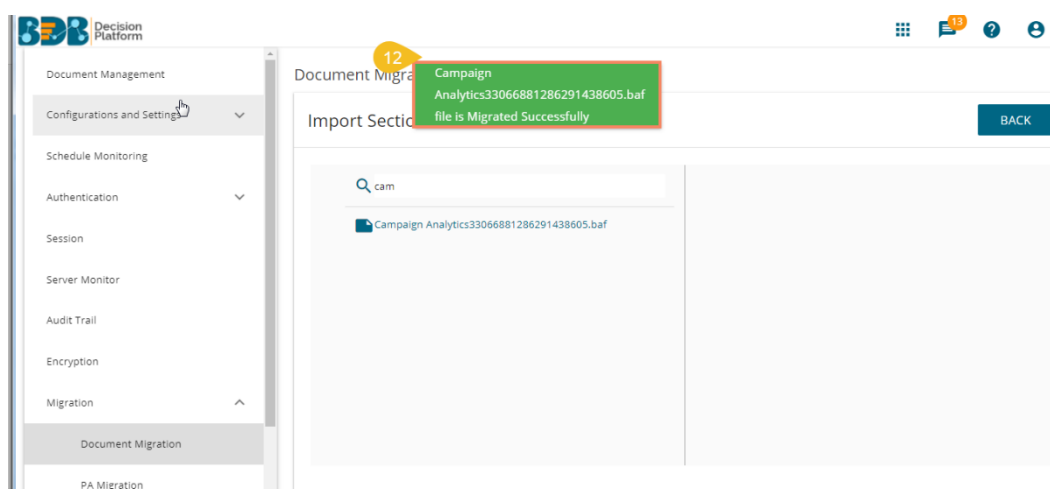


Note:

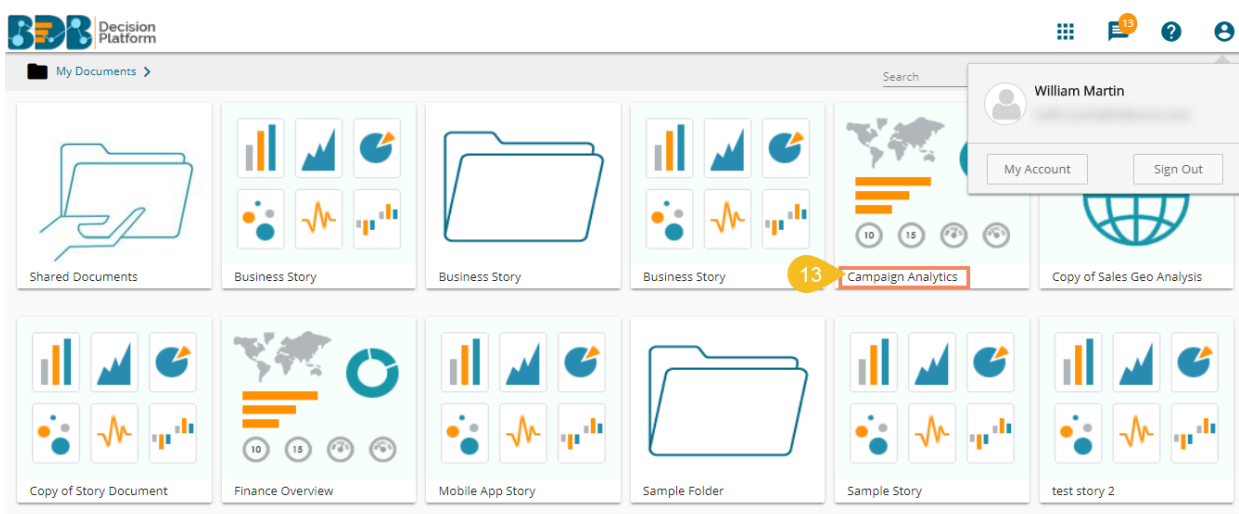
- a. Users can also migrate the dashboard in the Designer workspace by using a check mark in the given box.
- b. If the selected dashboard or story is created based on an RDBMS connector, the data connector details get displayed on the right-side panel.
E.g., The Test Story is created using data connectors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



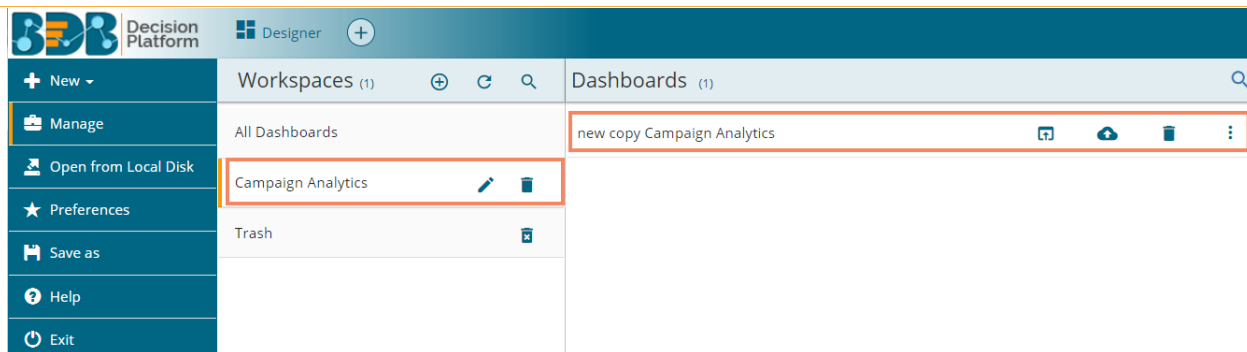
xii) A confirmation message appears to inform completion of the baf file migration.



xiii) The migrated document lists on the platform homepage

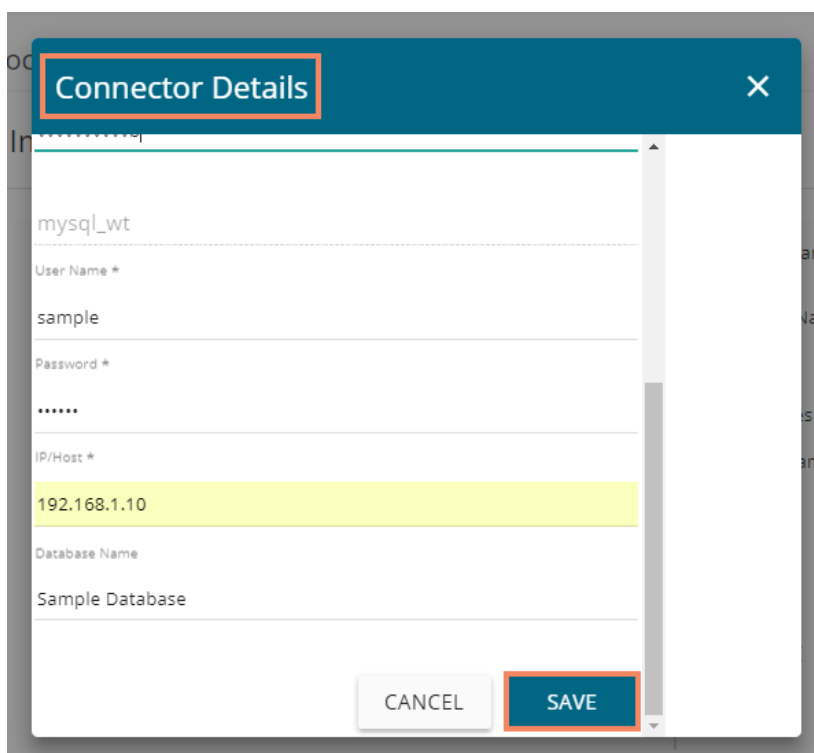


xiv) Users can open the Dashboard Designer plugin to check whether the selected Dashboard got migrated to the workspace provided if the users enabled that option for the dashboard.



Note:

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

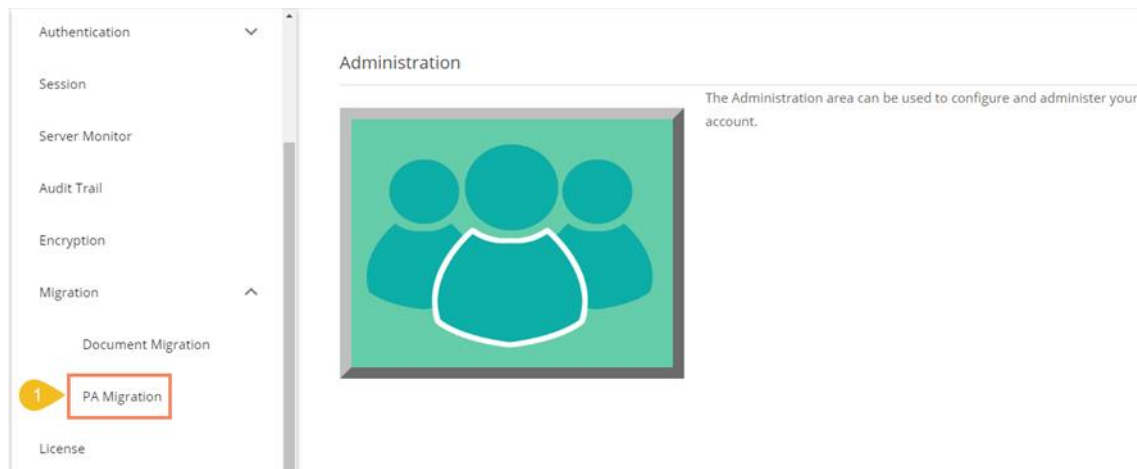


- iii. The selected data connector gets migrated to the destination user account.
- b. Dashboards and Stories using the API data connectors/data sets don't require to provide the Connector details for document migration.
- c. Dashboards and Stories using the File data connectors or Dashboards having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

4.2.9.2. PA Migration

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

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

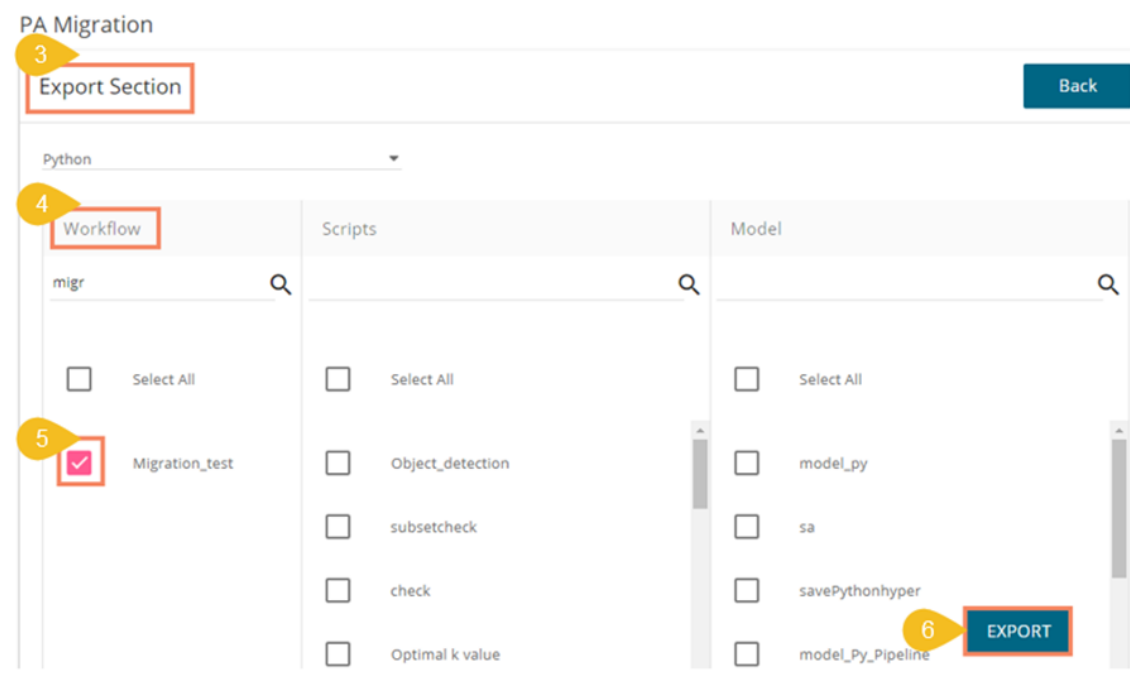


- ii) Click the 'Export' option from the next screen

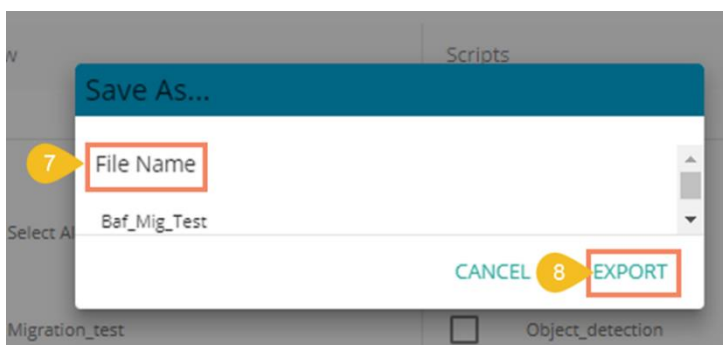
PA Migration

Export Section	Import Section
Export Instructions	Import Instructions
<ol style="list-style-type: none"> 1. Click on Export Button 2. Select the Workflows, Scripts and Models to Export 3. Give a name to the Baf File. 	<ol style="list-style-type: none"> 1. Login to the server or Space where you need to import the baf Content 2. Click on import 3. Select one or multiple baf files which you wish to Import 4. Configure connector details for the selected content 5. Choose one or multiple users to import these files into their accounts. 6. Click on Import.

- iii) The 'Export Section' opens
 1. Select a Predictive Workspace to display the list of Workflows (By selecting 'All' option workflows from all the predictive workspaces display)
 2. Select the Workflow(s), Script(s), or Model(s) using the respective lists (If the selected workflow contains script and model components, then those components get selected by default)
 3. After selecting the desired workflows, scripts, and models click the 'Export' option



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



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



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

PA Migration

Export Section	Export	Import Section	11 Import
Export Instructions		Import Instructions	
<ol style="list-style-type: none"> 1. Click on Export Button 2. Select the Workflows, Scripts and Models to Export 3. Give a name to the Baf File. 		<ol style="list-style-type: none"> 1. Login to the server or Space where you need to import the baf Content 2. Click on import 3. Select one or multiple baf files which you wish to Import 4. Configure connector details for the selected content 5. Choose one or multiple users to import these files into their accounts. 6. Click on Import. 	

- viii) Search for the created BAF file
- ix) Click the 'NEXT' option

PA Migration

Import Section Back

Select Files to Import

Baf_Mig_ 🔍

12 Baf_Mig_Test111232769.baf

13 NEXT

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

PA Migration

Import Section Back

14 Data Connector Configuration

BAF_MIG_TEST111232769.BAF

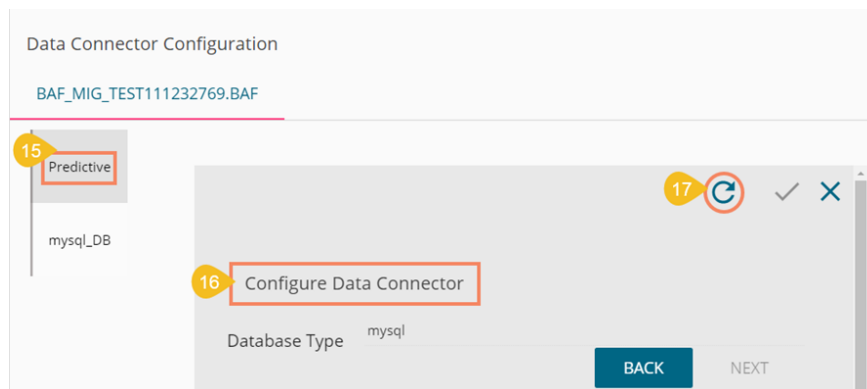
Predictive

mysql_DB

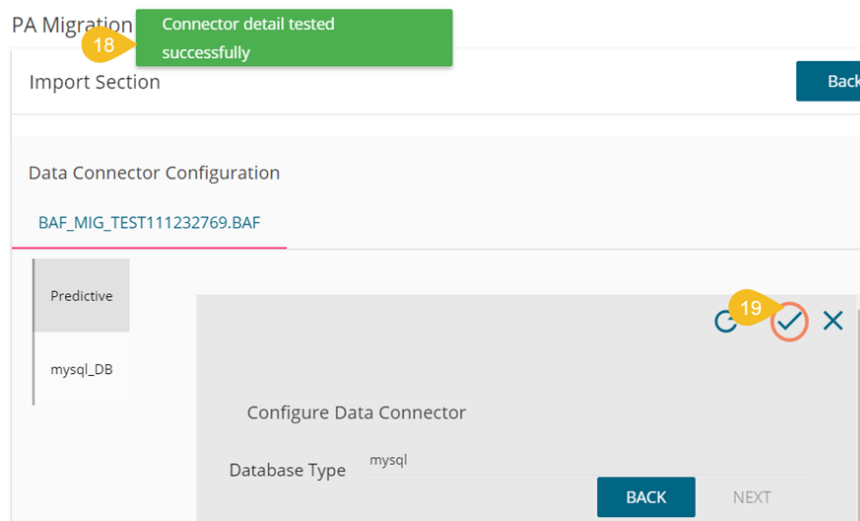
BACK NEXT

1. Configure Data Reader

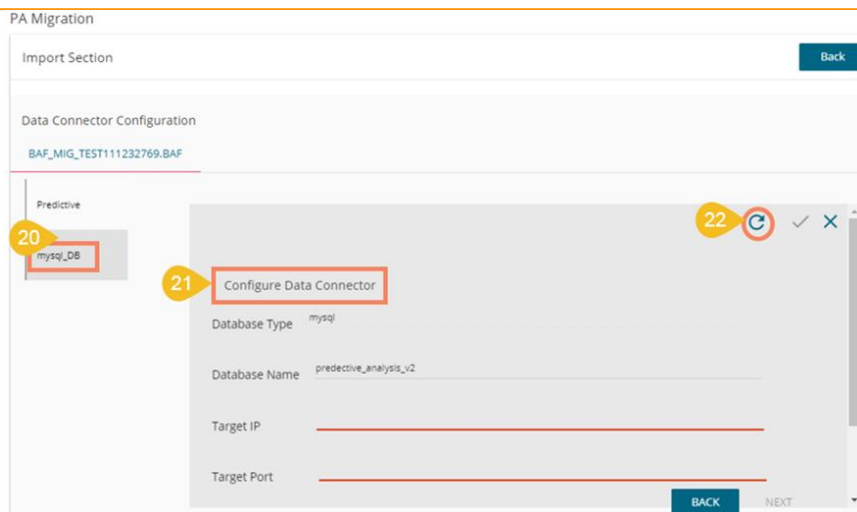
- a. Select the Data Reader
- b. Configure the fields provided under 'Configure Data Connector' heading
- c. Click the 'TEST' icon to check the connection



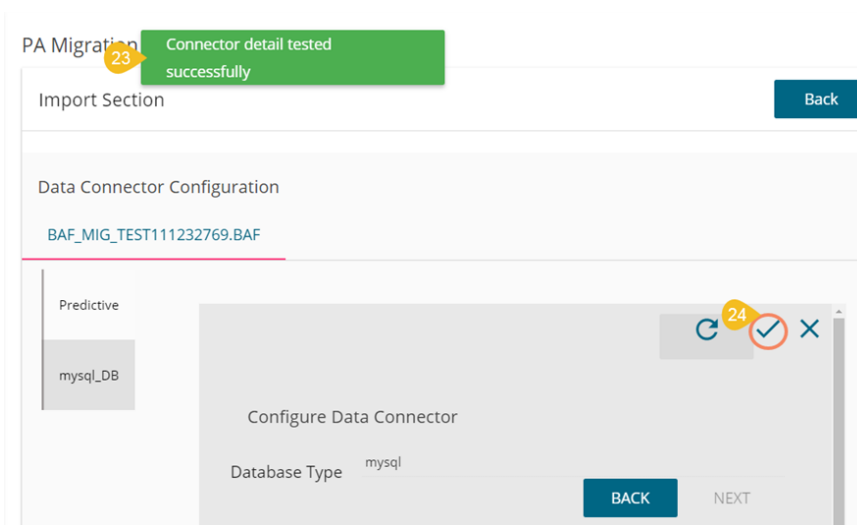
- d. A success message appears
- e. Click the 'SAVE' icon to save the connector details



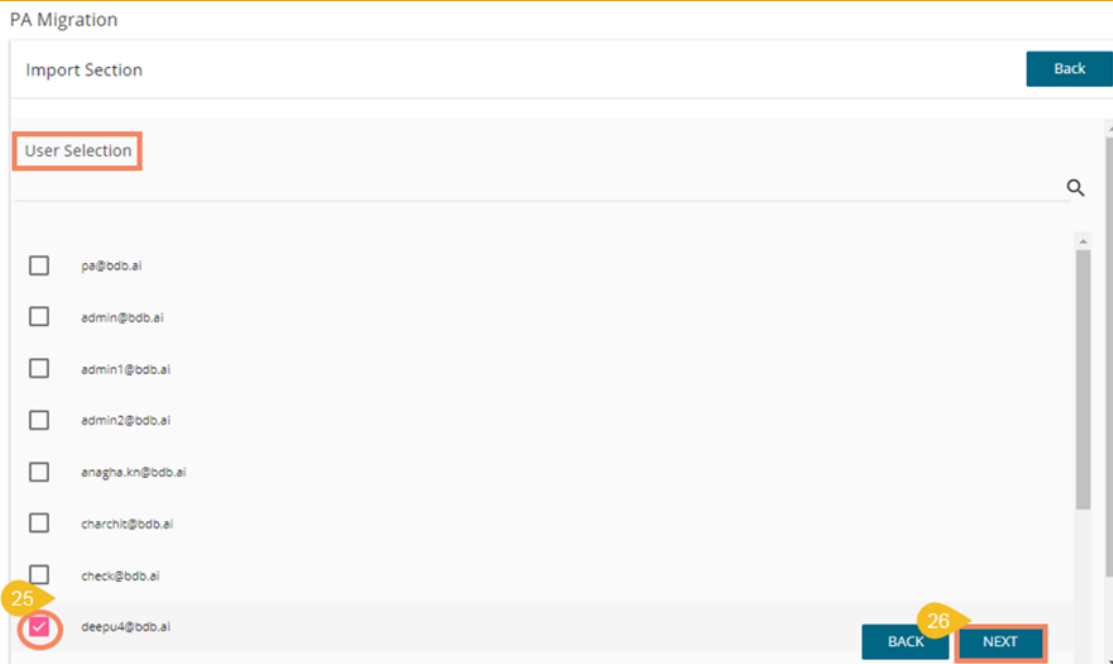
2. Configure Data Writer
 - a. Select the Data Reader
 - b. Configure the fields provided under 'Configure Data Connector' heading
 - c. Click the 'TEST' icon to check the connection



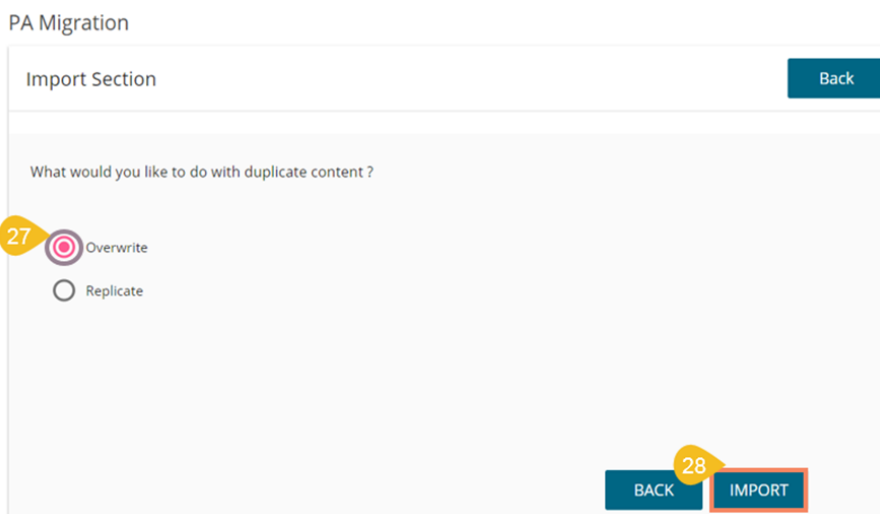
- d. A success message appears
- e. Click the 'SAVE' icon to save the connector details



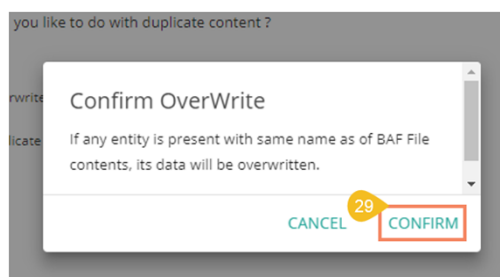
- xi) The 'User Selection' page opens
 1. Select user/users from the displayed list
 2. Click the 'NEXT' option to proceed



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



- xiv) A confirmation message appears
 1. Click the 'CONFIRM' option if wish to confirm the selected action



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

PA Migration 30 The workflow has been migrated successfully

Export Section Export	Import Section Import
Export Instructions	Import Instructions
<ol style="list-style-type: none"> 1. Click on Export Button 2. Select the Workflows, Scripts and Models to Export 3. Give a name to the Baf File. 	<ol style="list-style-type: none"> 1. Login to the server or Space where you need to import the baf Content 2. Click on import 3. Select one or multiple baf files which you wish to Import 4. Configure connector details for the selected content 5. Choose one or multiple users to import these files into their accounts. 6. Click on Import.

4.2.10. License

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

License Settings	
<input type="checkbox"/> License Options	
Active Session	100
Customer Name	BDB.AI
Type	Cloud

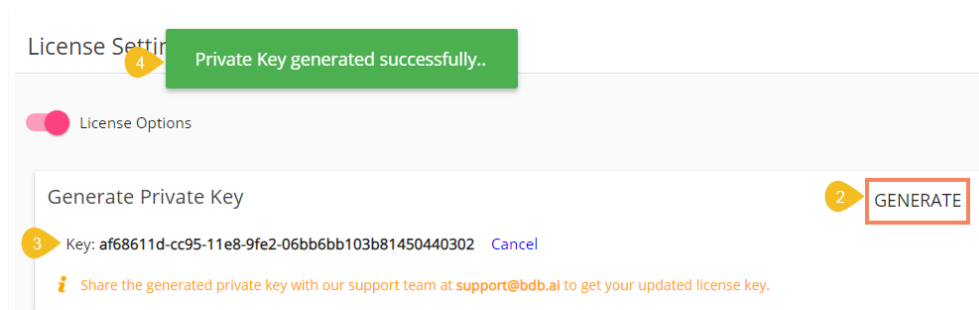
License admin section also contains the ‘License Options’ to generate a Private Key and Update the licensed users.

The following steps are given to use the ‘License Options’

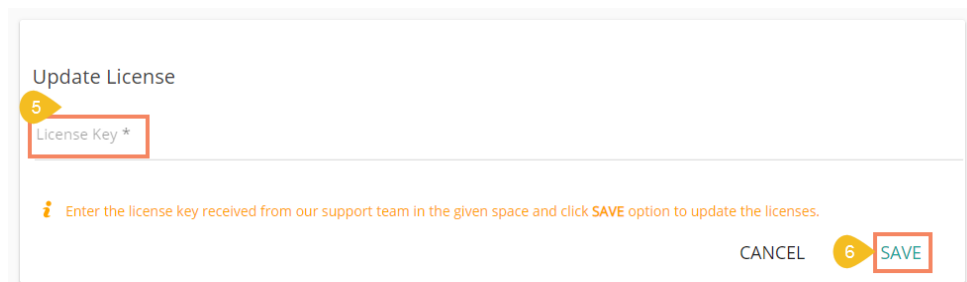
- a. Generate Private Key
 - i. Navigate to the ‘License Settings’ page
 - ii. Enable the License Options by using the radio button

- iii. Click the ‘GENERATE’ option
- iv. A Private key gets generated, and a message appears to inform the same.

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



- b. Update License
 - i. Once the user shares the generated private key with the support team of BDB, the support team sends them the license key.
 - ii. Users need to enter the license key provided by the support team in the space given under the 'Update License' section.
 - iii. Click the 'SAVE' option to update the existing licenses.



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



License key is invalid or expired, To continue using your account update new license key.



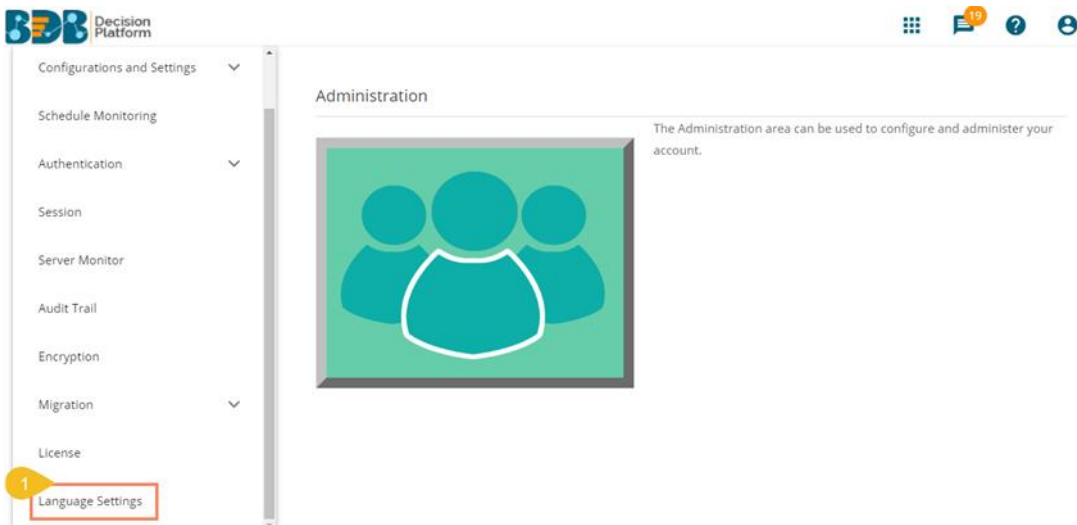
Already have a Key [Click Here](#)

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

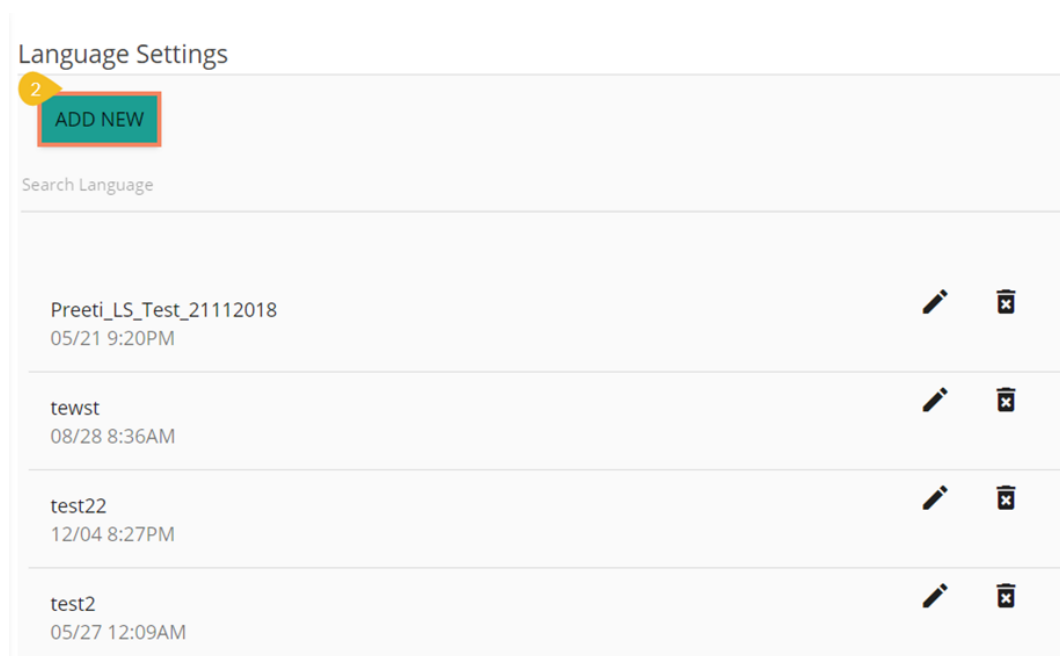
4.2.11. Language Settings

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

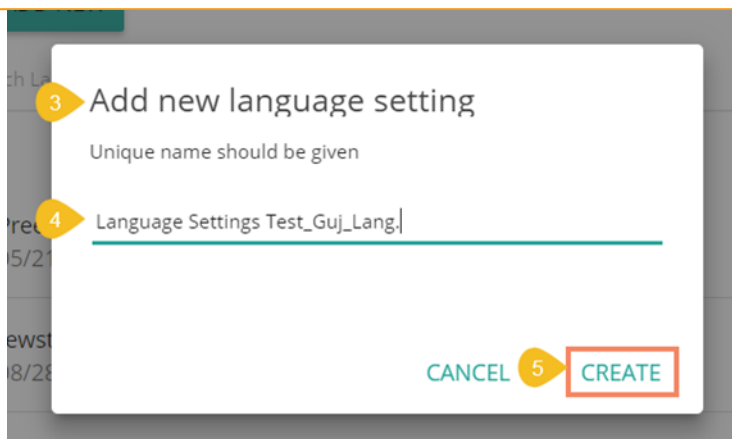
- i) Click the 'Language Settings' option using the Administration module.



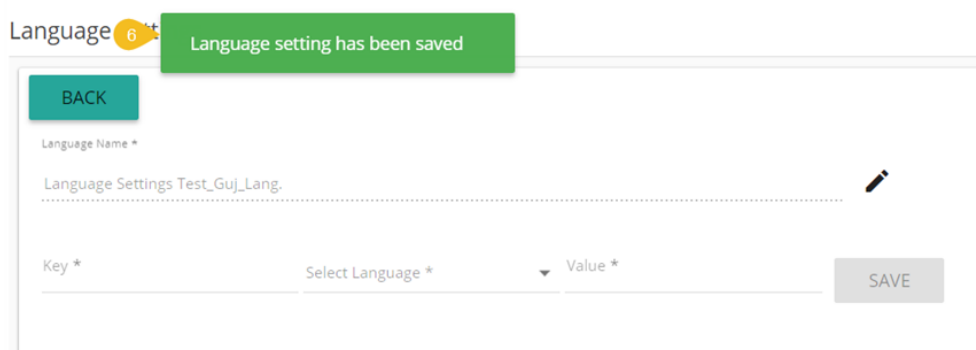
- ii) Click the 'ADD NEW' option provided on the language settings page



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

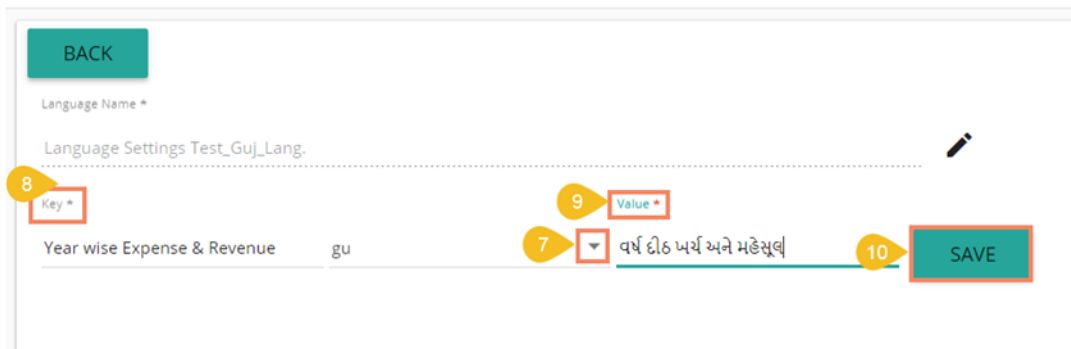


iv) A new Language Setting gets created, and a message appears to inform the same

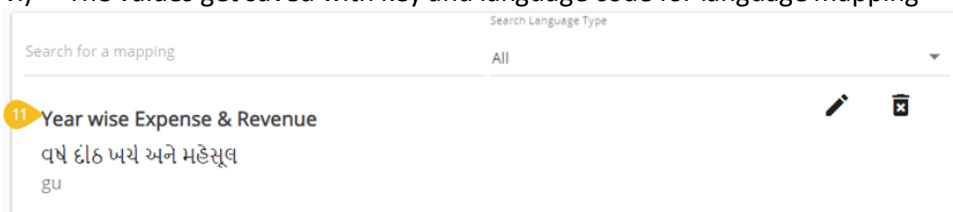


- v) Users can add more terms to the newly created language setting using the following steps:
1. Select a language code from the drop-down menu
 2. Provide the key term from the Dashboard
 3. Provide the value of the inserted key term in the selected language
 4. Click the 'SAVE' option

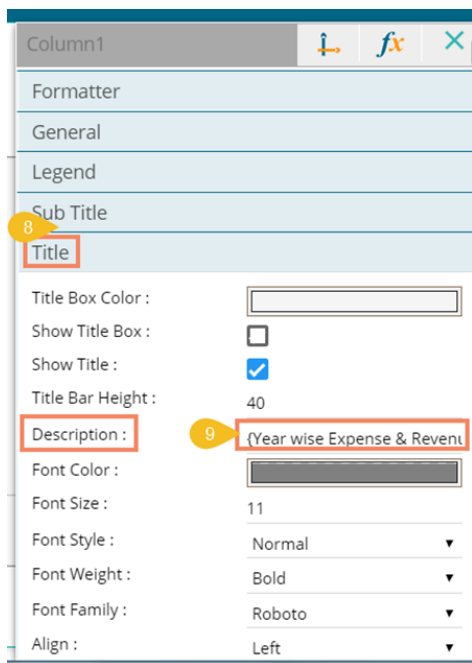
Language Settings



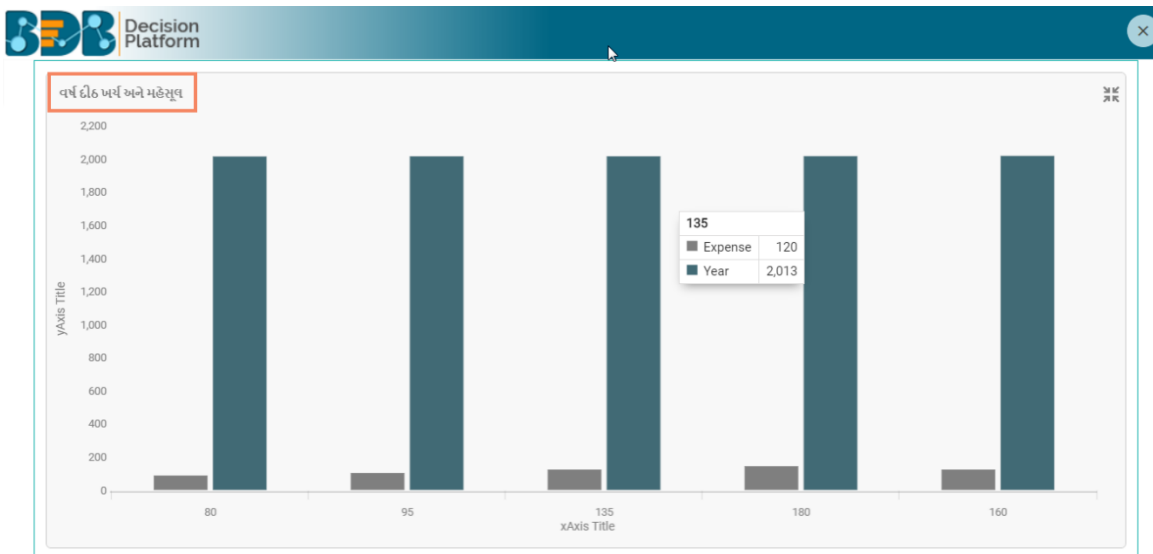
vi) The values get saved with key and language code for language mapping



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



- viii) Click the 'Preview' icon to see the Dashboard title in the selected language



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

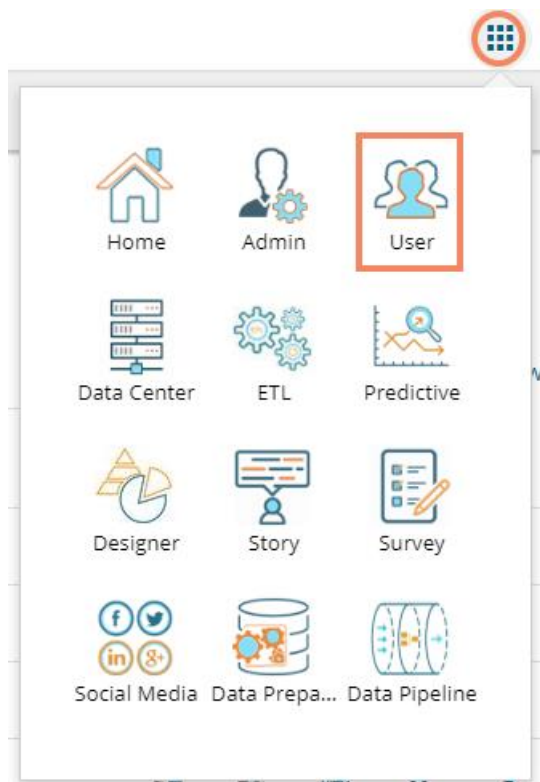
1. Title and Subtitle description
2. X-axis and Y-axis description (second Axis description)
3. Inbuilt Legends, Timeline Legends.
4. Legend component and static legends
5. Title of filters
6. Header name of Grids
7. Pie chart without a category: Legends
8. Tooltips and custom tooltip
9. Export, Filter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

5. User Management

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

5.1. Accessing the User Management Page

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



- ii) The User Management page opens

User Management NEW

User Group

Search User Group Showing 6 out of 6

All Group

- alls ✎ ✕ 🗑
- allcaseci ✎ ✕ 🗑
- allcase1e ✎ ✕ 🗑
- test ✎ ✕ 🗑
- Viewer Role 🗑
- Admin Role 🗑

Type: Enterprise Status: Active A-Z

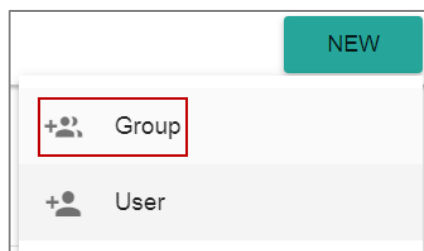
Search User Showing 5 out of 5

Platform User	✎ ✕ 🗑 ↻
etl admin	✎ ✕ 🗑 ↻
William Martin	✎ ✕ 🗑 ↻
BI Prod User	✎ ✕ 🗑 ↻
Dev User	✎ ✕ 🗑 ↻

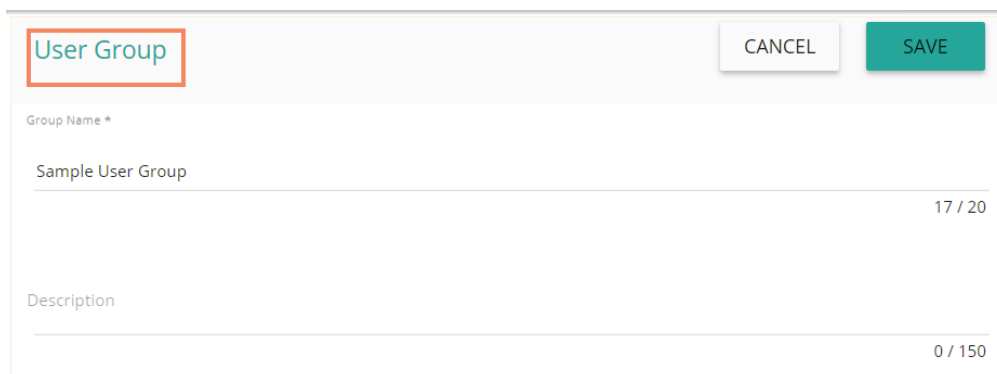
Note: The admin can search for a specific user or group by using the ‘Search’ boxes

5.2. Creating a New User Group

- i) Click the ‘NEW’ option
- ii) A context menu opens
- iii) Select ‘Group’ option from the context menu

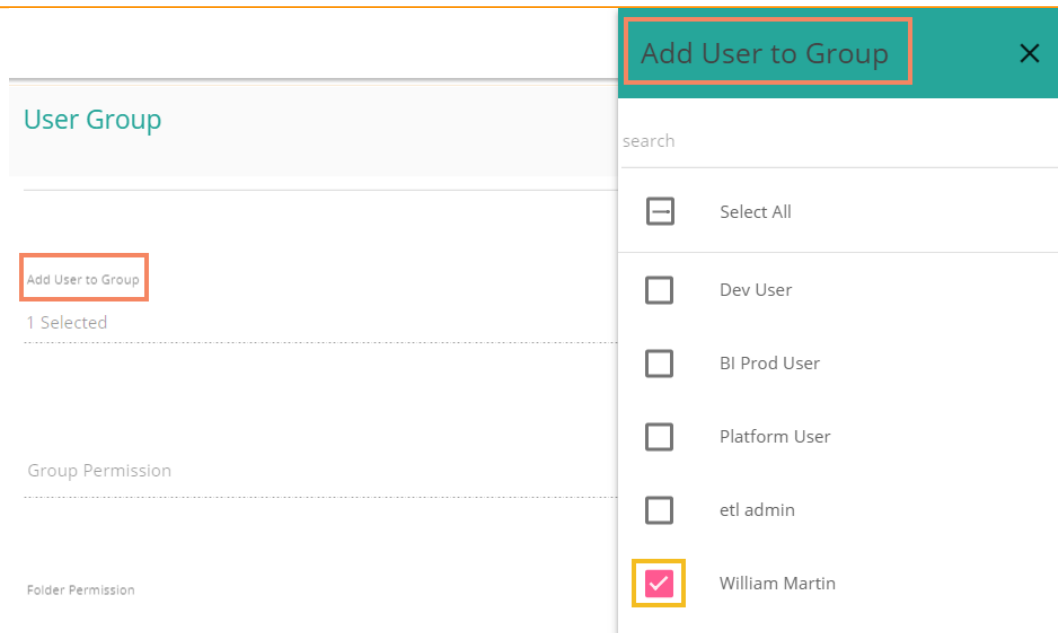



- iv) Provide the following information for a new User Group:
 - a. **Group Name:** Enter a name for the user group (The group name should not exceed 20 words)
 - b. **Description:** Describe the user group (optional) (The description should not exceed 150 words)

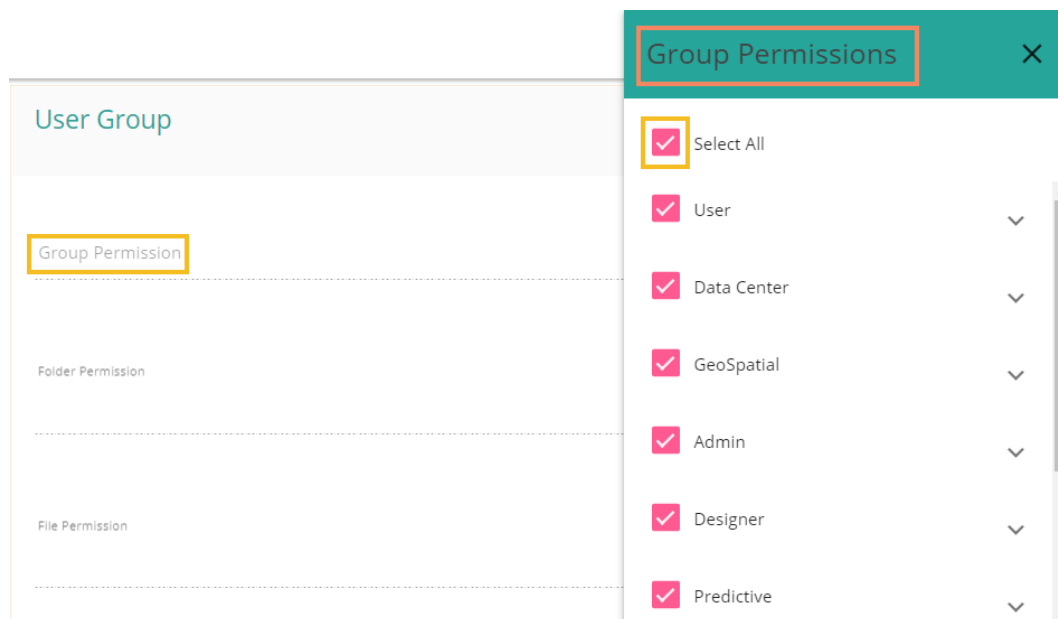



A screenshot of a form titled 'User Group'. At the top right are 'CANCEL' and 'SAVE' buttons. The form has two main sections: 'Group Name *' and 'Description'. The 'Group Name' field contains the text 'Sample User Group' and has a character count of '17 / 20'. The 'Description' field is empty and has a character count of '0 / 150'.

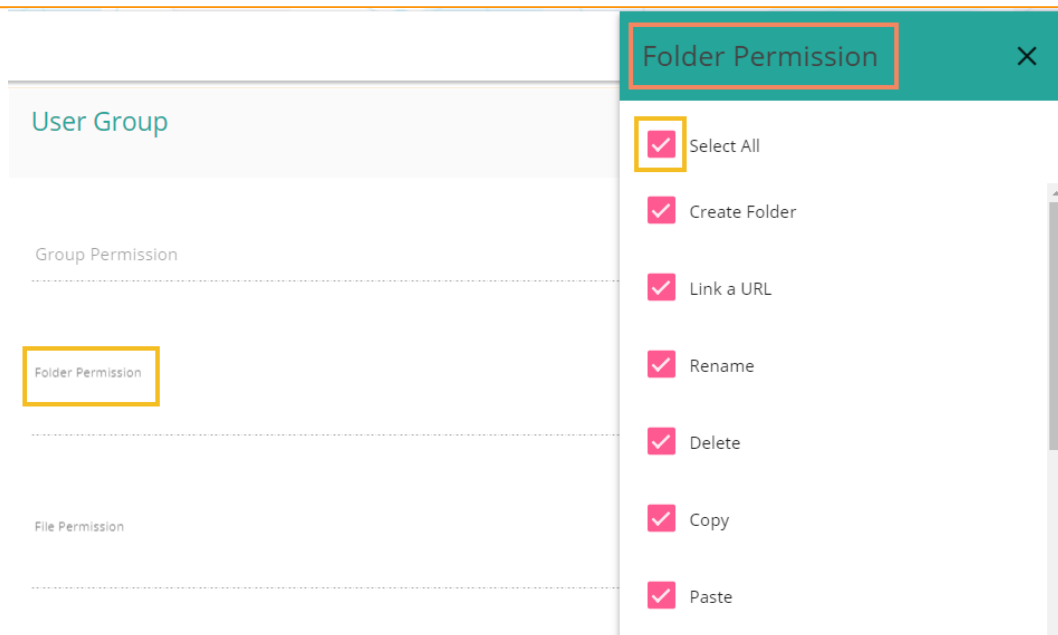
- c. **Add User to Group:** Click the ‘Add’ button  and select User(s) by using a checkmark in the box from the displayed list of users.




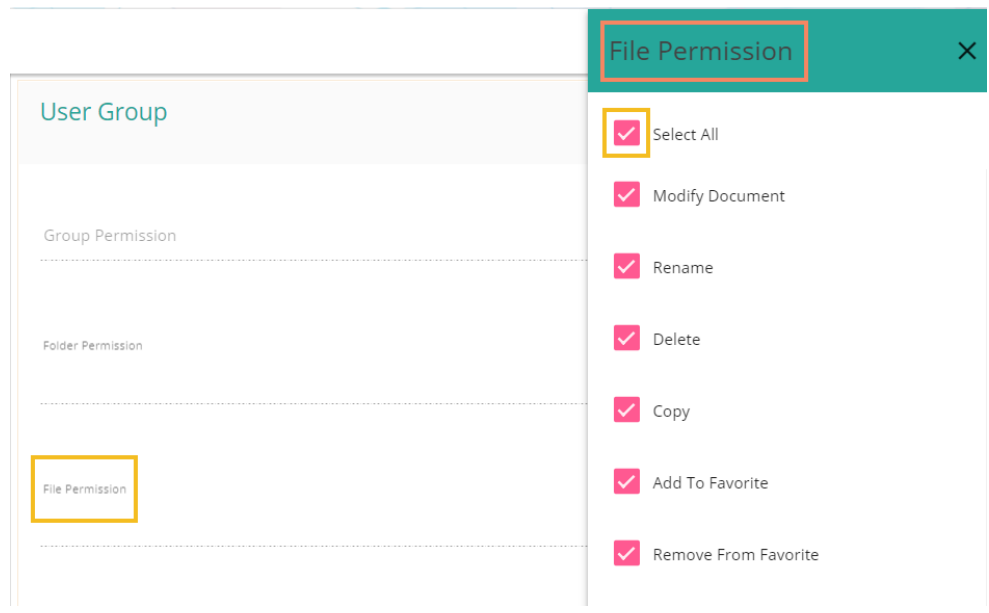
- d. **Group Permission:** Click the **'Add'** button  provided next to the Group Permission option. Assign various plugin/app rights to the User Group via the **'Group Permissions'** menu list (It is Mandatory).



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



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



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



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

User Management

User Group

Search User Group

Showing 13 out of 13

All Group

Sample User Group			
BI Trainees			
ETLTest			
ABCGroup			
Demo Viewers			

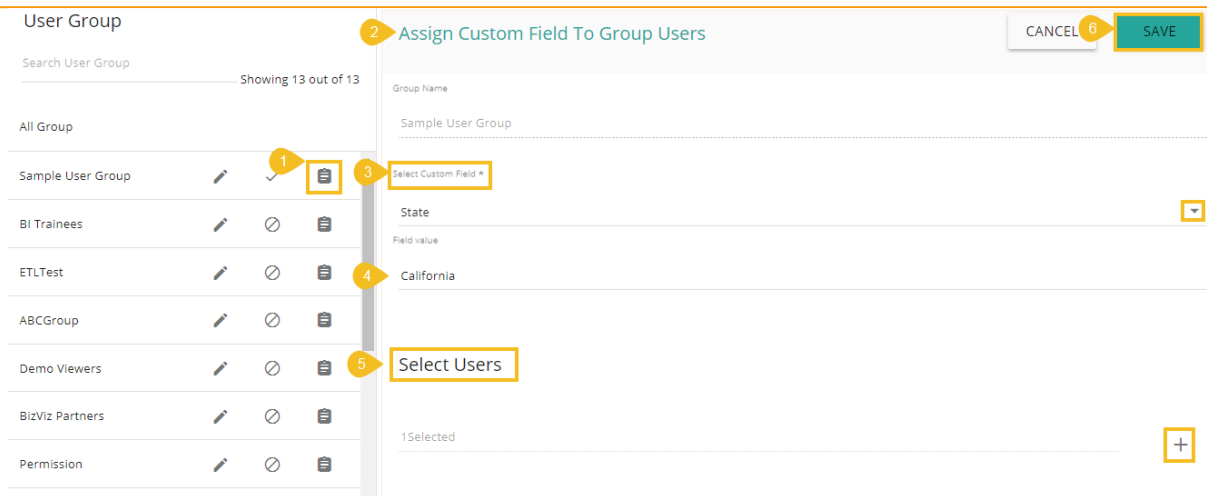
Note: Users can apply the following actions on a created user group.

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

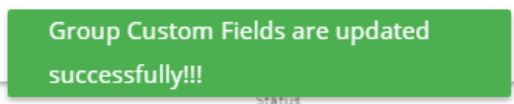
5.2.1. Assigning Group Custom Fields

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

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



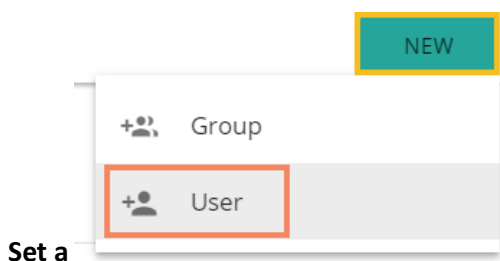
vii) A message will pop-up to assure that the group custom fields are updated successfully



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

5.3. Creating a New User

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



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

New User CANCEL SAVE

Email *
jmartin@abc.com

Short Name *
John Martin 11 / 20

Full Name *
John Martin 11 / 20

Description
0 / 150

Password *
***** 8 / 16

Confirm Password *

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

Custom Fields


State
California

City *
Sacramento

Manager *
David

Department
Dev.]

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

Add User to Group 

0Selected

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

Add User to Group
×

New User

Description

Password *

.....

Confirm Password *

.....

Add User to Group
1 Selected

search

no

Select All

TestGroupAnoop

NonAdmin Group

- xi) The existing user list opens
- xii) The newly created user gets added to the user list

Type: Enterprise Status: Active A-Z

Search User Showing 85 out of 85

John Martin	
userTestAudit	
GKTESTFOUR	
GKTESTTHREE	
uhuihuhu	
Buser	

Options	Name	Description
	Edit	Update/Edit the user specific details for a selected user
	Block	Block the selected user
	Remove	Remove the selected user from the user list
	Reset Password	A Reset password gets sent to the registered user email

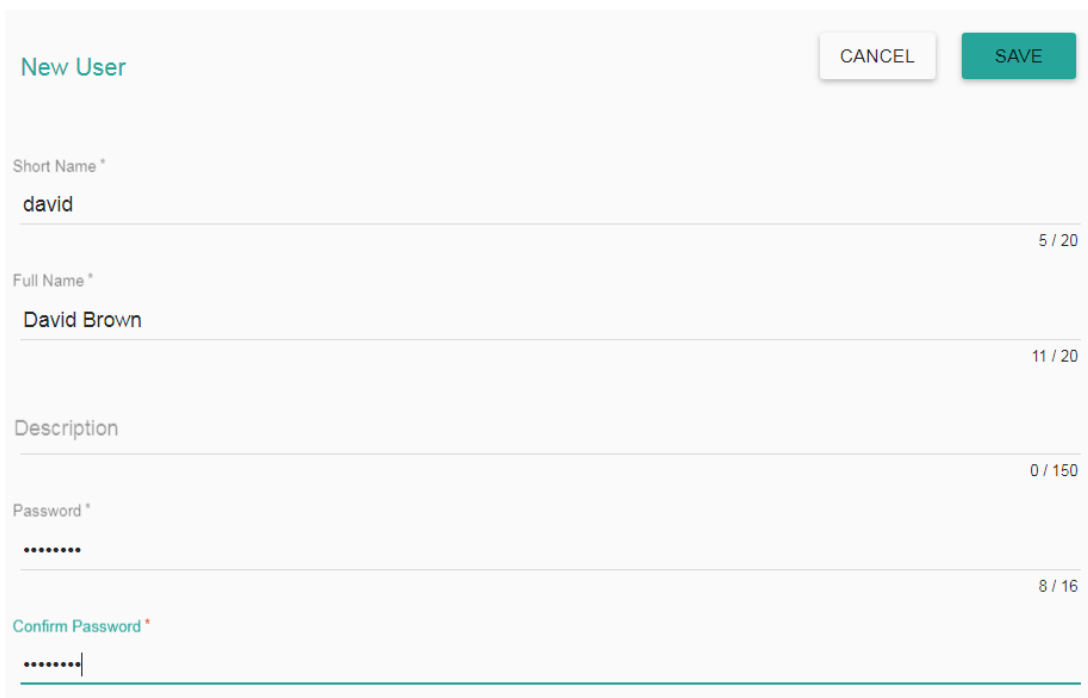
Note:

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

5.3.1. Default User Role

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

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



New User CANCEL SAVE

Short Name *
david 5 / 20

Full Name *
David Brown 11 / 20

Description 0 / 150

Password *
..... 8 / 16

Confirm Password *
..... 8 / 16

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

New User CANCEL SAVE

Custom Fields

Nationality
USA

State
California

City
Sacramento

Manager
Admin

Department
Platform

v) Do not add the user to any group

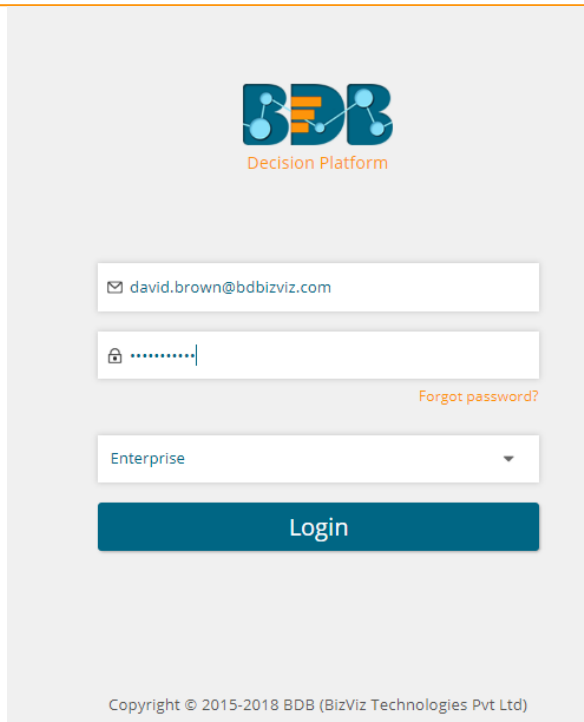
Add User to Group

0 Selected +

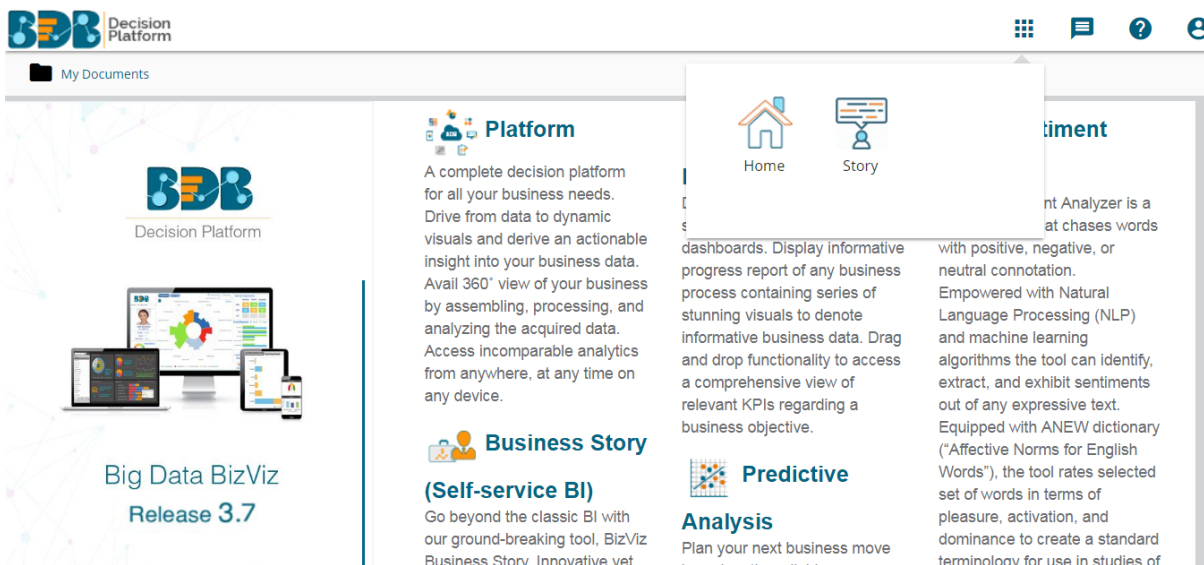
vi) The user is created and added to the list of users (By default the newly created user is added to the Viewer Role User Group)

Type	Status	
Enterprise	Active	A-Z
Search User		Showing 86 out of 86
David Brown		
John Martin		
userTestAudit		

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



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



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

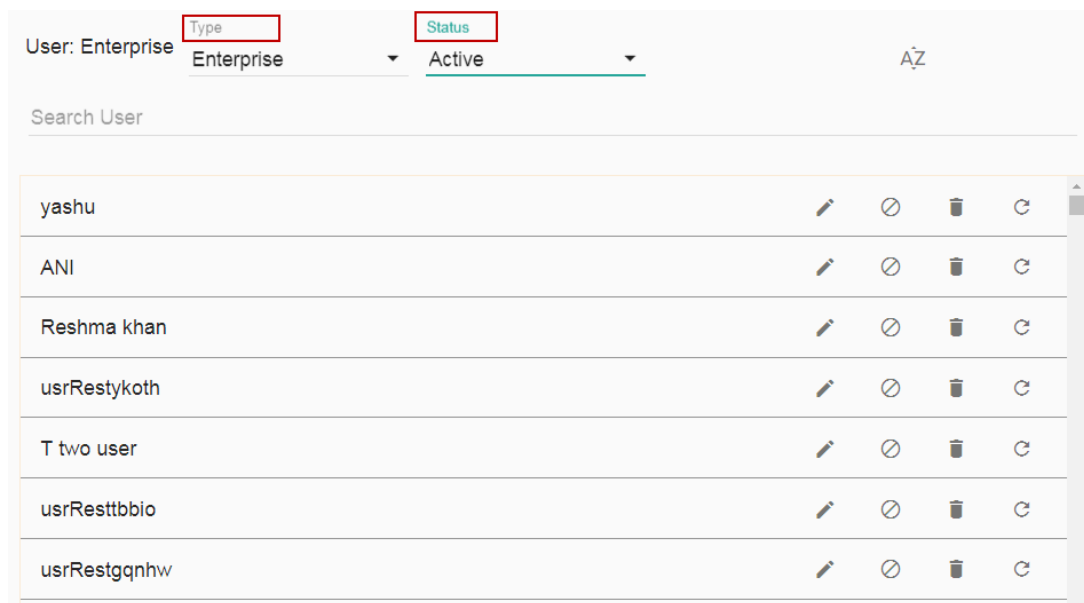
1. **Viewer Role:** Any new user created under the BDB Platform who is not added to any user group falls into this user role by default.
2. **Admin Role:** The users part of the Admin Group with permissions to access all the BDB Plugins belong to this group.
3. **Ordinary User Role:** The users part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

5.4. User Status

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

user account.

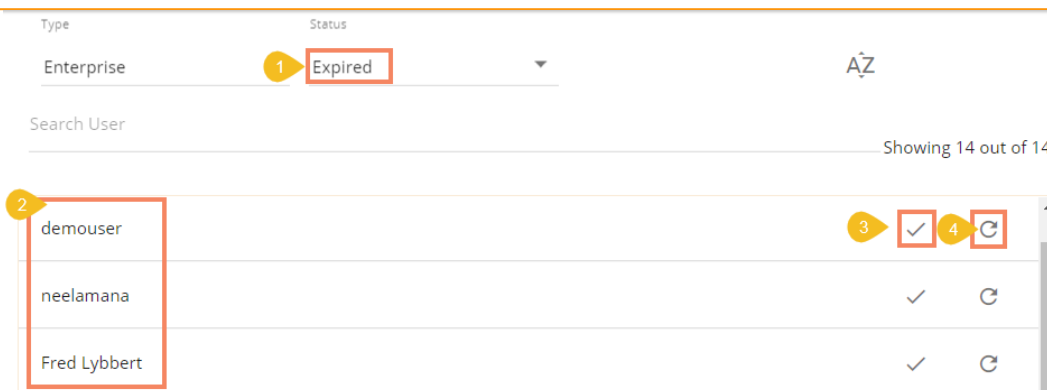
- i) Navigate to the User Management page.
- ii) Users can see two drop-down menus.
 - a. **Type:** It contains the following authentication types as drop-down options
 - i. Enterprise
 - ii. Window AD
 - iii. CA PPM
 - b. **Status:** It includes the following user status as drop-down options
 - i. Active
 - ii. Blocked
 - iii. Expired
 - iv. Deleted



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

5.4.1. Activating an Expired User Account

- i) Select '**Expire**' as the status option
- ii) A list of all expired user accounts/ groups appears
- iii) Click the '**Activate**' ✓ icon to activate a specific user/user group
- iv) Click the '**Reset Password**' option ↻ to set a new password for an activated user



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


6. Data Center

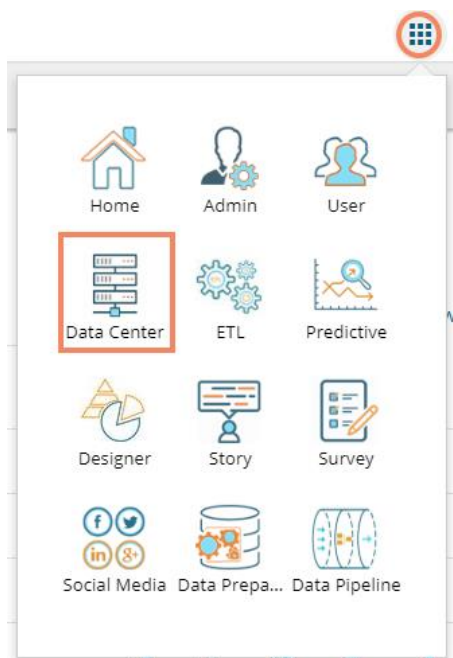
This section explains how to connect with multiple databases to create data service and elastic search-based Data Store. It also describes steps to create data store metadata.

6.1. Data Connector

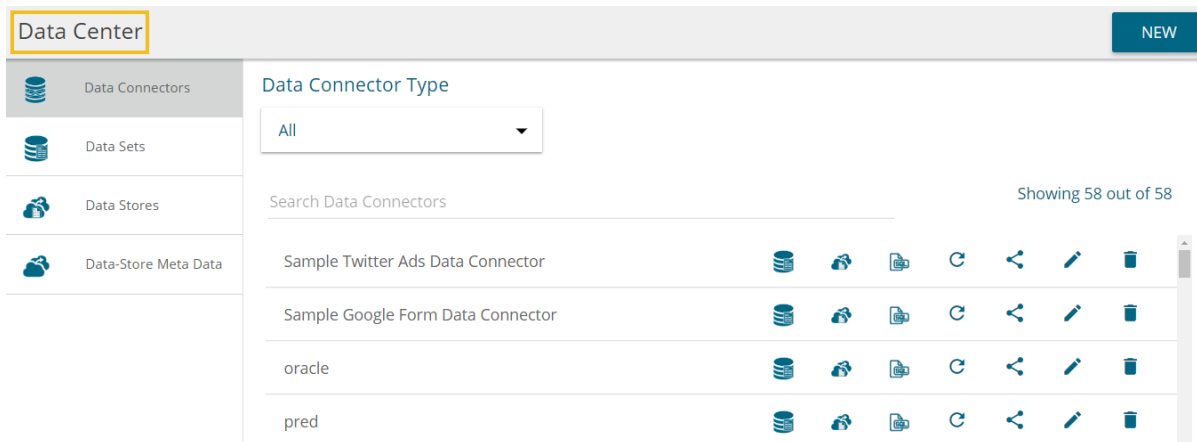
BDB Decision Platform offers a wide choice of data connectors ranging from RDBMS, Big Data and File types to various API connectors to fetch data from any media.

6.1.1. Creating a Data Connector

- i) Click the ‘**Data Center**’ option  from the Apps menu.



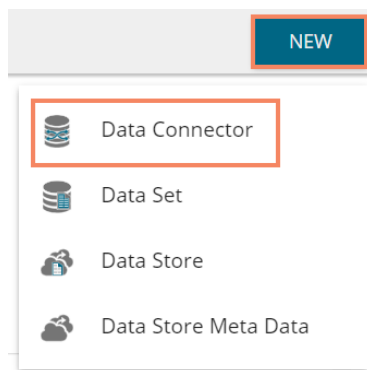
ii) The Data Center page opens.



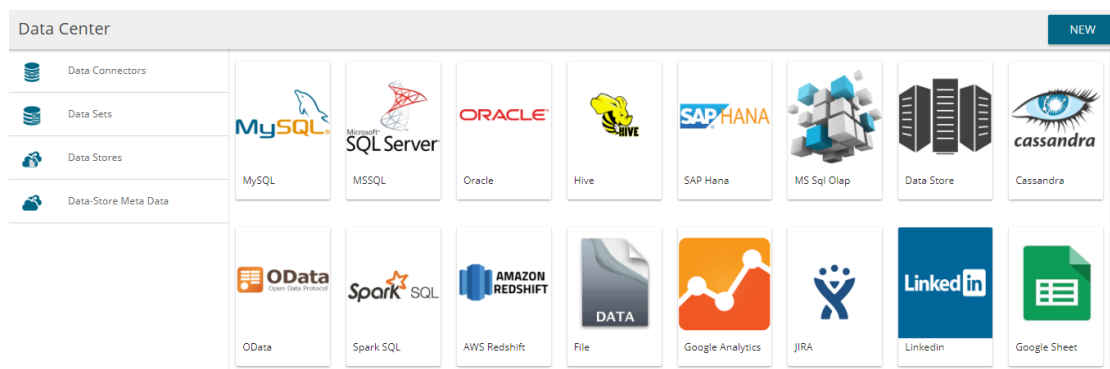
iii) Click the 'NEW' option.

iv) A context menu opens.

v) Select the 'Data Connector' option from the context menu.



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



vii) By selecting a connector type, users need to configure that connector.

viii) Users need to fill in the required details for the selected data connector.

ix) Verify the data connection by clicking the 'TEST' option.

E.g. The following image displays details to be filled to create a MySQL Data Connector

MySQL Data Connector

Data Connector Name *

Description

User Name *

Password *

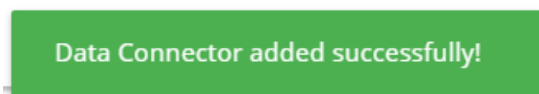
IP/Host *

Port

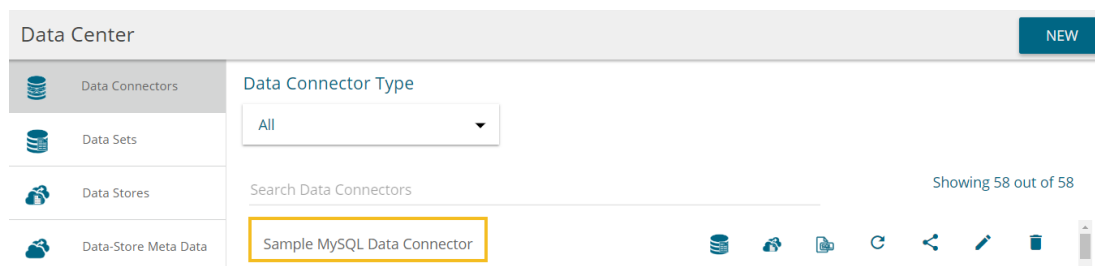
Database Name

CANCEL TEST SAVE

- x) Once the connection is tested successfully, click the **'SAVE'** option.
- xi) A Success message will pop-up as below:



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



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

1. MySQL Data Connector

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

MySQL Data Connector

Data Connector Name *

Description

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

User Name *

Password *

IP/Host *

Port

Database Name

CANCEL TEST SAVE

2. MSSQL Data Connector

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

MSSQL Data Connector

Data Connector Name *

Description

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

User Name *

Password *

IP/Host *

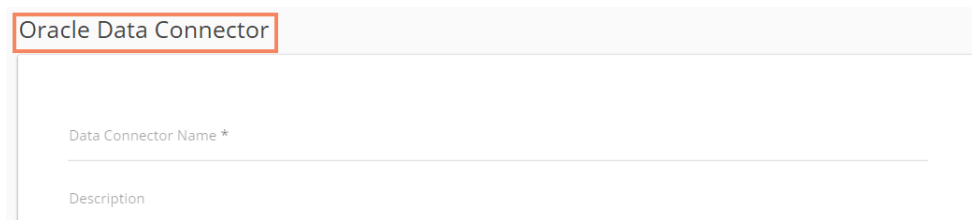
Port *

Database Name *

CANCEL TEST SAVE

3. Oracle Data Connector

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

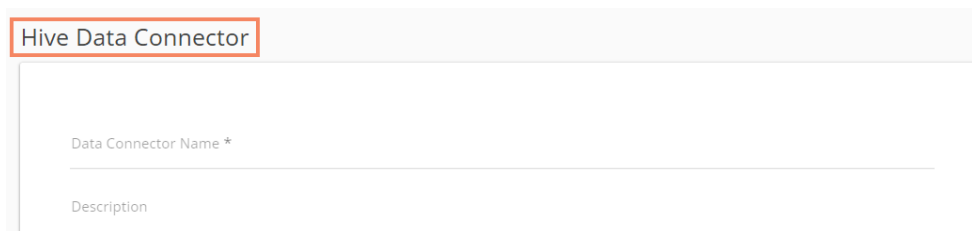


- iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
- v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
- vi) **Port:**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



4. Hive Data Connector

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



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

User Name *

Password *

IP/Host *

Port *

CANCEL TEST SAVE

5. SAP Hana Data Connector

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

SAP Hana Data Connector

Data Connector Name *

Description

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

User Name *

Password *

IP/Host *

Port *

CANCEL TEST SAVE

6. MSSQL OLAP Data Connector

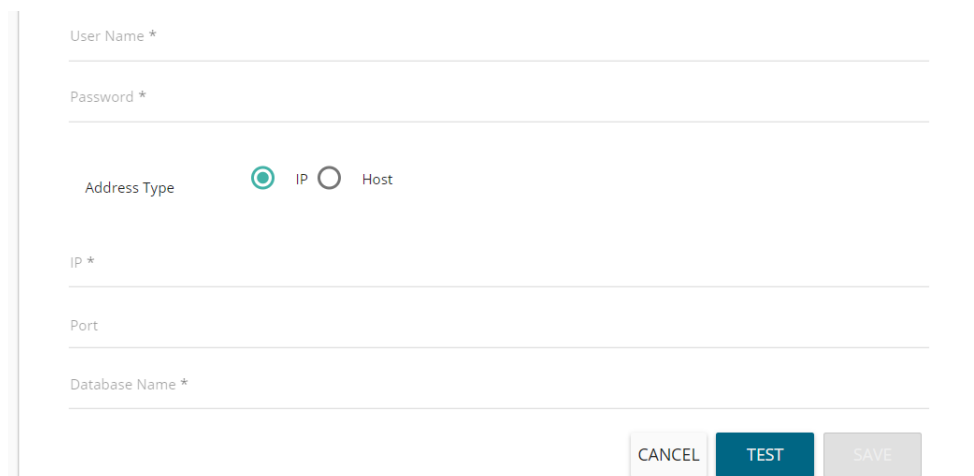
- i) **Data Connector Name:** A user-defined name to identify the data source
- ii) **Description:** Connection Details

MsOlap Data Connector

Data Connector Name *

Description

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



User Name *

Password *

Address Type IP Host

IP *

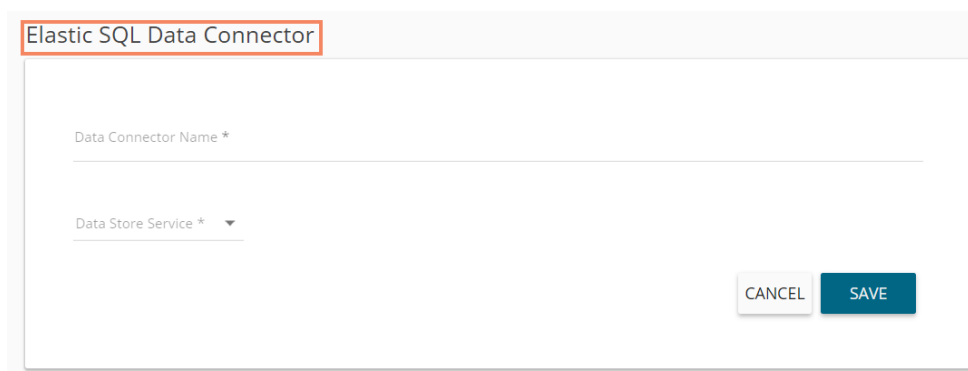
Port

Database Name *

CANCEL TEST SAVE

7. Data Store – Elastic SQL Data Connector

- i) **Data Connector Name:** A user-defined name to identify the data source
- ii) **Data Store Service:** Select a data store service from the drop-down list



Elastic SQL Data Connector

Data Connector Name *

Data Store Service *

CANCEL SAVE

8. Cassandra Native Data Connector

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

Cassandra Native Data Connector

Data Connector Name *

Description

- iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
- v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
- vi) **Port:** The server port number
- vii) **Default Key-Space Name:** Enter the default keyspace name
- viii) **Consistency:** Select a consistency option from the drop-down list (One/Two/Three/Quorum)

User Name *

Password *

IP/Host *

Multiple comma separated hosts can be given

Port *

Default Keyspace Name

Consisten...

ONE ▾

CANCEL TEST SAVE

9. O Data Connector

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

OData Data Connector

Data Connector Name *

Description

- iii) **Database Type:** Select the Database type using the drop-down menu in which you wish to store the data(OData V1-V2/OData V3-V4)
- iv) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- v) **Password:** Enter the Password (It should be the same as provided in the connection server)
- vi) **Base Url:** Enter Service Root URL or Base URL

Database Type
 OData V1-V2 ▾

User Name

Password

Base Url *

CANCEL TEST SAVE

10. Spark SQL Data Connector

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

Spark SQL Data Connector

Data Connector Name *

Description

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

User Name *

Password *

IP/Host *

Port *

CANCEL TEST SAVE

11. AWS Redshift

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

AWS Redshift Data Connector

Data Connector Name *

Description

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

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

12. File

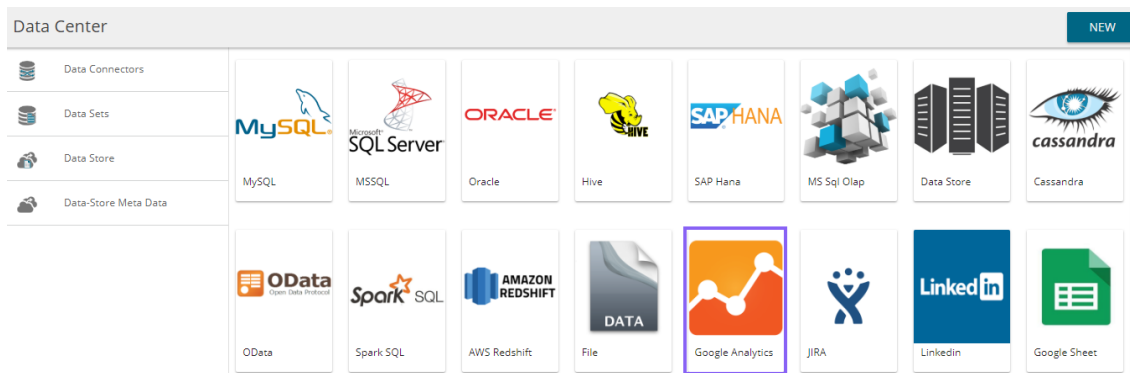
- i) **Data Connector Name:** A user-defined name to identify the data source
- ii) **Description:** Connection details (optional)
- iii) Click the **'SAVE'** option

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

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

13. Google Analytics Connector

- i) Navigate to the Data Connector page by using the 'NEW' context menu.
- ii) Click 'Google Analytics' connector



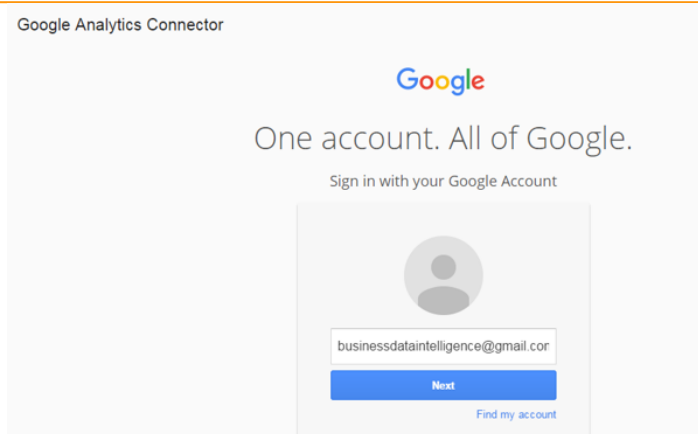
- iii) Users get directed to the Google Analytics Connector form

The screenshot shows the 'Google Analytics Connector' form. The title 'Google Analytics Connector' is highlighted with a red border. The form contains the following fields:

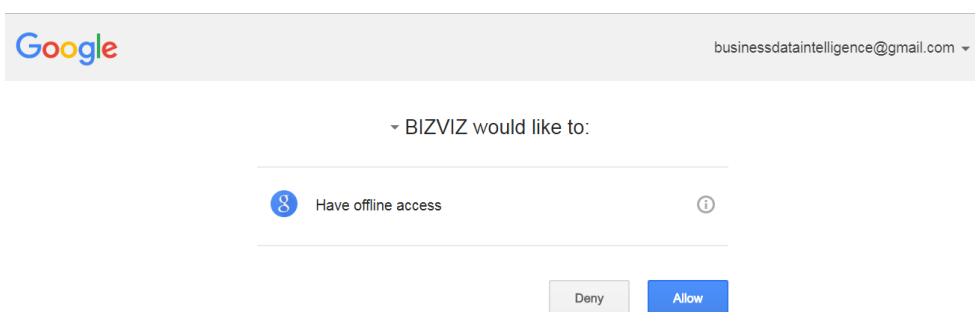
- 'Select Account' dropdown menu
- 'Data Connector Name *' text input field
- 'Description' text input field

At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE'.

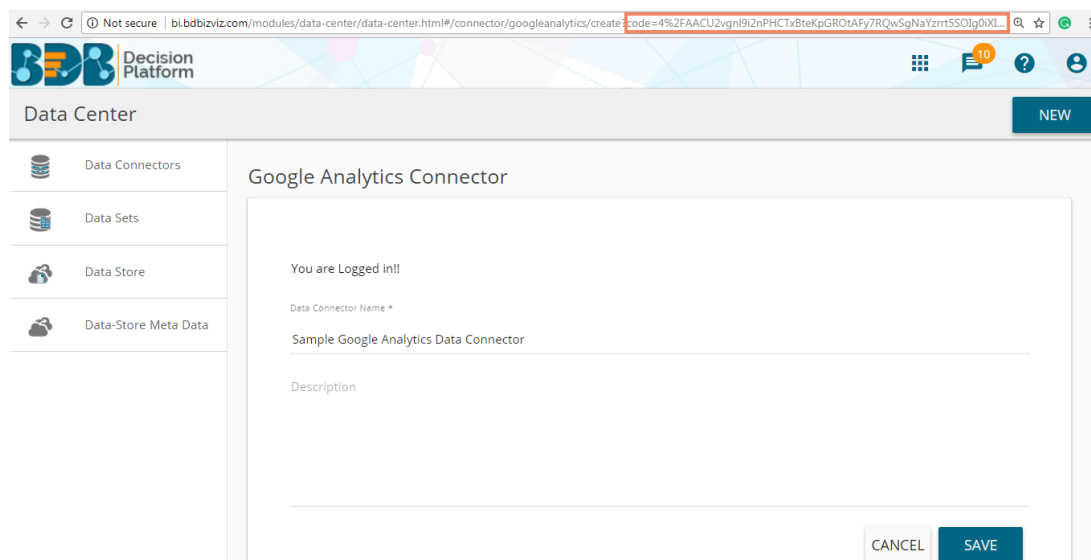
- iv) Select Account: Either select a Google account from the list or choose 'Add New Account' option to add a new Google account
- v) Adding a new google account redirects users to follow the below given steps:
 - a. After selecting a google account, users need to login to the same



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

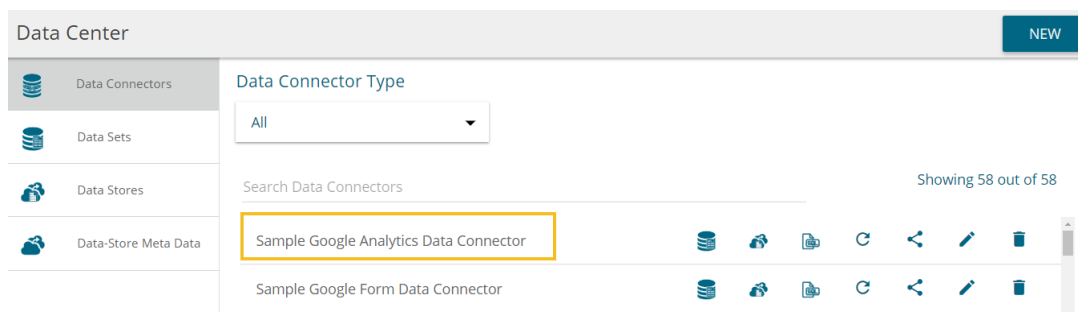


- c. Users get redirected to the data connector form with an authorization code in the URL, after getting the access permission.
 - i. Click the '**CHANGE ACCOUNT**' option, if wish to change the selected account
 - ii. **Data Connector Name:** Enter a user-defined name to identify the data connector
 - iii. **Description:** Describe the data connector (optional)
 - iv. Click '**SAVE**'



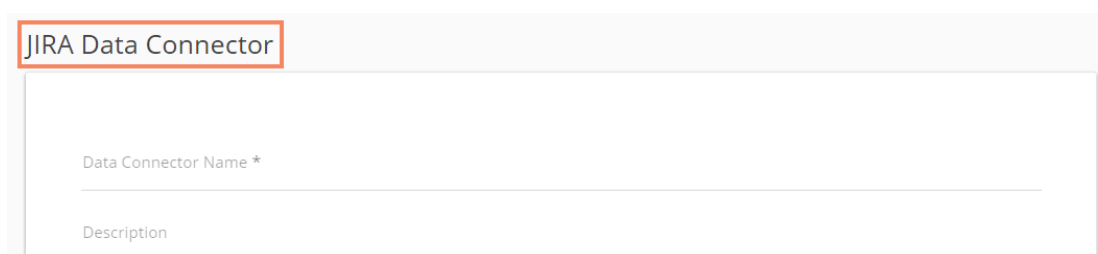
Note: Users can '**CANCEL**' the connector if wished to do so from the current page.

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

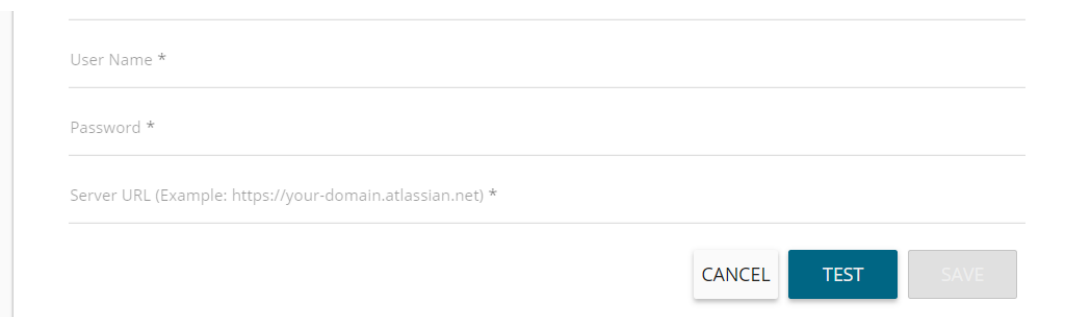


14. JIRA

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



- iii) **User Name:** Enter a User Name (It should be the same as given in the connection server)
- iv) **Password:** Enter the password (It should be the same as provided in the connection server)
- v) **Server URL:** Enter the server URL link
- vi) Click **'TEST'** to verify the connection



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

JIRA Data Connector

Data Connector Name *

Sample JIRA Data Connector

Description

User Name *

Password *

.....

Server URL (Example: https://your-domain.atlassian.net) *

https://bdbviz.atlassian.net

CANCEL TEST SAVE

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

Data Center

NEW

Data Connectors | Data Connector Type: All

Data Sets

Data Stores

Data-Store Meta Data

Search Data Connectors

Showing 58 out of 58

Sample JIRA Data Connector

15. LinkedIn

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

Linkedin Connector

Login to LinkedIn account

SELECT ACCOUNT

Data Connector Name *

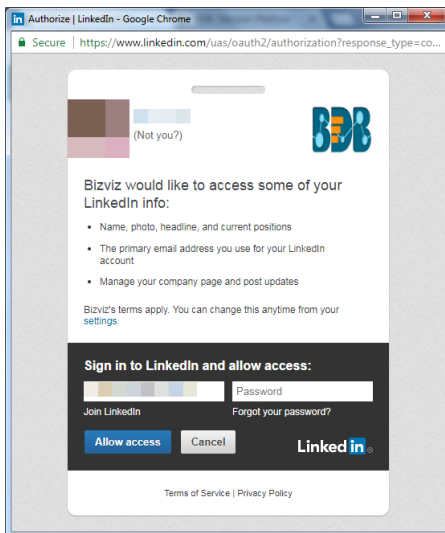
Description

.....

CANCEL SAVE

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

from the selected LinkedIn account



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

LinkedIn Connector

Login to LinkedIn account

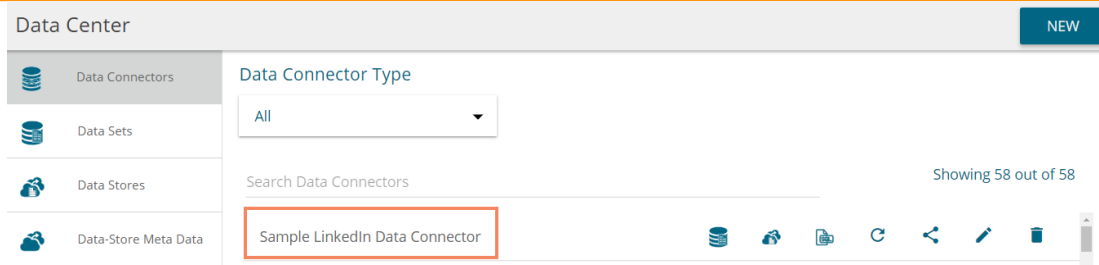
CHANGE ACCOUNT

Data Connector Name *

Sample LinkedIn Data Connector

Description

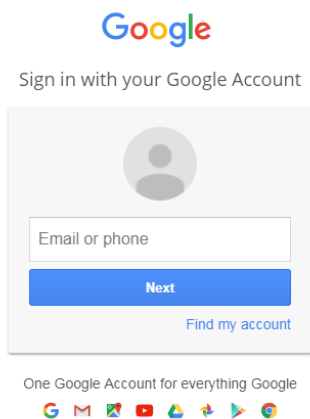
3. A message appears to notify that a new LinkedIn connector has been successfully created. The newly formed data connector gets added to the list of data connectors.



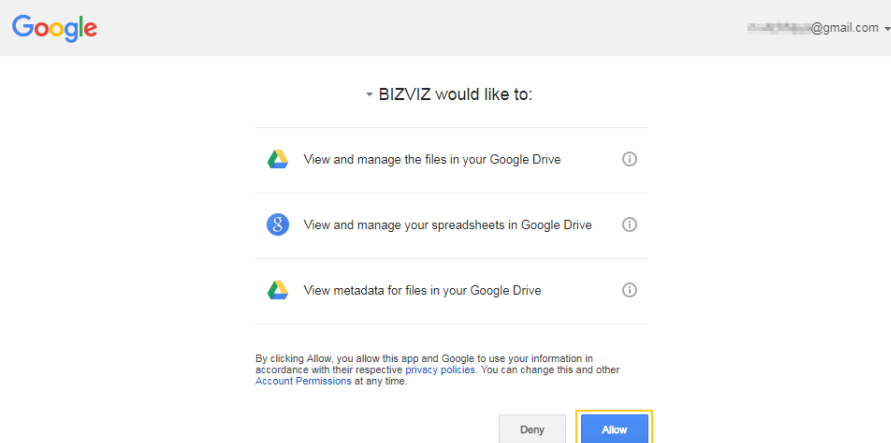
16. Google Sheet

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

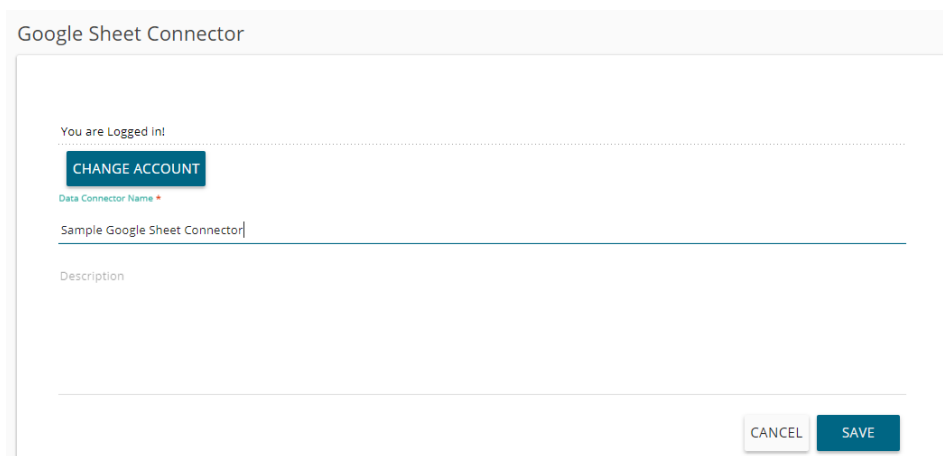
- iv) Enter the credentials of your Google Account



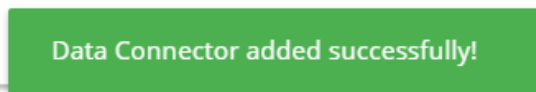
- v) A new page opens asking users to share their information with BizViz
- vi) Click '**Allow**' to share the same



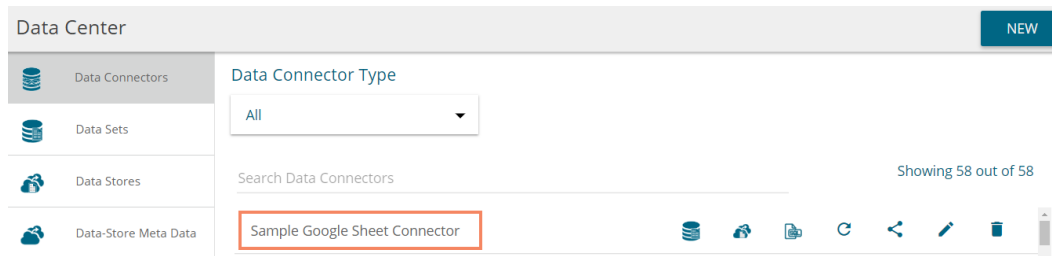
- vii) The Google Sheet Connector page
 - i. The **'SELECT ACCOUNT'** button gets changed into the **'CHANGE ACCOUNT'** option
 - ii. Provide a name for the Data Connector
- viii) Click the **'SAVE'** option



- ix) A success message will pop-up as below

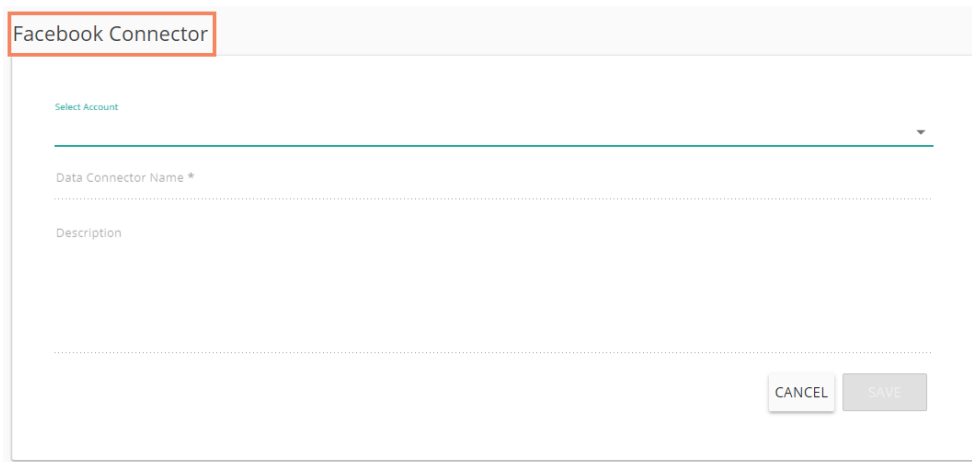


- x) The newly created Google Sheet Data Connector gets added to the list of connectors

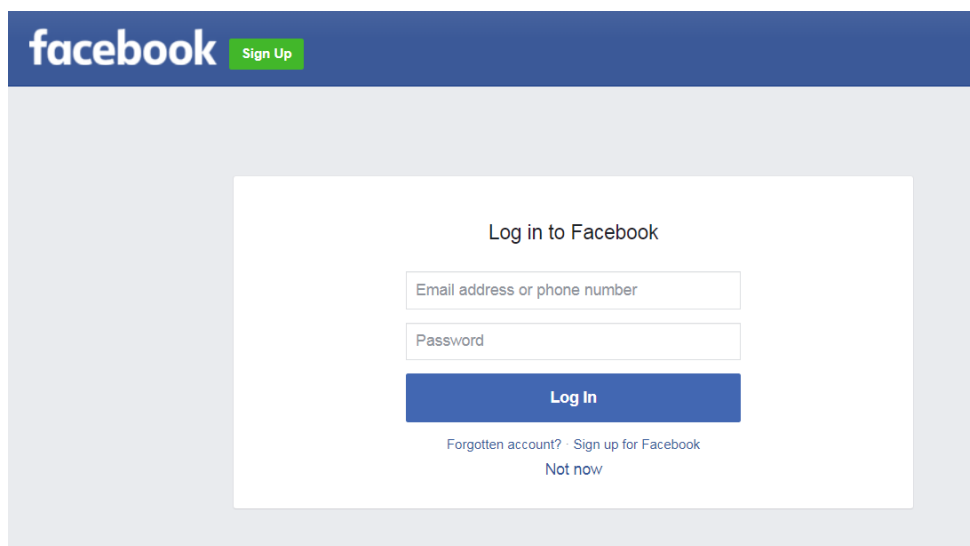


17. Facebook

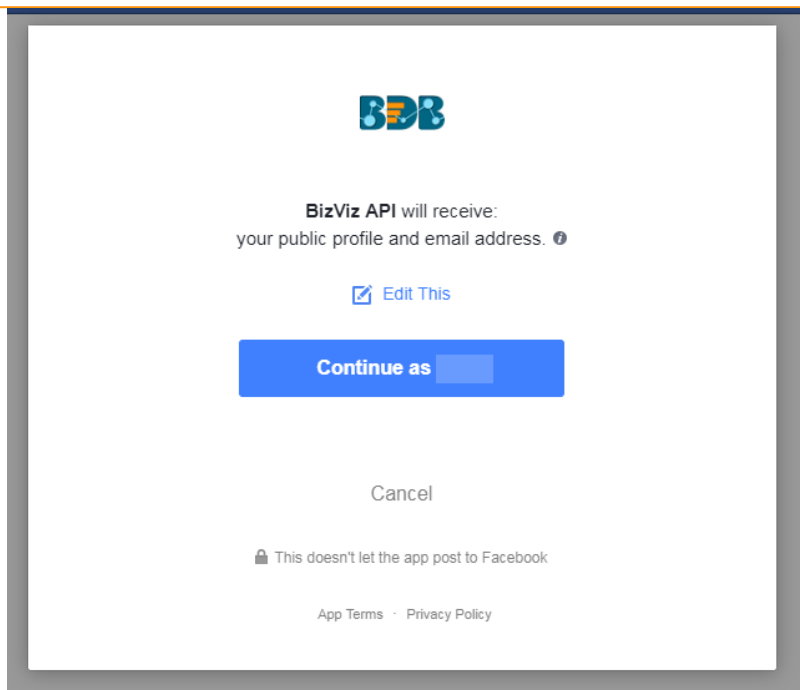
- i) Select the **'Facebook'** connector from the Data Connector page
- ii) The Facebook Connector page opens
- iii) Select an account using the **'Select Account'** drop-down menu



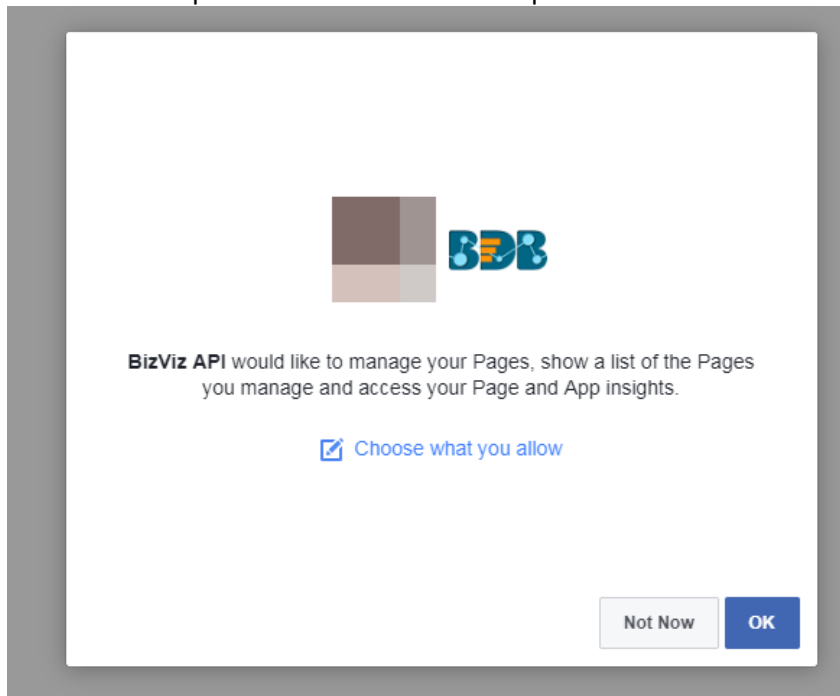
- iv) Enter the credentials for a Facebook account for login



- v) A new page opens allowing BizViz to access the information from the logged in Facebook account
- vi) Click the Continue as 'The profile owner's name' if you wish to map the same account, or use 'Edit' option to edit the information.



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



- viii) By selecting the continuation option, users are notified as logged in to the selected account redirected to the Facebook Connector page
- ix) Provide a title for the data Connector
- x) Click the 'SAVE' option

Facebook Connector

You are Logged in!!

Data Connector Name *

Sample Facebook Data Connector

Description

CANCEL SAVE

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

Data Center NEW

- Data Connectors**
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type: All

Search Data Connectors

Showing 58 out of 58

Sample Facebook Data Connector

18. MailChimp

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

MailChimp Connector

Select Account

Data Connector Name *

Description

CANCEL SAVE

- iv) Enter the credentials of the selected MailChimp account
- v) Click 'Log In' option for connecting it with the BDB platform



Connect BizViz to your account

Dev Bzviz MailChimp

Username

Password

Log In

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

MailChimp Connector

Account:

Data Connector Name *

Sample MailChimp Data Connector

Description

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

Data Center

- Data Connectors
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type

All ▼

Search Data Connectors Showing 58 out of 58

Sample MailChimp Data Connector

19. Flipkart

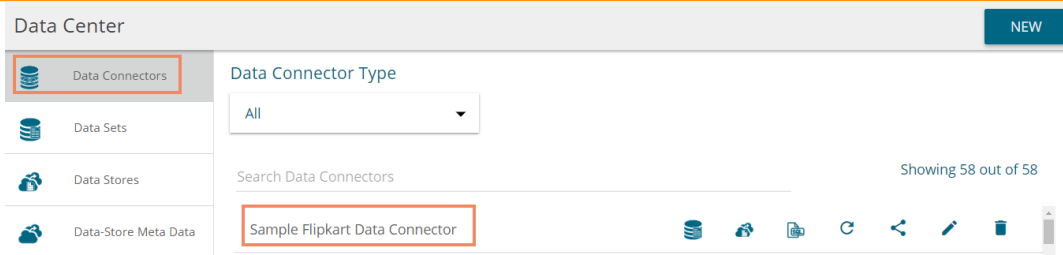
- i) Select the '**Flipkart**' connector from the Data Connector page
- ii) The Flipkart Connector page opens

- iii) Click the **'SELECT ACCOUNT'** option

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

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

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



20. Amazon

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

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



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

ACCOUNT VERIFIED

Data Connector Name *

Sample Amazon Marketplace Data Connector

Description

G

CANCEL SAVE

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

Data Center NEW

- Data Connectors
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type

All

Search Data Connectors

Showing 58 out of 58

Sample Amazon Marketplace Data Connector

21. Dropbox

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

Dropbox Connector

Login to Dropbox account

SELECT ACCOUNT

Data Connector Name *


Description

CANCEL SAVE

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



Sign in to Dropbox to link with BDBIZVIZ.COM

 Sign in with Google

or

Email

Password

[Forgot your password?](#)

Sign in

[New to Dropbox? Create an account](#)

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



BDBIZVIZ.COM would like access to the files and folders in your Dropbox. [Learn more](#)

Cancel

Allow

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

Dropbox Connector

Account :

Data Connector Name *

Sample Dropbox Data Connector

Description

CANCEL SAVE

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

Data Center NEW

- Data Connectors
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type: All

Search Data Connectors Showing 58 out of 58

Sample Dropbox Data Connector

Icons: Database, Cloud, Document, Refresh, Share, Edit, Delete

22. Zoho Books

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

ZohoBooks Data Connector

Data Connector Name *

Description

User Name *

Password *

CANCEL TEST SAVE

- d. Click '**SAVE**' after the data connection gets verified

ZohoBooks Data Connector

Data Connector Name *

ZohoBooks Data Connector

Description

User Name *

.....

Password *

.....

CANCEL TEST SAVE

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

Data Center NEW

- Data Connectors**
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type

All

Search Data Connectors Showing 58 out of 58

Sample ZOHO Books Data Connector

Icons: Database, Refresh, Copy, Share, Edit, Delete

23. QuickBooks

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

QuickBooks Connector

Login to QuickBooks account

SELECT ACCOUNT

Data Connector Name *

Description

CANCEL SAVE

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

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

- vii) The QuickBooks connector page opens after verification gets over
 - a. Displays the account number of the selected account on this page
 - b. Enter a Data Connector Name
 - c. Click the **'SAVE'** option

QuickBooks Connector

Account :

Data Connector Name *

QuickBooks Data Connector

Description

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

Data Center

- Data Connectors
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type:

Search Data Connectors Showing 58 out of 58

24. Twitter

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

Twitter Connector

BDBBizviz

Note:if you are already loggedIn using one account and want to try using another account then first logout from <https://twitter.com>

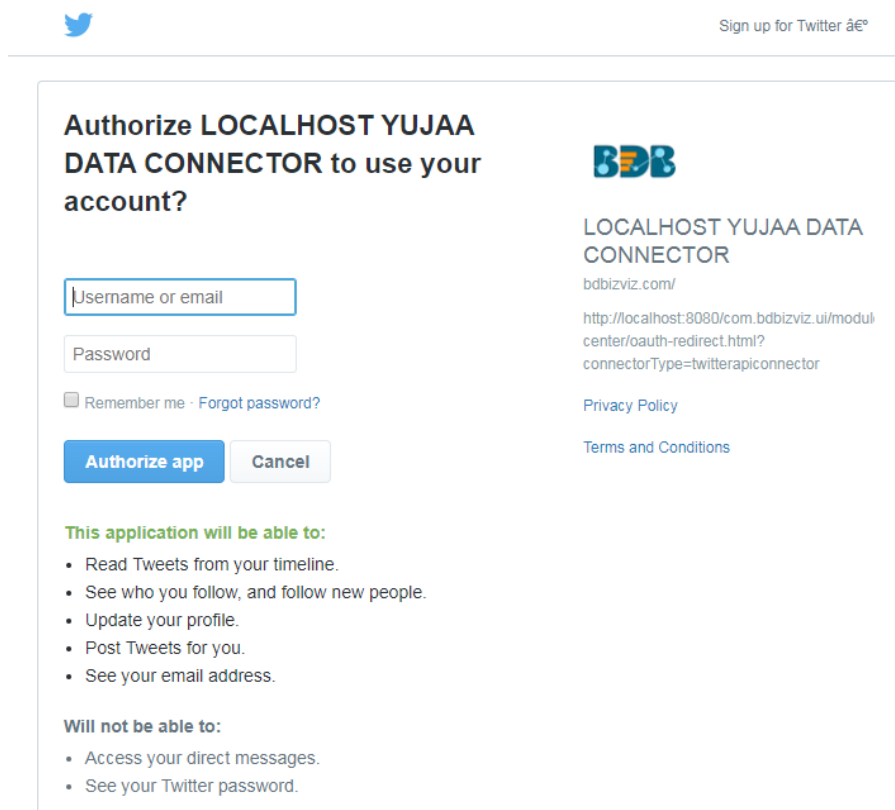
Data Connector Name *

Sample Twitter Data Connector

Description

- iv) If users wish to add a new account, the authorization page allowing BDB to access the Twitter account opens
- v) Enter the credentials to Sign in

- vi) Users receive a code to assure the authenticity of the selected account (Users get the verification code through the registered email and mobile)



Twitter Sign up for Twitter æ™

Authorize LOCALHOST YUJAA DATA CONNECTOR to use your account?

LOCALHOST YUJAA DATA CONNECTOR
bdbizviz.com/
http://localhost:8080/com.bdbizviz.ui/module/center/oauth-redirect.html?connectorType=twitterapiconnector
[Privacy Policy](#)
[Terms and Conditions](#)

Username or email

Password

Remember me · [Forgot password?](#)

Authorize app **Cancel**

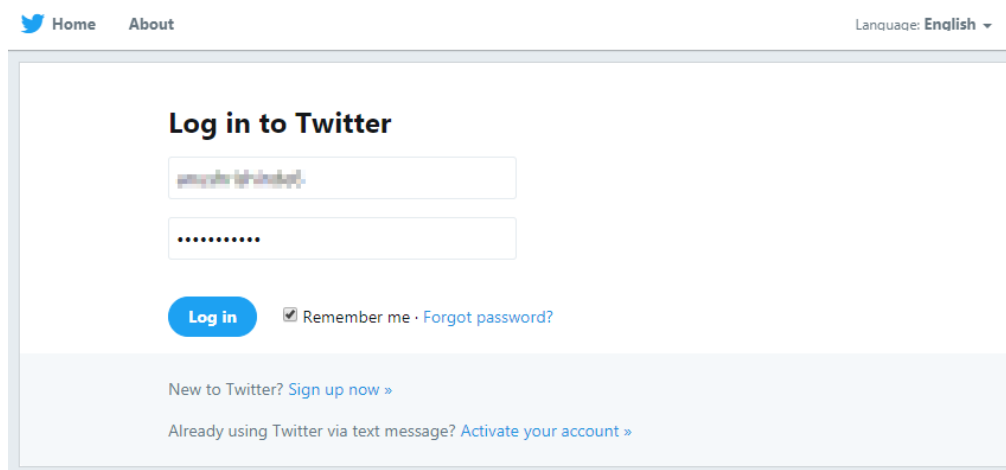
This application will be able to:

- Read Tweets from your timeline.
- See who you follow, and follow new people.
- Update your profile.
- Post Tweets for you.
- See your email address.

Will not be able to:

- Access your direct messages.
- See your Twitter password.

- vii) The Twitter Login page opens



Home About Language: English

Log in to Twitter

Log in Remember me · [Forgot password?](#)

New to Twitter? [Sign up now »](#)

Already using Twitter via text message? [Activate your account »](#)

- viii) The Twitter Connector page opens
- Enter a Data Connector Name
 - Click the 'SAVE' option

Twitter Connector

Account :

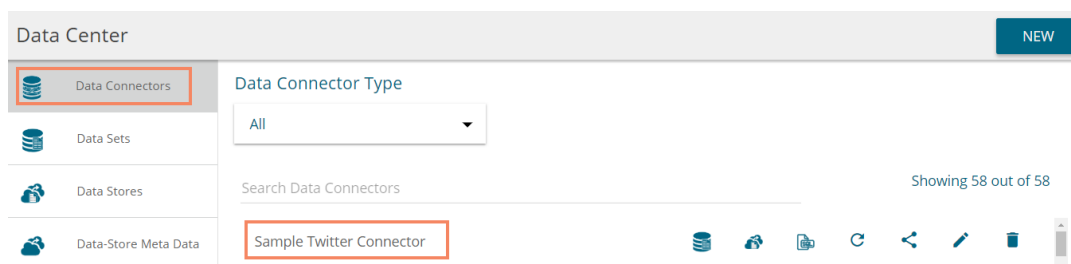
Note: If you are already logged in using one account and want to try using another account then first logout from <https://twitter.com>

Data Connector Name *

Sample Twitter Connector

Description

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



25. FTP Server

- i) Select 'FTP Server' connector type icon from the Data Connector page
- ii) Fill in the following information:
 6. Data Connector Name: A user-defined name to identify the data source
 7. Description: Describe the connector details

FTP Server Data Connector

Data Connector Name *

Description

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

Host *

Port *

User Name *

Password *

Start Path *

Select Server Type *

CANCEL TEST SAVE

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

Data Center NEW

- Data Connectors**
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type: All

Search Data Connectors Showing 58 out of 58

FTP Server Data Connector

26. ServiceNow

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

Data Center NEW

- Data Connectors**
- Data Sets
- Data Stores
- Data-Store Meta Data

Service Now Conn...

Data Connector Name *

Description

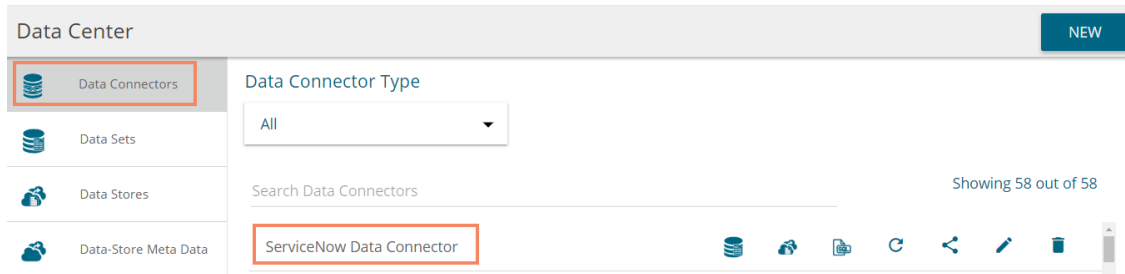
Instance User Name *

Password *

Developer Instance URL *

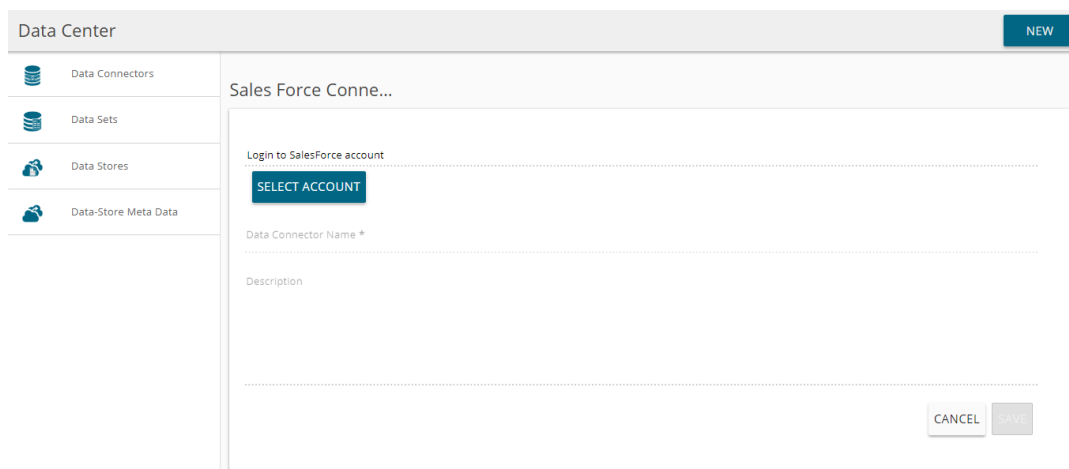
CANCEL TEST SAVE

- v) Once the connection is tested successfully, click the **'SAVE'** option
- vi) The newly created ServiceNow data connector gets added to the Data Connectors list

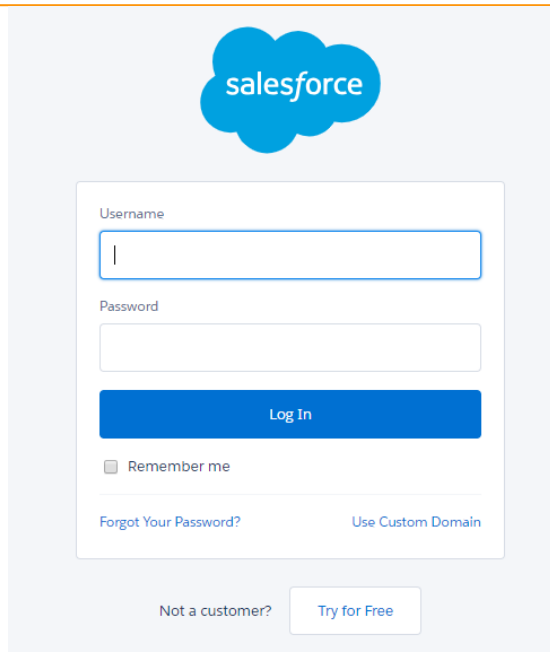


27. Salesforce

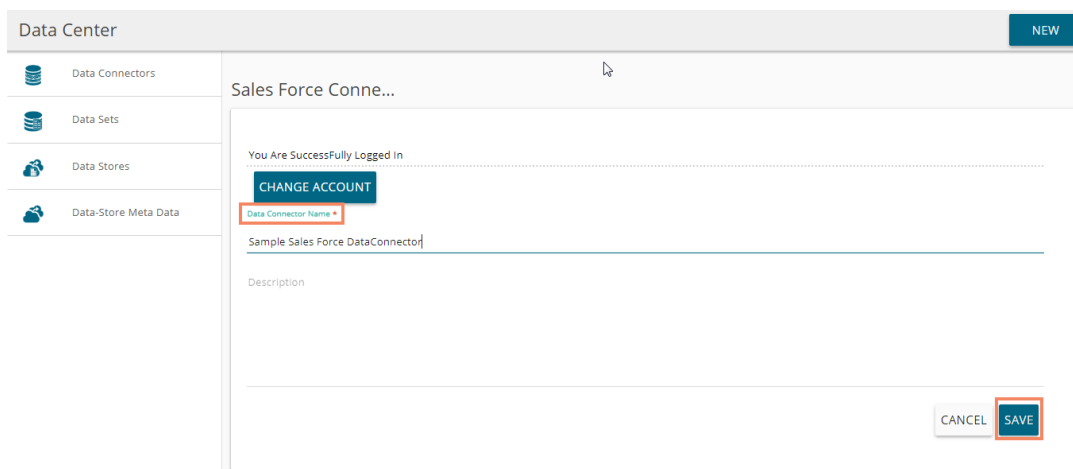
- i) Select **'Salesforce'** connector type icon from the Data Connector page
- ii) Users get directed to the Sales Force Connector page



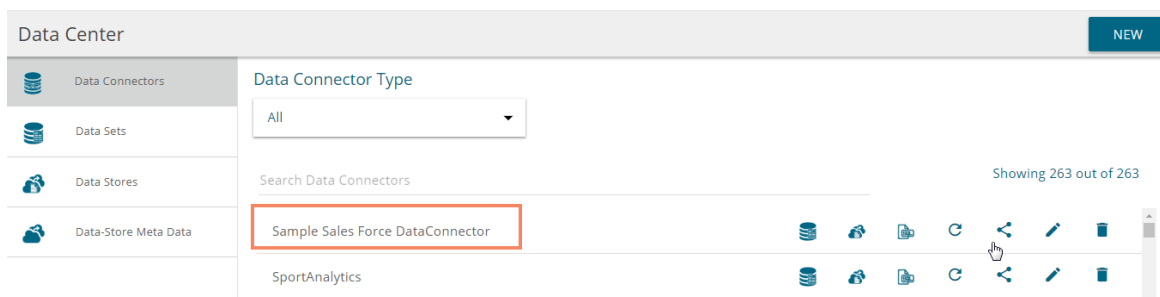
- iii) Click the **'SELECT ACCOUNT'** option to select an account
- iv) Users get the Salesforce login page
 1. Insert the valid username
 2. Provide the correct password for your account
 3. Click the 'Log In' option



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

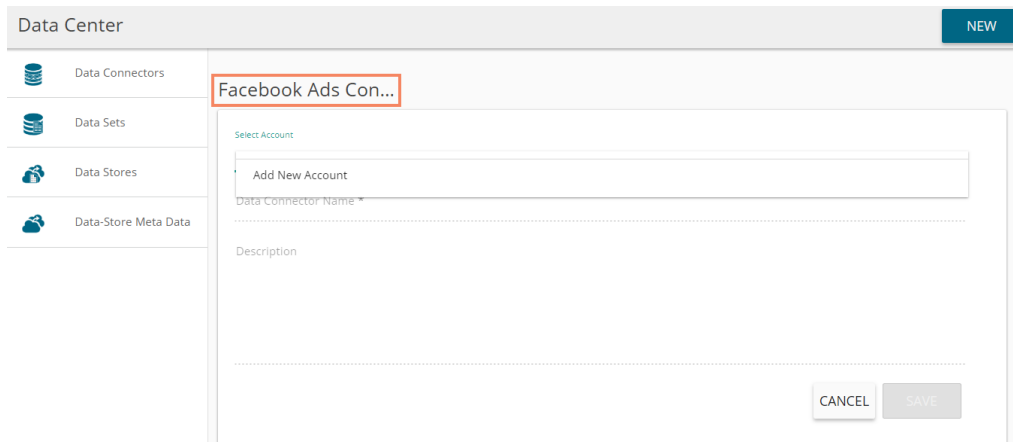


- vi) The newly created data connector gets saved in the list of Data Connectors



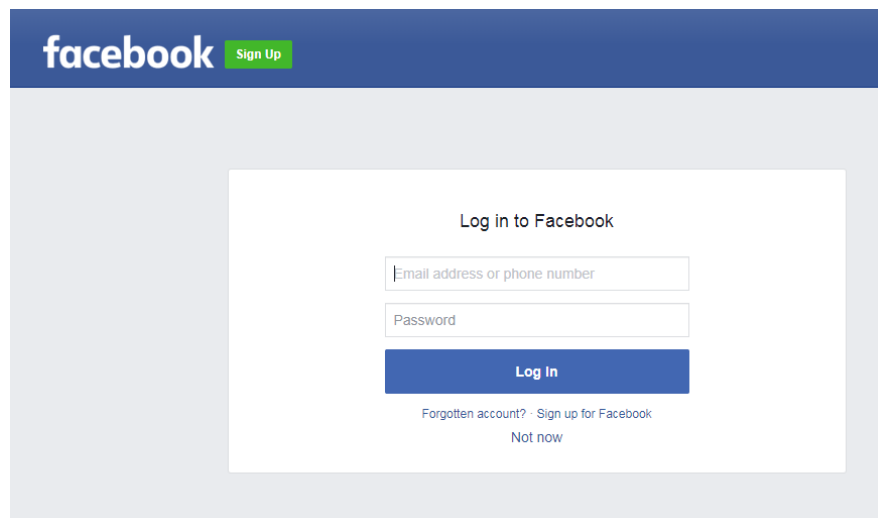
28. Facebook Ads

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



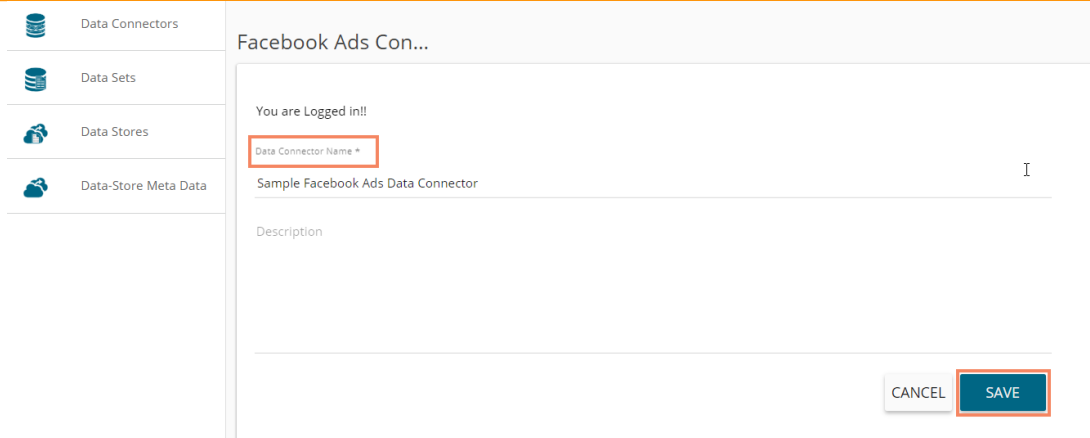
The screenshot shows the 'Data Center' interface. On the left, there is a navigation menu with 'Data Connectors' highlighted. The main area displays the 'Facebook Ads Con...' connector page. At the top right of the main area is a 'NEW' button. Below the connector name, there is a 'Select Account' section with an 'Add New Account' button and a 'Data Connector Name' dropdown menu. Below this is a 'Description' field and 'CANCEL' and 'SAVE' buttons.

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

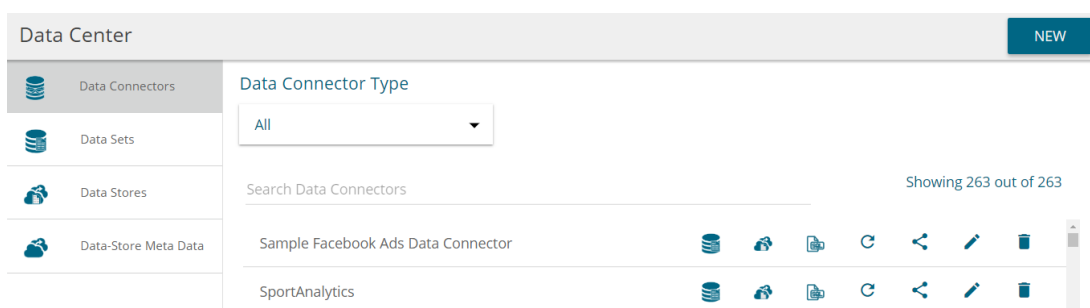


The screenshot shows the Facebook login page. At the top, there is the Facebook logo and a 'Sign Up' button. The main content area is titled 'Log in to Facebook' and contains input fields for 'Email address or phone number' and 'Password', a 'Log In' button, and links for 'Forgotten account?', 'Sign up for Facebook', and 'Not now'.

- v) After a successful login to the selected Facebook account, users get redirected to the Facebook Ads connector page
 1. Enter the Data Connector name
 2. Provide Description for the data connector (optional)
 3. Click **'SAVE'** option

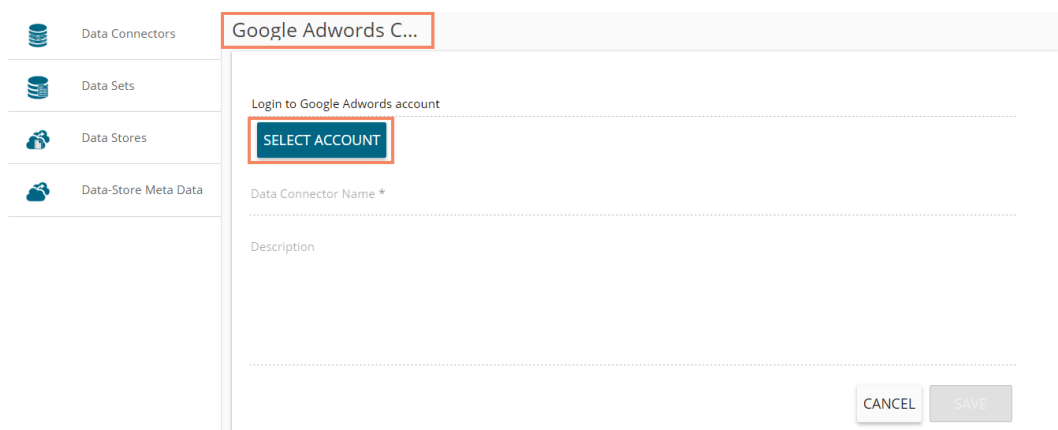


vi) A new Facebook Ads Data Connector gets created and added to the List of the Data Connectors



29. Google AdWords

- i) Click the **'Google AdWords'** connector type icon from the Data Connector page
- ii) Users get directed to the Facebook Ads Connector page
- iii) Log in to a Google AdWords account using the **'Select Account'** option



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



One account. All of Google.

Sign in with your Google Account

Email or phone

Next

[Find my account](#)

[Create account](#)

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



One account. All of Google.

Sign in with your Google Account

←

cricitx.analytics@gmail.com

.....|

Sign in

Stay signed in [Forgot password?](#)

[Sign in with a different account](#)

One Google account for everything Google



- vi) Users get a page asking their permission to allow BDB data access from their selected Google AdWords account
- vii) Click the 'Allow' option to permit the data access

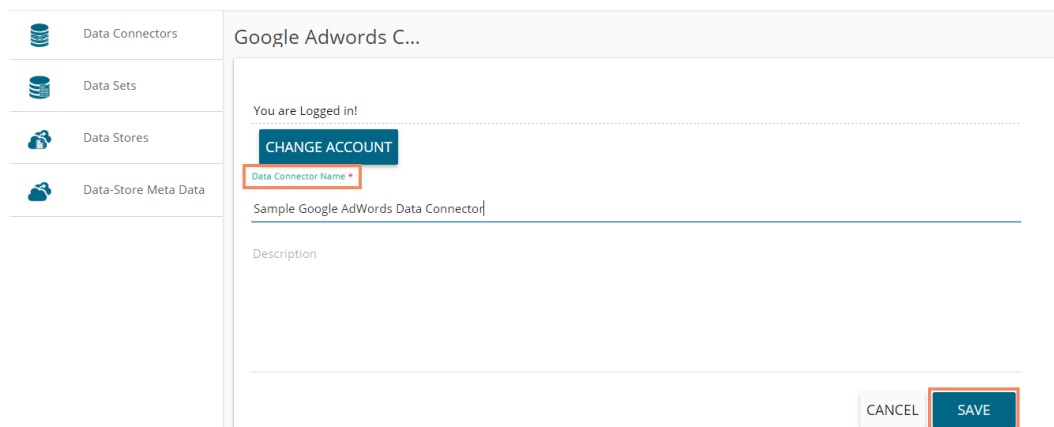
Google cricitx.analytics@gmail.com ▾

▾ BD BizViz would like to:

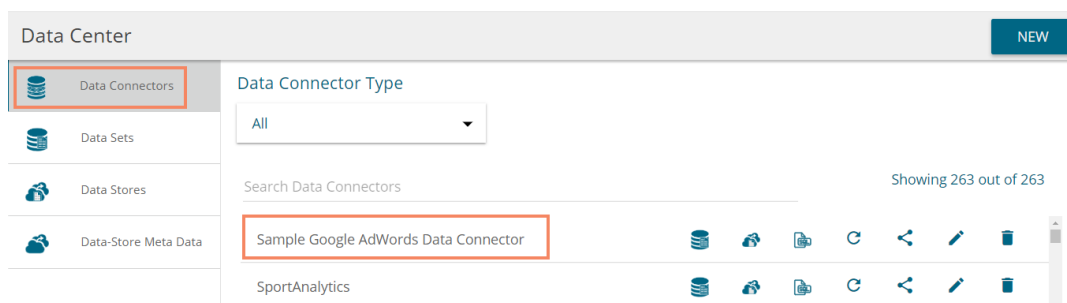
Have offline access ⓘ

Deny **Allow**

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



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



30. Snowflake

- i) Click the 'Snowflake' Data Connector icon from the Data Connector page
- ii) Users get directed to the Snowflake Data Connector page
 - a. Provide the Data Connector name
 - b. Describe the data connector (optional)
 - c. Enter the valid username
 - d. Enter the correct password for the selected account
 - e. Select a type by using the drop-down menu
 - f. Provide the relevant URL link for the account name field
 - g. Click 'TEST' to check the connection

Snowflake Connec...

Data Connector Name *

Description

User Name *

Password *

Type

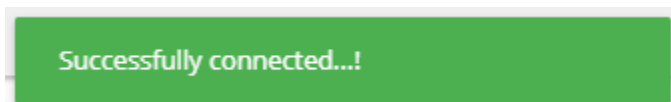
Without region ▾

Account name *

Database Name

CANCEL TEST SAVE

iii) Users get a message “Successfully connected...!” if the connection gets successfully verified



iv) Click ‘SAVE’ after getting the success message

v) A new Snowflake Data Connector gets created and saved under the Data Connectors list

Data Center NEW

- Data Connectors**
- Data Sets
- Data Stores
- Data-Store Meta Data

Data Connector Type: All

Search Data Connectors Showing 264 out of 264

Sample Snowflake Data Connector					
Sample Google AdWords Data Connector					

31. Google Form

i) Click the ‘Google Form’ Data Connector icon from the Data Connector page

ii) Users get directed to the Google Form Data Connector page

iii) Click the ‘SELECT ACCOUNT’ option

Google Form Conn...

Login to Google Form account

SELECT ACCOUNT

Data Connector Name *

Description

CANCEL SAVE

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

Google

Sign in with your Google Account

Email or phone

Next

Find my account

One Google Account for everything Google

G M Y T D P

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

Google businessdataintelligence@gmail.com

~ BIZVIZ would like to:

Have offline access

Deny **Allow**

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

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

32. Twitter Ads

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

Twitter Ads Conne...

Select Account

Add New Account

Note: If you are already logged in using one account and want to try using another account then first logout from <https://twitter.com>

Data Connector Name *

Description

CANCEL
SAVE

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

Sign up for Twitter >

Authorise Twitter ads Api Conn to use your account?

Remember me · [Forgotten your password?](#)

Authorise app
Cancel

This application will be able to:

- Read Tweets from your timeline.
- See who you follow, and follow new people.
- Update your profile.
- Post Tweets for you.
- See your advertising data including:
 - Campaigns
 - Audiences
 - Business and ad account information
 - Ad account and user settings

Twitter ads Api Conn

By Bizviz
www.bdbizviz.com

http://localhost:8080/datacenter/oauth-redirect.html?
connectorType=twitteradsapiconnector

[Privacy Policy](#)

v) Log in to the Twitter account

Home About
Language: English ▾

Log in to Twitter

Log in
 Remember me · [Forgot password?](#)

New to Twitter? [Sign up now >](#)

Already using Twitter via text message? [Activate your account >](#)

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

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

33. LinkedIn Ads

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

LinkedIn Ads Conn...

Select Account

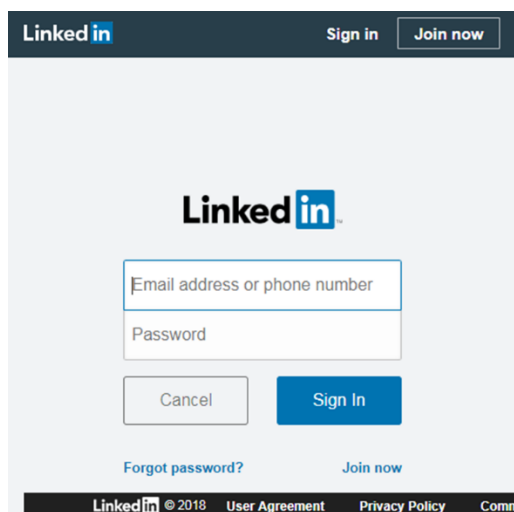
Add New Account

Data Connector Name *

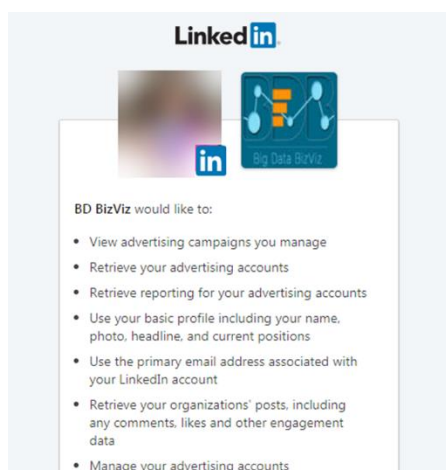
Description

CANCEL
SAVE

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



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

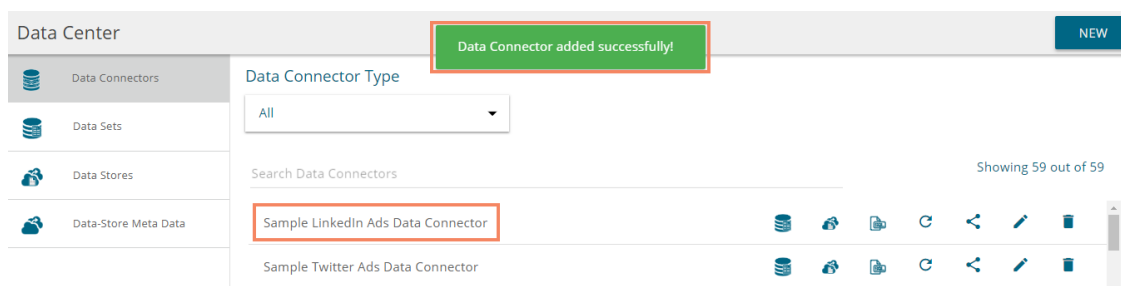


vi) The LinkedIn Ads Data Connector page opens with a notification that the user is successfully logged in to the selected account

- a. Provide the Data Connector name

- b. Describe the Data connector (optional)
- c. Click the **'SAVE'** option

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



34. Postgre SQL

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

PostgreSQL Data C...

Data Connector Name *

User Name *

Password *

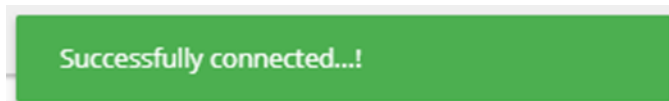
IP/Host *

Port

Database Name

CANCEL TEST SAVE

- v) A success message appears to inform that connection has been developed
- vi) Click the **'SAVE'** option



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

Data Center NEW

Data Connectors | Data Connector Type: All

Data Sets

Data Stores

Data-Store Meta Data

Search Data Connectors Showing 58 out of 58

Sample PostgreSQL Data Connector							
Sample Google Form Data Connector							

35. Firebase

- i) Click the **'Firebase'** Data Connector icon from the Data Connector page
- ii) The Firebase Data Connector page opens
- iii) Click the **'SELECT ACCOUNT'** option

FireBase DB Conn...

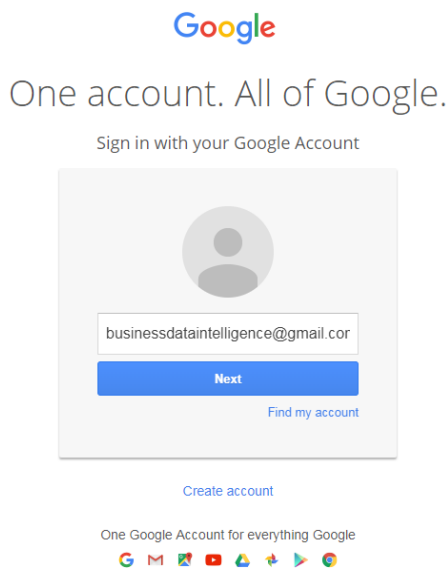
Login to FireBase DB account **SELECT ACCOUNT**

Data Connector Name *

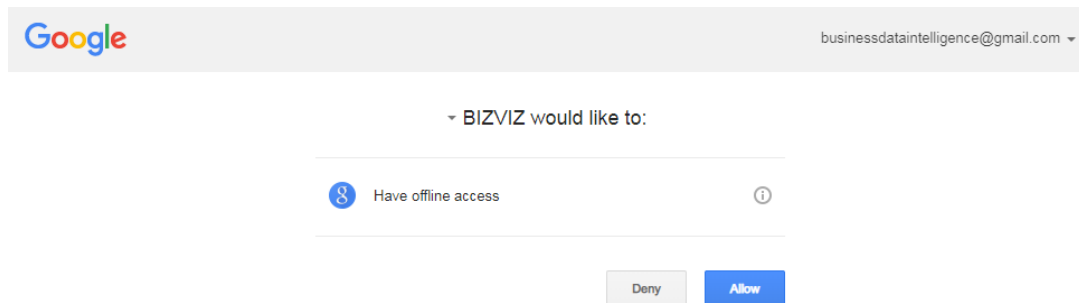
Description

CANCEL SAVE

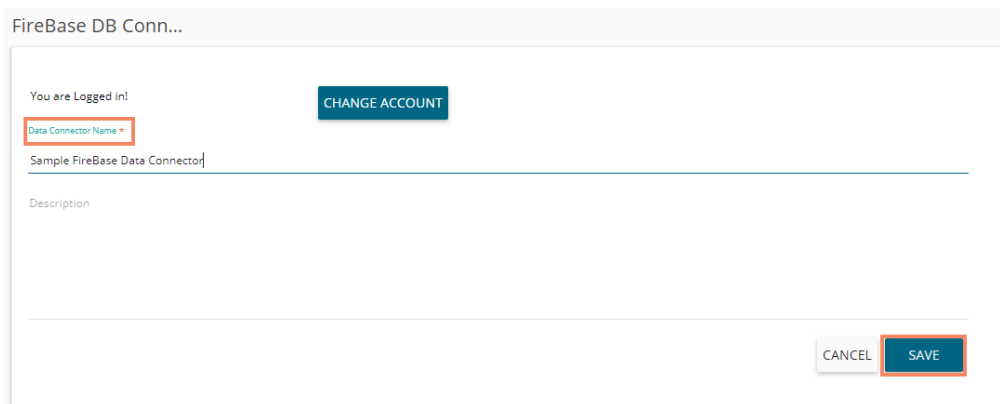
iv) A new page opens asking valid credential for a Google account.



v) Allow BDB to access data from the selected Google Account by clicking the 'Allow' option.

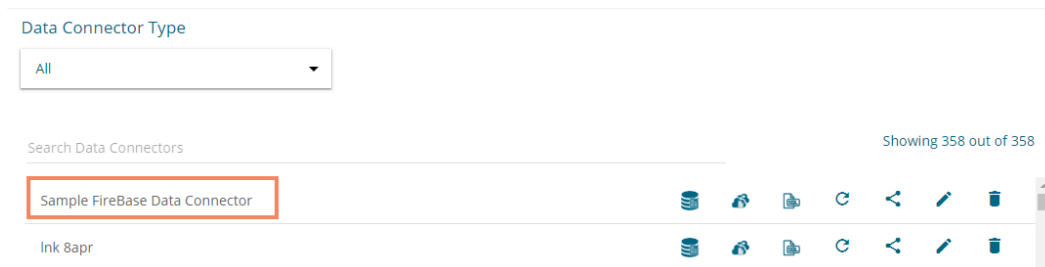


- vi) The Firebase Data Connector page opens with a notification that the users is successfully logged in to the selected account
 - a. Provide the Data Connector name
 - b. Describe the Data connector (optional)
 - c. Click the 'SAVE' option



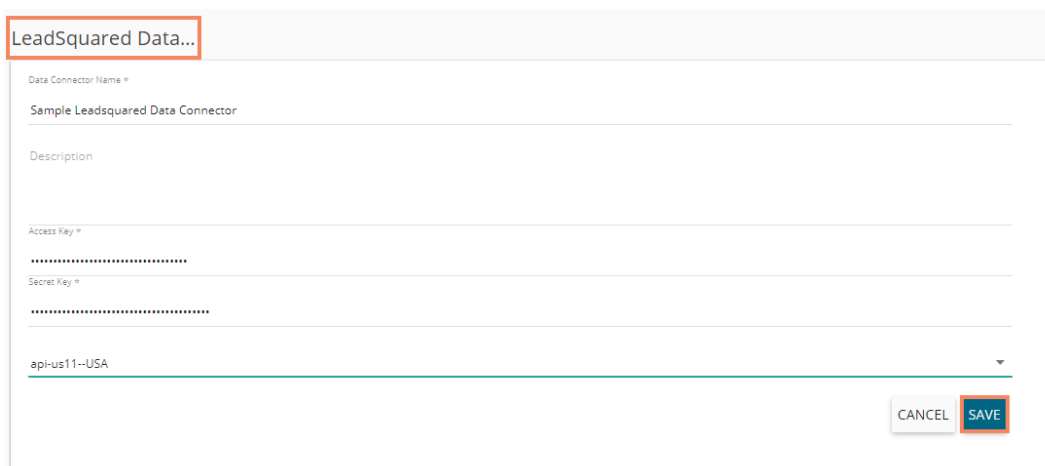
vii) A success message appears.

viii) A new Firebase data connector gets created and added to the Data Connectors list.

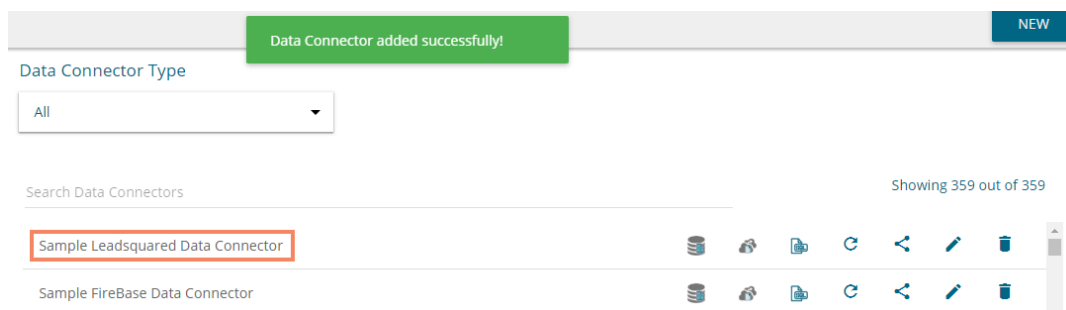


36. Leadsquared

- i) Click the **'Leadsquared'** Data Connector icon from the Data Connector page.
- ii) Users get directed to the Leadsquared Data Connector page.
- iii) Provide the following information:
 - a. Data Connector name
 - b. Description
 - c. Access Key
 - d. Secret Key
 - e. Region Type
 - f. Database Name
- iv) Click the **'SAVE'** option.



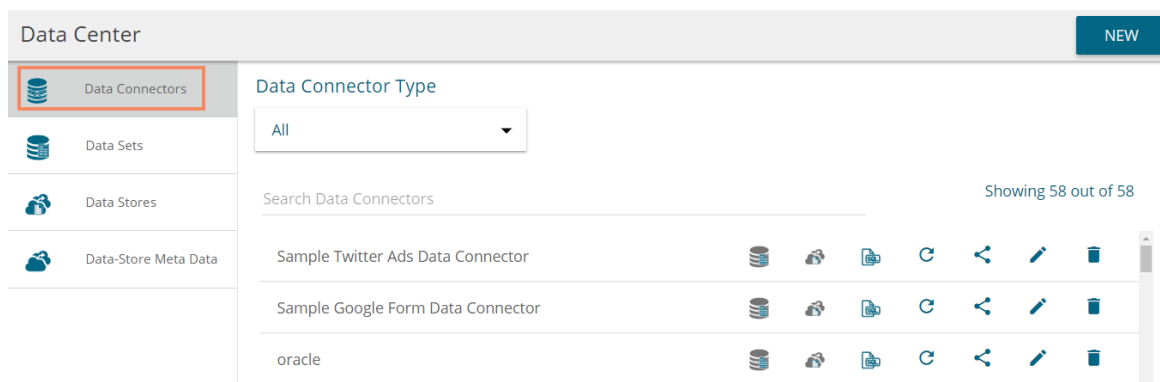
- v) A success message appears to inform that connection has been developed.
- vi) A new Leadsquared data connector gets created and added to the Data Connectors list.



6.1.2. Data Connector List

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

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

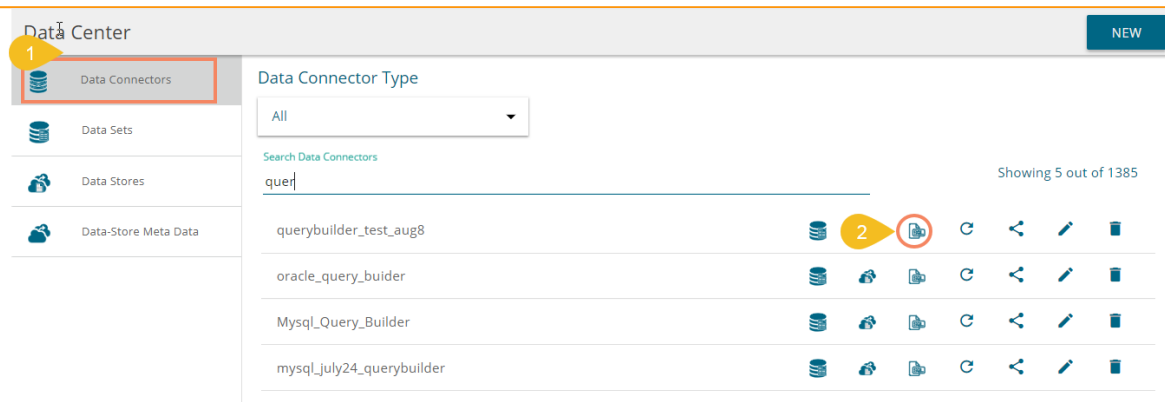


Option	Name	Task
	New Data Set	Redirect user to create a new Data Set
	New Data Store	Redirect user to create a new Data Store
	Reconnect	Reconnect with the server
	Share	Share connector with the selected user(s) or group(s)
	Edit	Edit the connector fields
	Remove	Remove a connector from the list

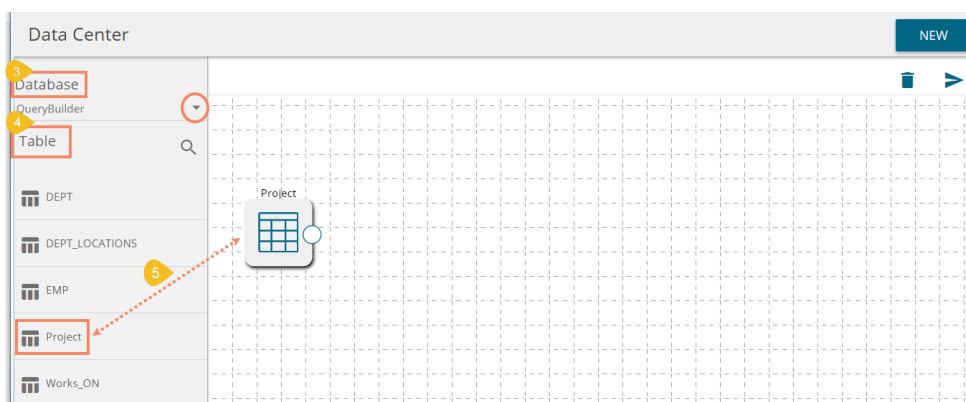
6.1.3. Creating Data Store/Data Set by using Query Builder

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

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



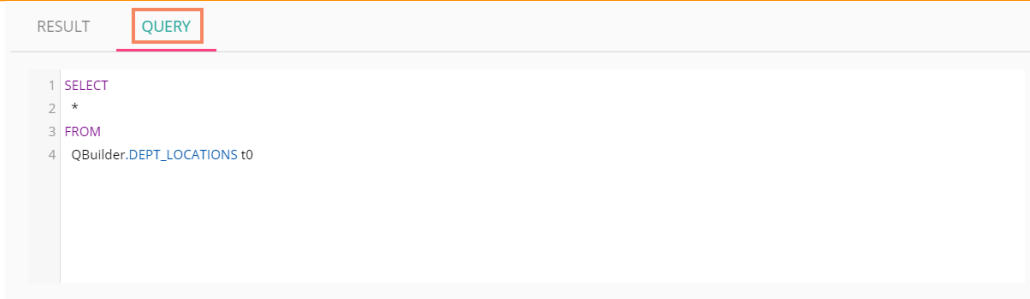
- iii) A new page opens redirecting the user to select a database
- iv) List of the existing tables appears from the selected database
- v) Drag-drop a database table to the workspace (The users can drag multiple tables to the workspace)



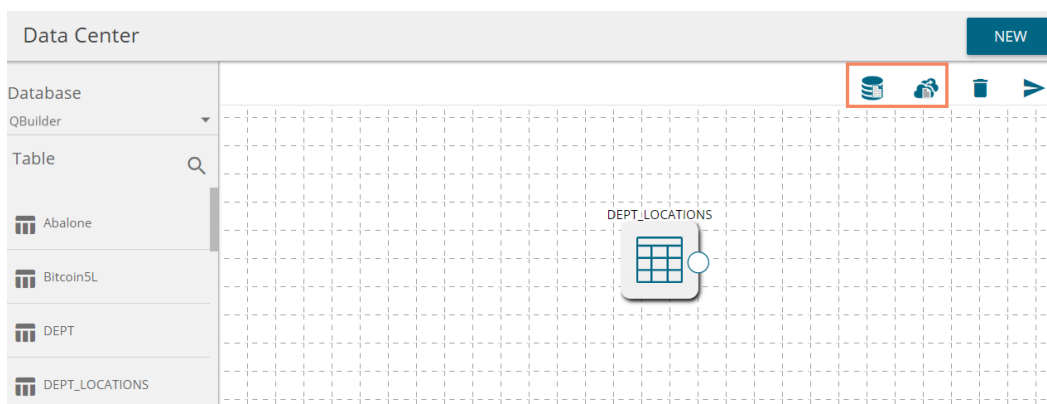
- vi) Click the 'Execute Query' ➤ option.
- vii) The requested data gets sent to the server, and the result displays on the screen with two tabs - one for showing the query result and other displaying the generated query itself.
 1. The **'RESULT'** tab opens by default with the preview of the data

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

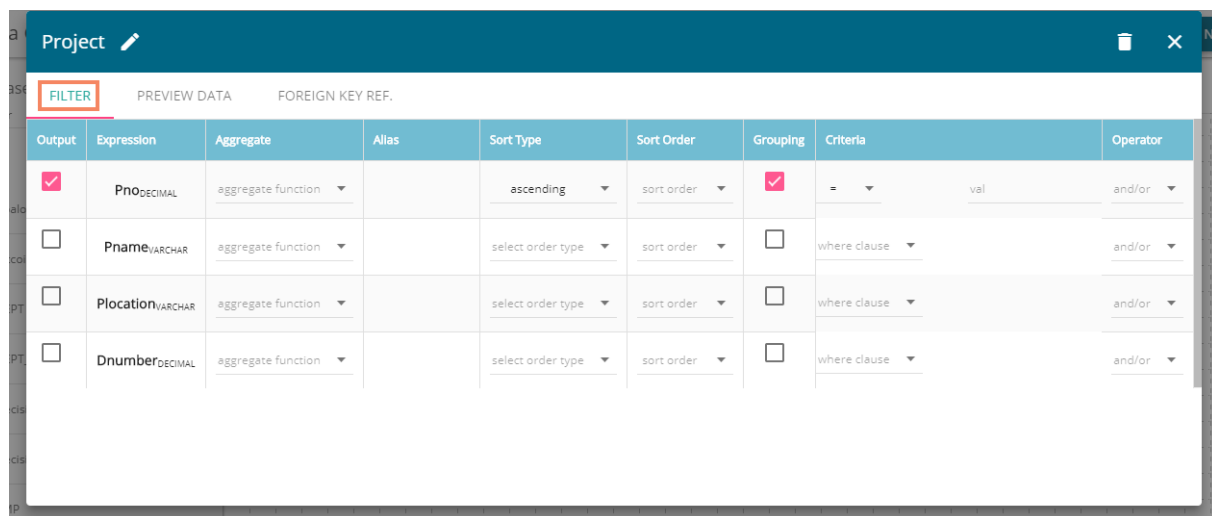
2. The **'QUERY'** tab displays the generated query



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



- ix) The users can click the dragged table component
- x) A new page opens with FILTER, PREVIEW DATA, and FOREIGN KEY REF tabs
 1. The FILTER tab displays various columns heading with Selectors/Expressions, Aggregate Functions, Alias Column Names, Sort Type, Sort Order, Grouping, Criteria (Where Condition) and Operator to the user.



E.g., If you want to build a query like "Select ZIP, SUM(POPULATION) AS sum_pop from the location where POPULATION > 20 AND ZIP > 30000 ORDER BY ZIP ASC" then you can do it by

selecting the checkboxes and providing appropriate values in criteria as shown in the following image:

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	Grouping	Criteria	Operator
<input checked="" type="checkbox"/>	ZIP VARCHAR	aggregate function		ascending	sort order	<input type="checkbox"/>	> 30000	and
<input type="checkbox"/>	POPULATION BIGINT	sum	sum_pop	select order type	sort order	<input type="checkbox"/>	> 20	and/or
<input type="checkbox"/>	ORDERING_START BIGINT	aggregate function		select order type	sort order	<input type="checkbox"/>	where clause	and/or

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

Pno	Pname	Plocation	Dnumber
1	DataCenter	Bangalore	10
2	ETL	Jaipur	20
3	BI Story	Kerala	30
4	NLP	Tamilnadu	40
5	Dashboard	Bangalore	50
6	Yujjaa	Hyderabad	60

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

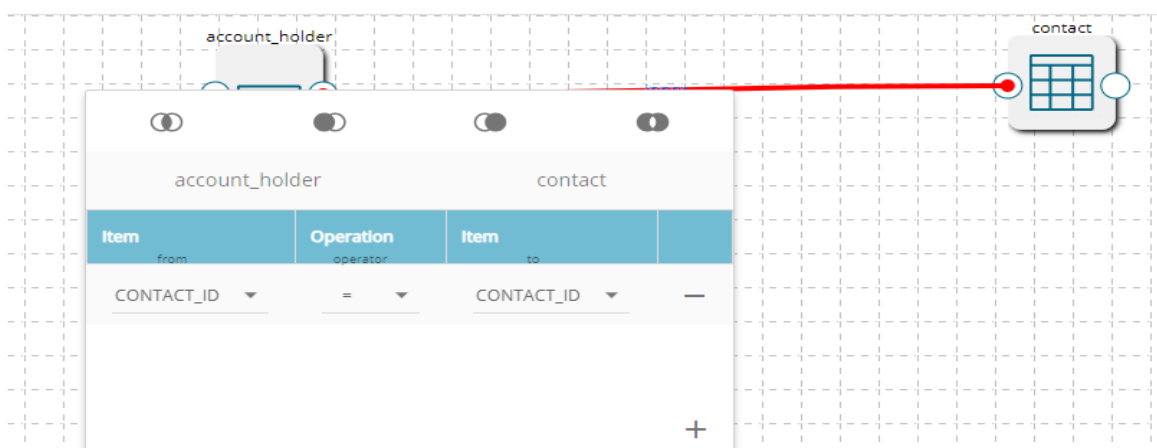
Column Name	Reference Column	Reference Table
Dnumber	Dno	DEPT

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

Column Name	Reference Column	Reference Table
Dnumber	Dno	DEPT

Note:

- a. Users can join the multiple tables by joining the table-nodes. The users can see the possible join conditions in the pop-up window that displays on clicking the node-link. E.g., Two different tables 'account_holder' and 'contact' are joined in the following image. By clicking on the connection link, we got the option to choose the join condition. Note that auto-suggestion is provided to help the user with the join condition.



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

Data Center NEW

1 Getting Data
2 Data Type Definition
3 Hierarchy Definition
4 Batch Query
5 Data Restrictions
6 Schedule Data Refresh

Data Store Name *
Data Connector Name
Database Name

Myssql
QBuilder

Query

```
SELECT t0.Pno FROM QBuilder.Project t0 WHERE ((t0.Pno = '')) GROUP BY t0.Pno ORDER BY t0.Pno ASC
```

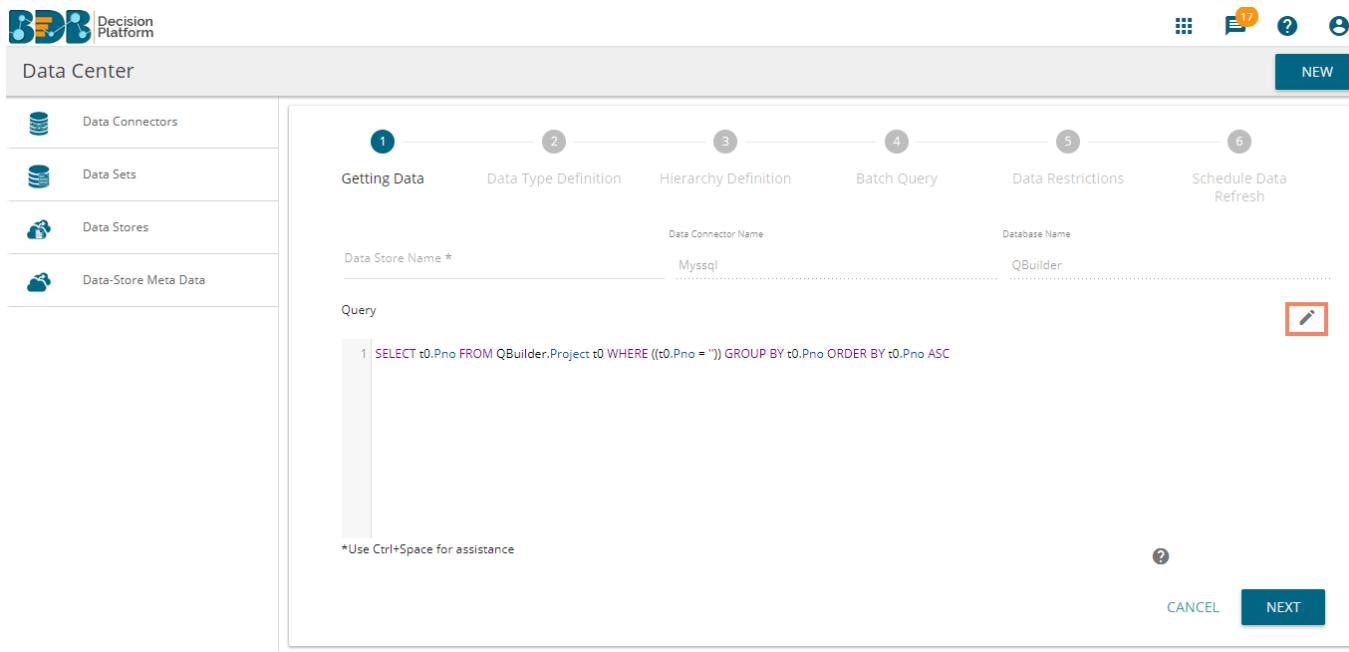
*Use Ctrl+Space for assistance

CANCEL NEXT

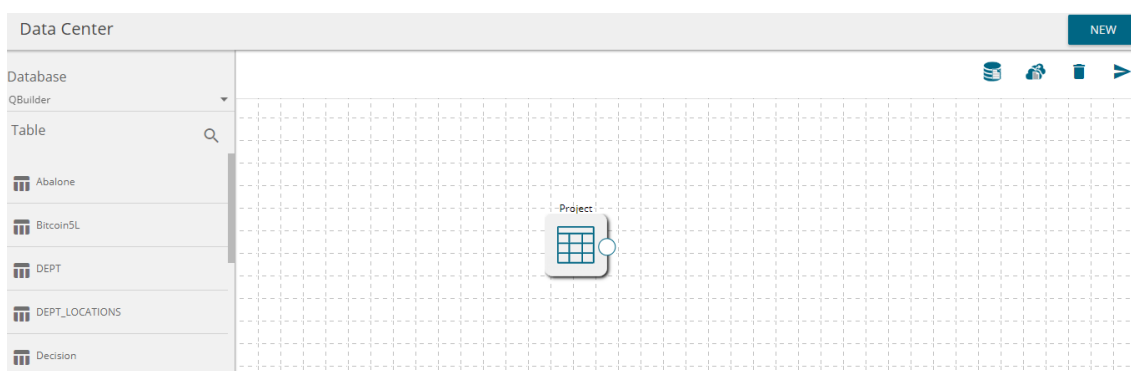
- c. Users can use the Query Builder functionality to create basic queries and perform various joins, but it is not possible to create in-depth BI queries using the current Query Builder option.

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

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



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



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

Data Store Name * _____ Data Connector Name: Myssql Database Name: QBuilder


Query

```
1 SELECT t0.Pno FROM QBuilder.Project t0 WHERE ((t0.Pno = '')) GROUP BY t0.Pno ORDER BY t0.Pno AS
```

*Use Ctrl+Space for assistance

CANCEL NEXT

6.1.4. Reconnecting a Data Connector

- i) Navigate to the Data Connector list
- ii) Select a Data Connector and click the 'Reconnect' icon  provided in the connector list
- iii) A message will pop-up to assure the action

Data Center NEW

1 **Data Connectors**

3 Successfully reconnected...!!


Data Connector Type: All

Search Data Connectors Showing 58 out of 58

Sample Twitter Ads Data Connector						
Sample Google Form Data Connector						
oracle			2			

- iv) The selected data connector gets reconnected

6.1.5. Sharing a Data Connector

- i) Navigate to the Data Connector list
- ii) Select a Data Connector and click the 'Share' icon 

Data Center NEW

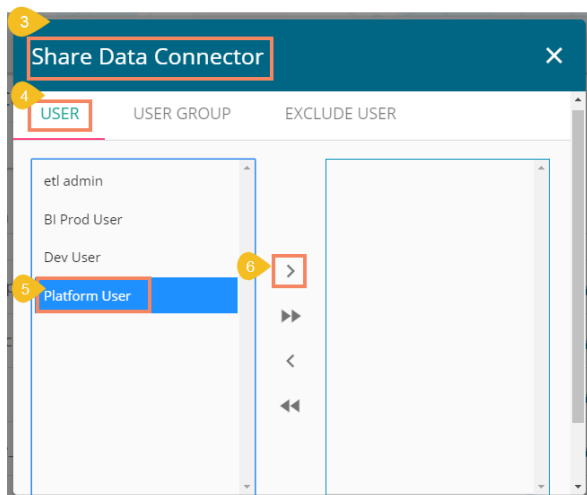
1 **Data Connectors**

Data Connector Type: All

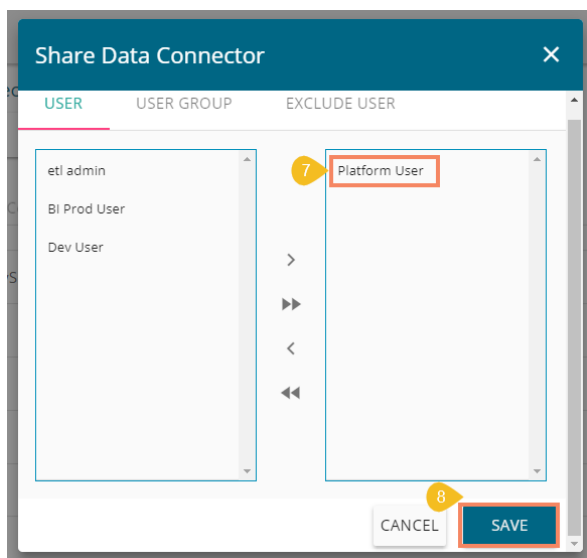
Search Data Connectors Showing 58 out of 58

Sample Twitter Ads Data Connector			2			
Sample Google Form Data Connector						

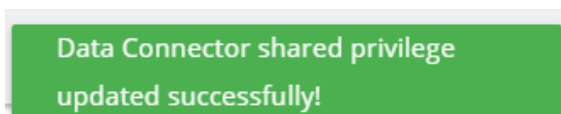
- iii) Users get directed to the ‘Share Data Connector’ window
- iv) Select an option out of the given choices: User and User Group/ Exclude User (‘Exclude User’ option can be chosen, if the document is already shared with a user/user group and you wish to exclude them from the privilege)
- v) Select a user or user group using the displayed list of users/user groups
- vi) Click the arrow to move the selected User(s)/User Group(s)



- vii) The selected user(s)/user group(s) are moved to the box given on the right
- viii) Click the ‘SAVE’ option




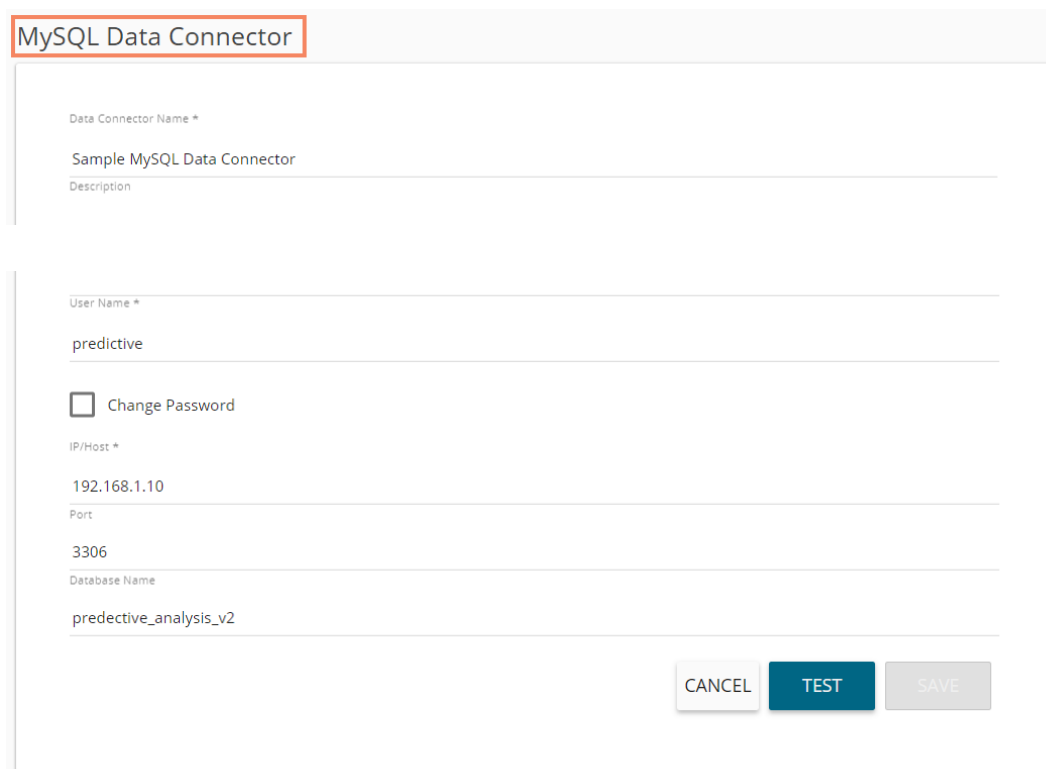
- ix) A message will pop-up to communicate the same (as displayed below)



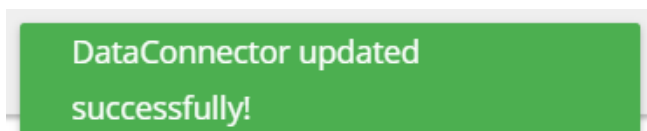
By completing the steps mentioned above, a data connector can be successfully shared with the selected user/user group. The selected users can be excluded from their privileges as well.

6.1.6. Editing a Data Connector

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




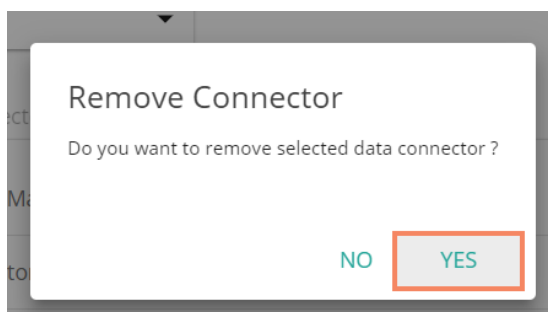
- vi) Click 'SAVE' to save the edited details
- vii) A success message will pop-up stating that the data connector has been updated successfully



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

6.1.7. Removing a Data Connector

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



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

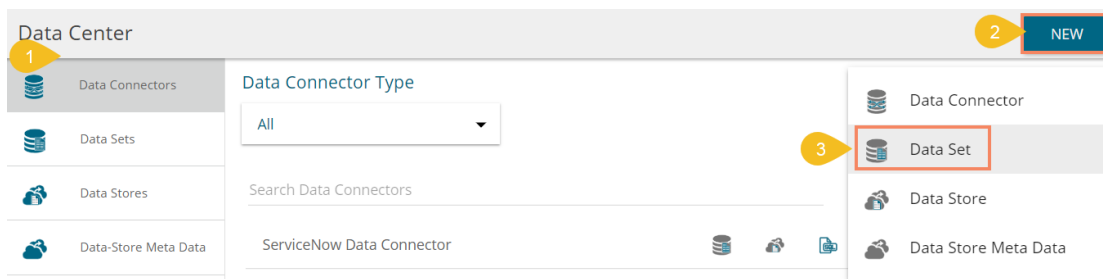
6.2. Data Set

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

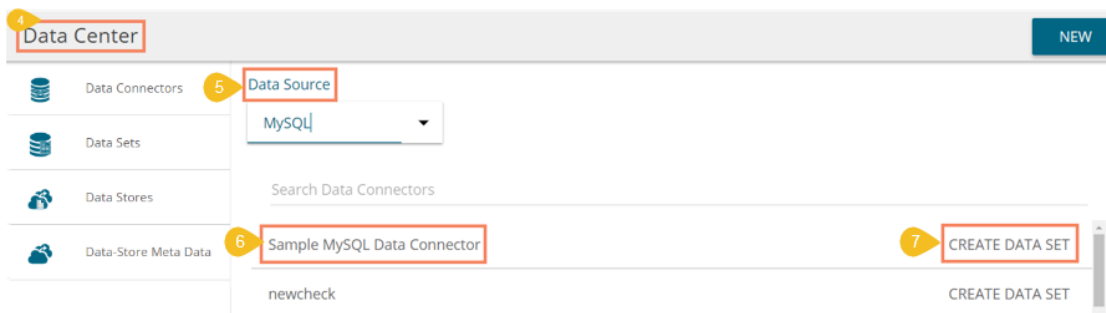
6.2.1. Creating a New Data Set using RDBMS or Big Data Connector

This section explains the steps to create a new Data Set

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



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

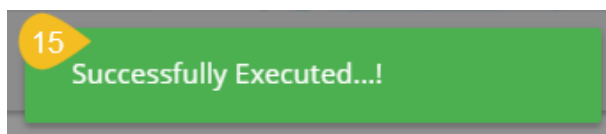


- viii) The '**Data Set**' page opens for filling the required details

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

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

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



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

SepalLength	SepalWidth	Petal.Length	Petal.Width	Species
5.1	3.5	1.4	0.2	setosa
4.9	3	1.4	0.2	setosa
4.7	3.2	1.3	0.2	setosa

- xi) After getting the data preview, click the **'SAVE'** option
- xii) A newly created Data Set gets added to the **'Data Sets'** List

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

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

6.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

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

- i) Navigate to the Data Set form for any RDBMS connector
- ii) Enter filter condition to the **'Query'** section as highlighted in the below image
- iii) Click the **'VALIDATE'** option

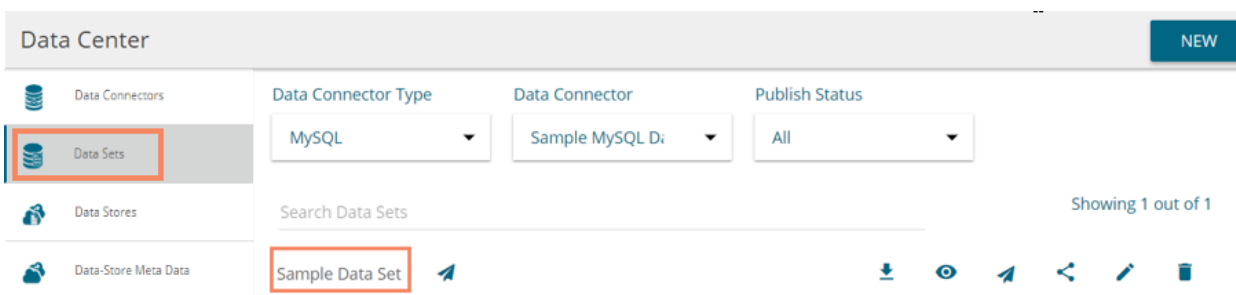
- iv) A window will pop-up asking for the filter value
- v) Enter a filter value
- vi) Click the '**CONTINUE**' option



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

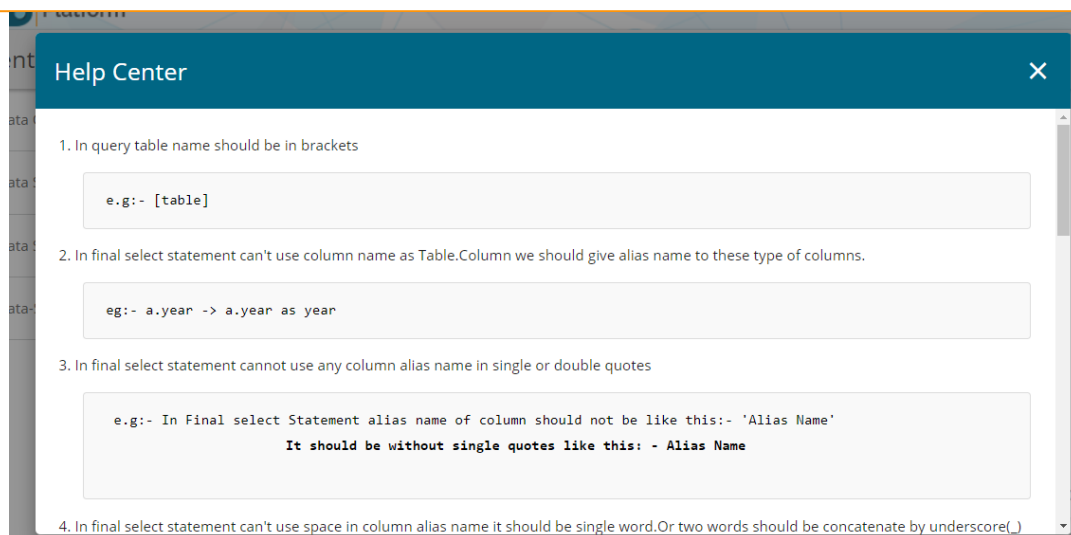
Preview Result			
dt	item_code	Item_name	sm
2009-04-01	A005	TROPICAL ICE BERG	58.5
2009-04-01	A005	TROPICAL ICE BERG	58.5
2009-04-01	A005	TROPICAL ICE BERG	175.5
2009-04-01	A005	TROPICAL ICE BERG	58.5

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

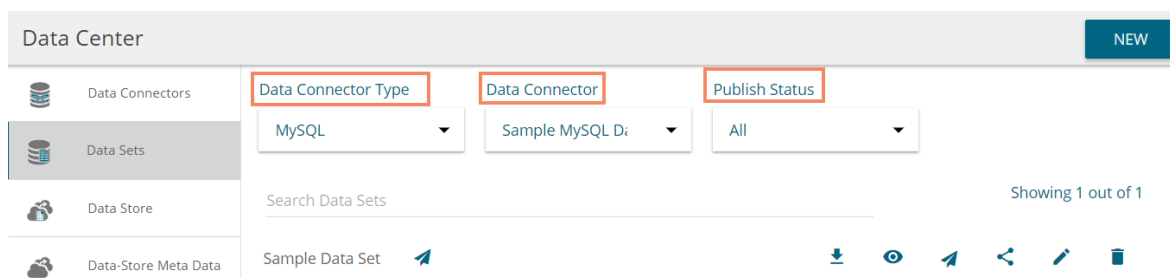


Note:

- a. Use '**Ctrl+Space**' to get assistance while writing a query.
- b. Click the '**Help Center**' icon from the Data Set form to get rules regarding the formation of a query. The query formation rules get displayed in a new pop-up screen.



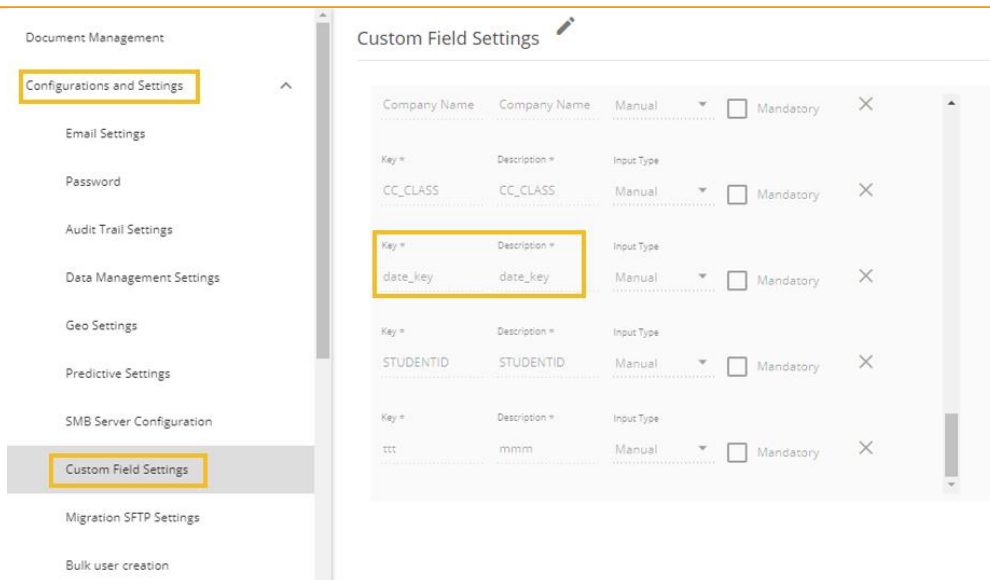
- c. Users can filter the list of Data Sets by Data Connector Type, Data Connector, and Publish Status. These filters are provided on the top of the Data Set List page.



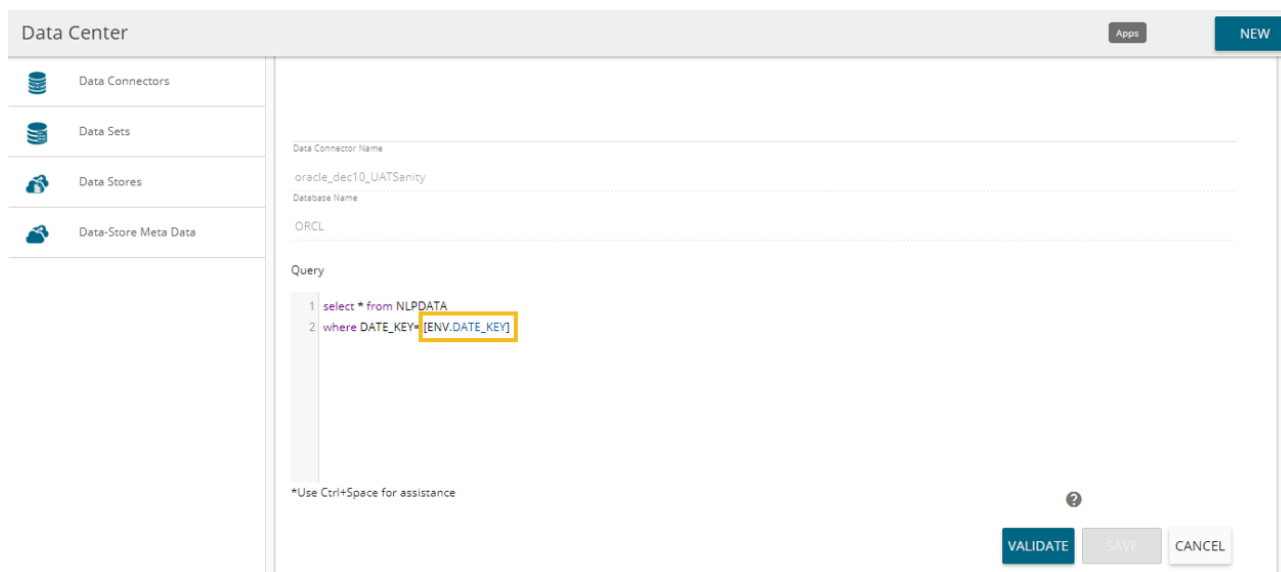
6.2.1.2. Restricting Displayed Data for End Users via Data Set

BDB Platforms provides an option to control data display for the Dashboard end-users. The Note: Data Restriction through Data Service (Data Set) is interconnected with multiple platform plugins. A pre-condition for this feature is that the users should possess a good understanding of all the involved BDB Platform modules and Dashboard Designer plugin.

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



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



iii) Create a Dashboard using the Data Set

iv) Publish the Dashboard to the portal

v) Open the Dashboard (it opens in preview mode by default)

My Documents > demo

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

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

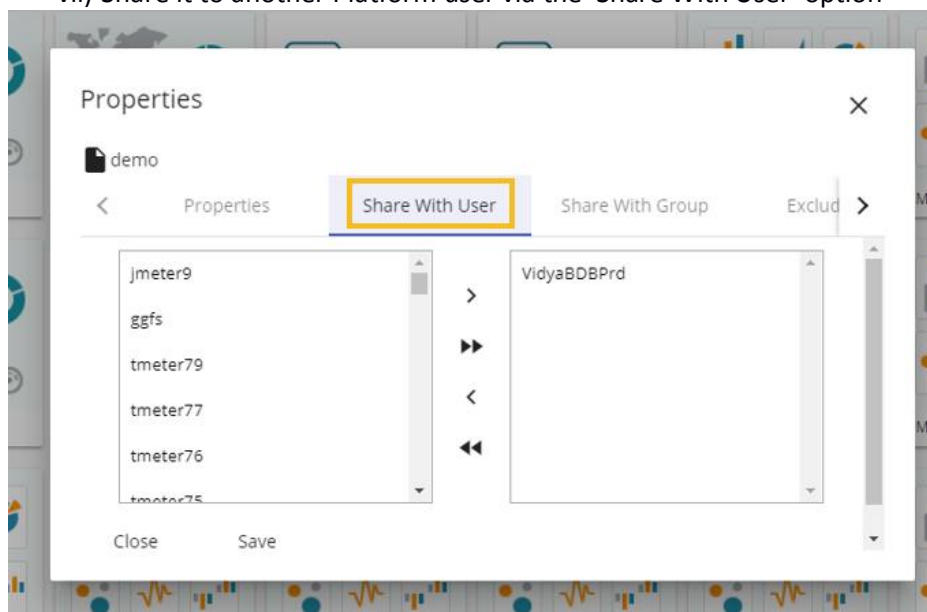
Update User CANCEL SAVE

Keil

DATE_KEY

20-APR-18 09.12.06.110000000 AM

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



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

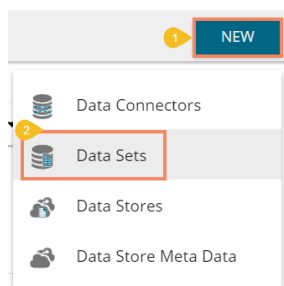
Decision Platform

Shared Documents > demo

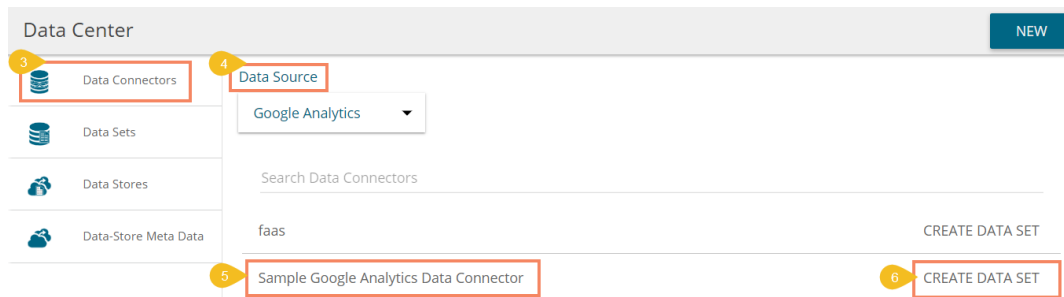
Yearly sales and expense	
date_key	student_name
2018-04-20 09:12:06.110000	Kartik

6.2.2. Creating a New Data Set Using API Connectors

- i) Click the **'NEW'** menu from the Data Center page.
- ii) Select the **'Data Set'** option from the context menu



- iii) The page containing all the data connectors opens
- iv) Use the **'Data Source'** filter to search for a specific API Data Connector (E.g., the below image displays **'Google Analytics'** as the data source filter)
- v) Select a data connector from the displayed list (E.g., in this case; a google analytics data connector is selected)
- vi) Click the **'CREATE DATA SET'** option



- vii) Users are redirected to a new Data Set form for Google Analytics Data Set
- viii) Fill in the following information:
 - a. Service Name: Enter any user-defined name for the new dataset

- b. Description: Brief description of the Data Set (It is an optional field)

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

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

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

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

12 **Data Selection**

Select Web Property *

Select View *

Dimensions

Metrics *

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

13 **Apply Filters:**

filter query *

ga:browser==Firefox;ga:operatingSystem==Windows

- g. Date Type: Select a Date Type using the given options- '**Fixed Type**' and '**Dynamic Type**.'
- i. Fixed Type: Define a time range by specifying dates using the '**From date**' and '**To date**' options

14 **Date Type ***

Fixed type

From date * **To date ***

4/1/2018 6/14/2018

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

Date Type * 14

Dynamic type

Select Date Range *

7 Days ago

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

15

CANCEL **PREVIEW DATA** SAVE

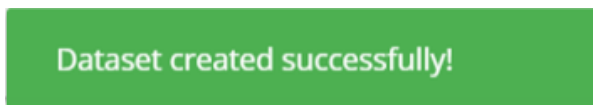
- ix) After getting the data preview in the tabular format, click the '**SAVE**' option

CANCEL PREVIEW DATA SAVE

Preview of 10 rows are shown below

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

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



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

Data Center NEW

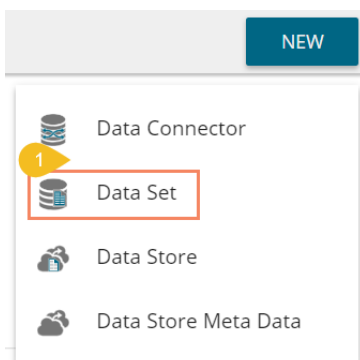
Data Connector Type	Data Connector	Publish Status
All	All	All

Search Data Sets Showing 105 out of 105

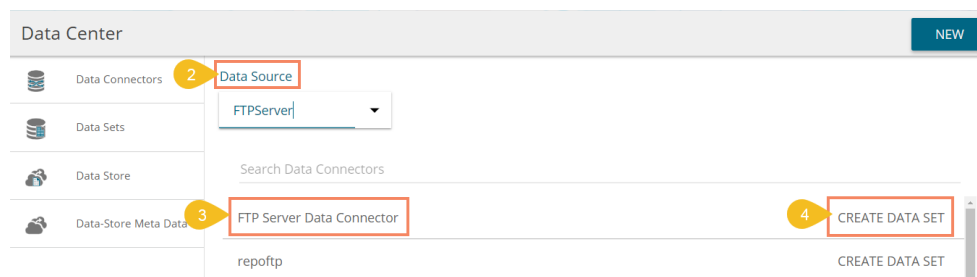
Sample Google Analytics Data Set	Download	View	Share	Edit	Delete
123	Download	View	Share	Edit	Delete

6.2.3. Creating a New FTP Data Set

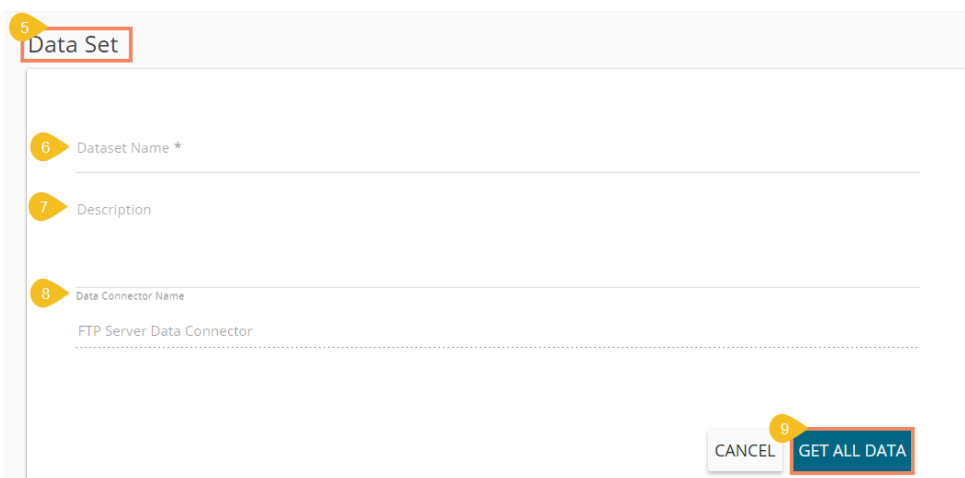
- i) Select 'Data Sets' from the 'NEW' context menu



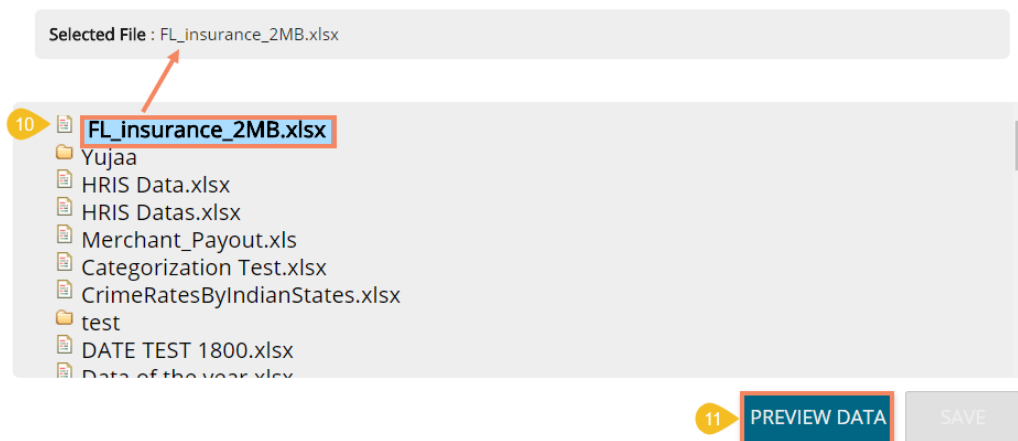
- ii) The Data Connectors list appears
 - a. Select an FTP Server using the data source filter
 - b. Select an FTP Data Connector from the list
 - c. Click the '**CREATE DATA SET**' option



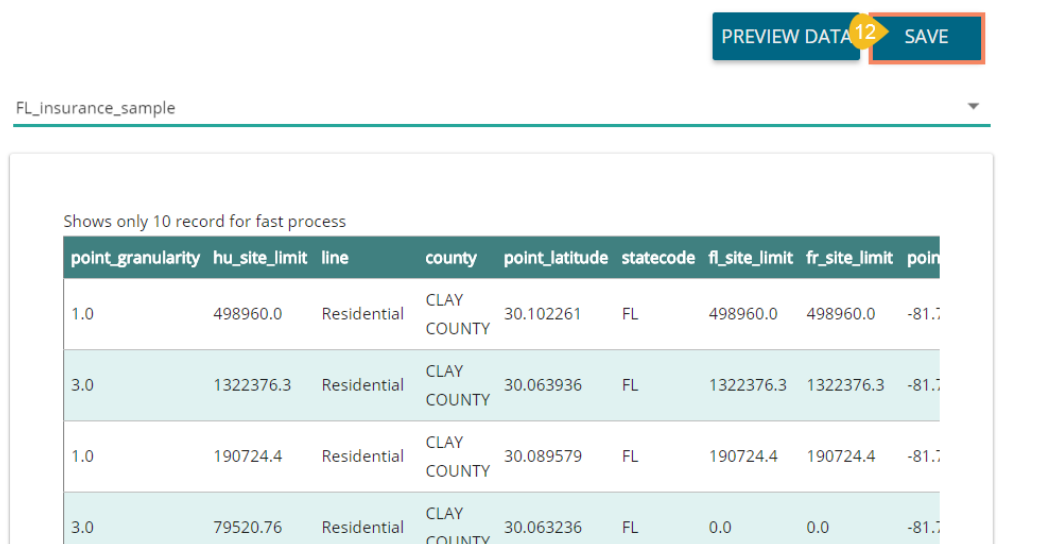
- iii) The FTP Data Set form opens
 - a. Provide Data Set Name
 - b. Provide Description of the Data Set (Optional)
 - c. A pre-selected Data Connector name appears
 - d. Click '**GET ALL DATA**' option



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

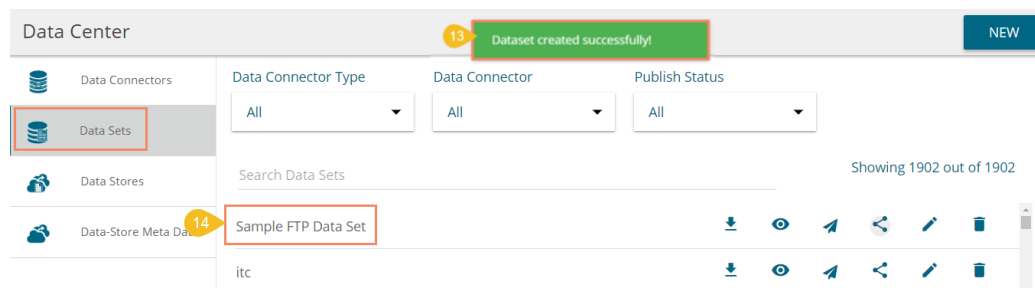


vi) Click the 'SAVE' option after getting the data preview



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

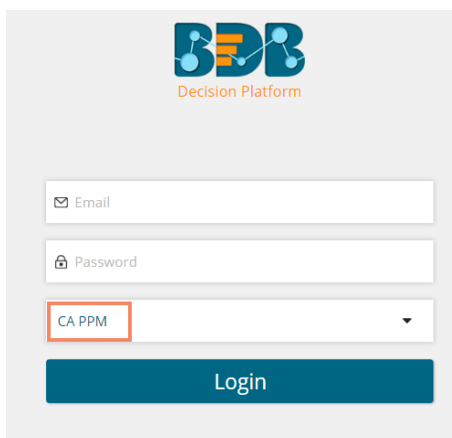
viii) The newly created FTP Data Set gets added to the Data Sets list



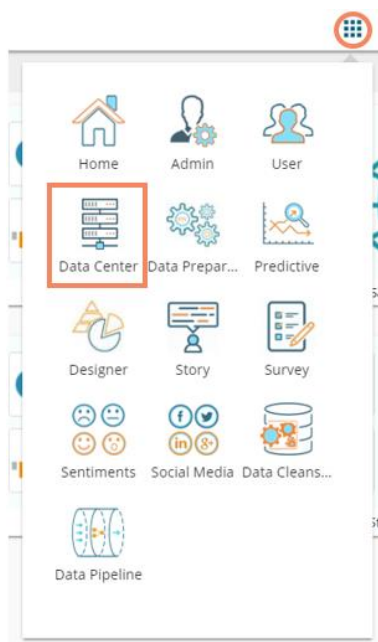
6.2.4. Creating a CA PPM Data Set

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

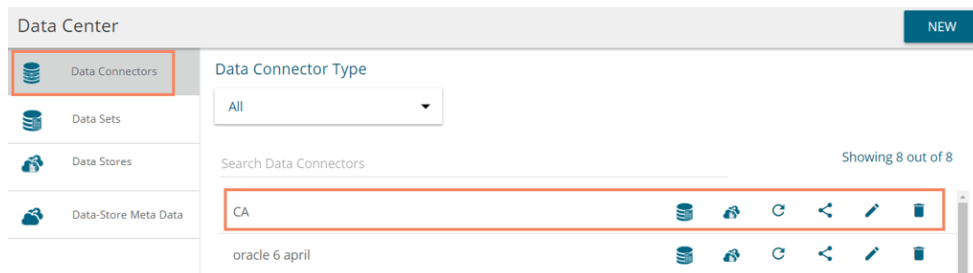
- i) Login to the platform using the CA PPM authentication option



- ii) Select Data Center from the Apps menu



- iii) The Data Connector list opens
- iv) Select the default data connector 'CA' from the data connector list



- v) Click the 'Create New Data Set' icon for the CA data connector
- vi) A form to create new Data Set opens

- vii) Configure the following information to create a CA PPM Data Set
 - a. Service Name: A user-defined name given to the data set
 - b. Service URL: Select a service URL from the drop-down menu

Data Set

Service Name *

Service URL

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

Mandatory Filter

quer: _task_status

quer: _task_status_from

quer: _task_status_to

quer: _task_status_in

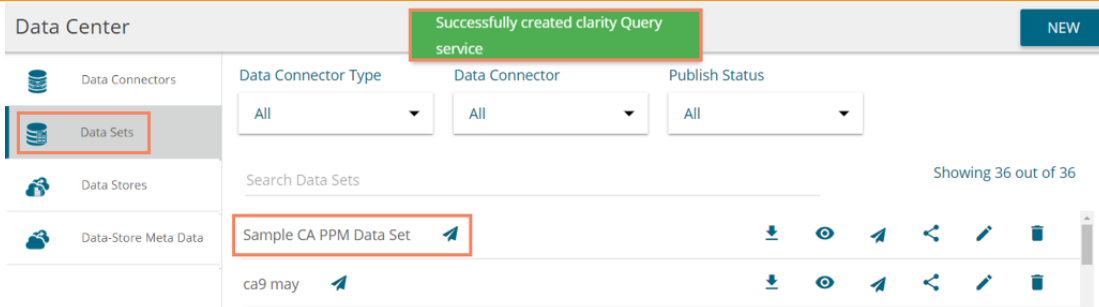
Custom Filter

quer:task_int_id

quer:task_int_id_from

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

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



Note:

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

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

6.3. Data Store

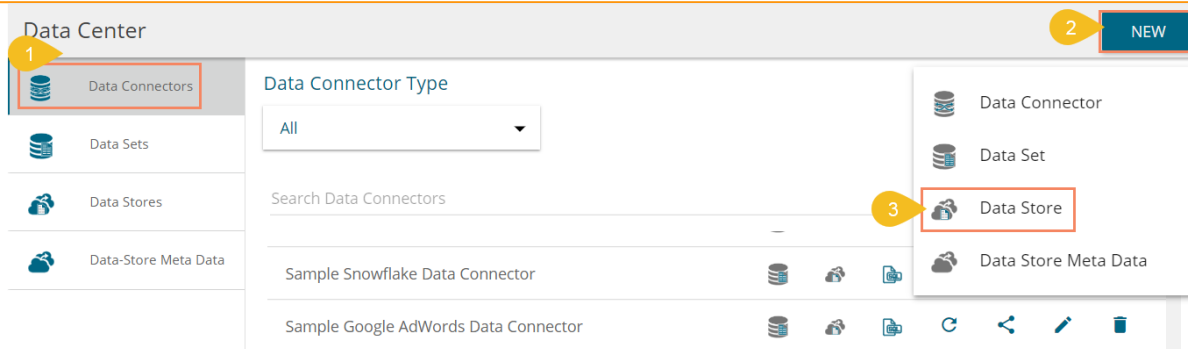
Data store is a data source for persistently storing and managing collections of data which include not just repositories like databases, but also simpler store types such as simple files, emails. BDB Data Stores use Elastic Search for data interaction to use in the visualization layer such as Dashboard Designer and Business Story.

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

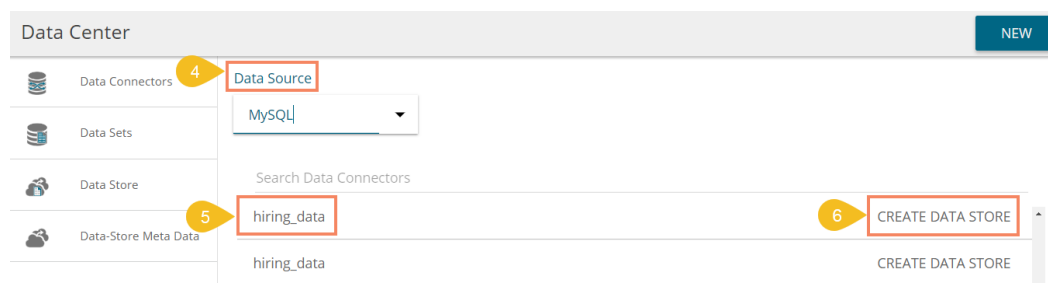
6.3.1. Creating a New Data Store

This section explains the steps to create a new data store.

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



- iv) A new page opens
 - a. Select a Connector Type from the ‘**Data Source**’ filter
 - b. Select a data connector from the Data Connector list
 - c. Click the ‘**CREATE DATA STORE**’ option provided next to the selected data connector



- v) The ‘Get Data’ option opens to create a new Data Store

6.3.1.1. Getting Data

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

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

1 Getting Data 2 Data Type Definition 3 Hierarchy Definition 4 Batch Query 5 Data Restrictions 6 Schedule Data Refresh

Data Store Name * Sample Data Store

Data Connector Name Hiring

Database Name BDB_Hiring_Data

Query

```

1 SELECT
2 candidate_id as CandidateId,
3 NAME as Name,
4 gender as Gender,
5 source as Source,
6 referral_of as ReferralOf,
7 designation as Designation,
8 team as Team,
9 previous_organisation as PreviousOrganisation,

```

*Use Ctrl+Space for assistance

CANCEL NEXT

6.3.1.2. Data Type Definition

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

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

Getting Data 2 Data Type Definition 3 Hierarchy Definition 4 Batch Query 5 Data Restrictions 6 Schedule Data Refresh

Dimensions

Source	<input checked="" type="checkbox"/>	123	⌚
ReferralOf	<input checked="" type="checkbox"/>	123	⌚
Designation	<input checked="" type="checkbox"/>	123	⌚
Team	<input type="checkbox"/>	123	⌚
PreviousOrgani...	<input type="checkbox"/>	123	⌚
Skills	<input checked="" type="checkbox"/>	123	⌚

* Enable checkbox for LOV filtering

PREVIOUS

Measures

PreviousCTC	Abc	⌚
OfferedCTC	Abc	⌚
ExperiencePerCTC	Abc	⌚
MonthlySalary	Abc	⌚
UsedBilling	Abc	⌚
CurrentMonthlyPayment	Abc	⌚

Time

ExpectedJoiningDate	Abc	123
BillStartDate	Abc	123

CANCEL NEXT

Note:

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

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

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

6.3.1.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

- Click the **'Add'** option provided in the Hierarchy Definition window
- A new **'Drill Def'** box gets added
- Drag and drop the dimensions or time options to define a hierarchy
- Proceed to the next tab by clicking the **'NEXT'** tab



Note:

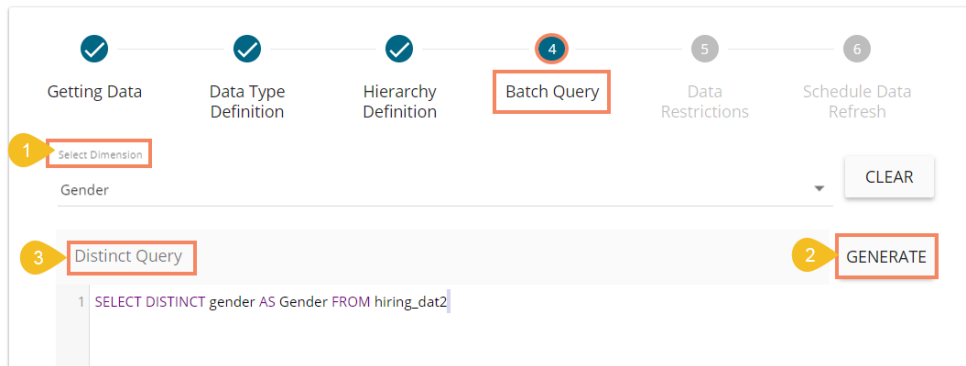
- Click the **'PREVIOUS'** option to go back to the previous tab.
- Click the **'Remove'** option (in the Drill Def box) to remove the defined hierarchy using the selected option.
- The **'Date Drill'** functionality is available for the Time dimensions. By default, the Time dimensions can be split into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



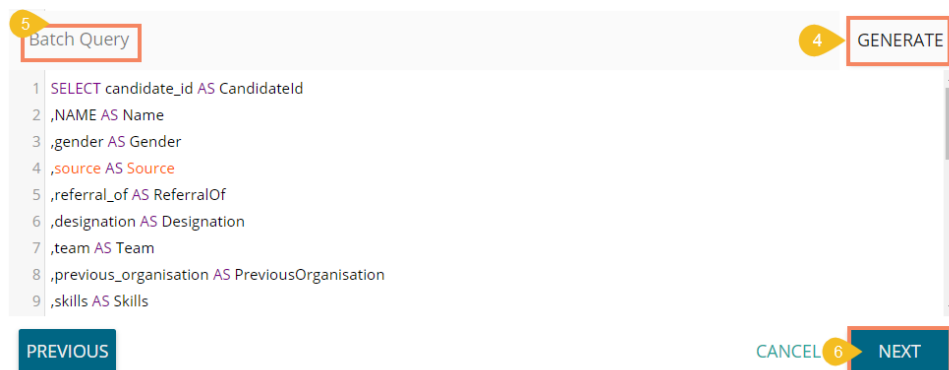
6.3.1.4. Batch Query

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

- i) Select a Dimension using the drop-down menu
- ii) Click the '**Generate**' option
- iii) Based on the selected dimension a distinct query is generated (in the below-given box)
Users can edit the distinct query as per their requirement



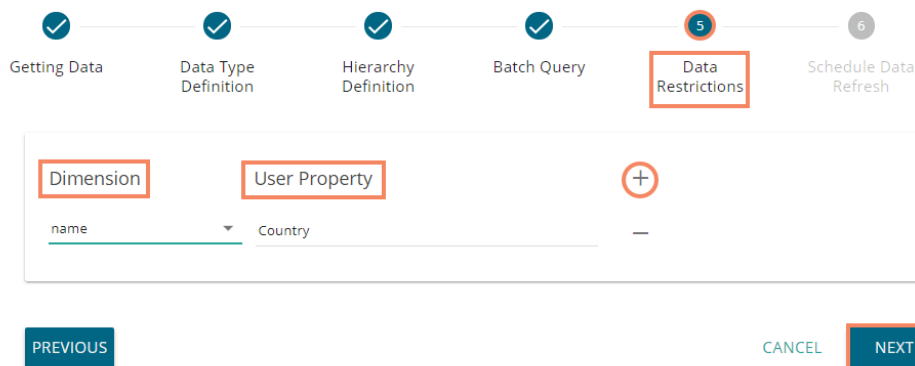
- iv) Click the '**Generate**' option provided for the '**Batch Query**' option
- v) The original query generates with the distinct query specifications to fetch data
- vi) Proceed to the next tab by clicking the '**NEXT**' tab



6.3.1.5. Data Restriction

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

- i) Click '**Add**' to add a new box for inserting the data restriction parameter
- ii) Fill in the following information:
 - a. **Dimension**: Select a dimension using the drop-down menu
 - b. **User Property**: Enter user/group specific custom field
- iii) Click the '**NEXT**' option to proceed to the next tab

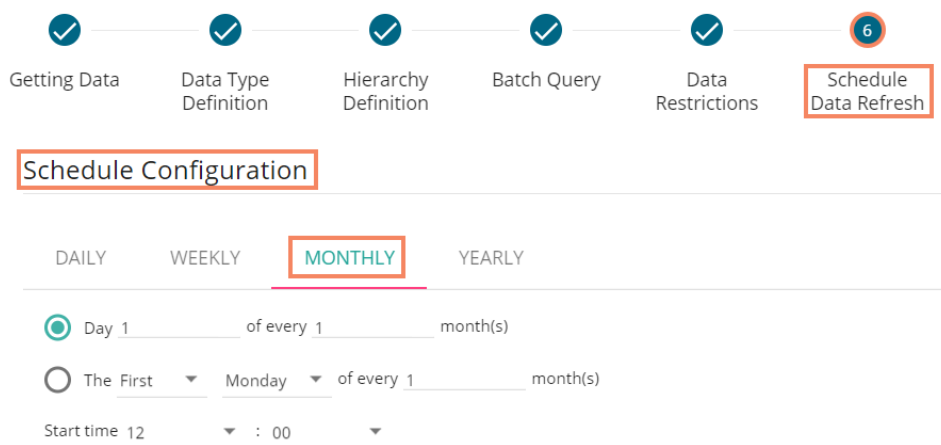


Note: The Administrator can restrict access to data for a specific user by configuring the User Property via the ‘Data Restriction’ tab. E.g., If for a user/user group ‘Country’ custom field is provided value ‘India,’ and the administrator passes ‘Country’ as User Property while creating a data store.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

6.3.1.6. Schedule Data Refresh

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

- i) The following options are provided to refresh the data:
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly
- ii) Select any one option from the above-given list to set the data refresh interval



- iii) Select the ‘Refresh Now’ option by enabling the box to refresh the data store immediately after it gets created.
- iv) Enable Email Notification by enabling the option
- v) Provide the Email Address on which you want the notification email to be sent

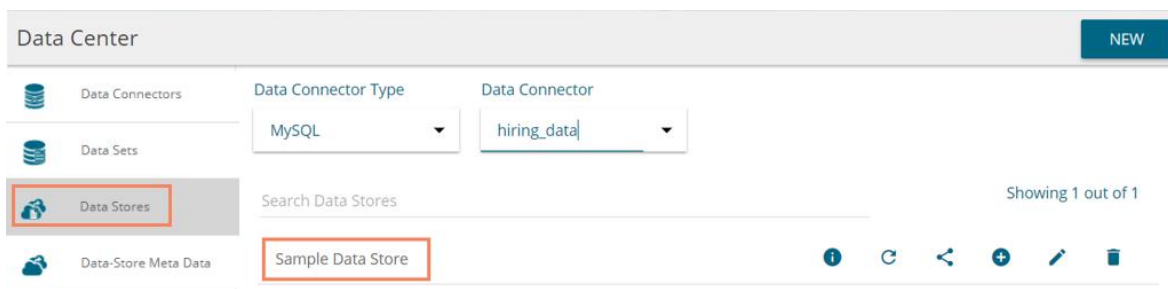
vi) Click the 'FINISH' option to complete the data store creation process

Refresh Now
 Enable Email Notification
 Email Address *

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

viii) The Data Store List opens

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



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

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

Step 1- Getting Data

- i) Fill in the following information:
 - a. **Data Store Name:** Enter a data store name
 - b. **Data Connector Name:** Displays the preselected name of the selected data connector in this field
- ii) Click 'Choose File' to browse a file from the system
- iii) Configure the following information in case of the Flat file with multiple sheets:
 - a. Sheet List
 - b. Sheet Layout
- iv) Proceed to the next tab by clicking the 'NEXT' option

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

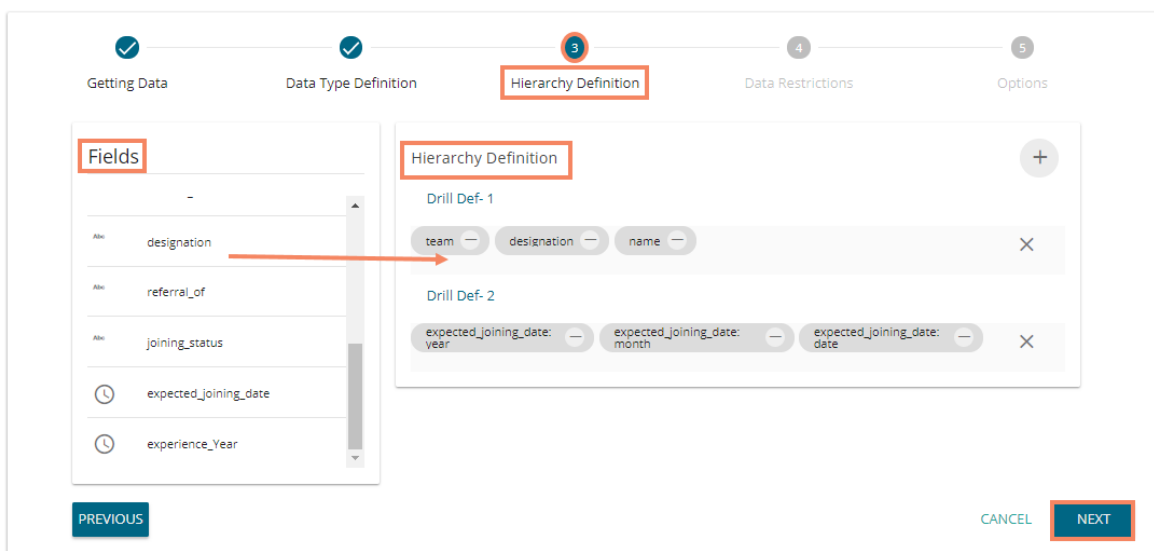
Step 2- Data Type Definition

- i) Users can define data by interchanging available Dimensions, Measures, and Time fields from the selected data store
- ii) Proceed to the next tab by clicking the **'NEXT'** option

Step 3- Hierarchy Definition

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

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

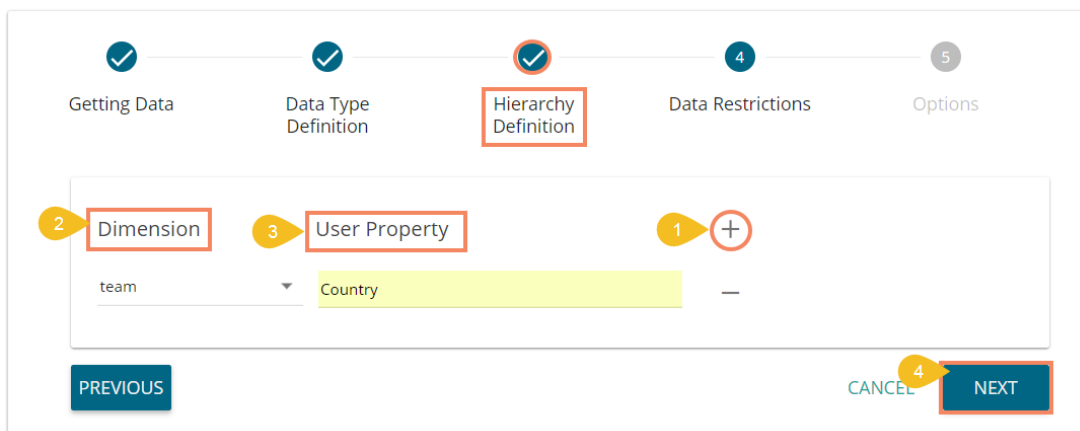


Step 4- Data Restriction

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

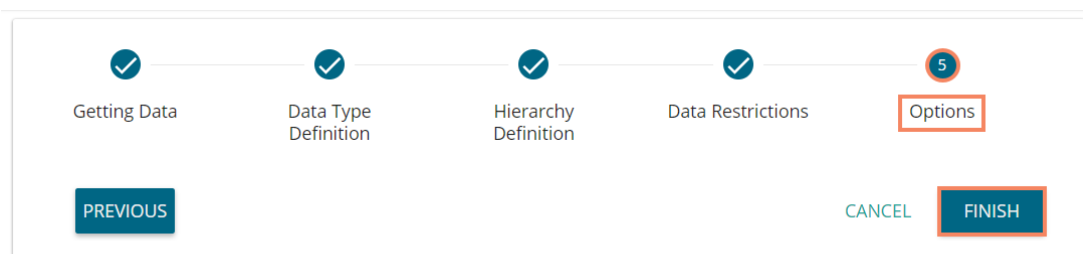
E.g., If for a user/user group ‘Country’ custom field value is ‘USA’ and the administrator passes ‘Country’ as a User Property while creating a data store. Users for whom ‘USA’ was selected as value for the ‘Country’ custom field can access data related only to the USA from the data store.

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

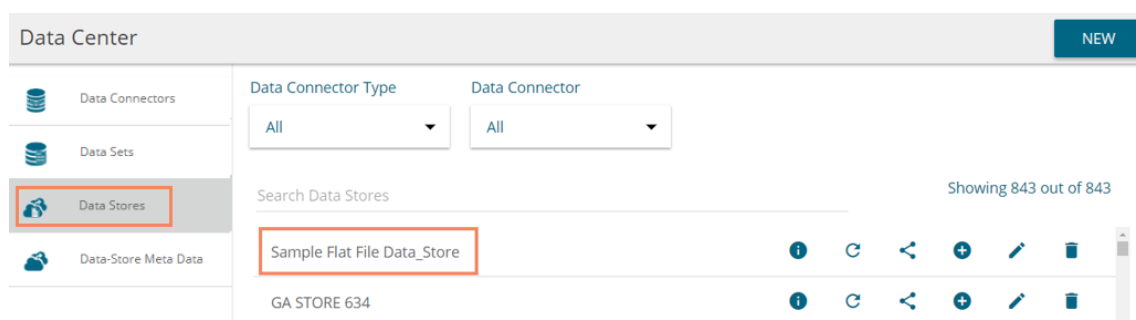


Step 5 – Options

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

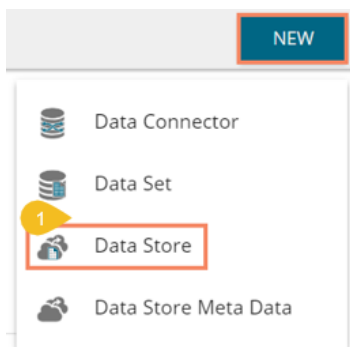


ii) The newly created data store gets added to the Data Store list

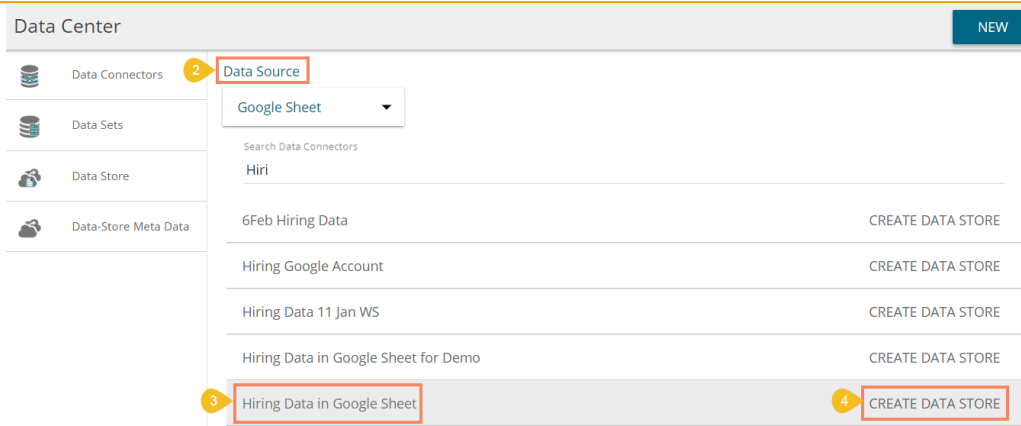


6.3.3. Creating a New Data Store Using an API Data Connector

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

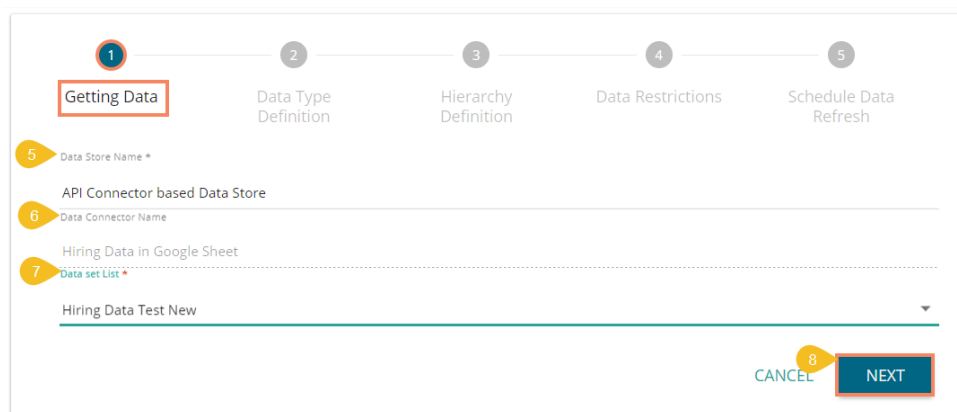


- ii) Choose an API connector type from the filter panel
- iii) Select a data connector from the displayed list
- iv) Click '**CREATE DATA STORE**' option



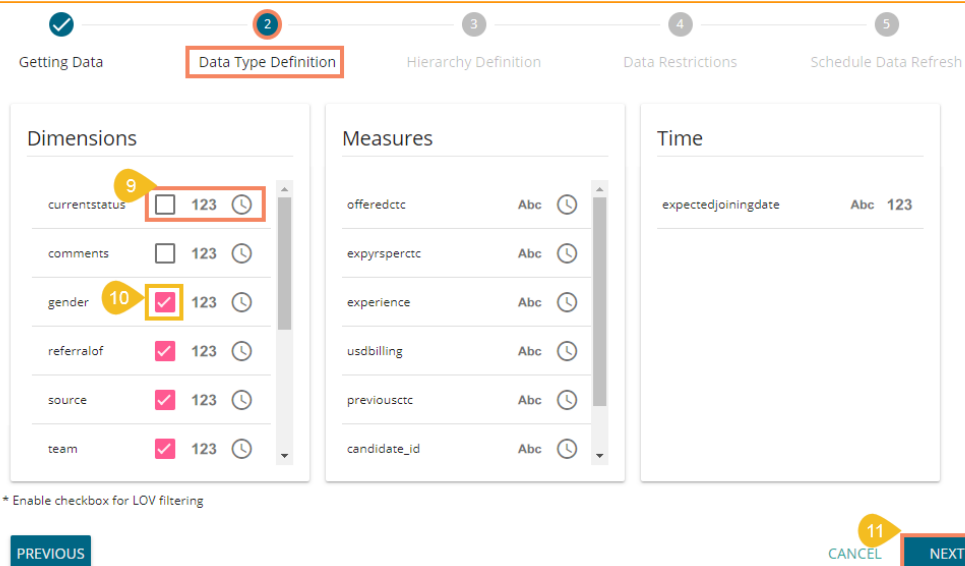
v) The **'Getting Data'** tab opens

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



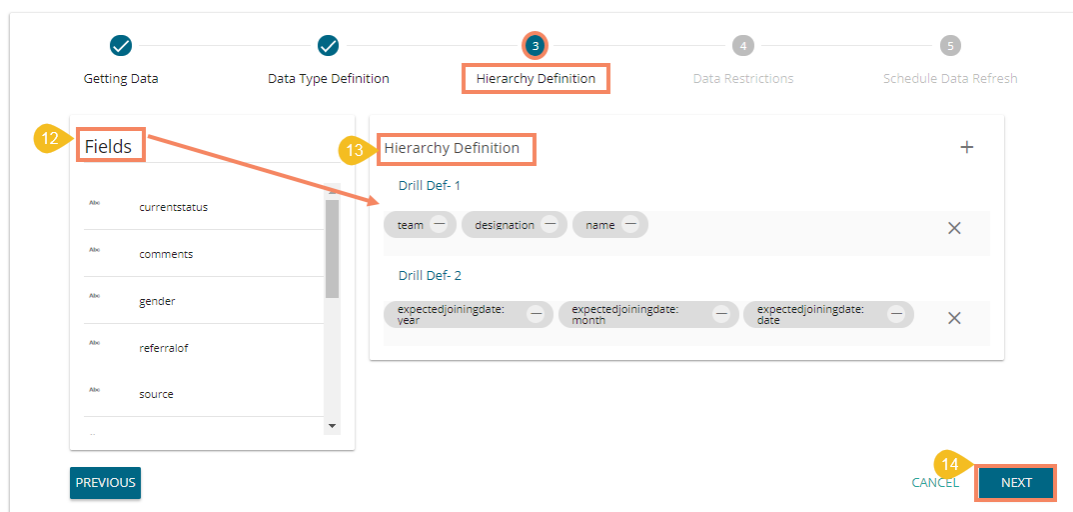
vi) The **'Data Type Definition'** tab opens

1. Interchange the available Dimensions, Measures, and Time fields to define data
2. Enable dimension fields with a checkmark to get in the LOV of the Filter pane of the Self-service BI Report
3. **'NEXT'** to proceed



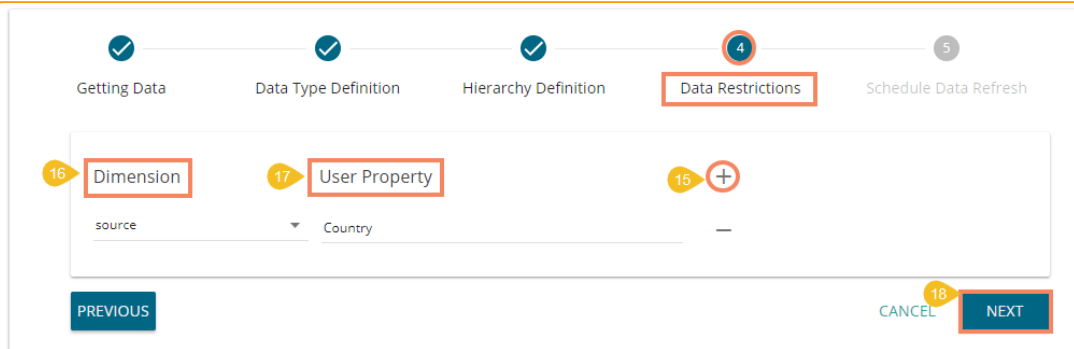
vii) The **'Hierarchy Definition'** tab opens

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



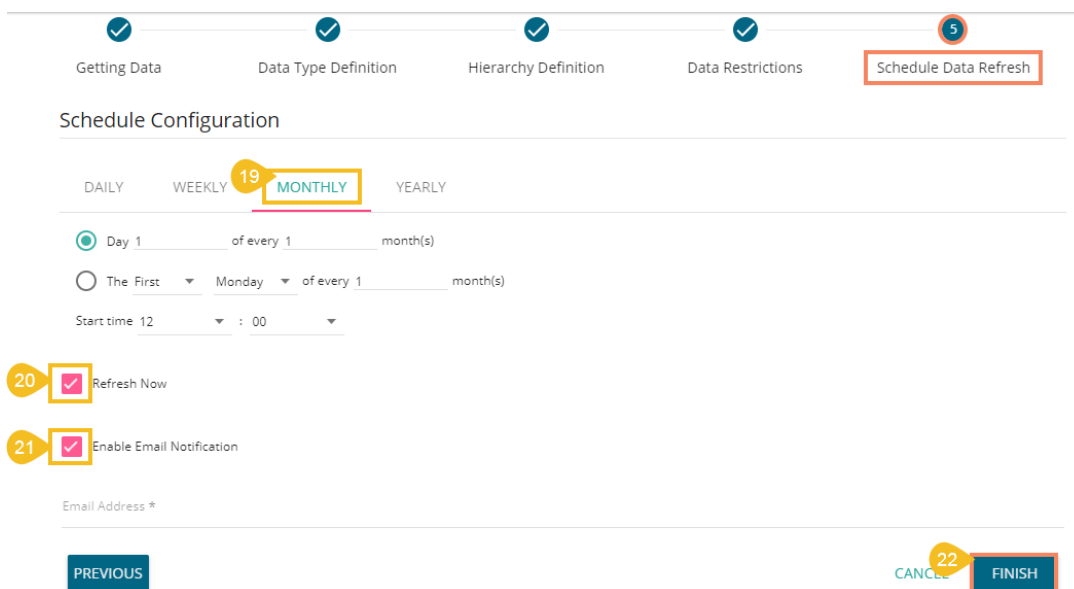
viii) The **'Data Restriction'** tab opens

1. Select a Dimension from the drop-down menu
2. Enter a User Property based on the inserted custom fields of a specific user(s) or user group(s)
3. Click the **'NEXT'** option to proceed

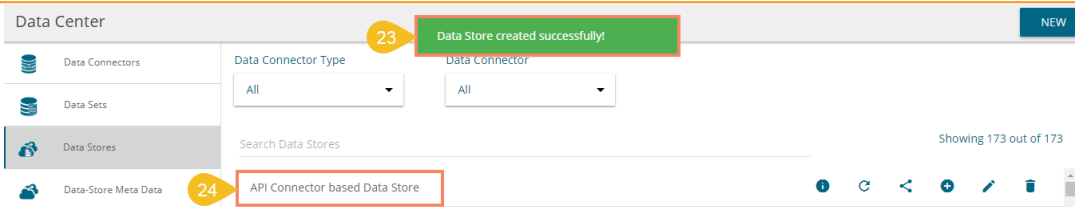


ix) The **'Schedule Data Refresh'** tab opens

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

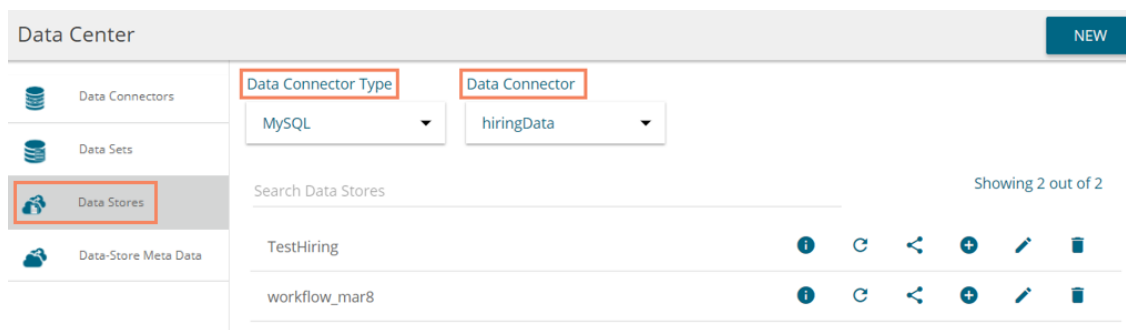


- x) A success message appears to inform about the creation of a new data store
- xi) The newly created data store gets added to the Data Stores list



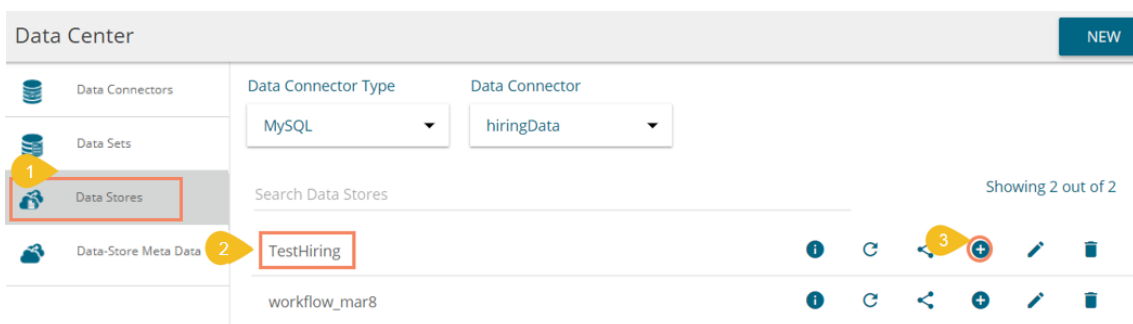
Note:

- a. 'Getting Data' tab opens by default while creating a new data store.
- b. Click the 'PREVIOUS' option to be redirected to the previous page.
- c. Users can click 'CANCEL' to cancel the creation of a new data store at any step.
- d. Enabling NLP service allows the 'Data Search' bar provided on the Storyboard of the Business Story to display data from the selected data store.
- e. Users can filter the created data stores based on 'Data Connector Type' and 'Data Connector.'

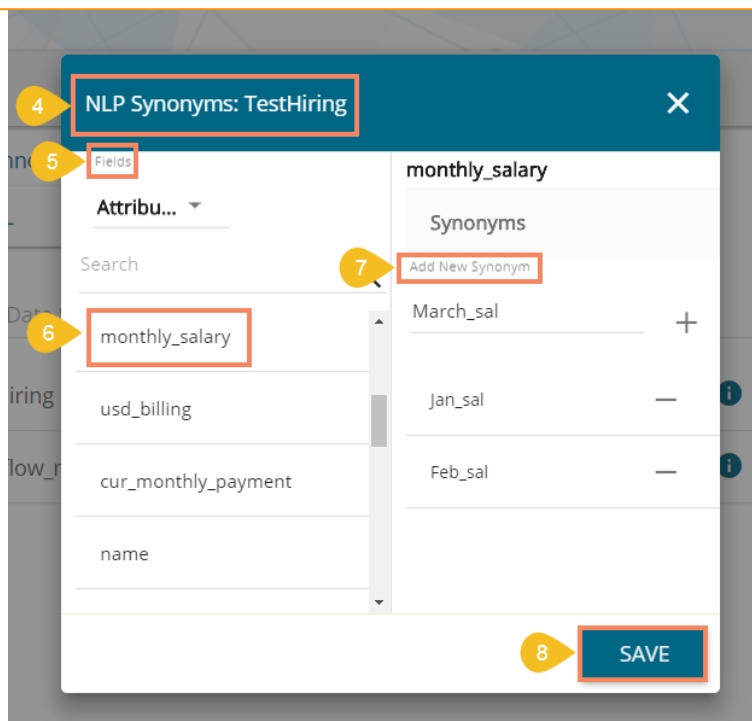


6.3.4. Adding Synonyms to a Datastore

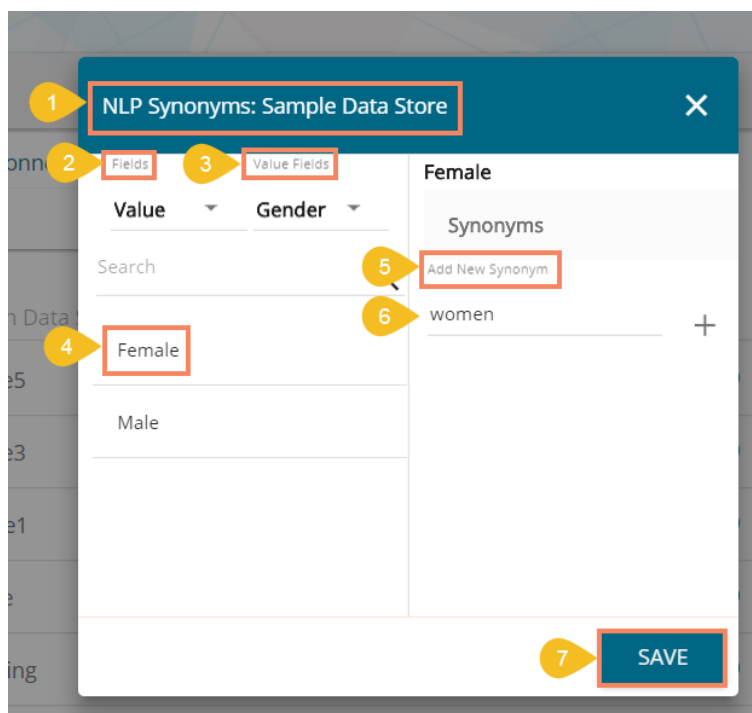
- i) Navigate to the Datastore list.
- ii) Select a datastore
- iii) click the 'Add Synonym to Datastore' option



- iv) A new pop-up window opens
- v) Select either 'Attribute' or 'Value' using the Fields drop-down
- vi) Select an attribute or value from the displayed list
- vii) The selected data element is moved to the right-side
- viii) Add new Synonym below the selected data element
- ix) Click 'SAVE'



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

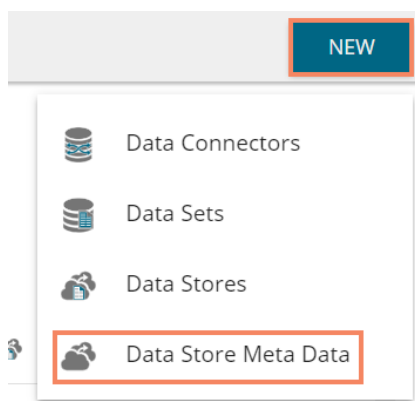


6.4. Data Store Meta Data

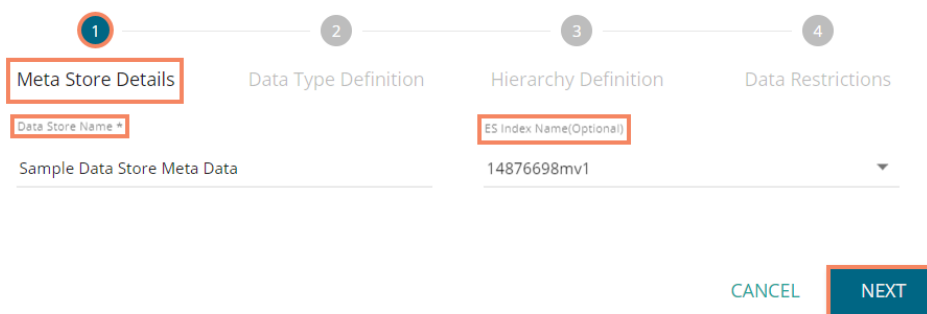
The Data Store Meta Data is a database created to store metadata. It is a structure/index in which the

actual data can be stored/written using an application such as ETL.

- i) Navigate to the Data Center page
- ii) Select the **'Data Store Meta Data'** option from the **'NEW'** context menu



- iii) A new page asking the Meta Store details opens
- iv) Enter a Data Store Name
- v) Choose an ES Index number from the drop-down list (optional)
- vi) Click the **'NEXT'** option



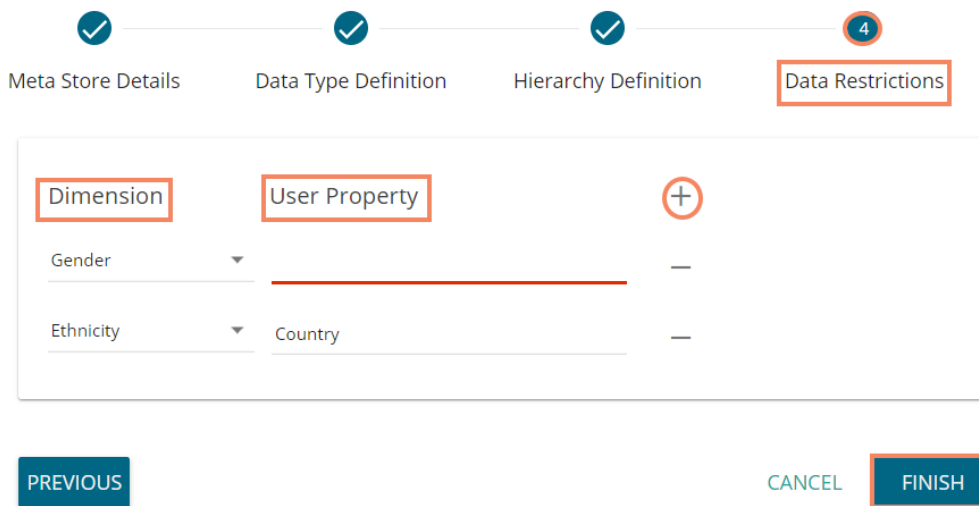
- vii) Define the data type (if users have not chosen the ES index then they need to insert the fields name manually, else the fields names get selected from the chosen ES index)
- viii) Users can interchange the Dimensions, Measures, and Time fields
- ix) Click **'NEXT'**

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

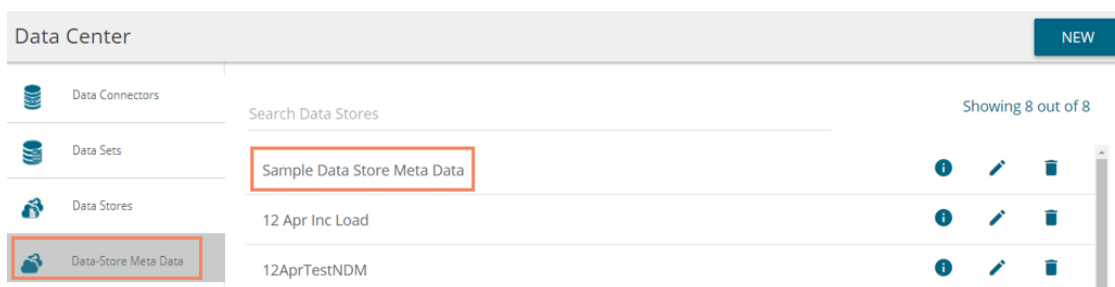
Options	Description
Abc	Move to Dimensions
123	Move to Measures
🕒	Move to Time

- x) Define the hierarchy using Dimensions and Time dimensions
 - a. Click the 'Add' option **+** provided in the Hierarchy Definition window
 - b. A new 'Drill Def' box gets added to the page
 - c. Drag and drop the dimensions or time options to define a hierarchy
- xi) Click the 'NEXT' option

- xii) The **'Data Restrictions'** page opens. The Data Restriction tab allows the user/user group to access data as per the selected **'User Property'** options
 - a. Select a dimension from the drop-down menu to apply filter values on the data store
 - b. Enter a User Property to create a filter parameter based on the user
- xiii) Click the **'FINISH'** option



- xiv) A pop-up window appears to confirm that the configuration got saved.
- xv) The newly created Meta Data gets added to the list displayed on the left pane of the page



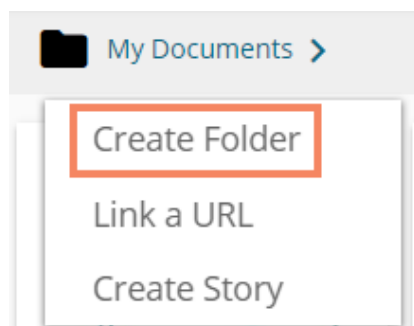
Option	Name	Task
	Latest Scheduler Status	Display the stored information via a pop-up window
	Edit	Edit the data store meta data fields
	Remove	Remove a data store metadata from the list

7. Options

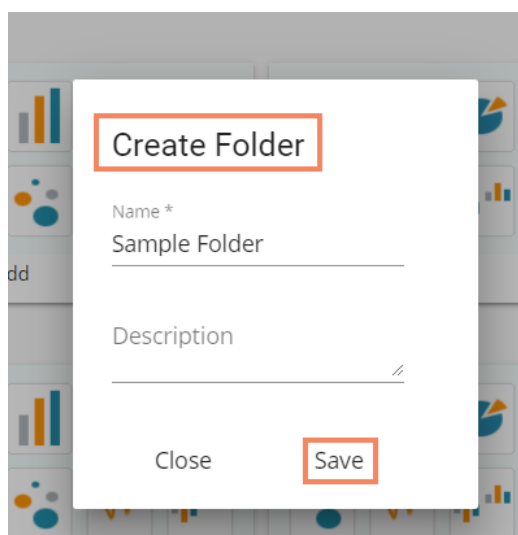
Users can access various options by using right-click anywhere on **My Documents** or **Public Documents**.

7.1. Creating a Folder

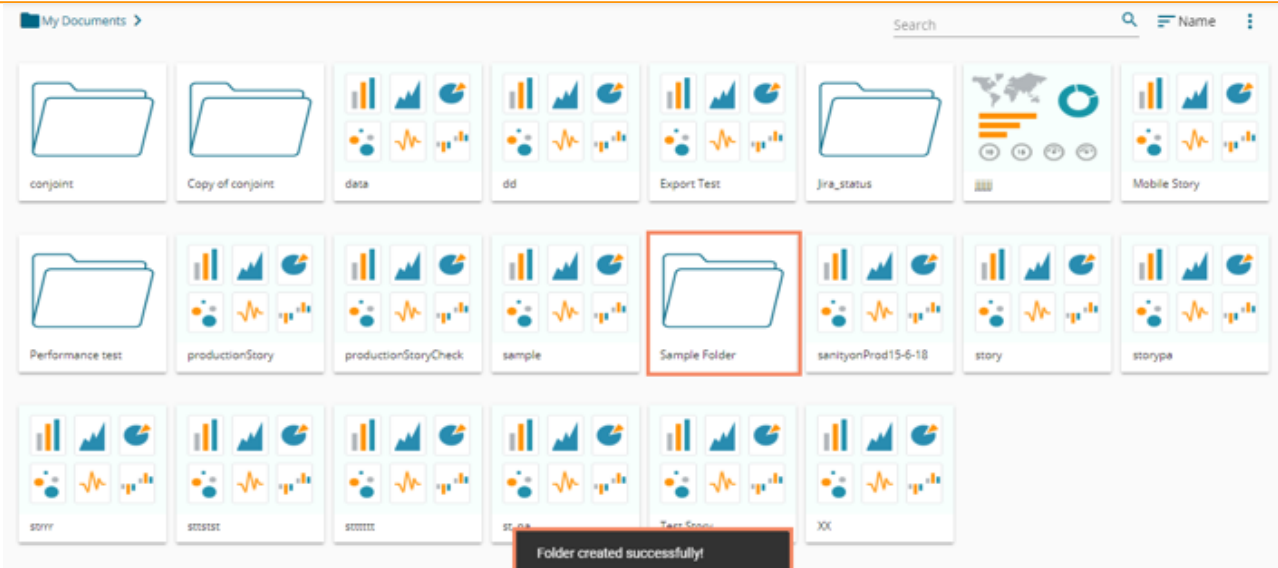
- i) Navigate to the platform home page
- ii) Open '**My Documents**' or '**Public Documents**'
- iii) Right-click anywhere on the My Documents or Public Documents space
- iv) A context menu opens
- v) Select '**Create Folder**' from the context menu



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



- ix) A success message appears
- x) The newly created folder gets added to the selected document space

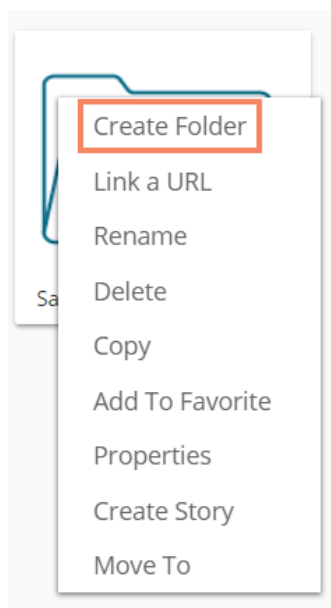


- **Options Assigned to a Folder**

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

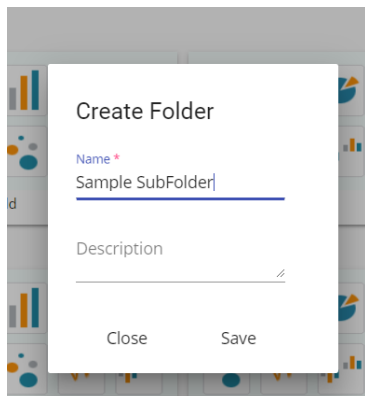
7.1.1. Creating a Folder (Sub-Folder)

- i) Select a folder
- ii) Use right-click on an existing folder to display the various options
- iii) Select the **'Create Folder'** option

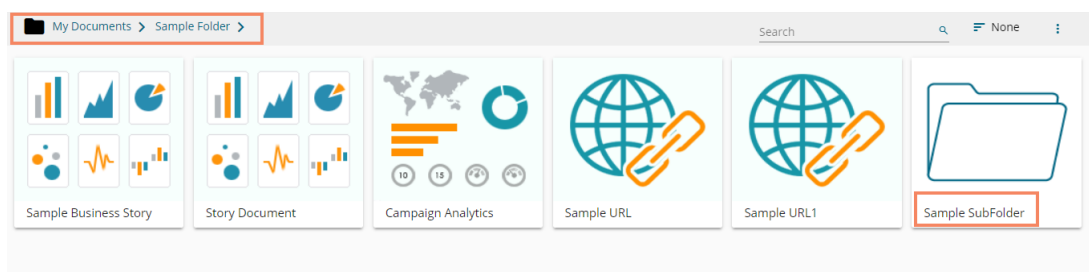


- iv) Select the **'Create Folder'** option
- v) A new window pops-up
- vi) Fill in the following information:

- a. **Name:** Enter a folder name
 - b. **Description:** Describe the folder (optional)
- vii) Click the **'Save'** option



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



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

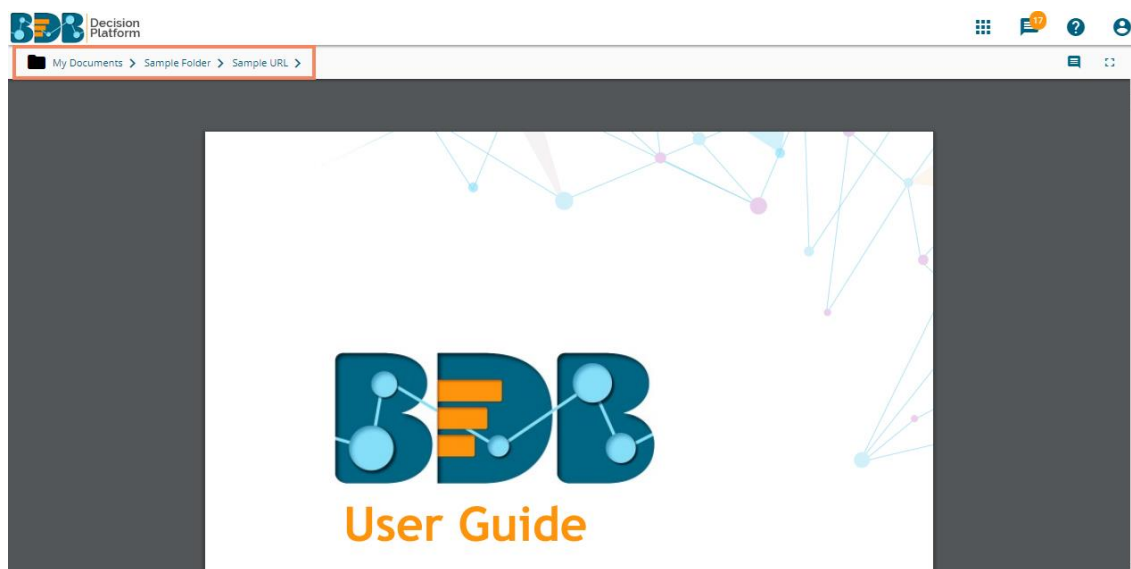
7.1.2. Linking a URL

Users can connect a URL to the required platform documents.

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




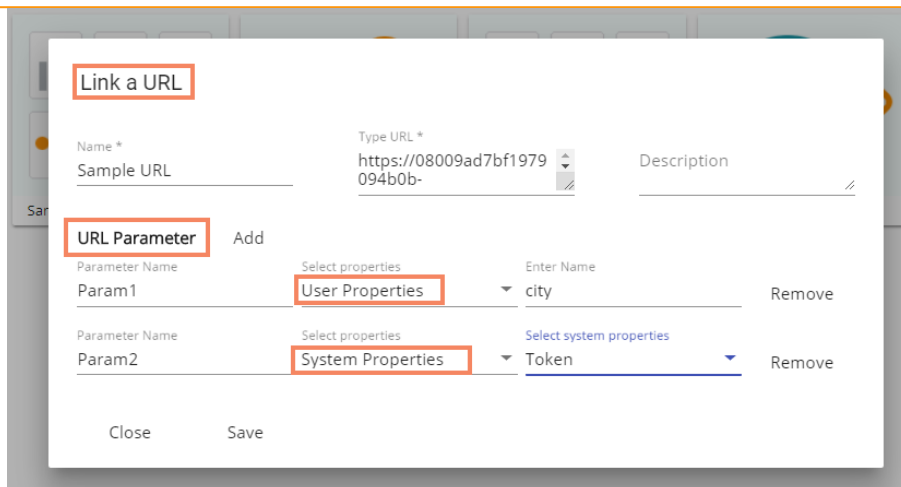
vii) The URL gets linked to the selected folder



7.1.2.1. Adding or Removing a URL Parameter:

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

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

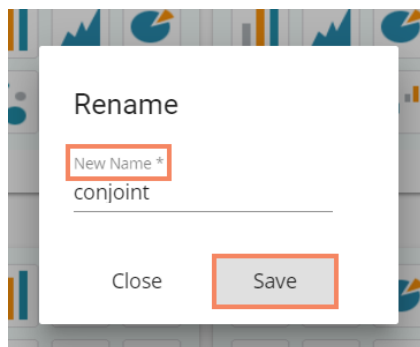


Note:

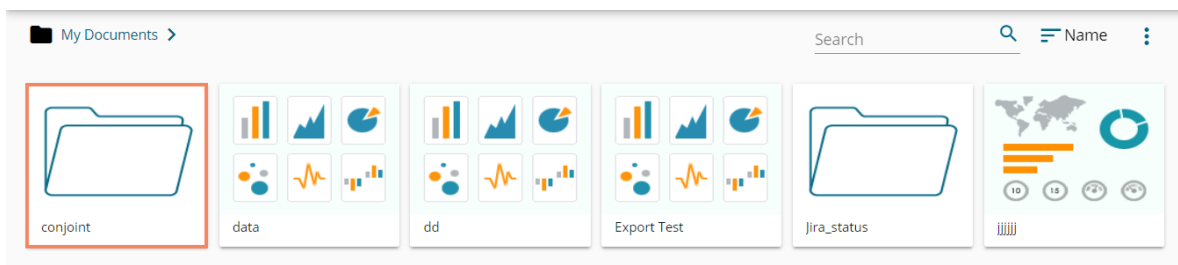
- a. Users can easily connect internal URL links by using the parameters, while the external URLs requires security permission to link.
- b. Users can click the 'Remove' option provided next to an added parameter to remove the parameter.

7.1.3. Renaming a Folder

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

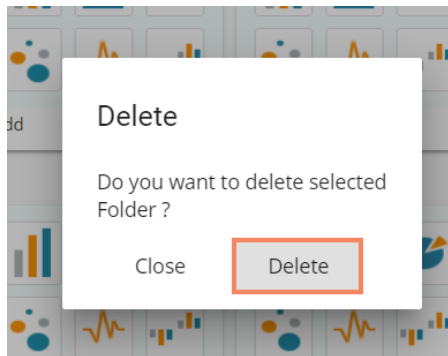


- iv) The folder gets renamed.



7.1.4. Deleting a Folder

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



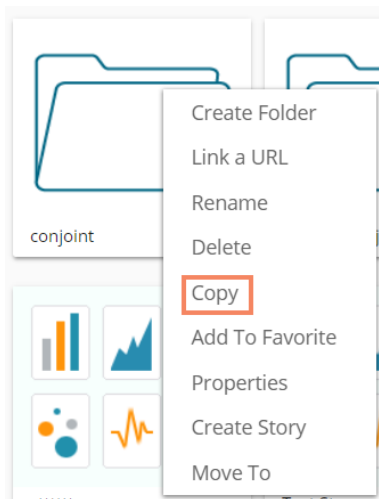
- v) The selected folder gets removed from the platform.

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

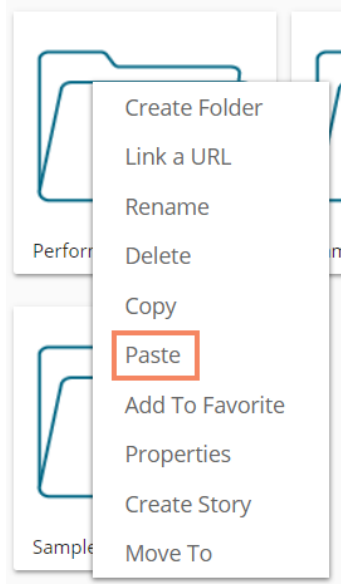
7.1.5. Copying a Folder

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

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

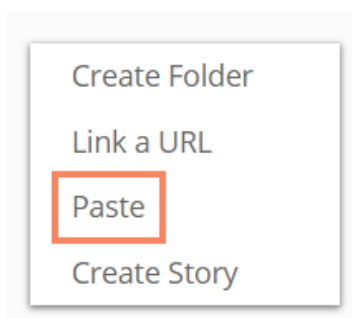


- iii) Select another folder and use the right-click or use the right click to get the **'Paste'** option

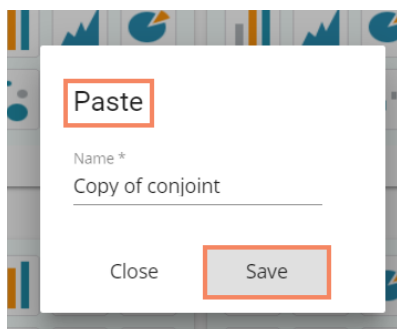


Or

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

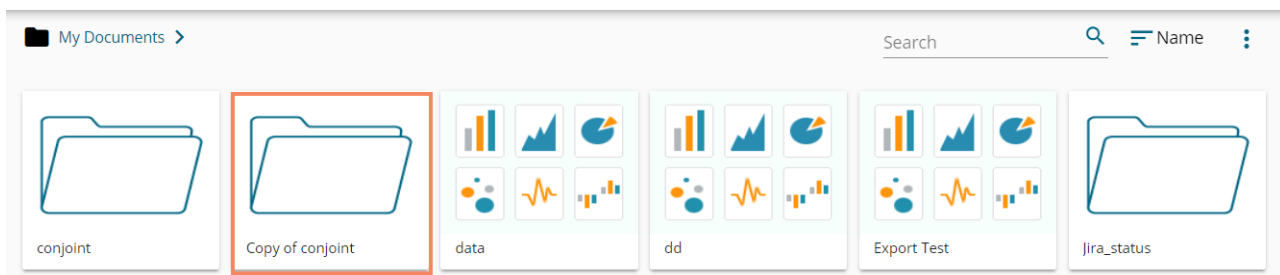


- iv) By selecting the 'Paste' option, a message window appears
- v) The **Name** mentioned in the pop-up window shows prefix **'Copy of-'** before the original name of the folder (E.g., *conjoint* gets a new name *Copy of conjoint*)
- vi) Click the **'Save'** option



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

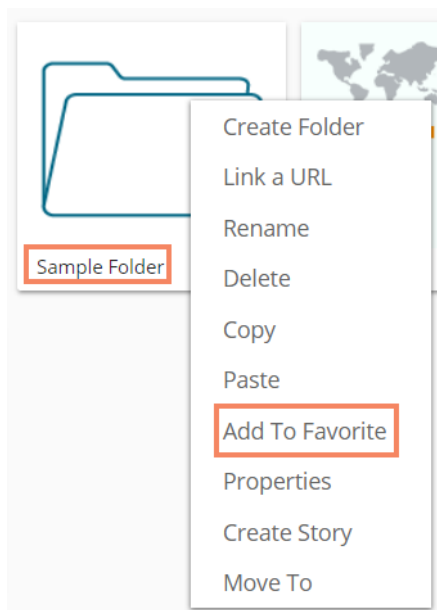
E.g., The following image shows that a folder 'conjoint' from 'My Documents' is named *Copy of conjoint* and has been posted next to the original one in the same document space.



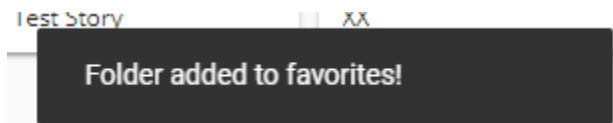
7.1.6. Adding/Removing a Folder to/from Favorites

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

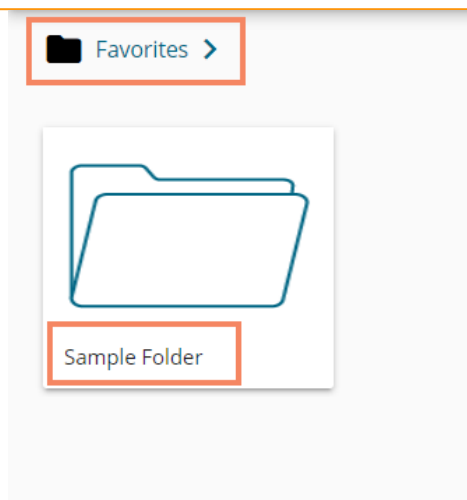
- i) Select a folder
- ii) Use the right-click to get the list of folder options
- iii) Select the 'Add to Favorite' option



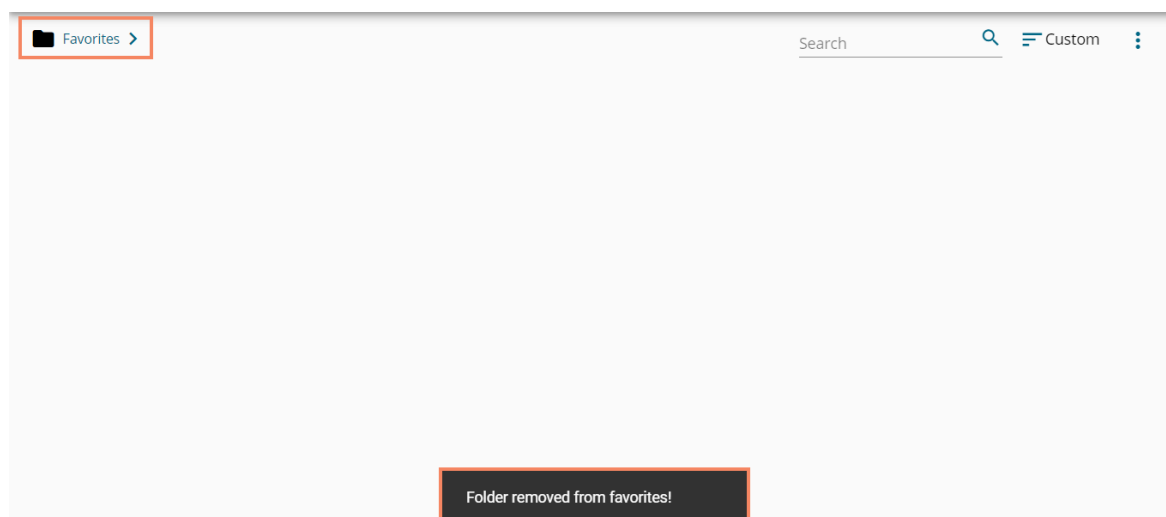
- iv) A message appears, "Folder added to favorites!"



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

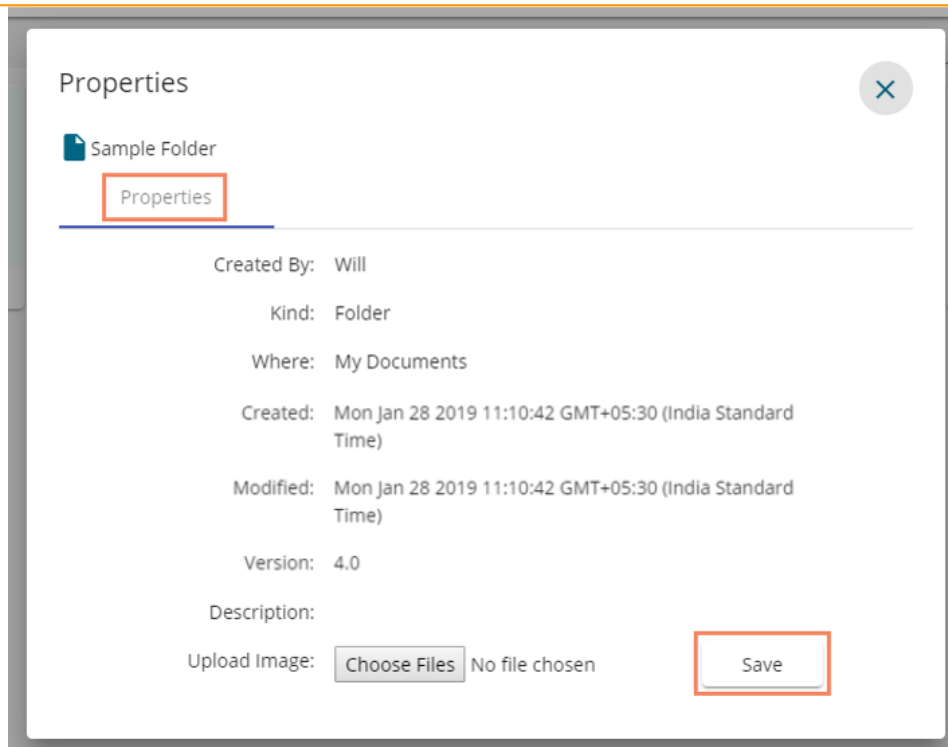


- vi) Open the '**Favorites**' documents space
- vii) Navigate to the folder you wish to remove
- viii) Use the right-click on it to get the '**Remove from Favorites**' option
- ix) Click the '**Remove from Favorites**' option
- x) A message, "**Folder removed from favorites!**" appears on the screen and the selected folder gets removed from the '**Favorites**' document space

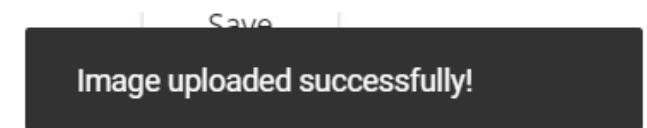


7.1.7. Properties

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



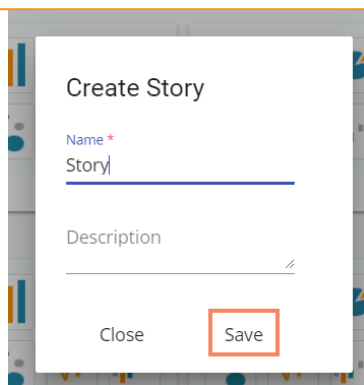
- vi) A success message appears stating, “the image updated successfully!”



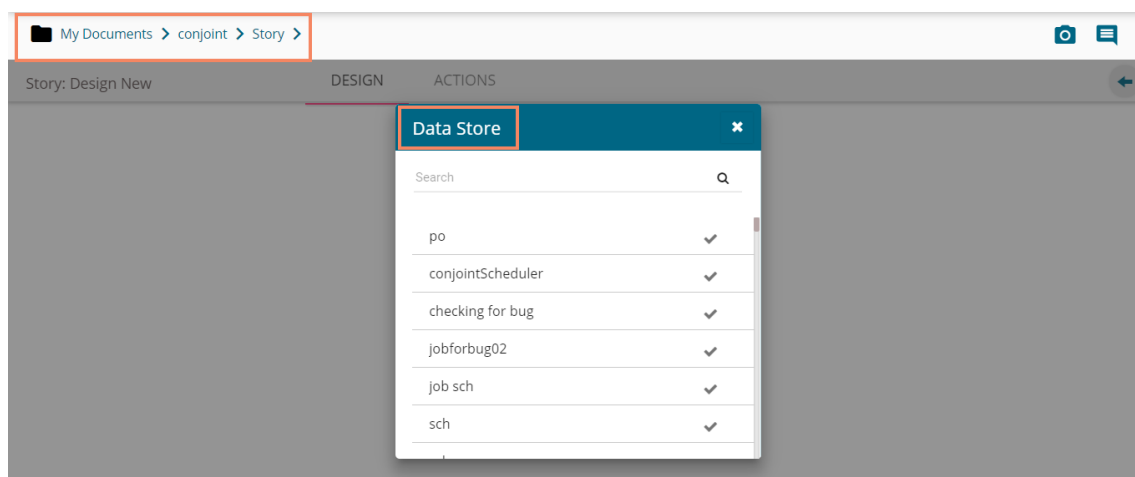
Note: Click ‘Close’ option to close the folder properties.


7.1.8. Creating a Story

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

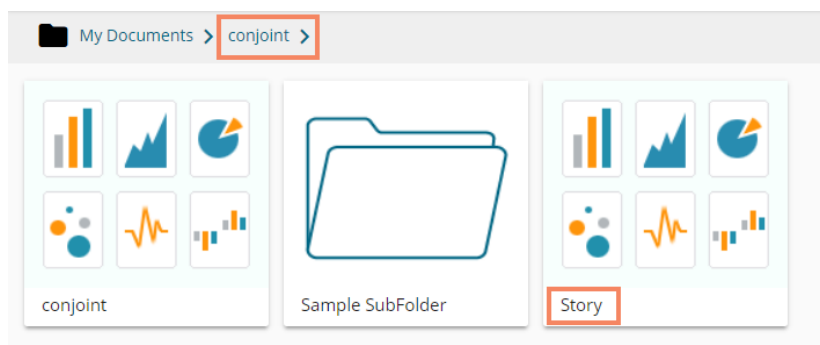


vii) Users are directed to the following page of the story to select a data store




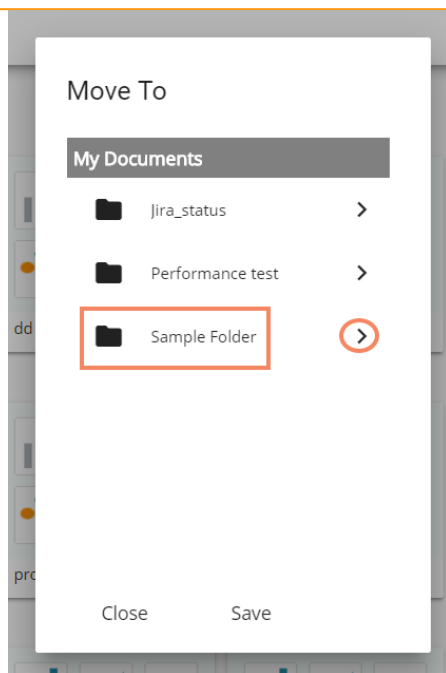
viii) Users can close the Data Store list by clicking the 'Close'  icon and then navigate back to the folder

ix) The Story document gets added to the selected folder

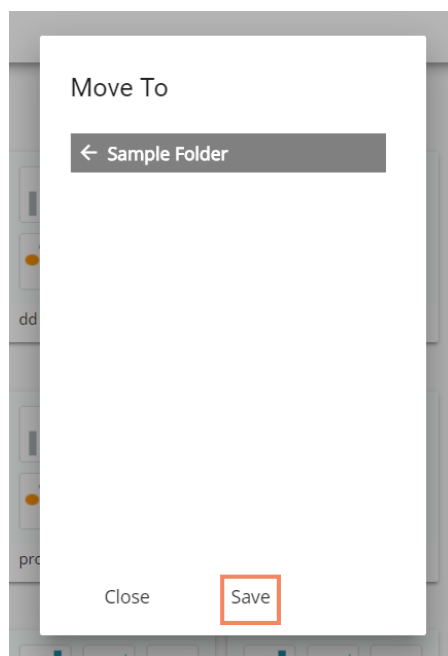


7.1.9. Moving a Folder

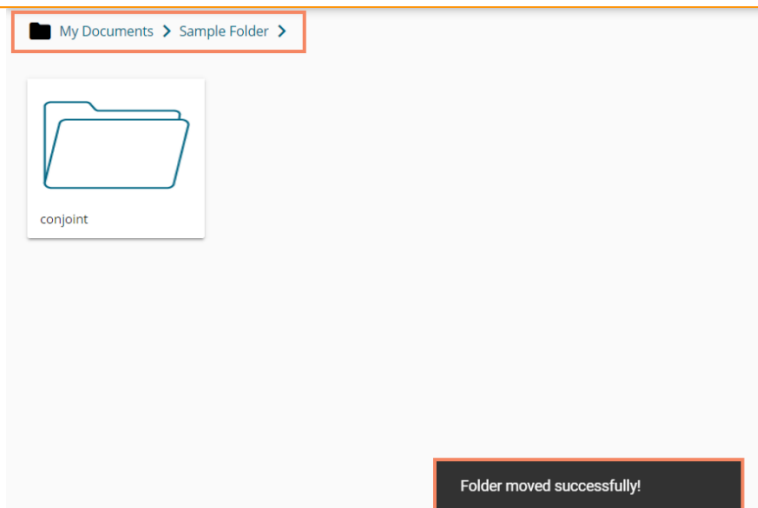
- i) Select a folder.
- ii) Select the '**Move To**' option from the context menu.
- iii) The 'Move To' window appears displaying the available folders.
- iv) Select a folder.
- v) Click the '**Move**'  icon.



- vi) Users get redirected to the next screen.
- vii) Click the **'Save'** option.



- viii) A success message appears.
- ix) The users can open the target folder to check about the recently moved folder.

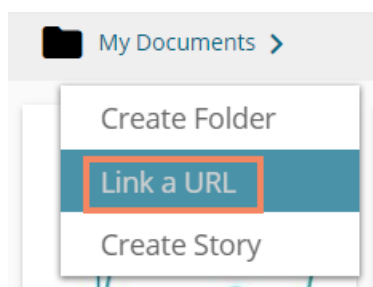


Note: The ‘Move To’ option is not available to the folders shared as the Public Documents.

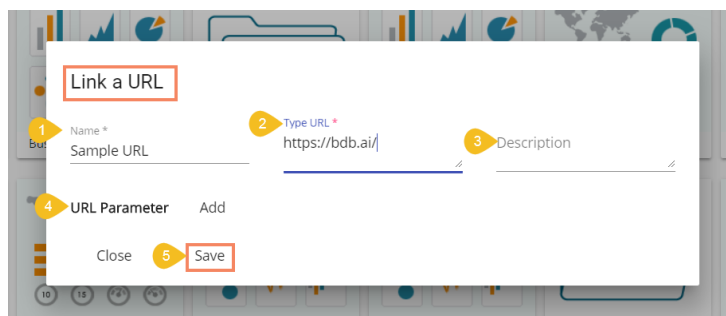
7.2. Linking a URL

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

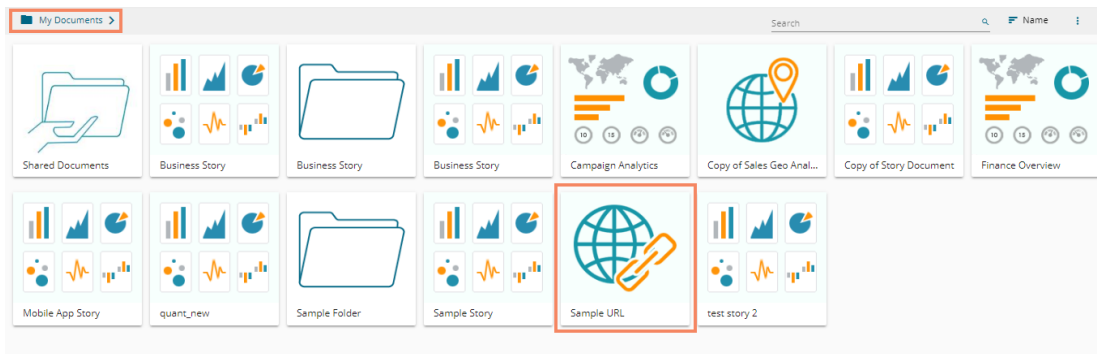
- i) Use the right-click anywhere at the blank space on the ‘My Documents’ or ‘Public Documents’
- ii) Select the ‘Link a URL’ option.



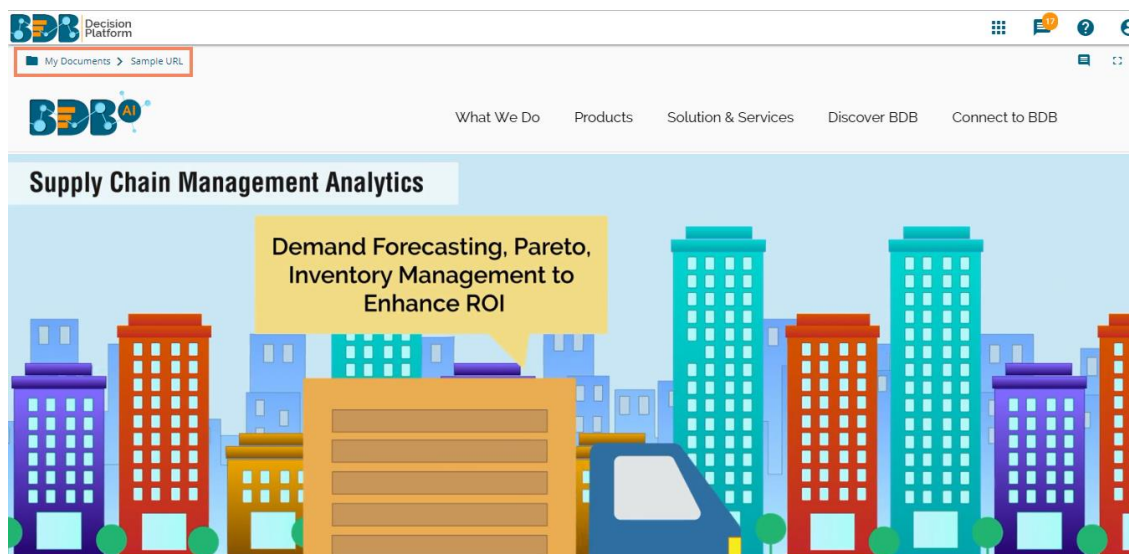
- iii) A new window appears.
- iv) Fill in the required information:
 - a. **URL Name:** Enter a name for the URL
 - b. **Type URL:** Type the URL link that you wish to add
 - c. **Description:** Describe the URL (optional)
 - d. **URL Parameter (Optional)**
- v) Click the ‘Save’ option.



- vi) A success message appears.
- vii) The linked URL document gets added to the selected document space.



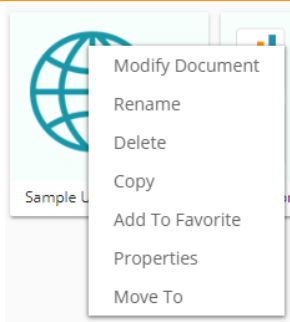
- viii) Users can open the linked URL document by clicking on it.





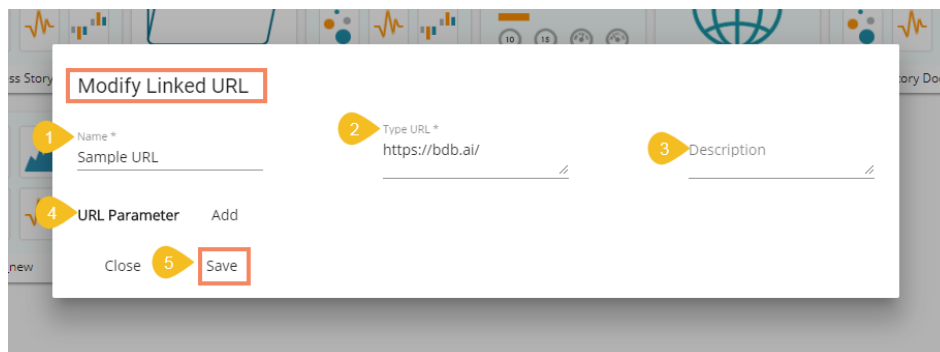
• Options Assigned to a URL

7.2.1. Modifying a Document (URL information)

- i) Select a linked URL document.
- ii) Use the right-click on the Link URL for options.
- iii) A context menu opens with all the related options.



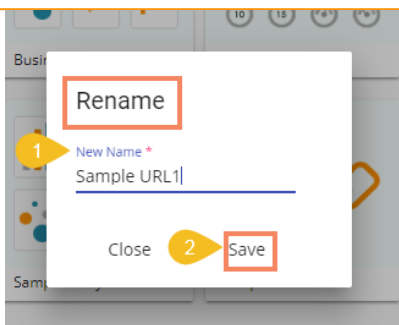
- iv) Select the **'Modify Document'** option.
- v) A pop-up window appears.
- vi) Modify the following information:
 - a. URL Name
 - b. URL Link
 - c. Description
 - d. URL Parameter
 - i. Click the **'Add'** button  to add the URL Parameter.
 - ii. Click the **'Remove'** button  to remove the inserted URL Parameter.
- vii) Click the **'Save'** option.



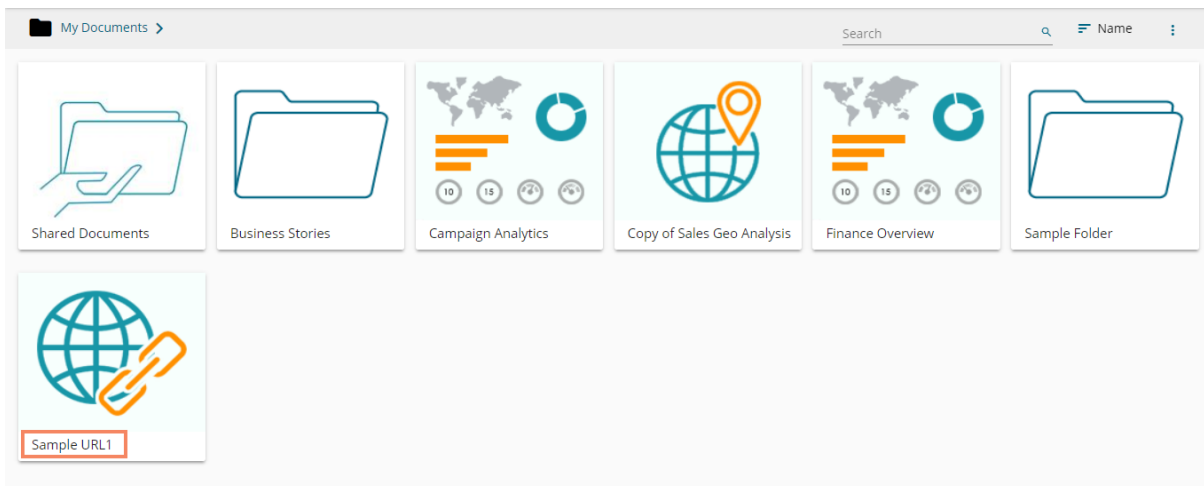
- viii) The modified URL Link gets saved.

7.2.2. Renaming a URL Document

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

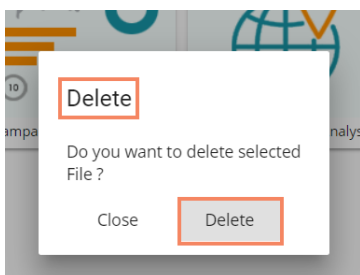


vi) The linked URL document is renamed.



7.2.3. Deleting a URL Document

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



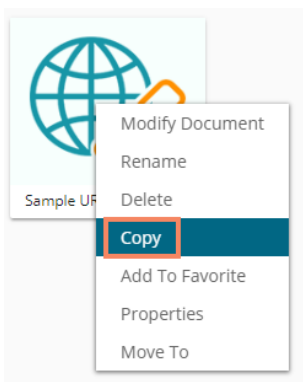
v) The selected URL file gets removed.

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

7.2.4. Copying a URL Document

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

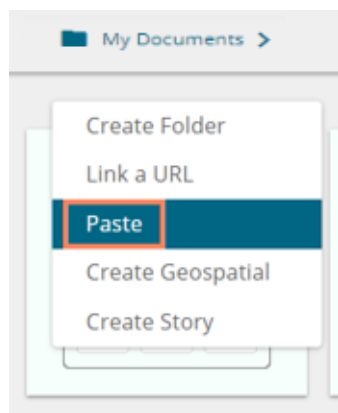
- i) Select a linked URL document.
- ii) Select the **'Copy'** option from the context menu.



- iii) Select another folder and use the right-click.

Or

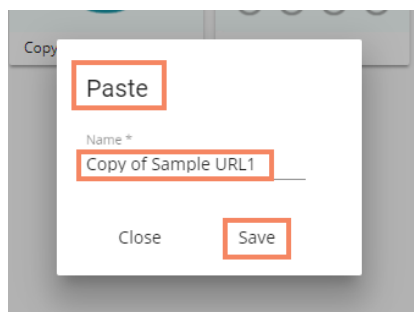
- iv) Navigate to **'My Documents'** or **'Public Documents'** and use right-click on the blank space.
- v) A context menu appears with the **'Paste'** option.
- vi) Select the **'Paste'** option.



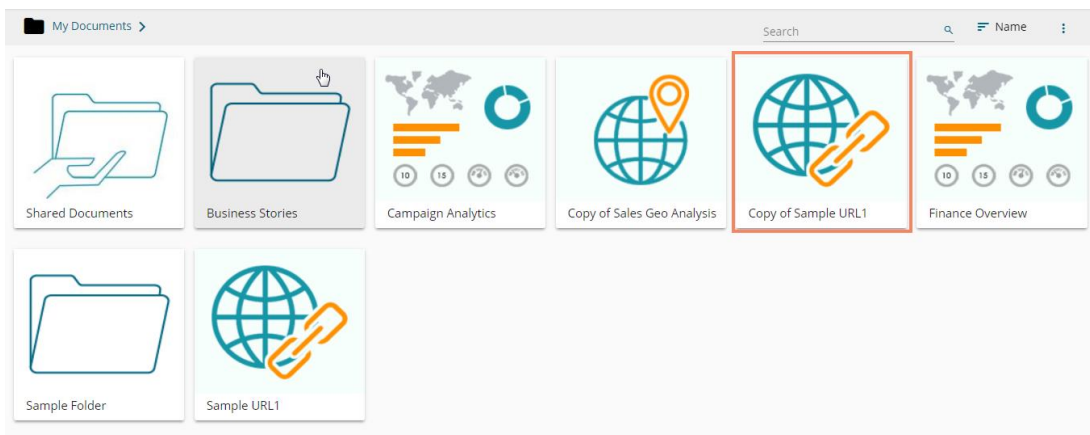
- vii) A new window appears.

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

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



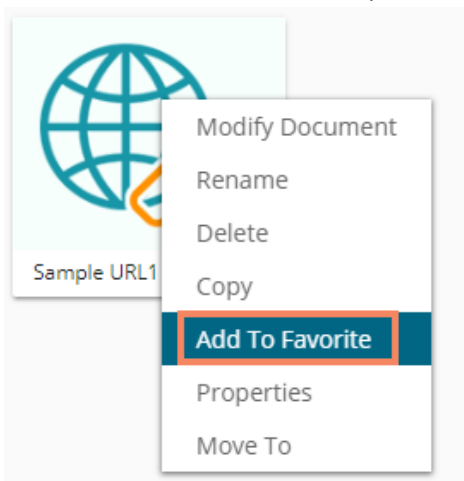
- x) A success message appears.
- xi) The copied link URL gets replicated with a different name.



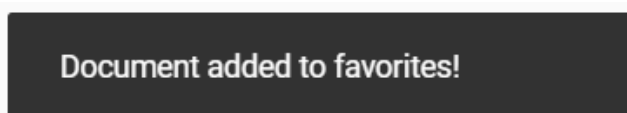
7.2.5. Adding/Removing a URL Document to/from Favorites

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

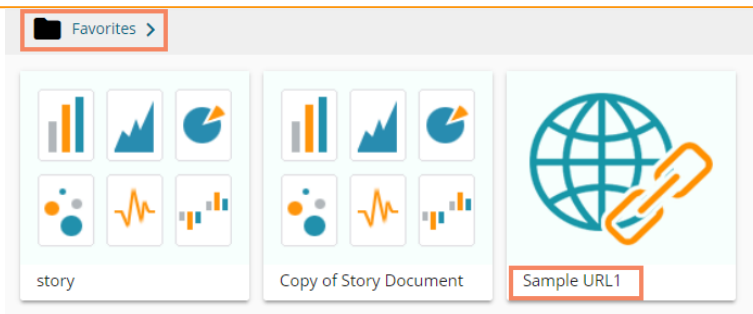
- i) Select a linked URL document.
- ii) Select the 'Add to Favorites' option from the context menu.



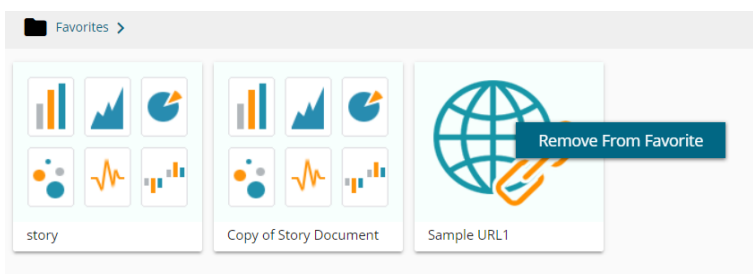
- iii) A message, "Document added to favorite!" appears.



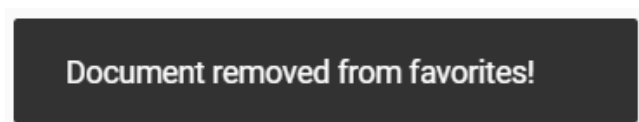
- iv) The selected link URL is added to the 'Favorites' section.
- v) Open the 'Favorites' section for documents.



- vi) Navigate to the link URL you wish to remove from the '**Favorites**' section.
- vii) Use right-click on the URL to get the remove option.
- viii) Click the '**Remove From Favorite**' option.



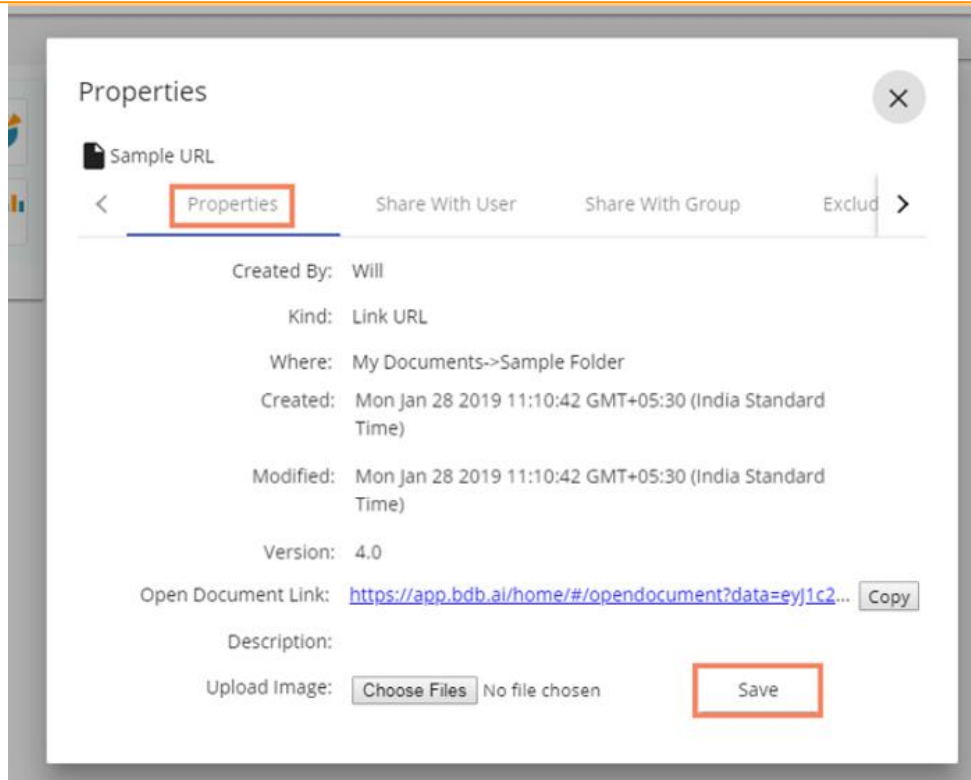
- ix) A pop-up window appears with a message, "**Document removed successfully!**"



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

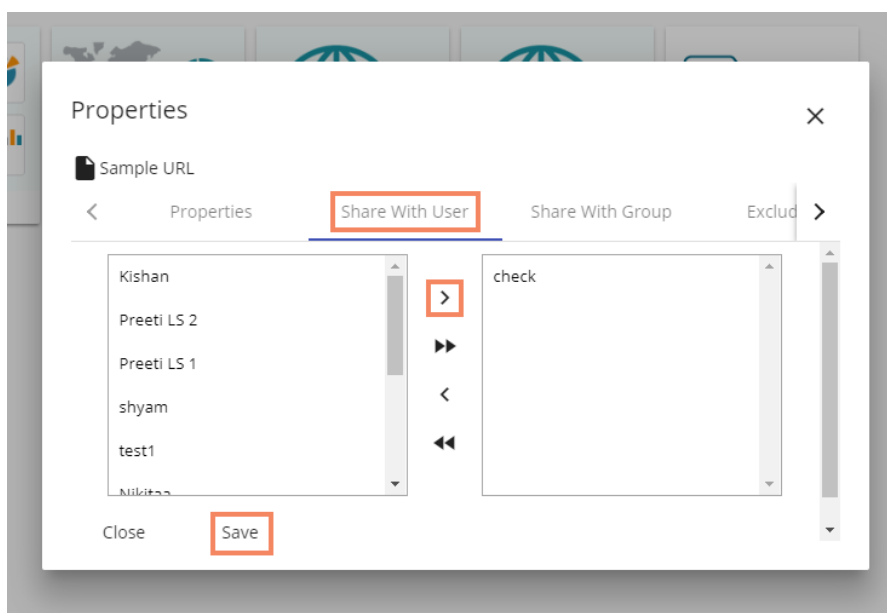
7.2.6. Properties

- i) Select a linked URL document.
- ii) Select the '**Properties**' option from the context menu.
- iii) The '**Properties**' window appears with four options.
 - a. **Properties:** Properties of the linked URL documents is displayed.



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

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



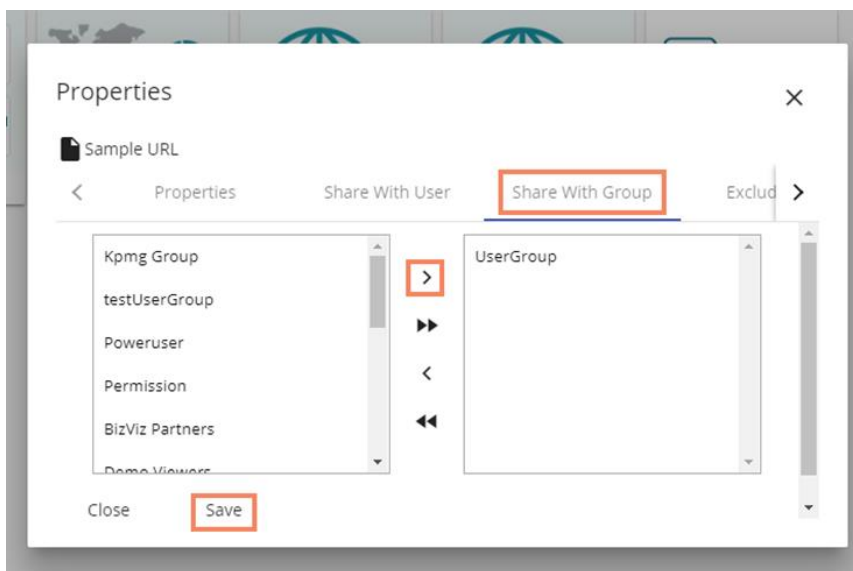
4. A success message appears stating that the document privilege is updated.

Document privilege updated successfully!

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

c. **Share With Group:** The linked URL document can be shared with the selected group.

1. Select the **'Share With Group'** option from the Properties window.
2. Select one group or all the groups and move to the space given on the right side.
(Use the single arrow to move one group and double arrows to move all the groups.)
3. Click the **'Save'** option.



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

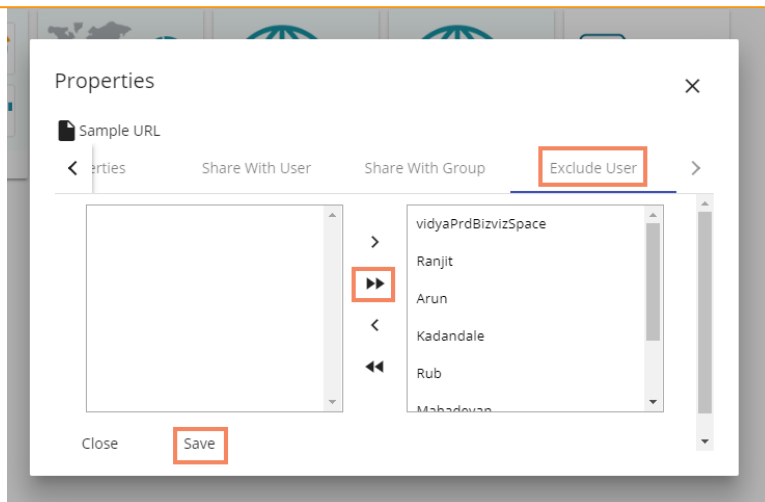
Document privilege updated successfully!

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

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

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

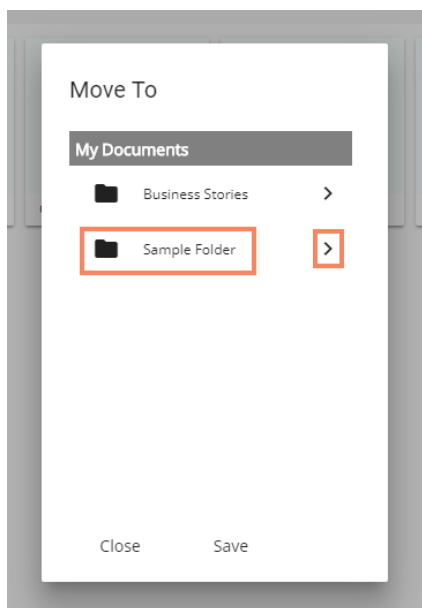
1. Select **'Exclude User'** on the Properties pop-up screen.
2. Select and move a user or all the users to the space given on the right side using the arrows.
3. Click the **'Save'** option.



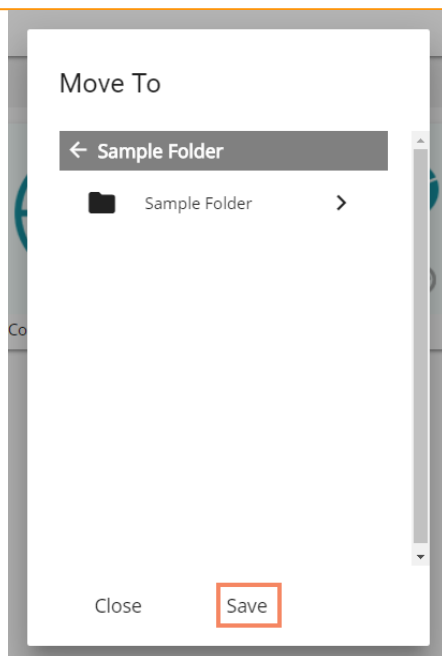
4. A success message appears, and the document privilege gets updated to exclude the selected user(s).

7.2.7. Moving a URL File

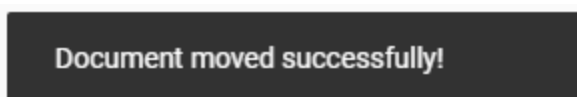
- i) Select a linked URL document
- ii) Select the '**Move To**' option from the context menu
- iii) The '**Move To**' window appears displaying the available folders
- iv) Select a folder
- v) Click the '**Move**' > icon



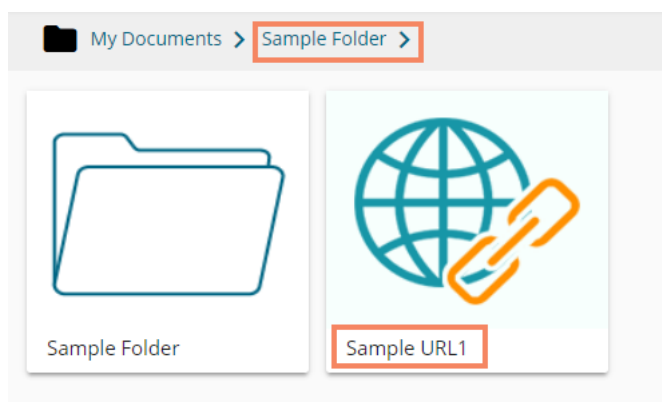
- vi) Users get redirected to the next screen
- vii) Click 'Save'



viii) A success message appears

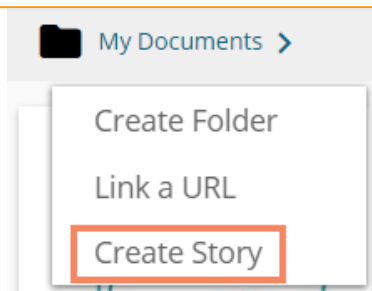


ix) The desired URL is moved to the selected space

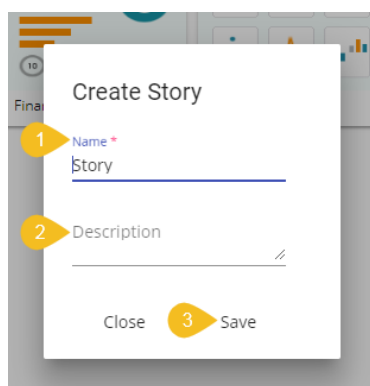


7.3. Creating a Story

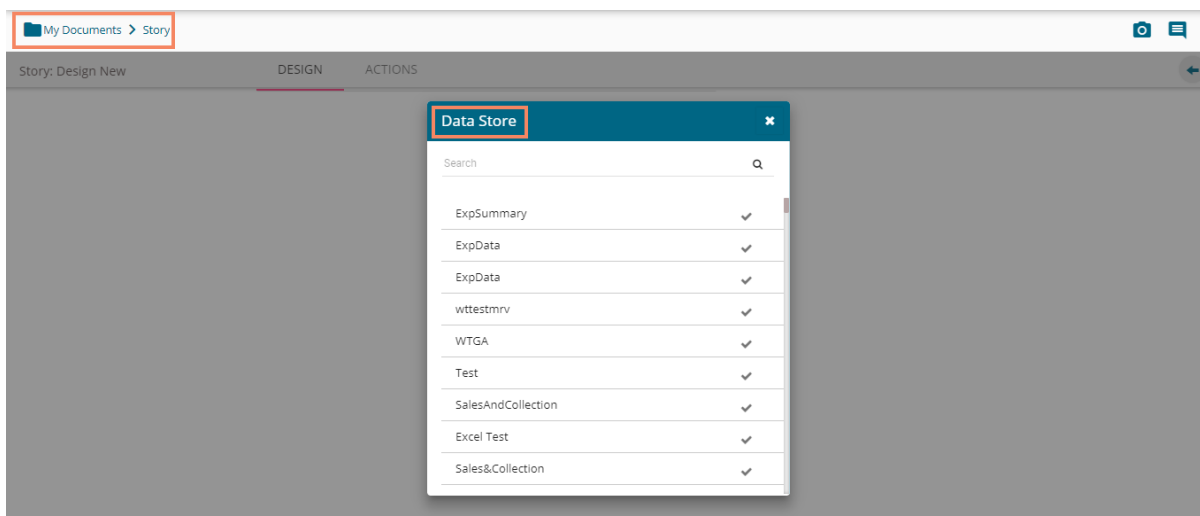
- i) Navigate to **'My Documents'** or **'Public Documents'**
- ii) Right-click anywhere on the My Documents or Public Documents blank space
- iii) Select the **'Create Story'** option from the context menu



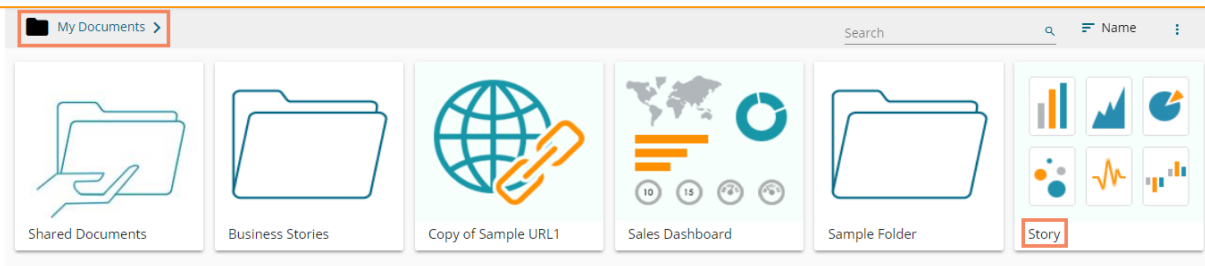
- iv) A pop-up window appears
- v) Fill in the following information:
 - a. **Title:** Enter a title for the story document
 - b. **Description:** Describe the story document (optional)
- vi) Click the 'Save' option



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

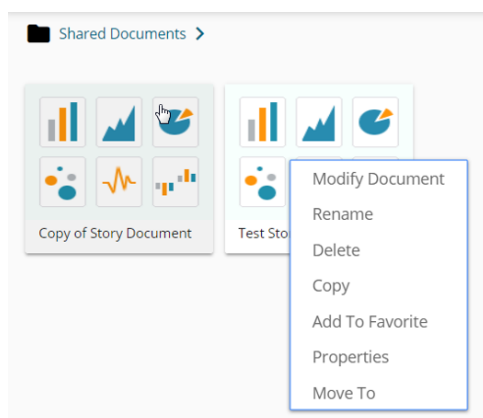


- viii) Users can close the Data Store list by clicking the 'Close' and then navigate back to the 'My Documents' space
- ix) The Story document gets added to the My Documents space.



Note:

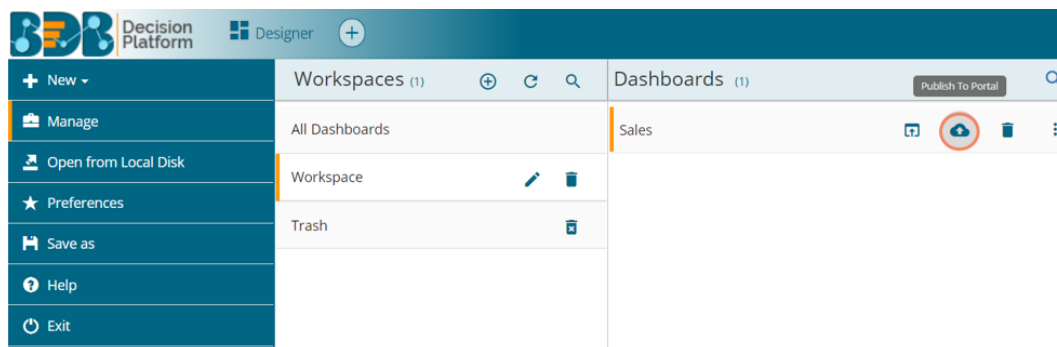
- a. Please refer to the Business Story (Self-Service BI) User Guide for more details on the Story option.
- b. The credited options are assigned only for the shared documents which are shared to the users via the **'Copy To'** option. The documents shared through the 'Share With' option do not display any option by using the right-click over them. (E.g., The 'Copy of Story Document' is shared using the 'Share With' option whereas the 'Test Story' document is shared using the 'Copy To' option in the following image.)



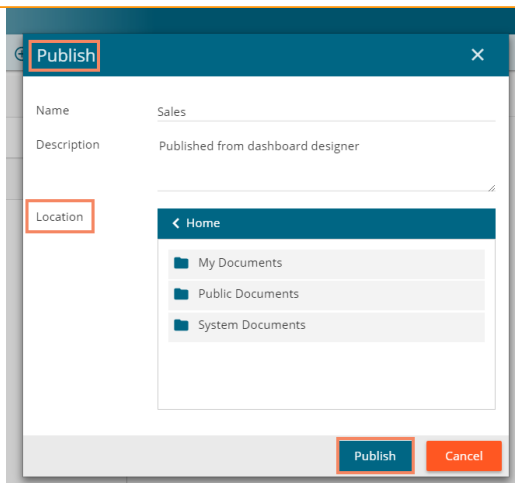
7.4. Published Dashboard on the BizViz Platform

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

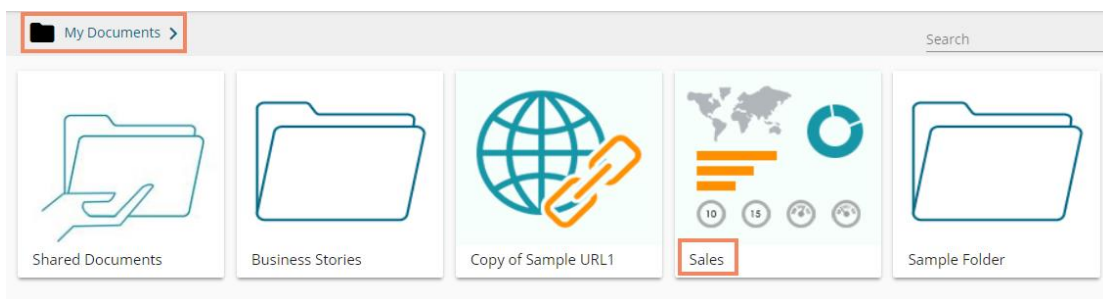
- i) Users need to navigate to the dashboard list provided in a workspace.
- ii) Access the 'Publish to Portal' option from the list of Dashboards.



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

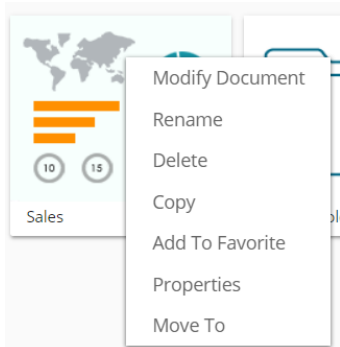


- iv) Users can access the published dashboard from the given location. E.g., location for the following dashboard is **'My Documents.'**



• **Options Assigned to a Published Dashboard**

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

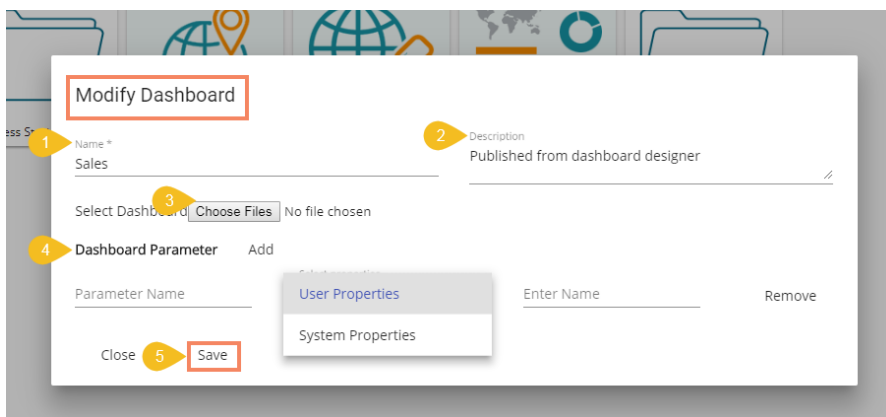


7.4.1. Modifying a Dashboard

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

- i) Select a dashboard.

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

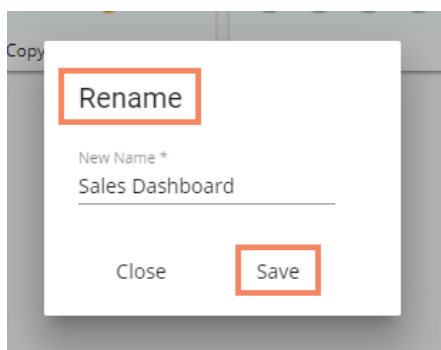


- vii) A message appears to assure that the required data got updated

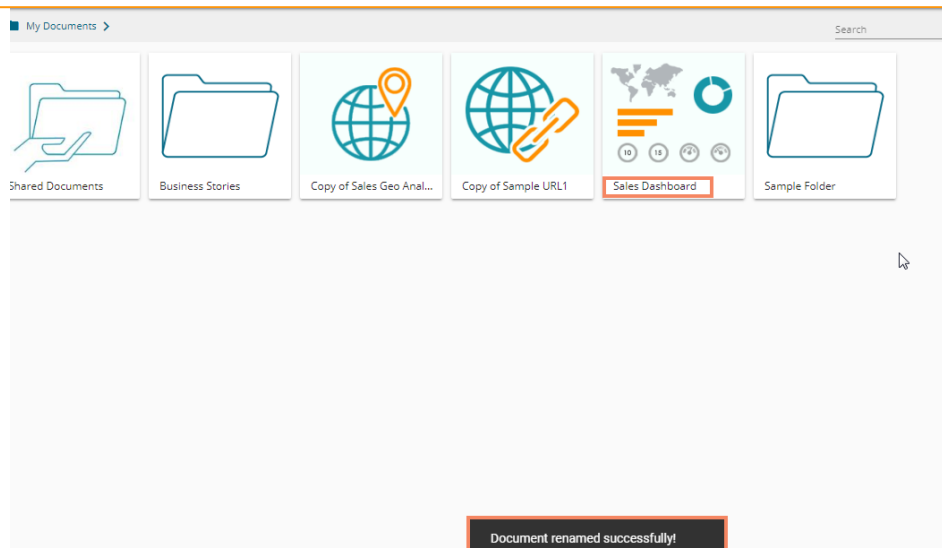
7.4.2. Renaming a Dashboard

Administrators can change the name of an existing dashboard

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



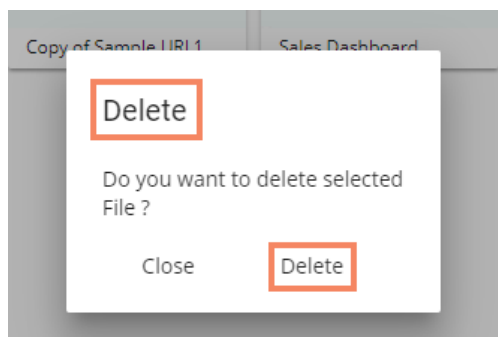
- vi) A message appears to assure the action.
- vii) The selected dashboard gets renamed



7.4.3. Deleting a Dashboard

Administrators can remove a dashboard by following the given steps:

- i) Select a dashboard.
- ii) Select the '**Delete**' option from the context menu.
- iii) A new window pops-up to confirm the deletion.
- iv) Click the '**Delete**' button.

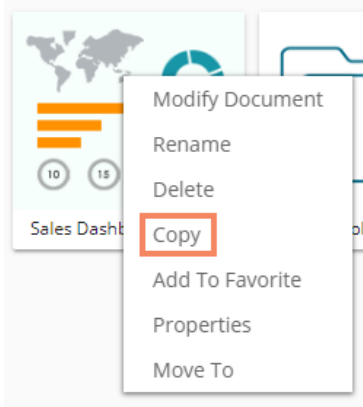


- v) The selected dashboard gets deleted

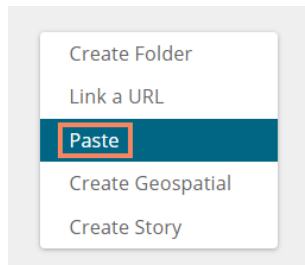
7.4.4. Copying and Moving a Dashboard

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

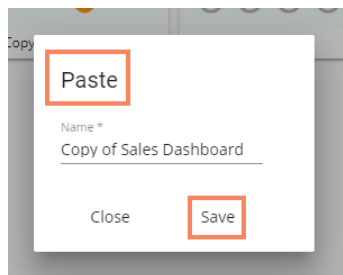
- i) Select a dashboard
- ii) Select the '**Copy**' option from the context menu



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



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



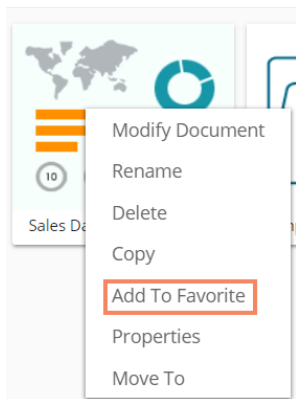
- x) The selected dashboard gets copied with a different name



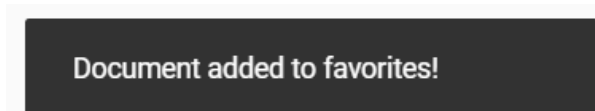
7.4.5. Adding/Removing a Dashboard to/from Favorites)

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

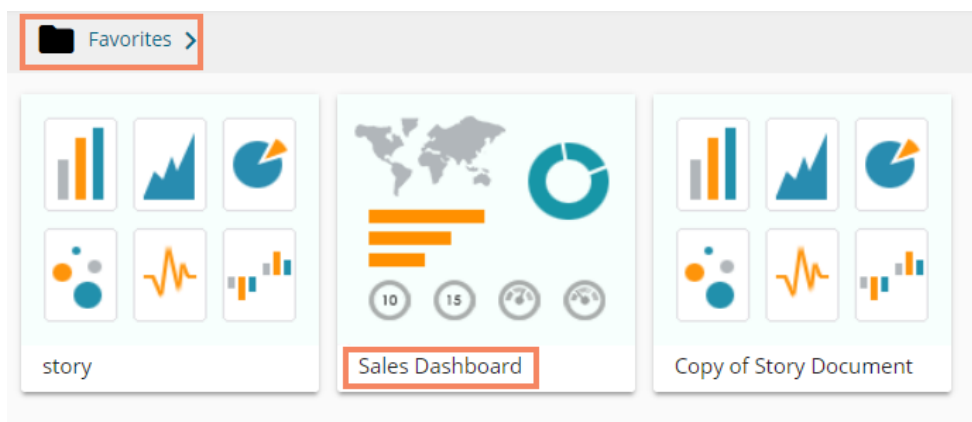
- i) Select a dashboard
- ii) Select the **'Add to Favorites'** option from the context menu



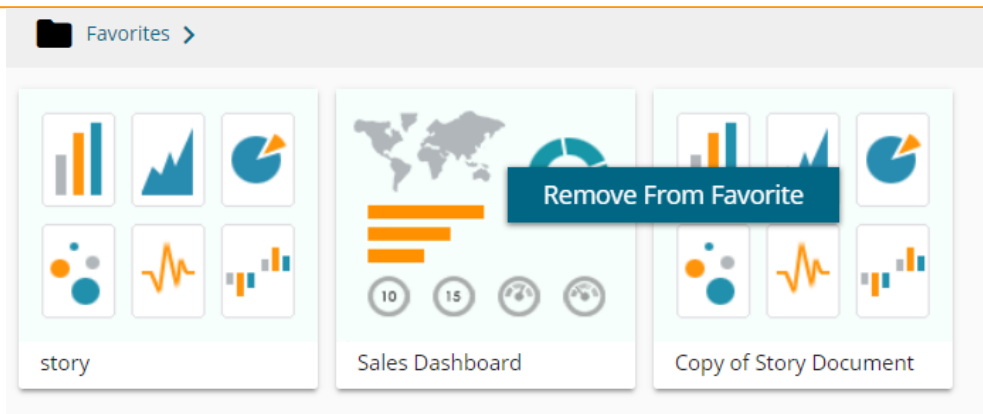
- iii) A pop-up window appears with a message, **"Document added to favorites!"**



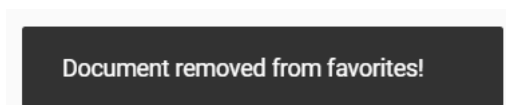
- iv) The selected dashboard gets added to the **'Favorites'** section



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



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

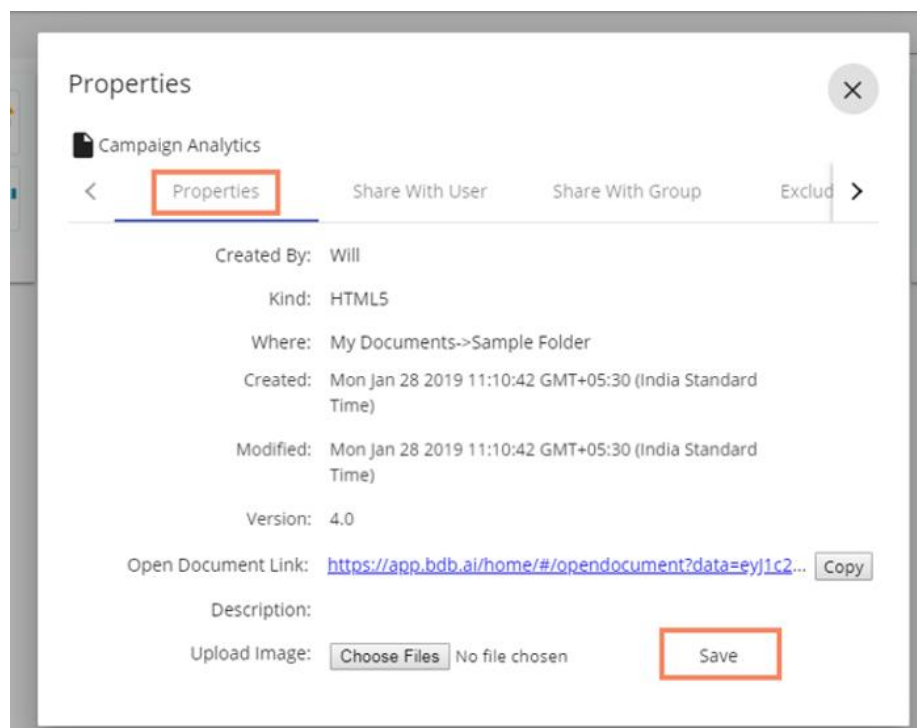


ix) The dashboard gets removed from the **‘Favorites’** section.

7.4.6. Properties

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

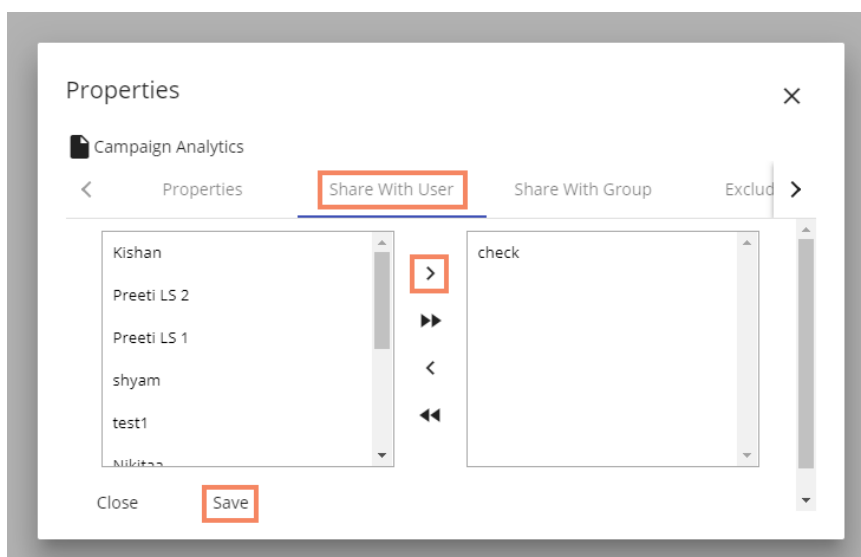
- i) Select a dashboard.
- ii) Select the **‘Properties’** option from the context menu
- iii) The Properties window appears with four options
 - a. **Properties:** Displays dashboard properties



Note: Users can copy the document URL link by clicking the ‘Copy’ option given in the Properties window.

b. Share With User: The dashboard gets shared with the selected user(s).

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



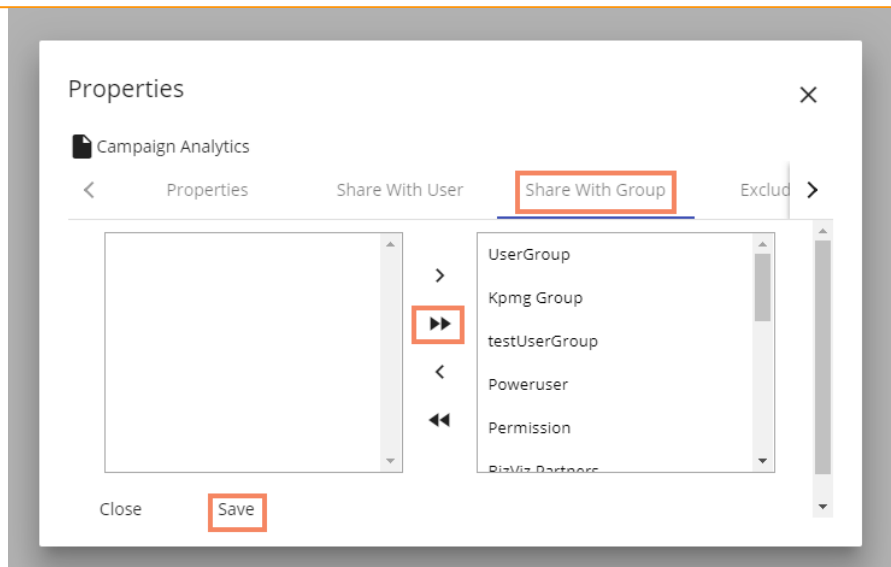
4. A success message appears stating that the document privilege is updated.

Document privilege updated successfully!

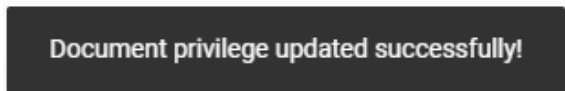
5. The dashboard gets shared with the selected user(s).

c. Share With Group: The dashboard gets shared with the selected group(s).

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



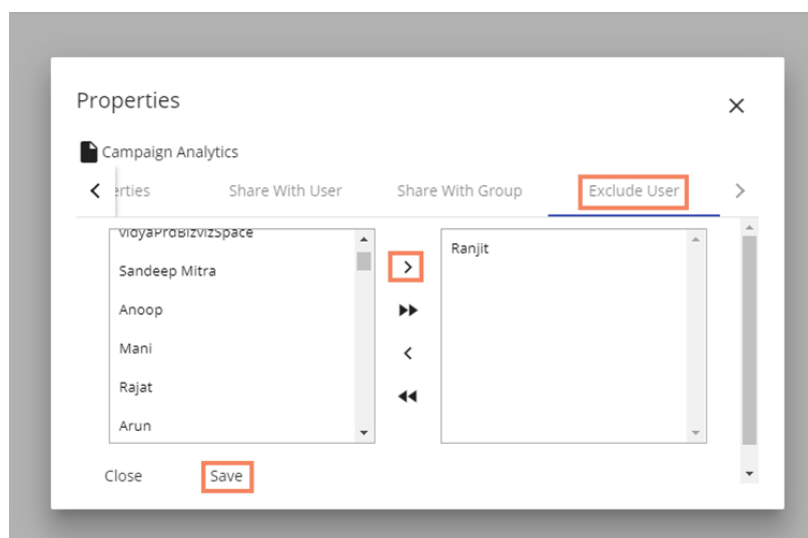
4. A success message appears stating that the document privilege is updated



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

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

- d. Exclude User:** The user gets excluded from the rights to access a dashboard.
 1. Select the **'Exclude User'** option on the Properties window
 2. Select a user or all the users and move to the space given on the right-side **(Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)**
 3. Click the **'Save'** option

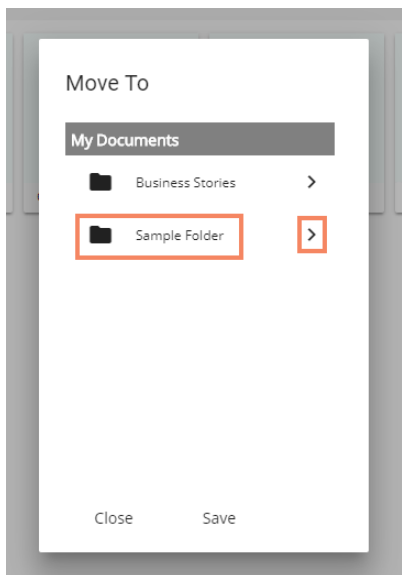


4. A success message appears, and the document privilege gets updated to exclude the selected user(s)

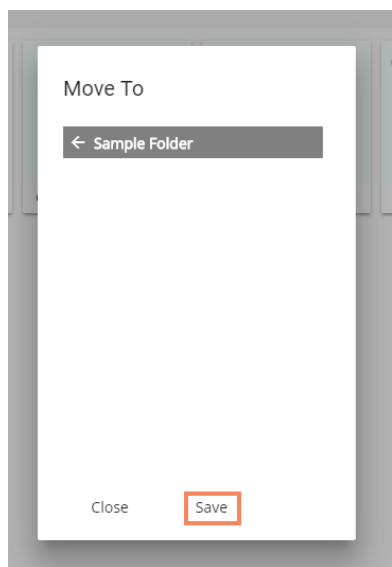
7.4.7. Moving a Dashboard

Administrators can move a dashboard from one folder or document space (E.g. 'My Documents') to another folder or document space.

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



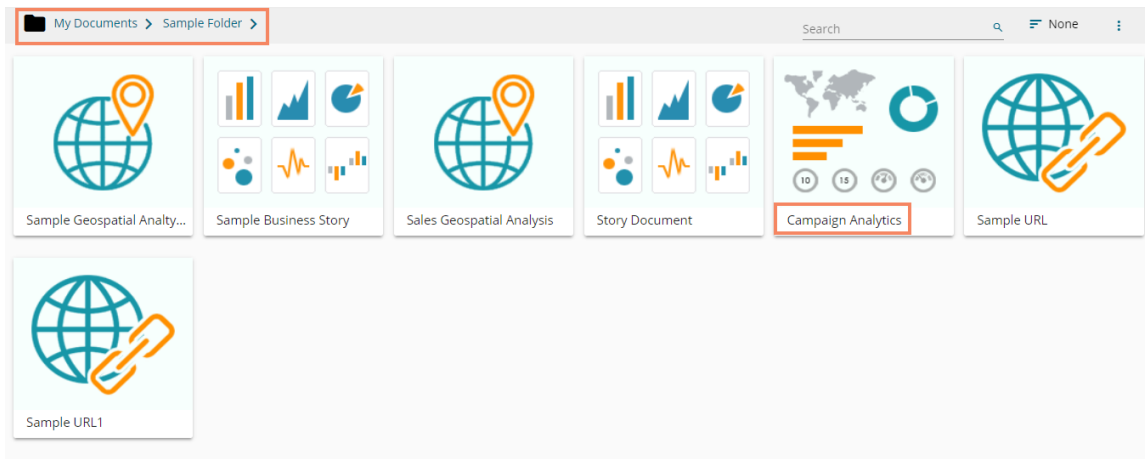
- vi) Users get redirected to the next screen.
- vii) Click the '**Save**' option.



- viii) A success message appears

Document moved successfully!

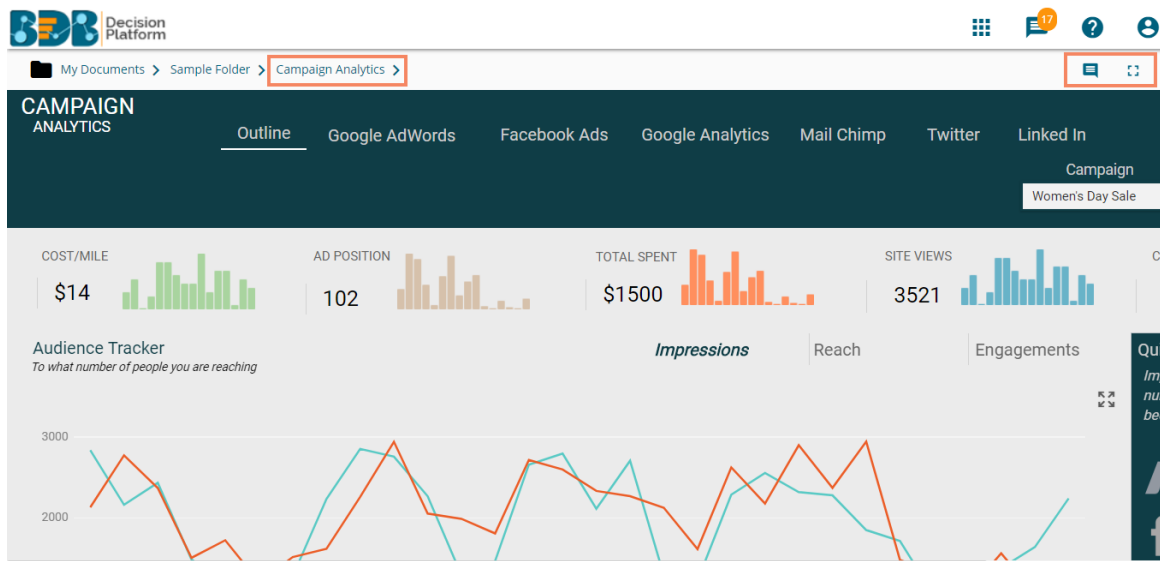
ix) The dashboard gets moved to the selected space



Note: To view a dashboard, use a click on the selected dashboard.

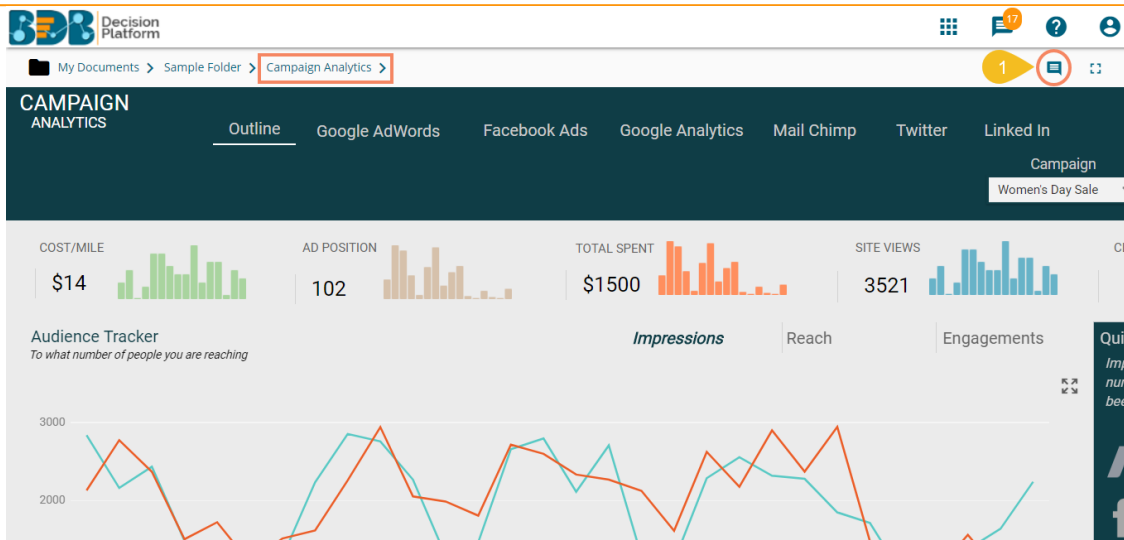
a. The following options are provided on a dashboard screen to facilitate users:

- **Comments:** Explain the dashboard or insert feedback comments.
- **Full Screen/ Reduce Size:** View the dashboard in full screen or reduce the dashboard screen size.

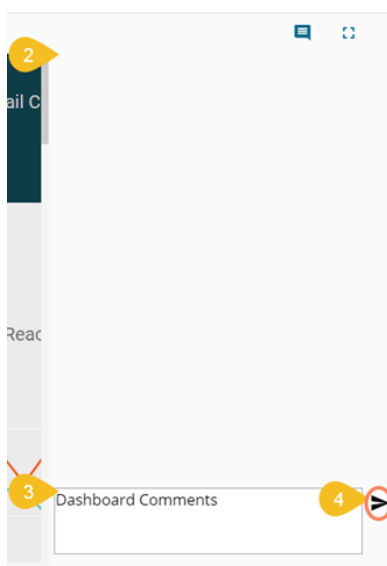


b. Steps to Insert a Comment

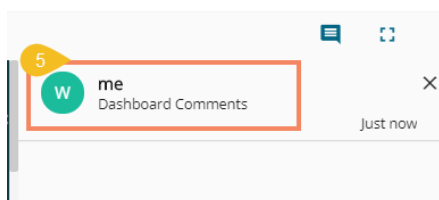
i) Click the '**Comments**' icon from the Dashboard Header panel.



- ii) A new window opens below with space to insert a message at the end of the window.
- iii) Type a comment in the given **'Message'** space.
- iv) Click the **'Send'** ➤ icon



- v) The entered comment gets displayed in the **'Comments'** window.




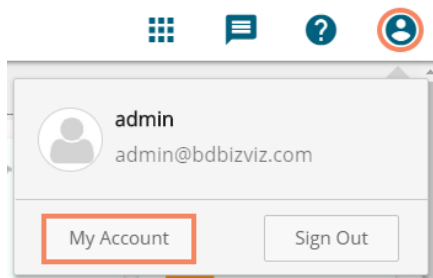
Note:

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

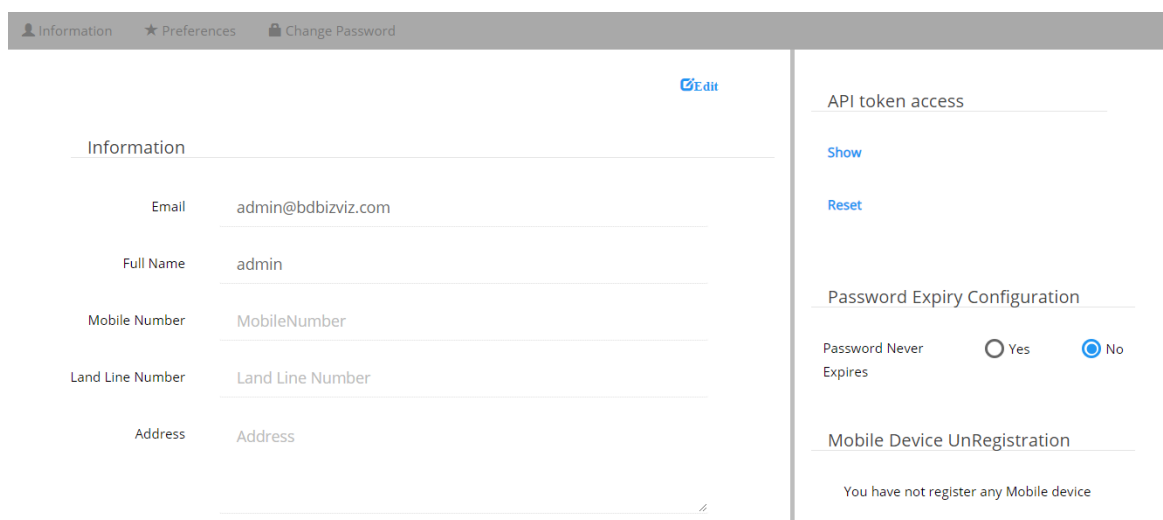
8. My Account

This section covers three options to manage settings for a user account.

- i) Navigate to the Platform homepage
- ii) Click the 'User'  icon
- iii) Details of the user display in a window
- iv) Click the 'My Account' option



- v) Users are directed to the following window:



Note: By clicking the user icon, the 'Information' tab opens by default.

8.1. Information

This module displays personal information about the user.

- i) Click 'Information' on the My Account menu row
- ii) Click the 'Edit' option
- iii) The following details display
 - Email (not editable)
 - Full Name
 - Mobile Number
 - Land Number
 - Address
- iv) The user can modify/change the required details except for the email and Click the 'Save' option

v) The user information gets saved

Note:

- a. It is mandatory to click the **'Edit'** option to enter/modify the user information.
Steps to edit the Information:
Click **'Edit'** -> Modify/ Change the details -> Click **'Save'**
- b. Users can modify the other profile information except for the Email by using the **'Information'** tab.

8.2. Preferences

The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

- i) Click **'Preferences'** on the My Account menu row
- ii) The **'Document Settings'** options appear
- iii) Use a radio button to select either of the choices out of: **'Folder'** or **'Document'**
- iv) As per the selected choice, a drop-down menu is launched
- v) Select a file or document from the respective drop-down menu
- vi) Select a theme from the drop-down menu
- vii) Click **'Save'**
- viii) A pop-up message appears to assure that the preferences have been updated

Information Preferences Change Password

Preferences

1 Document Settings

2 Select Type Folder Document Shared

3 Document --Select Any One--

4 Theme Settings

Select Theme Default Theme

5 Save

Note: Folders and documents are displayed to the users as per the set preferences by the administrator

8.3. Changing Password

The user can reset the password for his account using this segment.

- i) Click '**Change Password**' on the My Account menu row.
- ii) A new page opens.
- iii) Enter '**Old Password**,' '**New Password**,' and '**Confirm Password**' (the newly set password).
- iv) Click the '**Save**' option.

Information Preferences Change Password

Change Password

Old Password Old Password

New Password New Password

Confirm Password Confirm Password

Save

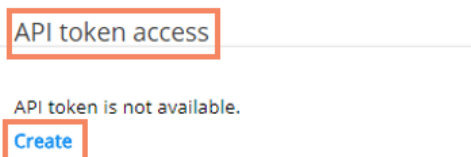
- v) The password gets changed.

8.4. Other Related Options

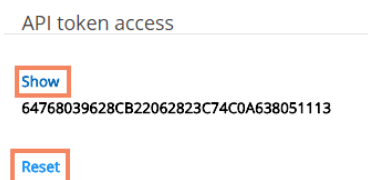
The API Token and Mobile Device access codes are displayed in the right pane of the '**My Account**' page. The Password Configuration can be accessed via the same page.

a. API Token

- It is an authentication token that is used to expose the document as an open document.
- API token can be accessed and reset using the '**My Account**' option.
 - a) Click the '**Create**' option

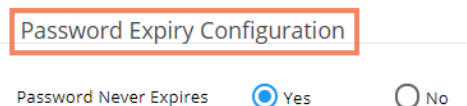


- b) A new API token is created
- c) The following details appear after creating an API token
 - a. Show: By clicking this option the API token is displayed
 - b. Reset: By clicking this option the API token gets reset



b. Password Expiry Configuration

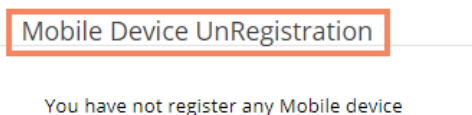
- Password expiry limit can be configured via this option.
- Users need to select either of the choices for the '**Password Never Expires**' option out of: '**Yes**' or '**No**' and click the '**Save**' option



Note: By selecting 'Yes' via the password expiry configuration section, the user's password will never get expired.

c. Mobile Device Deregistration

A user can access only one mobile app at a time, to configure another mobile device he must deregister the registered mobile app. The 'Mobile Device UnRegistration' option helps the user to deregister the registered mobile device.



Note: Users need to register the mobile device through the mobile app.

9. Securing Platform: Authentication

BizViz Platform is provided with some authentication features to keep it secure all the time.

9.1. Enterprise

Enterprise authentication is the default authentication method for the BizViz platform; it is automatically enabled when you first install the system - it cannot be disabled. The BizViz platform maintains user and group-specific information within its database while adding or managing users and groups. Use the system default Enterprise authentication if you prefer to create distinct accounts and groups for use with the BizViz platform, or if you have not already set up a hierarchy of users and groups in a third-party directory server. You do not have to configure or enable Enterprise authentication. However, users can opt for another authentication option to meet their organization's security requirements.

9.2. Windows AD

The Windows AD security enables you to map user accounts and groups from your AD 2008 user database to the BizViz platform. It also allows the system to verify all logged on requests that specify AD Authentication. Users are authenticated against the AD user database and have their membership in a mapped AD group verified before the BizViz platform grants them an active session. You can use the plug-in to configure updates for the imported AD groups.

9.3. Clarity


Security in CA Clarity PPM has two aspects: i) securing the application and, ii) securing its data. The security mechanism and control are the same for both.

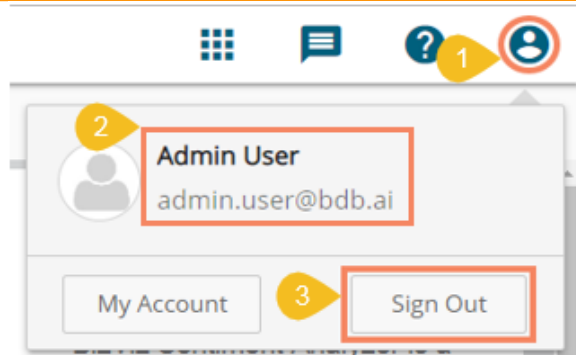
- a. **Securing the Application:** It verifies that the correct users have access to the appropriate application functionality. This type of clarity security controls user access and capabilities. **E.g.,** An administrator gets more rights than an end user.
- b. **Securing the Application Data:** It verifies that resources have access only to the assigned data. **E.g.,** everybody should be able to see the platform page, but with their assigned projects and functionalities.

Note: Users can change the authentication options can through the administration module.

10. Signing Out

The following steps describe how to log out from the BizViz Platform.

- i) Click the 'User' icon  on the Platform home page.
- ii) The user details appear.
- iii) Click the 'Sign Out' option.



iv) The user can successfully sign out from the **BDB Platform**.

Note: Clicking on '**Sign Out**' will redirect the user back to the **Log in** page of the BDB Platform.