

Admin Guide

Platform R-4.3



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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 |
| BDB Platform 4.2 | March 25 th , 2019 | Updated Document |
| BDB Platform 4.3 | April 24 th , 2019 | Updated Document |

1.2. Overview

This guide covers:

- Configuration details for the Big Data BizViz Platform and its Plugins
- Administrative Tasks and Features
- Data Center related Tasks and Features
- Steps to create and manage individual User(s) and User Group(s)
- Create and manage various documents

1.3. Target Audience

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

2. Introduction

2.1. Introducing the BDB Platform

BDB offers a unique BI platform that can give users better knowledge and insights into their business to make informed decisions. BDB Decision Platform has multiple Big Data connectors that make 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:

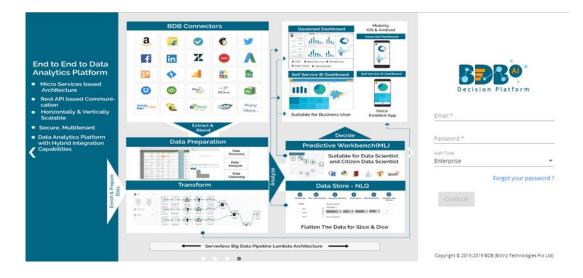
| Mozilla Firefox/ Firefox ESR | Latest Version |
|------------------------------|--|
| Microsoft Internet Explorer | 11 |
| Microsoft Edge | Latest Version |
| Apple Safari | 10 |
| Google Chrome | Latest Version (recommended web browser) |

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 log in.
- 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.

| Decisi | on Platform |
|-------------------------|------------------------|
| Email * | |
| Password * | |
| Auth Type Enterprise | - |
| | Forgot your password ? |
| Continue | |

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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 the 'Continue' option.

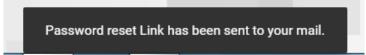






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vi) Users may be redirected to select a space in case of multiple spaces under one server link(They need to select a space and click the 'Continue' option once again). If users do not have multiple spaces then, a message appears to notify the user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



- 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.



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

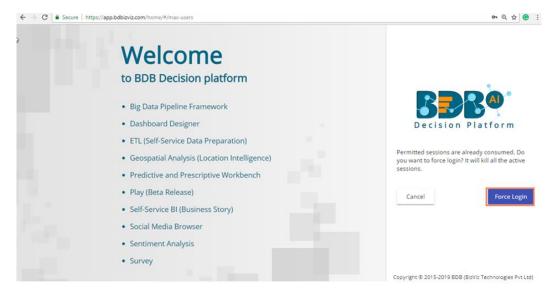
3.1.2. Force Login

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 gets 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

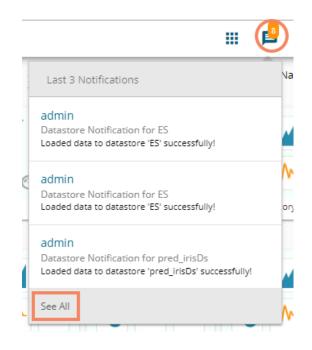
The Notification feature is a way to send and receive messages between people and from processes to people.

By default, Inbox and Trash folders are provided.

- i) Navigate to the Platform homepage.
- ii) Click the 'Notification' 😤 option.
- iii) A window opens with the latest notifications.

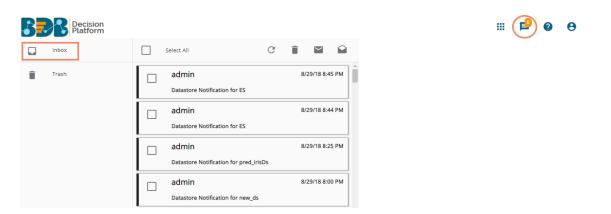


iv) Click the 'See All' option.

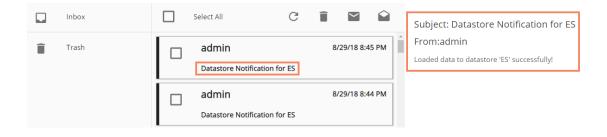


v) Users get redirected to the notification 'Inbox' page (by default).

(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.

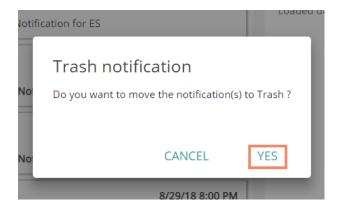




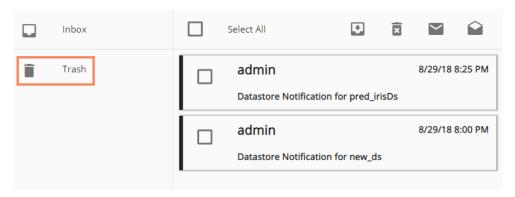
Icons provided on the inbox window:

| Icons | Name | Task Assigned |
|---------------------|---------|--|
| | Trash | Displays messages in a list of all the |
| | | deleted messages |
| C | Refresh | Receives the latest messages |
| Î | Trash | Moves the selected messages into the |
| - | Message | Trash folder |
| $\mathbf{\langle }$ | Unread | Marks messages status as 'unread' |
| | Read | Marks messages status as ' read ' |

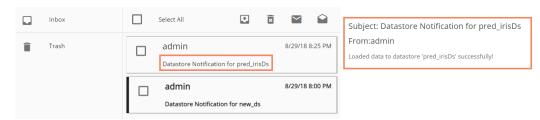
- vii) Click the '**Trash**' icon from the header panel of the notification inbox.
- viii) A message window appears to confirm the action of moving the selected notification to Trash.
- ix) Click the '**YES**' option to move the notification(s) to Trash.



x) Click the 'Trash' folder 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 |
|--------------|---------|---|
| Î | Trash | Displays messages in a list of all the deleted messages |
| Move to | | Moves the selected messages to the inbox |
| _ | Inbox | |
| × | Delete | Removes the selected messages permanently |
| - | Forever | |
| $\mathbf{>}$ | Unread | Marks messages status as 'unread' |
| | Read | Marks messages status as ' read ' |

Note: The 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 homepage.
- 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 H | elp |
|-------------|-------------------------|---|
| Version 4.3 | Release 4.3 | 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 **Less** icon:

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

| Decision Platform | | | | | III 🖻 🕐 | θ |
|----------------------|----------------|----------------------|---------------|-----------|------------------|---|
| My Documents > | | | | Search | o, 📻 Date | |
| My Documents | | | | The State | | |
| Public Documents | | | | 57 O | | 7 |
| Shared Documents | •ia 사 🔐 | | | | | |
| Favorites | | | | 0 0 4 | | J |
| Shared Documents | Business Story | Published Dashboards | Sample Folder | Sales | Business Stories | |

My Documents

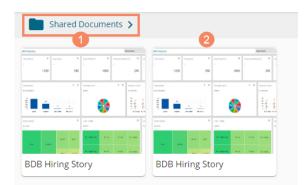
- o 'My Documents' lists all the documents created by the user or assigned to the user
- The documents are displayed as thumbnails

Public Documents

- o The 'Public Documents' folder is available to all users
- Users can view documents shared by others

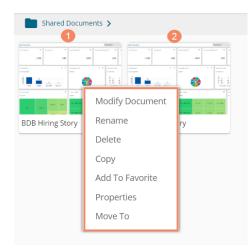
• Shared Documents

- 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 the '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.

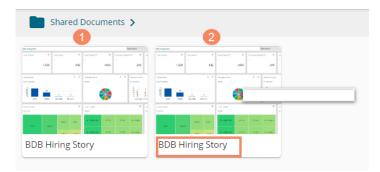




The Dashboard shared using the '**Copy To**' option gets all the permissions to modify it.



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



• Favorites

- o 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)
- The documents added to Favorites do not get any permission to modify them.

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.

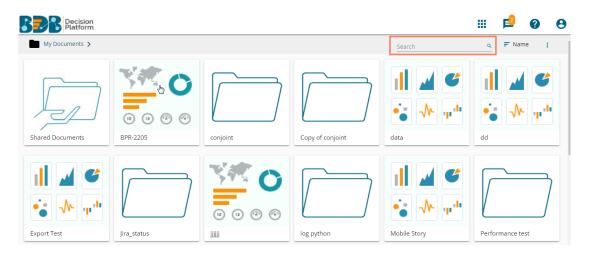
| Decision Platform | | | |
|----------------------|---------------|---------------|-------------|
| Public Documents > | | | |
| | | | |
| Samples | Public Folder | Sample Folder | BDB SAMPLES |



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:

| Decision Platform | III 🖻 🛛 🖯 |
|---|----------------|
| 3. Search Result | 2 () = None ; |
| | |
| Sample Folder Sample SubFolder Sample SubFolder | |

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)

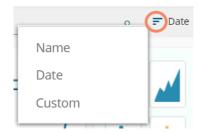
3. Custom

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



| My Documents > | | | | Search | o ► Name : |
|------------------|-------------------------|----------|------------------|----------------|--|
| Shared Documents | 10 (15 (20) BPR-2205 | conjoint | Copy of conjoint | data | Image: |
| • ▲ ● • • • | | | | ■ ▲ ■ • • • | |
| Export Test | Jira_status | | log python | Mobile Story | Performance test |

- 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.

| My Documents 🗲 | | | | Search | o, ₹ Date ; |
|------------------|---------------|--------------------------------|--------------------|-------------------|-------------------|
| | | ili ∡ ⊄ ** ∿ ₽ [±] | ili ∡ ⊄ ** ∿ ₽* | | II ▲ ⊄ ** ∿ ₽* |
| Shared Documents | Hide and Show | Test Story | Sample Story | Sample Folder 4.2 | Business Story |

- 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.



| Custom | n Order | | | | |
|-------------------------|--|---|---|------------|--------------|
| | Hide and Show Published from dashboard designer | ^ | ~ | ↑ | \checkmark |
| ill a ∉ ∿ * | Test Story | ^ | ~ | \uparrow | \checkmark |
| ill ⊿ ≪ ∿ √* | Sample Story | ^ | ~ | \uparrow | \checkmark |
| | Sample Folder 4.2 | ^ | ~ | \uparrow | \checkmark |
| di ⊿ ⊄ ≪ ♦ ₽* | Business Story | ^ | ~ | \uparrow | \checkmark |
| Close | Save | | | | |

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.

| a 두 Date | 0 |
|---------------|---|
| Create Folder | |
| Link a URL | |
| Create Story | E |
| | |

4. Administration

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

4.1. Accessing the Administration Module

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





- v) Users get directed to the 'Admin Module' page.
- vi) Click the '**Menu**' \equiv icon.

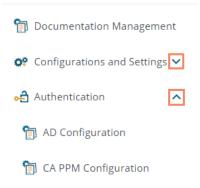
| Admin Module | | |
|--------------|--|--|
| | Administration Module can be used to con | figure and manage your platform |
| | | |
| | | Get a record of significant events on platform or plugin applications. |
| | | Control Data sharing and document migration. |
| | · | Configure and modify various settings for platform modules. |
| | | Securely access your data and system application all the time. |
| | | Empower your work efficiency with modifiable authentication settings. |
| | | |

vii) A panel appears displays various administration options on the left side of the page.

| BER Decision Platform | | | | | | | | | | | | ₽ | ? | θ |
|--------------------------|------------|---|--|--------|-------------|------------------------------|----------|------------|-----------|-------------|-------|----------|-----------|----------|
| 🛅 Documentation Man | agement | | | | | | | | | | | | | |
| OP Configurations and S | Settings 🗸 | | | | | | | | | | | | | |
| 👌 Authentication | ~ | 1 | | • User | ers can acc | ages selecte cess a drop- | -down me | nu by clio | king next | to the last | adde | d langu | age. | |
| Session | | | | | | n select moi e' option to | | | | | the L | anguag | e Setting | gs page. |
| 📆 Schedule Monitoring | ; | | | | | | | | | | | | | |
| 🝺 Server Monitoring | | | | | | | | | | | | | | |
| 1 Audit Trial | ~ | | | | | | | | | | | | | |
| 1 Encryption | | | | | | | | | | | | | | |
| 👌 Language | ~ | | | | | | | | | | | | Save | 2 |
| 1 Migration | ~ | | | | | | | | | | | | | _ |
| 🛅 License | | | | | | | | | | | | | | |



viii) Click the drop-down sign \checkmark provided next to the concerned admin option to display the subcategories for the same. By clicking the drop-down sign, it gets changed into the upward sign \land 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.

| 1 | Documentation Managemen | t |
|------------------|-----------------------------|---|
| 09 | Configurations and Settings | ~ |
| <mark>₀</mark> € | Authentication | ^ |
| î | AD Configuration | |
| î | CA PPM Configuration | |

- ii) Users get directed to the 'Document Management' window.
- iii) Select a user from the 'Users' list.
- iv) A list of documents created by that user displays.

| Document Management | | Enterprise |
|---------------------|----------------------|--------------------|
| Search | Q Selected User:Will | Showing 3 out of 3 |
| Showing 24 out of 2 | 4 Search Documents | ۹۹ |
| Avin Jain | 4 sample | ■ < □ |
| 💄 Prakash | BDB Hiring Story | ■ < 0 |
| L Will | BDB Hiring Story | |



| Icon | Name | Description |
|------|--------|--|
| Î | Delete | Removes the selected document from the list |
| < | Share | Redirects the users to share the selected document with another user(s) or |
| | | group(s). The users can also share the document with the excluded users |
| | Сору | Redirects to Copy the selected document to another user(s) |

Note:

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

Click the '**Share**' icon -> the Share Documents window opens -> Search and select Users/Group(s)/Excluded User(s) -> Click the 'Save' option.

| Share Documents | | × |
|--|--------|------|
| Users Search User | | |
| Group Search Group | | |
| ABCGroup 😣 | | |
| Excluded Search Exclude Users newseven | | |
| | Cancel | Save |

d. Steps to Copy a document

Click the 'Copy' icon -> the Copy Document window opens -> search and select the user(s) -> Click the 'Save' option

| ie | Copy Documents Search User Prakash S priya S | | × | ^ |
|----|--|--------|------|---|
| L | BDB Hiring Story | Cancel | Save | Ţ |

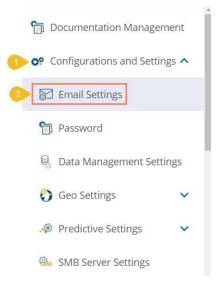


4.2.2. Configurations and Settings

This section covers configuration details for various platform plugins.

4.2.2.1. Email Settings

- i) Click 'Configuration and Settings' from the Admin options panel.
- ii) Click the 'Email Settings' option from the list of configuration options.



- iii) The 'Email Server Settings' window appears with the following fields:
 - Email Host: SMTP host address
 - Email Port: Port number of SMTP
 - Encryption Type: Select an encryption type from the drop-down menu
 - Email From: Enter authenticated credentials of the sender
 - Email Password: Provide the password
 - Email User Name: Name that gets displayed to the receivers
- iv) Click the '**Update Settings**' 🗟 icon to update the configured email information.

| Admin Module | | |
|------------------------|-------------------|---|
| ail Server Settings | | |
| Email Host * | | |
| mail.smtp2go.com | | |
| Email Port * | Encryption Type * | |
| 465 | SSL | * |
| Email From * | | |
| projectadmin@bdb.ai | | |
| Email Password * | | |
| | | |
| Email User Name * | | |
| bdbmail | | |
| ✓ Disable EmailSending | Send TestMail | |
| Domain Selection | | |
| All O Selected Domains | | |

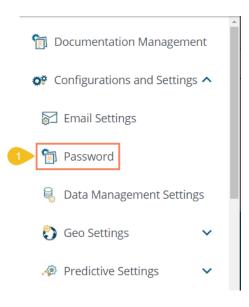
v) Click the '**Refresh**' $^{\bigcirc}$ icon to erase the entered configuration details.



4.2.2.2. Password

The administrator can configure the account password information using this option.

i) Click the 'Password' option from the list of configuration and Settings options.



- ii) The 'Password Settings' page appears.
- iii) Provide the following information:
 - Password Expiry (Days): 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.)
- iv) Click the '**Update Password**' 🔁 icon to save the entered password information.

| ≡ | Admin Module | 4 | |
|-------|---|---|---|
| 2 Pas | sword Settings | C | 8 |
| 3 | Password Information | ^ | |
| | Password Expiry * 0 | | |
| | Password Strength * | | |
| | Password Reuse * 3 | | |
| | Login Failures(before account is locked) * 6 | | |
| - | | | - |

v) Click the '**Refresh'** $^{\bigcirc}$ icon to erase the entered password information.



| = | Admin Module | | |
|------|--|---|--|
| issv | vord Settings | C | |
| | | | |
| | Password Information | ^ | |
| | Password Expiry * | | |
| | Password Strength * | | |
| | Password Reuse * | | |
| | Login Failures(before account is locked) * | | |
| _ | | | |

Note:

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

4.2.2.3. Data Management Settings

This option allows the users to configure the required server settings for Data Management.

- i) Click the 'Data Management Settings' option from the list of Configuration and Settings.
- ii) The 'Data Management Server Settings' page opens.
- iii) The users can set the Max Fetch Size for the listed data sources.
- iv) Click the 'Update Settings' icon to save the entered Max Fetch Size for data.

| Management Server Settings | | C |
|--------------------------------------|------------------------------------|---|
| Data Management Server Configuration | | ^ |
| MYSQL(Max Fetch Size) * | MSSQL(Max Fetch Size) * | |
| 30000 | 30000 | |
| Oracle(Max Fetch Size) * | Hive(Max Fetch Size) * | |
| 5000 | 5000 | |
| Hana(Max Fetch Size) * | OData(Max Fetch Size) * | |
| 5000 | 5000 | |
| Sparksql(Max Fetch Size) * | Cassandra(Max Fetch Size) * | |
| 5000 | 5000 | |
| Red Shift(Max Fetch Size) * | Cassandra Native(Max Fetch Size) * | |
| 5000 | 5000 | |

v) Click the '**Refresh'** icon to erase the entered information.

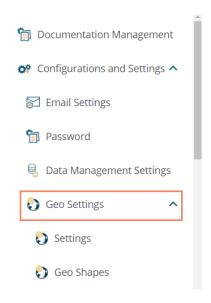
| B | B AI |
|---|-------------|
| | |

| Admin Module | | |
|--------------------------------------|------------------------------------|---|
| a Management Server Settings | | 0 |
| Data Management Server Configuration | | ^ |
| MYSQL(Max Fetch Size) * | MSSQL(Max Fetch Size) * | |
| Oracle(Max Fetch Size) * | Hive(Max Fetch Size) * | |
| Hana(Max Fetch Size) * | OData(Max Fetch Size) * | |
| Sparksql(Max Fetch Size) * | Cassandra(Max Fetch Size) * | |
| Red Shift(Max Fetch Size) * | Cassandra Native(Max Fetch Size) * | |

4.2.2.4. Geo Settings

This section explains the steps to configure the Geospatial plugin. The option provides two types of Map settings.

- i) Click the 'Geo Settings' from the Configuration and Settings admin option.
- ii) The following option appears:
 - a. Settings
 - b. Geo Shapes



• Settings

- a. Click the 'Settings' option.
- b. The 'Geo Settings' page opens displaying the 'Google Settings' and 'Leaflet Settings' options
- c. Fill in the following information for the 'Google Map':
 - i. **Map Key**: Enter the map key that has been provided by Google (To be purchased from Google).
 - ii. Click the 'Save' option.
- d. Fill in the following information for the 'Leaflet Settings':
 - i. Map Url: URL of the selected map (provided by the open-source vendors)



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

| Admin Mo | dule | |
|--------------|--|------------|
| Geo Settings | | |
| | Google Settings Map Key * AlzaSyADrD2CvOhA9Yet5yskKOtmwpV2000iXBU | ^ |
| | | Clear |
| | Leaflet Settings Map Url * http://(s).tile.osm.org/(z)/(x)/(y).png | ^ |
| | Attribution * © OpenStreetMap contributors | Clear Save |

e. Click the 'Clear' option to erase the information.

| Admin Mo | Jule | |
|--------------|------------------|------------|
| Geo Settings | | |
| | Google Settings | ^ |
| | Map Key * | |
| | | Clear Save |
| | | |
| | Leaflet Settings | ^ |
| | Map Url * | |
| | Attribution * | |
| | | Clear Save |

- Uploading a Geo Shape File
 - a. Click the 'Geo Shapes' option from the Geo Settings configuration option.
 - b. The 'Geo Shapes' page opens.
 - c. Click the 'Create New Geo Shape' + icon from the Geo Shapes page.

| Admin Module | | + Polygon | |
|--------------|-----------------|--------------------------------|---|
| earch | | | ۹ |
| Id | UserName | Actions | |
| 10059776 | USA Country | i i | |
| 10059777 | USA State Level | i | |
| 10059778 | USA States FM | Î | |
| 293470208 | USA Geo Shape | i | |
| | Items | oer page: 10 ▼ 1-4 of 4 < < > | > |



- d. The 'Create New Geo Shapes' page opens.
- e. Enter the following information:
 - i. Shape Name: Title of the geo shape (map)
 - ii. Geometry Type: Select anyone Geometry type from the drop-down menu (out of 'Polygon' or 'Line')
 - iii. Area Type: Select an area-type using the drop-down menu
 - iv. **Choose File**: Browse a shapefile from the system and upload (Only '**json** 'and '**js**' formats are supported)
- f. Click **'Save'** icon to save the inserted details.

| Create New Geo Shapes | | → 5 (5) |
|--|-------------|-----------------|
| Create Geo Shapes | | ^ |
| Shape Name * | | |
| Geometry Type * Choose File No file chosen | Area Type * | |

- g. A message will pop-up to assure that the file has been uploaded.
- h. All the uploaded Geo Shape files get displayed in the list format.

Note:

a. Select a Geometry Type using the drop-down menu.

| i. Polygon i. Line | | |
|-----------------------|-----------------|---|
| Admin Module | | |
| Geo Shapes | | - Polygon Line |
| Id | UserName | Actions |
| 10059776 | USA Country | T |
| 10059777 | USA State Level | ī |
| 10059778 | USA States FM | Ŧ |
| 293470208 | USA Geo Shape | ĩ |
| | | ltems per page: 10 ▼ 1 - 4 of 4 < < >> |

b. Use the 'Search' space to search a Geo Shapefile from the displayed list.

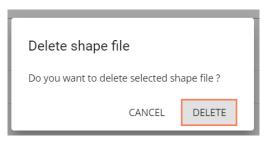


| = | Admin Module | | | | | |
|-----|--------------|---------------|---------------------------------|----------------------------|----|---|
| Geo | Shapes | | | + Polygon | | • |
| | 29 | | | | | |
| | Id | UserName | Actions | | | |
| | 293470208 | USA Geo Shape | Î | | | |
| | | | ltems per page: 10 💌 1 - 1 of 1 | $ \langle \rangle \rangle$ | >1 | |

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

| arch | | | C |
|-----------|-----------------|---------|---|
| Id | UserName | Actions | |
| 10059776 | USA Country | | |
| 10059777 | USA State Level | Î | |
| 10059778 | USA States FM | Î | |
| 293470208 | USA Geo Shape | i i | |

- iii. A new window opens to confirm the deletion.
- iv. Select the 'DELETE' option.



v. The selected Geo Shapefile gets removed from the list.

4.2.2.5. 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. Various Predictive Settings options display



| 🍕 Data Management Settings | • |
|----------------------------|---|
| Geo Settings | ł |
| Predictive Settings | 1 |
| 🧔 R Server | l |
| 🛷 Spark Server | l |
| 🛷 Python Server | l |
| 🛷 Process Queue | |
| 🐝 SMB Server Settings | |

• Steps to Create a New R-Server

- a. Navigate to the 'Predictive Settings' admin option
- b. Click the '**R Server**' option
- c. R Server page under Predictive Settings opens with the details of the existing R Servers

| ≡ | Admin Module | | | | | | | |
|----------|-----------------------|-------|----------|-----------|--------|---|------|------|
| Predicti | ve Settings: R Server | | | | | + | Test | Save |
| | Server Name | Cores | Workflow | Scheduler | Action | | | |
| | 34.209.28.33 | 1 | 0 | 0 | / = | | | |

- d. Click the 'Create New Server' + icon
- e. A scrollable window opens asking Basic Information for new R Server
- 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. Provide HTTP URL for R-Bokeh: Provide R Visualization URL
 - vii. Elastic Search Port: Provide an elastic search port number
 - viii. R Visualization URL: Provide HTTP URL for R-Bokeh
 - ix. Enable Parallel Processing: Avail this option by using the enable/disable button
 - x. Set as Default: Select this option by using a check-mark in the box
- g. Click the 'Test' option to verify the R-Server connection.

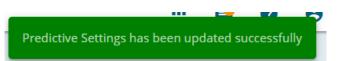


| asic Information | | ^ |
|---|-----------------------------|---------------------------------------|
| Address * | Port * | |
| | | Can contain only numbers. Maximum 0/5 |
| ser Name * | password * | |
| Server Name * | Elastic Search Port 9200 | |
| ovide HTTP URL for R-Bokeh * ttps:// <ip:port domainname="" rviz=""></ip:port> | | |
| Enable Parallel Processing | | |
| imberOfCores * | | |
| Enable Parallel Processing | | |

- h. A message appears to assure about the connection.
- i. The 'Save' option gets enabled
- j. Click the 'Save' option to save the verified R-server configuration details.

| | | E! (| 2 | 3 |
|---------------------------|----------|-------------|------|---|
| Successfully connected to | o R Serv | ver | | |
| | _ | | | |
| | ← | Test | Save | |
| | | | | |

k. A message appears to ensure the successful updates in Predictive Settings



I. The newly created R-Server gets added to the R-Server list displayed under '**R-Server**' window

| Predictiv | e Settings: R Server | | | | | | + | Test | Save |
|-----------|----------------------|-------|----------|-----------|--------|---|---|------|------|
| | Server Name | Cores | Workflow | Scheduler | Action | | | | |
| | 34.209.28.33 | 1 | 0 | 0 | | | | | |
| | R server | 1 | ۲ | ۲ | 1 | î | | | |

Note:

- a. Users can click '**Edit**' icon from the R Servers window to modify the R Server settings.
- b. Users can click the '**Save**' from the R Servers window to save the edited R Server settings.
- c. The Administrator can configure multiple R-Servers, but the process execution happens on a single server at a time.

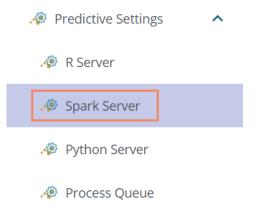
Click the '**Delete**'^I icon to remove the selected server configuration details from the list.



• 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. Click the 'Spark Server' option.



- c. The Spark Server page under the Predictive Settings opens.
- d. Click 'Create New Server' + icon

| 🗮 Admin Module | | | |
|--------------------------------|---------|--------|-------------|
| Predictive Settings: Spark Set | rver | | + Test Save |
| | | | |
| Server Name | Default | Action | |

- e. A new window 'Add Spark Server Configuration' opens
- f. Provide the following information:
 - i. Host: Host address of the Spark server
 - ii. Port: Spark server's port number
 - iii. User Name: Enter a username to log in to the Spark server
 - iv. Password: Enter the password for the above username
 - v. Spark Server Name: Provide Spark Server Address
 - vi. Jetty Confirmation URL: Provide Jetty confirmation URL link
 - vii. Application: Provide the application name
 - viii. Spark Server Protocol: Select a protocol option by using the radio option
- g. Click the 'Test' option to verify the connection.

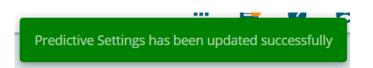
| Spark Server | | ← Test |
|---------------------------|---------------------|--------|
| Basic Information | | ^ |
| Host * | | |
| Port * | User Name * | |
| Password * | Spark Server Name * | |
| Jetty Configuartion Url * | Application * | |



- ix. A message appears to assure about the connection.
- x. The 'Save' option gets enabled.
- xi. Click the 'Save' option to save the verified Spark server configuration details.

| - | Spark server is successfully | connect | ed. | 2 |
|---|--------------------------------|---------|------|------|
| | - Spark server is successivily | | | |
| | | ← | Test | Save |

xii. A confirmation message appears to ensure the successful updates in the Predictive server settings.



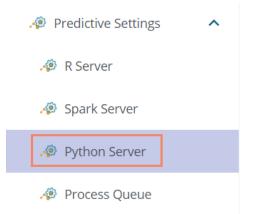
xiii. The newly configured Spark server gets added to the 'Spark Server' window.

| Admin Module | | | |
|-----------------------------------|---------|--------|-------------|
| Predictive Settings: Spark Server | | | + Test Save |
| Server Name | Default | Action | |
| 172.31.41.103 | 0 | Z . 1 | |
| Spark Server | ۲ | / 1 | |

• 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. Click the 'Python Server' option.



c. The Python Server page under Predictive Settings opens.



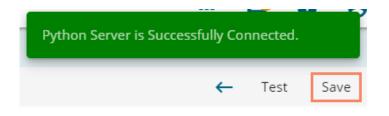
d. Click '**Create New Server**' ticon to add a new Spark server confirmation.

| Pre | dictive Settings: Python Server | | | + Test Save |
|-----|---------------------------------|---------|--------|-------------|
| | Server Name | Default | Action | |
| | pythonServer | ۲ | × + | |

- e. The 'Create 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. Python Server Protocol: Select a protocol option by using the radio option
- g. Click the 'Test' option to verify the connection.

| Basic Information | | / |
|---------------------------------|---------------------------------------|---|
| Host * | Port * | |
| User Name * | Password * | |
| Python Server Name * | Elastic Search Port * 9200 | |
| WebUrl * | Visualization URL * | |
| Tensorboard Visualization Url * | Python Server Protocol 💿 HTTP 🔿 HTTPS | |

- h. A message will pop-up to assure about the connection.
- i. The 'Save' option gets enabled.
- j. Click the 'Save' option to save the verified Python server information.



k. A success message appears to ensure that the predictive settings got updated.

Predictive Settings has been updated successfully



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

| Predictive Settin | gs: Python Server | | | + Test Save |
|-------------------|-------------------|---------|--------|-------------|
| Server Na | ame | Default | Action | |
| pythonSe | rver | ۲ | 2.1 | |
| Python Se | erver | | 2.1 | |

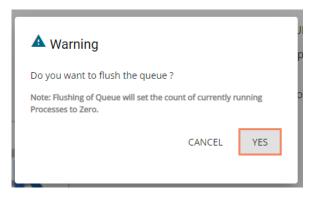
Note:

- a. Click 'Edit' Z icon to modify an existing python server configuration
- b. Click '**Delete**'^{**I**} icon to remove the selected Python server details from the list.

• Process Queue

Users can reset the Predictive process queue through this Predictive Settings option.

- i) Click the 'Process Queue' option from the Predictive Settings configuration options.
- ii) The Process Queue page opens.
- iii) Click the 'Reset Queue' option.
- iv) A warning message appears asking whether the user wants to flush the queue.
- v) Click '**YES**' to set the count of currently running processes to Zero for the Predictive Workbench.



4.2.2.6. SMB Server Configuration

This section covers Social Media Browser configuration details.

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



|) 🛅 Documentation Management | | | |
|---------------------------------|--|--|--|
| ♥ Configurations and Settings ▲ | | | |
| 🚰 Email Settings | | | |
| 🛅 Password | | | |
| 🍕 Data Management Settings | | | |
| 🕄 Geo Settings 🛛 🗸 | | | |
| 🛷 Predictive Settings 🔹 🗸 | | | |
| 🐜 SMB Server Settings | | | |
| 👘 Custom Field Settings | | | |

- b. The 'Social Media Browser Configuration' fields appear.
- c. Fill in the following information to configure the Social Media Browser settings:
 - i. Host
 - ii. Port
 - iii. Application
 - iv. Protocol
 - v. User Name
 - vi. Password
- d. Click the **'SAVE**' **b**icon.

| ≡ | Admin Module | | |
|-------|------------------------------------|-----------------|--|
| Socia | Social Media Browser Configuration | | |
| | SMB Server Configuration | ^ | |
| | Host * | | |
| | Password * | Protocol Type * | |
| | User Name * | | |
| | Application * | | |
| | Port * | | |
| | | | |

e. A message will appears to assure about the SMB server settings update.



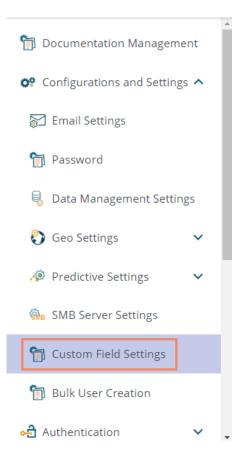
Note: Click the '**Refresh**' ^C icon to erase the existing SMB Server Configuration details.



4.2.2.7. Custom Field Settings

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

a. Click the 'Custom Field Settings' option from the 'Configuration and Settings' list



- b. The Custom Field Settings window opens
- c. Provide the following information for each custom field:
 - i. Key: Provide the key value of the custom field
 - ii. 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
 - iii. Description: Describe the inserted key
 - iv. Mandatory: Use checkmark in the given box to make the inserted custom field mandatory
- d. Click the '**Save Component**' **c** icon to save the inserted custom fields.

| Custom Settings | | | | + Add Fields C |
|-------------------------|-------------|-------------------|-----------|----------------|
| Custom Field Informatio | on | | | ^ |
| Key | Input Type | Description | Mandatory | Delete |
| State | Manual | ▼ state of user | No | • × |
| country | User LookUp | ▼ country of user | No | <u> </u> |
| component | Manual | component | No | • × |
| Gender | User LookUp | gender | No | • × |
| Language | Manual | ▼ user language | No | • (X) |

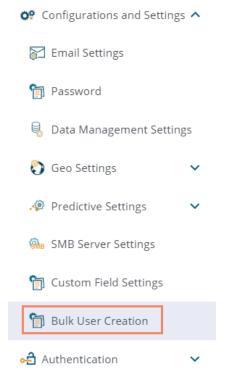
Note:

- a. Click 'Add Fields' option to add a new custom field.
- b. Click the '**Refresh**' \mathbf{C} icon to erase the inserted custom fields information.
- c. Click the '**Delete**' \times icon to remove a custom field.

4.2.2.8. Bulk User Creation

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

i) Click the 'Bulk Users Creation' option from the Configuration and Settings options.



- ii) The 'Bulk User Creation' page opens.
- iii) The Bulk User Creation gets completed in two steps as explained below:



Step- 1 Download the Standard Template

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

| stom Properties). |
|-------------------|
| tom Properties). |
| |
| 2 |
| _u: |

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

| Bulk User Creation | |
|--|------------|
| Download Template Click the 'Download' icon. A standard template for Bulk User Creation gets downloaded. Enter information for multiple users in the below given format Email Id, Username, Full Name, CP_spacekey (CP-Custom Pro- | operties). |
| | ٥ |
| Upload Template | |
| Use the 'Choose File' option to select a file with multiple usernames in the proper format. Click the 'Upload' option. A success message appears to confirm the user creation. | |
| Choose Files No file chosen Select Sheet | ۵ |
| UserTemplate (2).xlsx | Show al |

- 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

| 4 | A | В | С | D | E |
|----|-----------------|-----------|------------|-------------|---|
| 1 | Email Id | User Name | Full Name | CP spacekey | |
| 2 | user1@gmail.com | | User 1 | 1112 | |
| 5 | 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 | | | 0 | | |
| | User | [emplate | (+) | | |
| | | | | | |

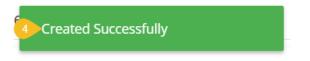
Steps-2 Upload a file with multiple usernames



- 6. Navigate to the 'Bulk User Creation' page
- 7. Use the 'Choose File' option to select the file with multiple usernames
- 8. Click the 'Upload' option



9. A success message appears to confirm the user creation



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

| User Manage | ement |] | | | | | | | | NEW |
|-------------------|-------|-----------|-------------|---------------------------|----------|---|---|-----------|---------|----------------|
| User Group | | | | Туре | Status | | | | | |
| Search User Group | S | Showing 1 | 8 out of 18 | Enterprise Search User | ✓ Active | * | | ĄZ | | |
| All Group | | | | | | | | | Showing | ; 15 out of 15 |
| PAGroup | 1 | \oslash | 8 | User 3 | | | 1 | \oslash | Î | G |
| Demo Role | / | \oslash | Ê | User 2 | | | ľ | \oslash | Î | C |

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 allow 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. Authentication

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

4.2.3.1. Active Directory Configuration

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



| 'n | Documentation Managemer | nt |
|------------------|-----------------------------|----|
| 09 | Configurations and Settings | ~ |
| ⊶ട്ടി | Authentication | ~ |
| • | Session | |
| × | Schedule Monitoring | |
| 0 | Server Monitoring | |
| 1 | Audit Trial | ~ |
| 'n | Encryption | |
| <mark>₀</mark> € | Language | ~ |
| ŧ | Migration | ~ |
| 1 | License | |

ii) The following authentication options appear:

- i. AD Configuration
- ii. CA PPM Configuration



- iii) Click the 'AD Configuration' authentication option
- iv) The '**Configuration**' tab for the Active Directory Configuration opens with the following details:
 - i. User Name: Name of the Windows AD service account
 - ii. Password: Secure authentication credential
 - iii. Host Name: IP address of the Windows AD server
 - iv. **Port:** Port number of Windows AD
 - v. Domain Name: Enter the Domain Name
- v) Click the **'Next'** option



| Active Dire | ectory Settings | | G |
|-------------|-----------------|--------------|----------------------|
| 1 Configur | ration | 2 Parameters | 3 SYNC CONFIGURATION |
| | CONFIGURATION | | ^ |
| | User Name * | | |
| | password * | | |
| | Host Name * | | |
| | Port * | | |
| | Domain Name * | | |
| | | | |
| | | | Next |

- vi) A message appears to confirm the action and leads to the 'Parameters' tab.
- vii) Set the user parameters by using this tab. Provide the following information:
 - 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: Enter the Active Directory Property
- viii) Click the 'Next' option

| Active D | Pirectory Settings | | AD Configuartion Settings Saved |
|----------|------------------------|------------------------------------|---------------------------------|
| 🕜 Confi | guration | 2 Parameters | 3 SYNC CONFIGURATION |
| | Parameter Information | | ~ |
| | Custom Fields | | ^ |
| | User Property | Active Directory Property | Delete |
| | User Property State | Active Directory Property State | × |
| | + Add Column | | |
| | | | Back |

- ix) A message appears to confirm the action and leads to the 'Parameters' tab.
- x) Once you get confirmation that AD details got saved, select the 'SYNC CONFIGURATION' tab
- xi) Select a user group using the drop-down menu
- xii) Select and move users from 'User List' to the 'Selected User List' using the arrows icons
- xiii) Click the 'Save' option



| 🗮 Admin Module | | |
|---------------------------|---------------|----------------------|
| Active Directory Settings | | C |
| Configuration | 🕜 Parameters | 3 SYNC CONFIGURATION |
| Select User Group | * | |
| User List | Selected List | |
| | | Save Back |

xiv) A message appears to confirm that the user list has been updated.



4.2.3.2. CAPPM Configuration

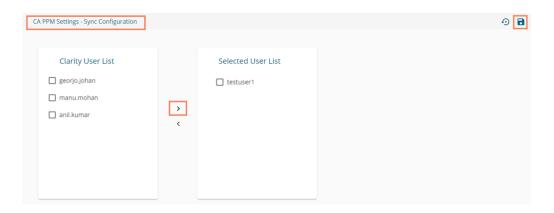
This section explains how to configure Clarity.

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

| ≡ | Admin Module | | | |
|-------|---------------------|-----------|---|---|
| CA PI | PM Settings | \$ | C | 8 |
| | CA PPM Information | ^ | | |
| | User Name * | | | |
| | password * | | | |
| | CA PPM Server * | | | |
| | User Acess NQUERY * | | | |
| | | | | |



- e. Once you get confirmation that CAPPM configuration details are saved, click the 'Synchronize' ticon.
- f. Select and move users from 'Clarity User List' to the 'Selected User List.'
- g. Click the **'Save'** icon.



h. A success message appears to confirm about the user list update.

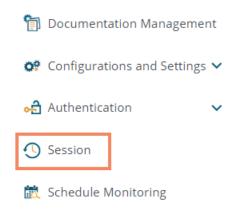
Note:

- a. Click the '**Reset**' ^C icon to erase the entered CA PPM Information.
- b. Click the '**Back**' 3 icon to go back on the CA PPM Settings page.

4.2.4. Session

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

i) Click 'Session' from the list of Admin options.



- ii) The 'Active Sessions' page opens displaying the Active Admin Sessions by default.
- iii) Select a user by using the checkbox provided next to any user name.
- iv) Click the 'Kill Session' icon.

| essions | | | Admin | <u> </u> |
|------------|------------|----------|-----------------|----------|
| Active Adm | in Session | | Search | ٩ |
| • | UserName | Email Id | Active Sessions | |
| | Avin Jain | | 6 | |
| | priya | | 3 | |
| | Prakash | | 23 | |

v) The active session for the selected user gets killed.

Note:

- a. 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.
- b. Use the drop-down menu to filter the displayed list of the Active Session as per Admin or User as displayed below:

| Active Sessions | Admin 🗙 |
|----------------------|---------|
| | User |
| Active Admin Session | μ |

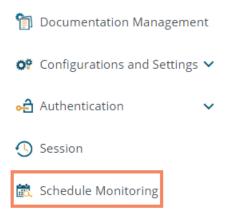
c. Use the 'Search' bar to search a specific user(s) from the displayed list of Active Sessions.

| Active | Sassions | | | | | Adm | in | | • × |
|--------|----------|---------------|------------------------|-------------------|-----------------|------|----|-----|-----|
| | Active A | Admin Session | | | | pr | | ۹ | 1 |
| | | UserName | Email Id | | Active Sessions | | | | |
| | | priya | propriet and the state | | 3 | | | | |
| | | Prakash | print print descent | | 23 | | | | |
| | | | | Items per page: 5 | ▼ 1 - 2 of | 2 < | < | > > | |

4.2.5. Schedule Monitoring

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' page appears with a list of data stores displaying their current Status and Action.

| Schedule Monitoring | | 3/28/2019 🖻 🏏 Search |
|---------------------|--------|---|
| Name | Status | Action |
| ftplarge | • | • Activate |
| check1212 | • | Activate |
| largestftp | ٠ | Activate |
| DSFTP | • | Activate |
| Hiring_26 | • | Activate |
| mysql_new_DS | • | Activate |
| | | ltems per page: 8 1 - 8 of 123 < < > > |

iii) Search and display a specific scheduled data store using the 'Search' space.

| Schedule Mor | itoring | | 3/28/2019 | ÷ | ~ | Sample d | ٩ |
|--------------|-------------------|--------|--------------------------------|---|---|----------|---|
| | Name | Status | Action | | | | |
| | Sample Data Store | ٠ | Activate | | | | |
| | | | Items per page: 8 • 1 - 1 of 1 | < | < | > > | |

4.2.6. Server Monitoring

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 the 'Server Monitoring' option from the list of Admin options.

| Documentation Management | |
|---------------------------------|--|
| 🔗 Configurations and Settings 🗸 | |
| Authentication ✓ | |
| Session | |
| 🔯 Schedule Monitoring | |
| server Monitoring | |
| 🗐 Audit Trial 🗸 🗸 | |



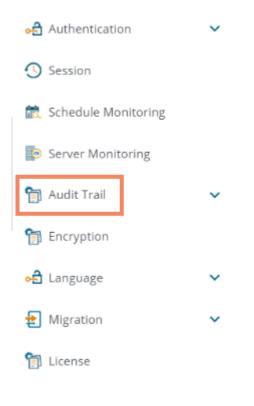
- ii) The **Server Monitor** page appears with various nodes presenting various modules of the BDB Platform.
- iii) Select a node to display the node-specific server details. E.g., the Predictive node is selected in the below given details:

| Sateway | Core | Predictive | Data Servic | e | Scheduler | Data Prep and Pipe | eline | Consumers | |
|------------------------------|--|------------|--------------|---------|-----------------|--------------------------|-------|-----------|--------|
| | | | | | | | | OS Memory | |
| | 1 | Current H | leap Size | 160 MB | | Committed Virtual Memory | 3 GB | | 94% |
| 160 | 9 | Committe | ed Heap Size | 1920 ME | 3 | Free Physical Memory | 2 GB | | |
| | | Max Heap | o Size | 1920 ME | 3 | Total Physical Memory | 31 GB | | |
| Curre | ent Heap Size | | | | | | | | |
| | | | | | | | | | |
| Search Bundle Bundle Name | | | | | Start Id | Version | | | C |
| Bundle Name | ompatibility Bundle | Jar | | | Start Id 162 | Version 2.7.11 | | | |
| Bundle Name Apache CXF C | ompatibility Bundle tio-json-schema-mbe | | | | | | | | Status |

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) Two options get displayed
 - 1. Audit Trail Settings
 - 2. Audit Trail List



| _ | |
|---------------|---|
| ٩ | 🕽 Audit Trail |
| | 1 Audit Trail Settings |
| | 1 Audit Trail List |
| iv) The 1. | k the 'Audit Trail Settings ' option ' Audit Trail Settings ' window opens Enable the Radio button to enable Audit Trail Click the 'Save ' option |
| | Audit Trail Settings |
| | Slide met |
| | Save |
| v) Clic | k the 'Audit Trail List ' option |
| | |

vi) The Audit Trail List page opens displaying the audit log details

vii)Filter the displayed Audit Log details by performing the following steps:

- 1. Select a User: Select a user from the drop-down list
- 2. Enter a Start Date: Select a Start Date using the calendar
- 3. Enter an End Date: Select an End Date using the calendar
- 4. Use Search Bar: Enter a term in the Search bar to display specific data under the Audit Trail list

| it Trial List | William Mar | rtin • 3/27/2019 | 3/28/2019 | Search |
|----------------------------------|------------------------|----------------------|-----------|--------|
| Message Id | Request | Response | Audit | View |
| 0ddb9baa5c78d166cdaa59b321253645 | [Request]=[pluginServ | null | null | := |
| 4da0661055ac3ba24857a0c1503e0fb1 | null | [response]=UserName: | null | = |
| 4da0661055ac3ba24857a0c1503e0fb1 | [Request]=[getalluser: | null | null | = |
| 7c91ab17942818116d4a2c4ce523fcc7 | null | [response]=UserName: | null | = |
| 7c91ab17942818116d4a2c4ce523fcc7 | [Request]=[getAuditTi | null | null | = |
| 8fe5330c04ce744a9bfa2004cb65626b | [Request]=[pluginSen | null | null | = |
| p9ae117b54546597d881ff0755a51970 | null | [response]=UserName: | null | |

- viii) Click the '**View**' icon.
- ix) A new window appears displaying the selected details by Message/Request/Response. E.g., the below given image displays the Audit details by Request.



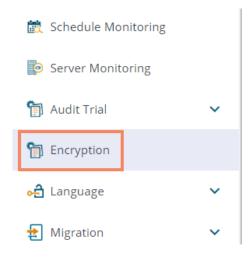
| i= [, | Audit Trail | | | × |
|--------------|-------------|---------|----------|---|
| < | Message Id | Request | Response | > |
| null | | | | |

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 Server Settings' page opens.
- iii) Enable Encryption by a checkmark in the box.
- iv) Click the 'Save' 🔁 icon.

| Encryption Server Settings | Active Users:1 |
|----------------------------|--|
| | Enable encryption for the data object, file, network packet or application to access secure data for your analytics processes. Encryption Protects Privacy. Encryption Protects Data across Devices. Move Data Securely. |



4.2.9. Language

The Language admin option allows the administrators to choose the language(s) from the supported list and map Key terms from a specific dashboard with the selected languages. This feature supports language mapping for Titles, X and Y Axis description, Tooltip, and Label of the selected Dashboard.

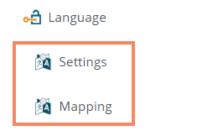
The Language option requires three steps to complete the process:

Step-1: Language Settings

Step-2: Language Mapping

Step-3: Configuring the Required Dashboard Settings

- i) Click the 'Language' option from the list of Admin options.
- ii) The following options appear:



iii) Configuring the Language Settings

- 1. Click the 'Settings' option from the Language menu.
- 2. The Language Settings page opens displaying all the languages selected by the user.

| Language Settings | |
|-------------------|---|
| | All the languages selected by the users appear on this page. Users can access a drop-down menu by clicking next to the last added language. The users can select more languages using the drop-down. Click the 'Save' option to save the newly selected language(s) on the Language Settings page. |
| ZA | Search Language Tamil(India) ③ Hindi(India) ③ Gujarati(India) ③ |
| | Save |

3. The user can access a drop-down menu by clicking next to the last added language to search more languages.



| Search Language | |
|---|----------|
| Tamil(India) 🛞 Hindi(India) 🛞 Gujarati(India) 🛞 | |
| Afrikaans(South Africa) | ^ |
| Arabic(U.A.E.) | |
| Arabic(Bahrain) | |
| Arabic(Algeria) | |
| Arabic(Egypt) | |
| | Ψ. |

- 4. The user can select more languages using the drop-down.
- 5. The selected language(s) gets added to the Language Setting page.



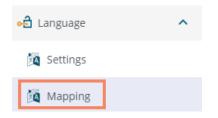
6. Click the 'Save' option to save the newly selected language(s) on the Language Settings page.

| Search Language Tamil(India) 😒 | Hindi(India) 😒 | Gujarati(India) 😒 | Arabic(U.A.E.) 😒 | |
|-----------------------------------|----------------|-------------------|------------------|------|
| <u> </u> | | | | |
| | | | | Save |

7. The Language Setting gets updated, and a message appears to inform the same.



1. Select and open the 'Mapping' option from the list of Language admin options.





- 2. Language Text Mapping page opens with the list of available language mapping options.
- 3. Click the 'Add New' + icon to add a new Language Text Mapping.

| ≡ Admin | Module | | |
|--------------|------------------------|------------------|------------|
| Language Tex | t Mapping | | + Search a |
| | Name | Created Date | Actions |
| | language test-22/01_ZY | 1/25/19, 5:32 PM | Z # |
| | language test-22/01 | 1/22/19, 5:25 PM | 2 T |

- 4. The 'New Language Mapping' window opens.
 - a. Provide a name for the new Language Mapping
 - b. Select a language or multiple languages using the drop-down menu
 - c. Click the 'Save' option.

| Created Date | |
|-------------------------------------|------|
| ≓ New Language Mapping | × |
| Name* Language Mapping | |
| Select Languages Gujarati(India) | * |
| | |
| | Save |

- 5. The newly created Language Mapping gets added to the list.
- 6. Click the **'Edit'** icon.

| Admin Mo Language Text M | | | | + | Search | |
|--------------------------|------------------------|------------------------------|---------|---|--------|--|
| | Name | Created Date | Actions | | | |
| Γ | Language Mapping | 4/1/19, 12:38 PM | • | | | |
| | language test-22/01_ZY | 1/25/19, 5:32 PM | / 1 | | | |
| | language test-22/01 | 1/22/19, 5:25 PM | / 1 | | | |
| | | ltems per page: 8 💌 1 - 3 of | 3 ≮ | < | > >1 | |

- 7. The 'Edit Language Mapping' window opens.
- 8. Click the **'Save'** option.

| ≓ Edit Language Mapping | × |
|---------------------------------------|----------|
| _{Name} * Language Mapping | |
| Select Languages Gujarati(India) | . |
| | |
| | Save |



9. The selected Language Mapping option gets updated, and a message appears to confirm the same.

| BER Decision Platform | | | _ | | 0 0 |
|-------------------------------------|-----|-----------------|-----------------|---------------------|-----|
| Admin Module | | | Language settir | ng has been updated | |
| Language Text Mapping | | | | ← Search | ٩ |
| Language Name * Language Mapping | Key | Gujarati(India) | Edit | Delete | 1 |
| Key * Selected Languages | | | | | |
| Gujarati(India) | | | | | |
| Save | | | | | |

- 10. Add various key terms and their synonyms using the steps given below:
 - a. Insert a key from the selected dashboard.
 - b. Provide the translated synonym of the key in the given space.
 - c. Click the 'Save' option.

| Language Text Mapping |
|---|
| Language Name * Language Mapping |
| 1 Key * Year wise Expense 8 |
| Selected Languages |
| 2 Gujarati(India) વર્ષ દીઠ ખર્ચ અને મહેસૂલ |
| 3 Save |

- d. A success message appears to confirm the update in the Language Setting content.
- e. The saved key with its synonym in the selected language(s) gets added to the right-side list.

| Admin Module | | 4 Language settin | g content na | as been saved |
|---|-------------------------------|--------------------------|--------------|---------------|
| anguage Text Mapping | | | ← Sea | rch |
| Language Name * Language Mapping | Key | Gujarati(India) | Edit | Delete |
| Key * Year wise Expense { | 5 Year wise Expense & Revenue | વર્ષ દીઠ ખર્ચ અને મહેસૂલ | 1 | |
| Selected Languages | | | | |
| Gujarati(India) વર્ષ દીઠ ખર્ચ અને મહેસૂલ | | | | |
| | | | | |

11. Users can save more terms to the newly created language settings using the same set of steps:



| Admin Module | Language settin | Language setting has been updated | | | |
|-------------------------------------|-----------------------------|-----------------------------------|-------|--------|--|
| Language Text Mapping | | | ← Sea | rch | |
| Language Name * Language Mapping | 6 Кеу | Gujarati(India) | Edit | Delete | |
| | Expense | ખર્ચ | 1 | 1 | |
| Key * | Revenue | મહેસૂલ | 1 | 1 | |
| Selected Languages | x Axis Title | એક્સ એક્સિસ શીર્ષક | 1 | î | |
| | y Axis Title | વાય એક્સિસ શીર્ષક | 1 | | |
| Gujarati(India) | Year | વર્ષ | 1 | 1 | |
| | Year wise Expense & Revenue | વર્ષ દીઠ ખર્ચ અને મહેસૂલ | 1 | î | |

v) Configuring the Dashboard Settings

1. Select a saved dashboard using the Designer plugin.

| Decision Platform | Becision E Designer + | | | | | | | | |
|----------------------|-----------------------|---|---|---|----------------------|-----|---|---|---|
| + New - | Workspaces (10) | Ð | C | Q | Dashboards (2) | | | | Q |
| 🖆 Manage | All Dashboards | | | | Language Mapping | ſ. | • | Î | : |
| Open from Local Disk | ODC Final version | | / | Î | Language db mig test | (f) | • | | : |
| ★ Preferences | CA PPM | | | î | | | | | |
| 🗎 Save as | | | · | • | | | | | |
| 🕄 Help | Migration test | | / | • | | | | | |
| 🖒 Exit | DD | | 1 | Î | | | | | |

2. 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)

| Bar1 | | | | | |
|--------------------|-----------------------------|--|--|--|--|
| Legend | | | | | |
| Sub Title | | | | | |
| Title | | | | | |
| Title Box Color : | | | | | |
| Show Title Box : | | | | | |
| Show Title : | | | | | |
| Title Bar Height : | 40 | | | | |
| Description : | {Year wise Expense & Revenı | | | | |
| Font Color : | | | | | |
| Font Size : | 12 | | | | |
| Font Style : | Normal 🔹 | | | | |
| Font Weight : | Bold 🔹 | | | | |
| Font Family : | Roboto 🔻 | | | | |
| Align : | Left 🔹 | | | | |
| Text Decoration : | None 🔻 | | | | |

Note:

- a. Use "{}" brackets for all the descriptive text that you want to translate by the newly created Language Mapping. E.g., Tooltip, Description of X and Y Axis, etc.
- b. Use Data Set Properties to Configure the Categories and Series description for the language mapping as shown below:



| Bar1 | |
|------------------|--------------|
| Connections Conn | ection-1 • C |
| | |
| Search | Category |
| Expense | Year |
| Revenue | Series |
| Year | Expense |
| | Revenue |
| | |
| | |
| | |
| | |
| Properties | Indicator |
| | |
| Display Name : | {Expense} |
| Visible : | |
| Color : | |
| Opacity : | 1 |
| Data Label : | \$ |
| D-+-C+ T | - |

- 3. Open the Dashboard Properties Panel and configure the Language Properties as shown below:
 - a. Enable the Language Mapping by using a tick mark in the given box
 - b. Hide the Curly braces by using a tick mark in the given box
 c. Click on the icon to select a mapping option.

| | Dashboard × |
|---|---|
| | Border |
| | Global Font And Themes |
| | Gradient |
| | Language Mapping |
| 1 | Enable : Hide Curly Braces : Select a Mapping: 3 |
| | Size |

vi) Click the 'Preview' icon to see the Dashboard title and other description in the selected language

| વર્ષ દીઠ ખર્ચ અ | ને મહેસૂલ | | | | | к л 2 У |
|--|----------------------------|-----------|-------------------------------|-----|-----|------------|
| 2008 2012 2013 2013 2013 2014 2014 | 2012 — ખર્ચ — મહેસૂવ | 100 95 | | | | |
| 0 | 100 | 200 | 300 400 એક્સ એક્સિસ શીર્ષક | 500 | 600 | 700 |

Note:



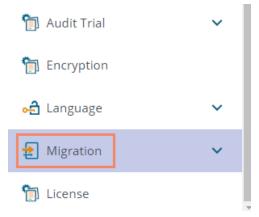
a. The old dashboards do not open while using the Mapping option. The users need to create a new dashboard to access this functionality.

- b. 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

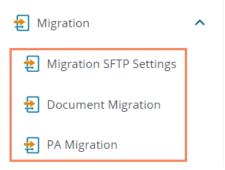
4.2.10. Migration

The Migration option is provided to migrate visual reports, governed dashboards, Predictive Workflows, Scripts, and Models to another space. The Migration admin option has two main categories: 1. Document Migration, and 2. PA Migration. The users need to configure the SFTP server settings to accomplish the migration task.





- ii) The following options get displayed:
 - a. Migration SFTP Settings
 - b. Document Migration
 - c. PA Migration





This section explains the step by step process of Migration.

4.2.10.1. Migration SFTP Settings

- i) Click the 'Migration SFTP Settings' option.
- ii) The Migration SFTP Settings window opens.
- iii) Provide the Required information:
 - a. Host
 - b. Port
 - c. Username
 - d. Password
 - e. Start Path
- iv) Click the **'Test'** (S) icon to verify the connection.

| Migration SFTP Settings | C 🕓 Save |
|-------------------------|----------|
| | |
| Migration Information | |
| Host * | |
| Port * | |
| userName * | |
| Password * | |
| startPath * | |
| | |

v) A success message appears to confirm about the verification of the connection.



- vi) The 'Save' option gets enabled.
- vii) Click the 'Save' option to save the SFTP details.



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



4.2.10.2. Document Migration

Users can migrate a business story or dashboard using the Document Migration option from the Admin module. 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 to migrate a document:

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



ii) Click the '**EXPORT**' option from the Document Migration page that opens next in the sequence.

| Admin Module | |
|--|--|
| Export Section | Import Section Import Files |
| | |
| Click on Export Button Select the Document To Migrate and download Your selected document will be migrated in configured SETP location | Login to the server or Space where you need to import the baf Content Configure the SFTP location On clicking import button, list of baf files from configured SFTP server will be displayed Select the baf file to migrate & Click on "Migrate" button |

- iii) A page opens with the list of documents available for export
- iv) Click the 'Download' icon for the document (story/dashboard) that you want to export.

| Admin Module | |
|-------------------------|------------------|
| Document - Export Files | ← C My Documents |
| te | ٩ |
| Test Story | 4 Story |
| Export Test | Story 💆 |
| Performance test | |

Note: Only stories and dashboards display the download icon, the listed folders do not display the download icon.

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

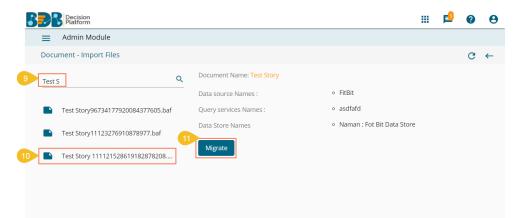


Your File has been downloaded in SFTP server

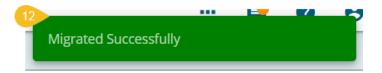
- vi) Then log in as a different user to the server or space where you need to import the baf content
- vii) Navigate to Migrate SFTP Settings
- viii) Configure the SFTP location (SFTP location for the source and destination account should be similar to use the document migration functionality)

| Admin Module 7 Migration SFTP Settir | _ | | William Martin |
|--|-----------------------|--------|----------------|
| | | My Acc | ount Sign Out |
| 8 | Migration Information | ^ | |
| | Host * | | |
| | Port* | | |
| | userName * | | |
| | Password * | | |
| | startPath * | | |
| | | | |

- 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.



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



xiii) The migrated document gets displayed on the platform homepage.



| Decision Platform | | | | | | ß | ? | θ |
|----------------------|--------------|------------------|-------------------|----------------|---------|-----------|----------|----|
| My Documents > | ill ∡ ⊄ • | | | Search | William | Martin | Sign Ou | ıt |
| Shared Documents 13 | Test Story | Sample Story | Sample Folder 4.2 | Business Story | | lished Da | shboards | |
| Sample Folder | 0 3 0 Sales | Business Stories | | | | | | |

Note:

a. 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., for the given example of Test Story document, the following details of data source names, query service names, and data store names are displayed.

| Document Name: Test Story | |
|---------------------------|------------------------------|
| Data source Names : | • FitBit |
| Query services Names : | • asdfafd |
| Data Store Names | • Naman : Fot Bit Data Store |

b. Users can also migrate the imported dashboard in the Designer workspace by using a check mark in the given box (as shown in the following image):

| 🗮 Admin Module | | | |
|-------------------------|--|------------------------|-----|
| Document - Import Files | | | C ← |
| hide Q | Document Name: Hide and Show Data source Names : Query services Names : Data Store Names Workspace Present I Migrate your Dashboard in Design | ∘ true er workspace | |
| | | | |

The migrated dashboard appears in the Designer after the migration process gets over.



| Decision Platform | signer + | | | | | | | | |
|------------------------|---------------------|------------|---|---|----------------|---|---|---|---|
| + New - | Workspaces (7) | (+) | C | Q | Dashboards (1) | | | | Q |
| 🚊 Manage | All Dashboards | | | | Hide and Show | ſ | 6 | Ĩ | : |
| 🧕 Open from Local Disk | Workspace1 | | | | | | | | |
| ★ Preferences | Terrelater | | | _ | | | | | |
| 💾 Save as | Templates | | * | • | | | | | |
| Help | Finance | - | * | Î | | | | | |
| 🖒 Exit | Trainning Workspace | | * | Î | | | | | |

- c. 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

| ingData DB | | |
|-----------------------------|---|-------------------|
| Jser Name * bdbizviz.com | 1 | |
| Password * | | |
| | | |
| P/Host * | | |
| Database Name | | |
| Note: If database name is n | ot provided, it will be taken from the da | taset internally. |

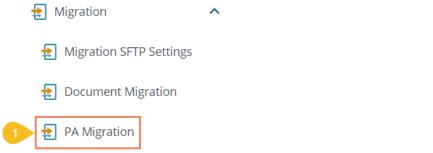
- iii. The selected data connector gets migrated to the destination user account.
- d. Dashboards and Stories using the API data connectors/data sets or File as data connectors don't require to provide the Connector details for document migration.

4.2.10.3. 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.

| Export Section 2 EXPOR | T Import Section Import Import Files |
|---|--|
| | |
| Click on Export Button Select the Workflows,Scripts and Models to Export Give a name to the Baf File. | Login to the server or Space where you need to import the baf Content Click on import Select one or multiple baf files which you wish to import Configure concerts datability for the calleded content |

- iii) The Export Section for PA Migration 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. Note: The following example displays that by selecting a Workflow from the list the related script gets selected by default.

| Admin Module | | | (| 5 |
|-------------------------------|---------------------|---|----------------------|---|
| PA Migration - Export Section | | | <u>3 All</u> | |
| Workflow | Scripts | | Model | |
| wf_k Q | k-l | ٩ | Search Model | |
| Select All | Select All | | Select All | |
| 4 WF_KmeanScript | К-М_сору | | Testing | |
| | K-M_copy_1551875544 | | House Price Testing | |
| | K-Means++_copy | | Emotion Recognizer | |
| | K-NN | | Python_JSONReadModel | |
| | Pyspark K-Means++ | | wtfinalmodel | |
| | | | ;oyiltxfv | |
| | | | fewdgf | |

- iv) The 'Save As' window opens to provide a file name.
 - 1. Give the file name
 - 2. Click the '**Ok**' option



| 6 | Save As | |
|---|--------------------------|--|
| | Please enter File Name ? | |
| | Kmeans_Migration | |
| | Cancel 7 Ok | |

v) A notification message appears to inform that the file has got successfully downloaded in SFTP server.



- vi) The user needs to login to the destination user account.
- vii) Click the 'Import' option using the PA Migration admin option.

| Export Section Export Export Files | Import Section 9 Import Import Files |
|---|--|
| | |
| Click on Export Button Select the Workflows.Scripts and Models to Export Give a name to the Baf File. | Login to the server or Space where you need to import the baf Content Click on import Select one or multiple baf files which you wish to import Configure connector details for the selected content Choose one or multiple users to import these files into their accounts. Click on import. |

- viii) Search for the created BAF file.
- ix) Select it by using the check mark in the box.
- x) Click the 'Next' option.

| PA Migration - Import Section | Ð |
|----------------------------------|------|
| Import Files |] |
| csv_kmeans111251445780.baf | |
| Kmeans_Migration967341779200.baf | |
| | |
| | |
| | |
| | |
| | |
| | |
| (12) | Next |

- xi) The Data Connector Configuration page opens (only for the Workflows created using RDBMS-MySQL, MSSQL, Oracle data source)
- xii) Click the 'Next' option after configuring the Data Connector details

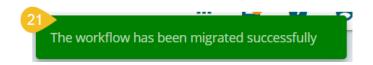


| | nport Section | | | Ð |
|------------------------|--|---|----------------------------------|-------------------------------------|
| 13 Configure Data Conn | | | | |
| Kmeans_Migration96 | 57341779200.baf | | | |
| 1 mysql_DB | | | | |
| Database Typ | pe | Data | base Name | |
| mysql | | | at Port | |
| Target IP | | Targe | et Port | |
| Target Usern | | Targe | et Password | |
| | | | | |
| 14 Next | | | | |
| | | | | |
| | | | | |
| | | | | |
| vi | ii) A success me | ssage annears | | |
| AI | ing A Success file: | souge appears | | |
| | | | | |
| | 15 Successfu | ully Connected | | |
| | - | | | |
| | | | \odot | |
| | | | | |
| xiv) | The user gets | redirected to select a de | estination user | |
| | | ser/users from the displa | | |
| | | | ved list | |
| | | | | |
| | | 'Next' option to proceed | | |
| | 2. Click the | 'Next' option to proceed | | 0 |
| | 2. Click the PA Migration - Import Sect Search User | 'Next' option to proceed | | ۍ د |
| | 2. Click the PA Migration - Import Sect | 'Next' option to proceed | | ب م |
| | 2. Click the PA Migration - Import Sect Search User | 'Next' option to proceed | | _ |
| 16 | 2. Click the PA Migration - Import Sect Search User Wi | 'Next' option to proceed | ł | _ |
| 16-[| 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | _ |
| 16 | 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | _ |
| 16 | 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | _ |
| 16-[| 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | _ |
| 16 | 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | _ |
| 16 | 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | Q 17 |
| 16 | 2. Click the PA Migration - Import Sect Search User Wi User Name | 'Next' option to proceed | d Last Login Date | Q 17 |
| | 2. Click the | tion Email Id | Last Login Date 1554368717924 | Q 17 Back Next |
| 16 xv) | Click the PA Migration - Import Sectors User Name Will Select an option | ion out of Overwrite and | d Last Login Date | Q 17 Back Next |
| xv) | Click the PA Migration - Import Sectors User Name Will Select an option it happens to | ion out of Overwrite and be duplicate). | Last Login Date 1554368717924 | Q 17 Back Next |
| | Click the PA Migration - Import Sectors User Name Will Select an option | ion out of Overwrite and be duplicate). | Last Login Date 1554368717924 | Q 17 Back Next |
| xv) | Click the PA Migration - Import Sectors User Name User Name Will Select an opting it happens to Click the 'Import Sector Click the 'Import Sector Click the 'Import Sector Click the 'Import Sector S | ion out of Overwrite and be duplicate). | Last Login Date 1554368717924 | Q Back Next te content (if in |
| xv) | Click the PA Migration - Import Sectors User Name User Name Will Select an optinit happens to Click the 'Import Sectors' | tion Email Id Email I | Last Login Date 1554368717924 | Q 17 Back Next |
| xv) | Click the PA Migration - Import Sectors User Name User Name Will Select an optinit happens to Click the 'Import Sectors' | ion out of Overwrite and be duplicate). | Last Login Date 1554368717924 | Q Back Next te content (if in |
| xv) | Click the PA Migration - Import Sectors User Name User Name Will Select an optinit happens to Click the 'Import Sectors' | <pre>ition ition image: final id image: final</pre> | Last Login Date 1554368717924 | Q Back Next te content (if in |
| xv) | Click the PA Migration - Import Sectors with User Name User Name Will Select an option of the pression of the pr | <pre>ition ition image: final id image: final</pre> | Last Login Date 1554368717924 | Q Back Next te content (if in |
| xv) | Click the PA Migration - Import Sectors with User Name User Name Will Select an option of the pression of the pr | <pre>ition ition image: final id image: final</pre> | Last Login Date 1554368717924 | Q Back Next te content (if in |



| ent ? | Confirm Duplicate | | |
|-------|-------------------|--------------|---------|
| | | 20 CANCEL | CONFIRM |
| | | | _ |

xviii) A message appears to inform the user about the successful migration of selected workflow.



xix) Open the PA workspace to check the migrated Workflow and Script in the respective sections.

| Predictive Analysis 😱 | William Martin | | | | |
|---|---------------------|--|---------------------|--|--|
| means Q | Create New Workflow | | | | |
| Saved Workflows | | | My Account Sign Out | | |
| WF_KmeanScript | | | | | |
| Algorithms | | | | | |
| 🔛 Clustering | | | | | |
| Custom R Script | | | | | |
| - ≶ Saved scripts | | | | | |
| ≶ K-Means++_copy | | | | | |
| 📡 k _means | | | | | |
| Skmeans_branded • Sv Pre-Packaged Scripts | | | | | |
| K-Means++ | | | | | |

Note: The users can click the '**Back**' \mathfrak{D} icon to go on the previous screen.

4.2.11. License

This admin option provides information about the user license and allows the administrator to perform the License related settings with the help of BDB support team.

- i) Access the 'License' admin option using the admin module.
- ii) The License Settings page opens displaying the active session with customer name and product type.
- iii) Enable the License Options to update the License Users.
- iv) The admin needs to follow the below given steps:
 - a. Generate Private Key

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



| Configurations and Settings | ~ ^ | License Settings | |
|-----------------------------|-----|------------------|--------|
| Schedule Monitoring | - 1 | License Options | |
| Authentication | ~ | | |
| Session | - 1 | Active Session | 100 |
| | - 1 | Customer Name | BDB.AI |
| Server Monitor | - 1 | Туре | Cloud |
| Audit Trail | - 1 | | |
| Encryption | - 1 | | |
| Migration | ~ | | |
| License | | | |
| Language Settings | * | | |

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. Enable the License Options by using the radio button from the 'License Settings' page.
 - ii. The 'Generate Private Key' section appears.
 - iii. Click the 'Generate' option.
 - iv. A private Key gets generated.
 - v. Users need to share the generated Private Key with our support team at support@bdb.ai to get the updated license key. Use the 'Copy' i icon to copy the Private Key.

| Admin Module | |
|---|--|
| 1 License Settings | |
| 2 License Options | |
| Generate Private Key | |
| 4 Key: fc86c9c03087482abe7f61377eb1a3b9 📋 | Cancel |
| 5 i Share the generated private key with our su | pport team at support@bdb.ai to get your updated license key. |

Note: Click the 'Cancel' option to remove the generated private 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 BDB support team in the space given under the '**Update License**' section.
- iii. Click the 'SAVE' option to update the existing licenses.



| | Update License |
|---|---|
| 1 | License Key * |
| | • Enter the license key received from our support team in the given space and click SAVE option to update the licenses. |
| | Cance 2 Save |

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.

| Decision Platf | orm |
|---|----------|
| License key is invalid or expired, To your account update new license ke | - |
| Cancel Already have a Key Click Here | Generate |

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

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

5. 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 Manager | nent | | | | | | | | | NEW |
|-------------------|------|-----------|--------------|----------------|----------|---|---|-----------|---------|------------|
| User Group | | | | Туре | Status | | | | | |
| Search User Group | | | | Enterprise | ▼ Active | • | | ĄZ | | |
| | | – Showing | g 6 out of 6 | Search User | | | | | Showing | 5 out of 5 |
| All Group | | | | | | | | | | |
| alls | | \oslash | Ê | Platform User | | | i | \oslash | Î | G |
| allcaseci | | \oslash | ê | etl admin | | | ľ | \oslash | Ĩ | G |
| allcase1e | | \oslash | ê | William Martin | | | 1 | \oslash | Î | G |
| test | | \oslash | ê | BI Prod User | | | 1 | \oslash | Î | G |
| Viewer Role | | | Ê | Dev User | | | 1 | \oslash | Î | G |
| Admin Role | | | ê. | | | | | | | |

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.



| | | NEW |
|-----|-------|-----|
| +•) | Group | |
| +• | User | |

- 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)

| User Group | CANCEL | SAVE |
|-------------------|--------|---------|
| Group Name * | | |
| Sample User Group | | |
| | | 17 / 20 |
| | | |
| Description | | |
| | | 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.
 - Add User to Group × **User Group** search \square Select All dd User to Grou Dev User 1 Selected \Box BI Prod User П Platform User Group Permission etl admin William Martin \checkmark Folder Permission
- 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).



| | Group Permissions | × |
|-------------------|-------------------|---|
| User Group | Select All | |
| | Vser | ~ |
| Group Permission | Data Center | ~ |
| Folder Permission | GeoSpatial | ~ |
| | Admin | ~ |
| File Permission | ✓ Designer | ~ |
| | V Predictive | ~ |

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.

| | Folder Permission | × |
|-------------------|-------------------|-----|
| User Group | Select All | |
| | Create Folder | ^ |
| Group Permission | ✓ Link a URL | |
| Folder Permission | Rename | - 1 |
| | V Delete | - 1 |
| File Permission | Сору | |
| | Paste | |

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.



| | File Permission |
|-------------------|----------------------|
| User Group | Select All |
| | Modify Document |
| Group Permission | Rename |
| Folder Permission | V Delete |
| | Сору |
| File Permission | Add To Favorite |
| | Remove From Favorite |

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

| User Group | CANCEL | SAVE | |
|------------|--------|------|--|
| | | | |

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

| User Management | | | |
|-------------------|----------|--------------|-------------|
| User Group | | | |
| Search User Group | <u>c</u> | howing 1 | 3 out of 13 |
| All Group | | | |
| Sample User Group | | \checkmark | Ê |
| Bl Trainees | - | \oslash | ê |
| ETLTest | / | \oslash | ê |
| ABCGroup | / | \oslash | ê |
| Demo Viewers | | \oslash | Ê |

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

| Option | Name | Description |
|--------------|----------------|---|
| 1 | Edit | To edit details for the selected user group |
| \checkmark | Activate Group | To activate the selected user group |
| \oslash | Block Group | To block the selected user group |



5.2.1. Assigning Group Custom Fields

Ê

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) Click the 'Add' icon to select user.
- vi) Click the '**SAVE**' option.

| User Group | | | | Assign Custom Field To Group Users | AVE |
|-------------------|---|-----------|-------------|------------------------------------|-----|
| Search User Group | S | howing 13 | 3 out of 13 | Group Name | |
| All Group | | | | Sample User Group | |
| Sample User Group | - | _ | 8 | Peless Custom Reid * | |
| BI Trainees | - | \oslash | 8 | State | * |
| ETLTest | 1 | \oslash | 8 4 | California | |
| ABCGroup | - | \oslash | ê | | |
| Demo Viewers | 1 | \oslash | 8 5 | Select Users | |
| BizViz Partners | / | \oslash | Ê | 1Selected | |
| Permission | 1 | \oslash | ê | - Selected | + |
| | | | | | |

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 the '**NEW**' option.
- ii) A context menu opens.
- iii) Select the 'User' option from the context menu.

| | | NEW | |
|-----|-------|-----|--|
| +•) | Group | | |
| +• | User | | |

- 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 | | |
| Full Name * | | 11 / 20 |
| John Martin | | |
| | | 11 / 20 |
| Description | | |
| Password 1 | | 0 / 150 |
| | | |
| Confirm Password * | | 8 / 16 |
| | | |

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 Liser 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 | search no | | |
| Description | | Select All | |
| Password * | | TestGroupAnoop | |
| | | NonAdmin Group | |
| Confirm Password * | | | |
| | - | | |
| Add User to Group 1Selected | | | |
| | | | |

xi) The existing user list opens

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

| _{Type} Enterprise | StatusActive | • | | ĄZ | | |
|-------------------------------|---|---|---|-----------|---------|-------------|
| Search User | | | | | Showing | 85 out of 8 |
| John Martin | | | / | \oslash | Î | C |
| userTestAudit | | | / | \oslash | Î | G |
| GKTESTFOUR | | | 1 | \oslash | Î | C |
| GKTESTTHREE | | | / | \oslash | Î | C |
| uhuihuhu | | | - | \oslash | Î | C |
| Buser | | | 1 | \oslash | Î | C |

| Options | Name | Description |
|-----------|--------|--|
| 1 | Edit | Update/Edit the user specific details for a selected |
| | | user |
| \oslash | Block | Block the selected user |
| Î | Remove | Remove the selected user from the user list |



Note:

C

- 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 * | | |
| | | |

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 |
|-------------------|
| 0Selected |
| USelected |

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)

| Туре | | Status | | | | | |
|---------------|---|--------|----------|---|-----------|---------|----------|
| Enterprise | ~ | Active | ~ | | ĄĴZ | | |
| Search User | | | | | | Showing | 86 out c |
| David Brown | | | | 1 | \oslash | Î | C |
| John Martin | | | | 1 | \oslash | Î | C |
| userTestAudit | | | | | \oslash | Î | C |

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



| Decision Platform | | | | | | |
|--------------------|-----------------------|--|--|--|--|--|
| Email * | | | | | | |
| davin.brown@bdb.ai | | | | | | |
| Password * | | | | | | |
| Auth Type | | | | | | |
| Enterprise | • | | | | | |
| F | orgot your password ? | | | | | |
| Continue | | | | | | |

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

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

| My Documents | | | | | |
|-------------------|---|---|---|-------------------------------------|--|
| | 🕈 👗 Platform | 🍲 D. | R | No. | ont |
| BBB | A complete decision platform for all your business needs. Drive from data to dynamic visuals and derive an | Designe Design, sav | Home | Story | alyzer is a text words with |
| Decision Platform | actionable insight into your business data. Avail 360° view of your business by assembling, processing, and analyzing the acquired data. Access incomparable analytics from anywhere, at any time on any device. | of any busines series of stunn informative bus drop functiona comprehensive | ative progress n is process conta ning visuals to de siness data. Dra lity to access a e view of relevan | ining enote ig and nt KPIs | positive, negative, or neutral connotation. Empowered with Natural Language Processing (NLP) and machine learning algorithms the tool can identify, extract, and exhibit sentiments out of any expressive |
| | (Self-service BI) | | isiness objective dictive | | text. Equipped with ANEW dictionary ("Affective Norms for English Words"), the tool rates selected set of |
| Big Data BizViz | Go beyond the classic BI with our ground-breaking tool, BizViz Business Story. Innovkave yet easy, flawless but rapid, and systematic yet spontaneous, this visualization tool | on the reliable | t business move information inst ne power of adva | ead of | words in terms of pleasure, activation, and dominance to create a standard terminology for use in studies of emotion and attention. Use opinions, reviews, comments. |
| Release 4.3 | will make you go "Wow" for what it offers. Select relevant data, generate immaculate views, and concoct a pertinent insight into your business | learning techno business barri consistently co | ysis and machin ology take care ers. Access and ommunicative | of your apply | feedbacks, and other personalized text as subject matter to be analyzed based on measures of "pleasure" along with "activation". |

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 user who is a part of Admin Group gets the permissions to access all the BDB Plugins which are provided to the group.
- 3. **Ordinary User Role:** The user allocated to 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

| User: Enterprise Type Status Enterprise Active T | | ĄĴ | 2 | | |
|---|---|-----------|---|---|----------|
| Search User | | | | | |
| yashu | 1 | \oslash | Û | C | ^ |
| ANI | 1 | \oslash | Û | C | _ |
| Reshma khan | / | \oslash | Û | G | |
| usrRestykoth | / | \oslash | Î | G | |
| T two user | | \oslash | Î | C | |
| usrResttbbio | - | \oslash | Î | G | |
| usrRestgqnhw | / | \oslash | Û | C | |

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 ^C to set a new password for an activated user

| Туре | Status | | |
|---------------|-----------|---|-----------------------|
| Enterprise | 1 Expired | * | ÂZ |
| Search User | | | Showing 14 out of 14 |
| 2 demouser | | | 3 ✓ 4 C |
| neelamana | | | ~ C |
| Fred Lybbert | | | ✓ C |



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 develop a connection to your data in any form.

6.1.1. Creating a Data Connector

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



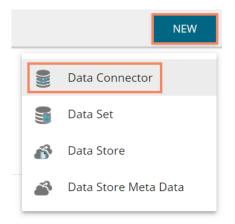
- ii) The Data Center homepage opens.
- iii) Click the 'Start Creating Connector' option.



| Data | Center | | | NEW |
|----------|-------------------------|---|---|--|
| | Home Data Connectors | Data Center: BDB provides quick and easy connections to yc | ur data sources such as databases, cloud | Start Creating |
| | Data Sets | applications API's spreadsheets etc. Using this external sources and build Data Sets and Data | | Connector |
| 6 | Data Stores | Data Sets: | Data Store: | |
| * | Data-Store Meta Data | This feature allows you to retrieve data directly from the source systems using parameterized SQL queries or API calls. Once you create the Data set, it can be published as a REST API service which can be consumed inside various BDB modules as well as outside the BDB Platform as well. | This feature allows you to Import data from external sources into BDB Platform Data store. Users can import the data using SQL queries or API calls. Data store also allows your to do row level user restrictions. We also provide provision to define the data hierarchy. | Crude Data Consector Crude Data Stor |

OR

- iv) Click the '**NEW'** option.
- v) A context menu opens with the following options:
 - a. Data Connector
 - b. Data Set
 - c. Data Store
 - d. Data Store Meta Data
- vi) Select the 'Data Connector' option from the context menu.



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

| Home | | | | | | | | |
|----------------------|--------------------|------------|--------------------|------|------------------|-------------|---------------|----------------------|
| Data Connectors | MySQL | Microsoft | ORACLE | HIVE | SAP HANA | | | |
| Data Sets | | SQL Server | | | | | | cassandro |
| Data Stores | MySQL | MSSQL | Oracle | Hive | SAP Hana | MS Sql Olap | Data Store | Cassandra |
| Data-Store Meta Data | | | | | | | | |
| | Open Data Protocol | Spark sal | AMAZON REDSHIFT | DATA | \sim | Ÿ | Linked in | Ħ |
| | OData | Spark SQL | AWS Redshift | File | Google Analytics | JIRA | Linkedin | Google Sheet |
| | | | | 2 | | | | |
| | | 6 🤧 | | a | | salesforce | ZOHO Books | untuit QuickBooks |



- viii) By selecting a connector type, users need to configure that connector.
- ix) Users need to fill in the required details for the selected data connector.

Note: Please note that based on the selected connector type the required information may vary.

x) Verify the data connection and save it by clicking the 'SAVE' option.
 E.g. The following image displays details to be filled to create a MySQL Data Connector.

| ЛуSQL Data Conn | | | | | | |
|---------------------------------------|--------|--|--|--|--|--|
| Data Connector Name * | | | | | | |
| Sample MySQL Data Connector | | | | | | |
| Description | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| User Name * | | | | | | |
| | | | | | | |
| *Use Read only credential Passed * | | | | | | |
| Instan | | | | | | |
| PAIsst * | | | | | | |
| Pot* | | | | | | |
| | | | | | | |
| Database Name | | | | | | |
| Sample Data Base | | | | | | |
| | CANCEL | | | | | |
| | | | | | | |

- xi) A success message appears to confirm the connection.
- xii) Another success message appears to inform the user that the data connector has been created successfully.



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

| Data Center | | | | | | | | N | EW |
|------------------------|-----------------------------|---|---|----------|---|------|-----------|----------|----------|
| Be Home | Data Connector Type | | | | | | | | |
| Bata Connectors | All | | | | | | | | |
| Data Sets | Search Data Connectors | | | | | Show | ing 250 (| out of 2 | 50 |
| Data Stores | Sample MySQL Data Connector | | 8 | b | C | < | 1 | Î | ^ |
| 🗳 Data Store Meta Data | mysql_deepu | 9 | 8 | b | С | < | - | Î | |

Users need to fill 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 Conn |
|-----------------------|
| 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

| CANCEL SAVE |
|-------------|
| |

2. MSSQL Data Connector

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

| Γ | MSSQL Data Conn | | | | | | | | |
|---|-----------------------|--|--|--|--|--|--|--|--|
| | 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

| *Use Read only credential | |
|---------------------------|-------------|
| Password * | |
| IP/Host * | |
| Port * | |
| Database Name * | |
| | CANCEL SAVE |

3. Oracle Data Connector

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

| C | Dracle Data Conne | |
|---|-----------------------|--|
| | 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) SID Service Name: Unique alias used for the database (when connecting)



| User Name * | |
|---------------------------|-------------|
| *Use Read only credential | |
| Password * | |
| IP/Host * | |
| Port * | |
| SID/ServiceName * | |
| | CANCEL SAVE |
| | |

4. Hive Data Connector

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

| ł | live 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

| iser Name * | |
|-------------|-------------|
| assword * | |
| P/Host * | |
| ort * | |
| | CANCEL SAVE |

5. SAP Hana Data Connector

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



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

| S | SAP Hana Data Co | |
|---|-----------------------|--|
| | 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

| Password * IP/Host * Port * CANCEL SAVE | User Name * | |
|--|-------------|--------|
| Port * | Password * | |
| | IP/Host * | |
| CANCEL SAVE | Port * | |
| | | CANCEL |

6. MSSQL OLAP Data Connector

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

| MsOlap Data Conn | | |
|-----------------------|--|--|
| 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 O Host | |
| IP * | |
| Port | |
| Database Name * | |
| | CANCEL 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 * 🔹 💌 | | | | | |
| | | CA | NCEL | SAVE | |
| | | | | | |

8. Cassandra Native Data Connector

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

| assandra Native | | |
|-----------------------|--|--|
| 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 |

9. O Data Connector

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

| C | Data Data Conne |
|---|-----------------------|
| | |
| | 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

| Data V1-V2 🔻 | | |
|--------------|--|-------------|
| | | |
| lser Name | | |
| assword | | |
| ase Url * | | |
| | | CANCEL 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 Co | | | |
|-----------------------|--|--|--|
| 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 SAVE |
| | |

11. AWS Redshift

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

| A | WS Redshift Data |
|---|-----------------------|
| | |
| | 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.

| User Name * | |
|---------------------------|--------|
| *Use Read only credential | |
| Password * | |
| IP/Host * | |
| Port * | |
| Database Name * | |
| | CANCEL |
| | |

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.

| File Data Connector | |
|----------------------------|-------------|
| Data Connector Name * | |
| Sample File Data Connector | |
| Description | |
| | |
| | |
| | |
| | CANCEL SAVE |
| | |

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

| Data Center | | | | | | | | N | EW |
|----------------------|----------------------------------|---|---|---|---|------|-----------|----------|----|
| e Home | Data Connector Type | | | | | | | | |
| Data Connectors | All | | | | | | | | |
| Data Sets | Search Data Connectors | | | | | Show | ing 373 (| out of 3 | 73 |
| 💰 Data Stores | Sample File Data Connector | 5 | ø | ¢ | C | < | / | Î | - |
| Data-Store Meta Data | Sample QuickBooks Data Connector | | 8 | þ | C | < | / | | |



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 the 'Google Analytics' connector.

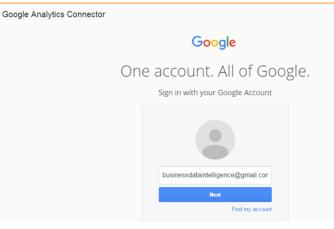
| Data | Center | | | | | | | | NEW |
|------|----------------------|--------------------|------------------|--------------------|------|------------------|-------------|------------------------|------------------|
| | Data Connectors | ~ | | | | | | | |
| | Data Sets | MySQL | Microsoft | ORACLE | HIVE | SAP HANA | | | |
| 6 | Data Store | MySQL | SQL Server | Oracle | Hive | SAP Hana | MS Sql Olap | Data Store | Cassandra |
| | Data-Store Meta Data | MySQL | MISSQL | Uracle | nive | SAP Hana | W3 SQI Olap | Data Store | Cassandra |
| | | Open Data Protocol | Spark sal | AMAZON REDSHIFT | DATA | \sim | Ÿ | Linked <mark>in</mark> | |
| | | OData | Spark SQL | AWS Redshift | File | Google Analytics | JIRA | Linkedin | Google Sheet |

iii) The user gets redirected to the Google Analytics Connector form.

| Google Analytics C | |
|-----------------------|--------|
| | |
| Select Account | • |
| Data Connector Name * | |
| Description | |
| | |
| | |
| | |
| | CANCEL |
| | |

- 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.

| Google | | bu | sinessdataintelligence@gmail.com 👻 |
|--------|-----------------------|--------------|------------------------------------|
| | - BIZVIZ wou | uld like to: | |
| | 8 Have offline access | i | |
| | | Deny Allow | |

- c. Users get redirected to the data connector form with an authorization code in the URL, after getting the access permission. The form mentions that the user has been logged in to the selected Google account.
 - i. Data Connector Name: Enter a user-defined name to identify the data connector.
 - ii. Description: Describe the data connector (optional).
 - iii. Click the **'SAVE'** option.

| \leftrightarrow \Rightarrow c | i Not secure bi.bdbizviz. | .com/modules/data-center/data-center.html#/connector/googleanalytics/create7 code=4%2FAACU2vgnl9i2nPHCTx8teKpGROtAFy7RQwSgNaYzrrt5SOIg0iXL 🔍 🧃 | ☆ 🙁 : |
|-----------------------------------|-----------------------------|--|-------|
| | Decision Platform | III 🖆 🛛 | 0 |
| Data | Center | | NEW |
| | Data Connectors | Google Analytics Connector | |
| | Data Sets | | |
| 6 | Data Store | You are Logged in!! | |
| | Data-Store Meta Data | Batz Connector Name * Sample Google Analytics Data Connector | |
| | | Description | |
| | | CANCEL SAVE | |

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



vi) A success message appears to notify about the new data connector has been created and added to the data connector list.

Data Connector added successfully!

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

| Data | Center | | | | | | | N | IEW |
|------|----------------------|--|---|----------|---|------|---------|----------|-----|
| | Home | Data Connector Type | | | | | | | |
| | Data Connectors | All | | | | | | | |
| | Data Sets | Search Data Connectors | | | | Show | ing 361 | out of 3 | 61 |
| ő | Data Stores | Sample Google Analytics Data Connector | 6 | è | C | < | 1 | Î | Â |
| ő | Data-Store Meta Data | Mobile_app | 6 | <u>d</u> | G | < | / | Î | |

Note: The below given page opens if the user selects an account using the '**Select Account'** drop-down menu. In this scenario, the user needs to provide only the Data Connector name, Description (optional) and click the '**SAVE**' option to create a new Google Analytics Data Connector.

| essdataintelligence@gmail.com | v |
|------------------------------------|-------------|
| nnector Name * | |
| le Google Analytics Data Connector | |
| iption | |
| ption | |
| | |
| | |
| | |
| | |
| | CANCEL SAVE |
| | |

14. JIRA

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



| JIRA 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) Server URL: Enter the server URL link.
- vi) Click 'SAVE' to verify the connection and save the new connector.

| User Name * | |
|---|--------------------|
| Password * | |
| Server URL (Example: https://your-domain.atlassian.net) * | |
| | CANCEL SAVE |
| | |

- vii) A success message appears to confirm the creation of the new data connector.
- viii) The newly created JIRA Data Connector gets added to the Data Connector list.

| Data | Center | | Data Conr | nector added successful | ly! | | | | | | N | W |
|------|----------------------|------------------------|--------------|-------------------------|-----|---|---|---|-------|--------|----------|----|
| | Home | Data Connector Type | | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | | Showi | ng 362 | out of 3 | 52 |
| ő | Data Stores | Sample JIRA Data Conne | ector | | | ß | ۵ | C | < | / | Î | |
| | Data-Store Meta Data | Sample Google Analytic | s Data Conne | ector | | 6 | ¢ | C | < | 1 | | |

15. LinkedIn

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



| nkedin Connector | | | |
|---------------------------|--|--------|--|
| | | | |
| Login to Linkedin account | | | |
| SELECT ACCOUNT | | | |
| Data Connector Name * | | | |
| Description | | | |
| | | | |
| | | | |
| | | | |
| | | CANCEL | |

- 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.

| Secure | https://www.linkedin.com/uas/oauth2/authorization?respon | se_typ | | |
|--------|--|--------|--|--|
| | (Not you?) | | | |
| | Bizviz would like to access some of your LinkedIn info: | | | |
| | Name, photo, headline, and current positions | | | |
| | The primary email address you use for your LinkedIn account | | | |
| | Manage your company page and post updates | | | |
| | Bizviz's terms apply. You can change this anytime from your settings. | | | |
| | Sign in to LinkedIn and allow access: | | | |
| | Password | | | |
| | Join LinkedIn Forgot your password? | | | |
| | Allow access Cancel Linked in 。 | | | |
| | Terms of Service Privacy Policy | | | |

- 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 the 'SAVE' option.



| Login to Linkedin account | |
|--------------------------------|--|
| CHANGE ACCOUNT | |
| Data Connector Name * | |
| Sample LinkedIn Data Connector | |
| Sumple Enkeenin Sata 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.

| Data | Center | | Data Connector added successfully! | | | | | | N | EW |
|------|----------------------|-------------------------|------------------------------------|---|---|---|-------|----------|-----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | - | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Showi | ng 363 d | out of 36 | 53 |
| 6 | Data Stores | Sample LinkedIn Data Co | onnector | ð | ¢ | C | < | / | Î | - |
| 2 | Data-Store Meta Data | Sample JIRA Data Conne | ctor | ø | 6 | G | < | 1 | Î | |

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

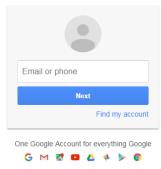
| Google Sheet Con | |
|-------------------------------|--------|
| Login to Google Sheet account | |
| Data Connector Name * | |
| Description | |
| | |
| | CANCEL |

iv) Enter the credentials of a Google Account to sign in with your Google account.



Google

Sign in with your Google Account



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

| Google | | @gmail.com · |
|--------|--|--------------|
| | → BIZVIZ would like to: | |
| | View and manage the files in your Google Drive | 0 |
| | 8 View and manage your spreadsheets in Google Drive | 0 |
| | View metadata for files in your Google Drive | 0 |
| | By clicking Allow, you allow this app and Google to use your information in accordance with their respective privacy policies. You can change this and ot Account Permissions at any time. | her |
| | Deny | Allow |

- vii) The Google Sheet Connector page opens.
 - 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.

| oogle Sheet Con | | | |
|--------------------------------|-----|--|-------------|
| You are Logged in! | | | |
| Sample Google Sheet Data Conne | tor | | |
| | | | |
| | | | CANCEL SAVE |



ix) A success message appears as displayed below.



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

| B | B Decision Platform | | | | | | | ß | ? | θ |
|------|------------------------|------------------------------------|---|---|---|---|------|---------|----------|-----|
| Data | Center | | | | | | | | N | IEW |
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Show | ing 364 | out of 3 | 364 |
| 6 | Data Stores | Sample Google Sheet Data Connector | 5 | 6 | ¢ | C | < | / | | ^ |
| | Data-Store Meta Data | Sample LinkedIn Data Connector | 5 | 8 | ¢ | C | < | 1 | Î | |

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

| • |
|----------|
| |
| |
| |
| |
| CEL SAVE |
| |

iv) Enter the credentials for a Facebook account for login



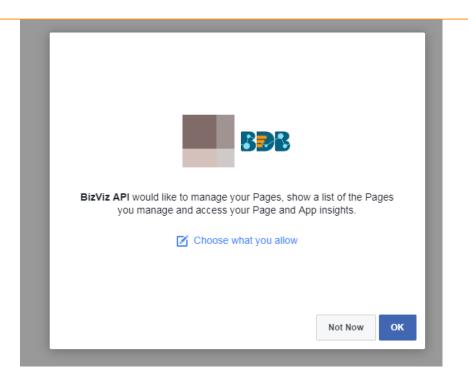
| facebook | Sign Up |
|----------|--|
| | |
| | Log in to Facebook |
| | Email address or phone number |
| | Password |
| | Log In |
| | Forgotten account? · Sign up for Facebook Not now |

- 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.

| BBB | |
|--|--|
| BizViz API will receive: your public profile and email address. ⁽⁹⁾ Edit This | |
| Continue as | |
| Cancel | |
| This doesn't let the app post to Facebook | |
| App Terms · Privacy Policy | |

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

| acebook Connector | |
|--------------------------------|--|
| | |
| You are Logged in!! | |
| Data Connector Name * | |
| Sample Facebook Data Connector | |
| Description | |
| | |
| | |
| | |
| | |

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

| Data | Center | | | | | | | NE | W |
|------|----------------------|--------------------------------|---|---|---|-----|---------|------------|----|
| | Data Connectors | Data Connector Type | | | | | | | |
| 3 | Data Sets | All | | | | | | | |
| 6 | Data Stores | Search Data Connectors | | | | Sho | wing 58 | 3 out of 5 | 58 |
| ۲ | Data-Store Meta Data | Sample Facebook Data Connector | 8 | þ | G | < | 1 | | Â |



Note: The below given page opens if the user selects an account using the '**Select Account'** drop-down menu. In this scenario, the user needs to provide only the Data Connector name, Description (optional) and click the '**SAVE**' option to create a new Facebook Data Connector.

| IO_EMAIL | | | - |
|-------------------------------|--|--------|------|
| ita Connector Name * | | | |
| ample Facebook Data Connector | | | |
| escription | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | CANCEL | SAVE |

18. MailChimp

- i) Select 'MailChimp' connector from the Data Connector page.
- ii) The MailChimp Connector page opens.
- iii) Provide the following information:
 - a. Data Connector Name
 - b. Description
 - c. User Name
 - d. API Key
- iv) Click the 'SAVE' option.

| Data Connector Name * | | |
|-----------------------|---|--|
| Description | | |
| | | |
| lser Name * | | |
| .PI Key * | ? | |
| | | |

- v) A success message appears.
- vi) The newly created MailChimp Data Connector gets added to the data connector list.



| Data | Center | Data Connector added successfully! | | | | | | | N | EW |
|------|----------------------|------------------------------------|---|---|---|---|-------|----------|----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | Showi | ng 365 (| out of 3 | 65 |
| ß | Data Stores | Sample MailChimp Data Connector | | ø | è | C | < | / | Î | ^ |
| | Data-Store Meta Data | Sample Google Sheet Data Connector | 9 | 6 | þ | G | < | / | Î | |

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.

| Flipkart Permission Registration | |
|----------------------------------|----------------|
| | Please sign in |
| | Email address |
| | Password |
| | Sign in |
| | |

- 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.



| Flipl | art Connector | |
|-------|--------------------------------|-------------|
| | | |
| | Account : Email_ID | |
| | Data Connector Name * | |
| | Sample Flipkart Data Connector | |
| | Description | |
| | | |
| | | |
| | | |
| | | |
| | | CANCEL SAVE |

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

| | Home | Data Connector Type | | | | | | | | |
|---|----------------------|------------------------------------|---|---|---|---|-------|----------|----------|----|
| | Data Connectors | All | | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | Showi | ng 366 (| out of 3 | 66 |
| 6 | Data Stores | Sample Flipkart Data Connector | 5 | ø | ¢ | C | < | / | Î | ^ |
| | Data-Store Meta Data | Sample MailChimp Data Connector | 5 | ø | þ | C | < | 1 | Î | |
| | | Sample Google Sheet Data Connector | | 6 | è | C | < | 1 | Î | |

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. Seller id
 - b. MWS Auth Token
 - c. Click 'VERIFY ACCOUNT' option

| Amazon Marketpla | | |
|--------------------------------|------|----------------|
| | | |
| IN - https://mws.amazonservice | s.in | * |
| Seller Id * | | |
| MWS Auth Token * | | |
| | | |
| | | VERIFY ACCOUNT |

v) A success message appears to confirm that the account has been successfully verified.

Account Verified Successfully



- 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 | |
| | |
| | |
| | |
| | CANCEL SAVE |
| | |

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

| Data | Center | | Data Connector added | successfully! | | | | | | N | EW |
|------|----------------------|------------------------|------------------------|---------------|---|----------|---|-------|----------|----------|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | | Showi | ng 367 (| out of 3 | 67 |
| ß | Data Stores | Sample Amazon Marke | etplace Data Connector | | ø | è | c | < | / | Î | ^ |
| | Data-Store Meta Data | Sample Flipkart Data C | Connector | | Ô | B | G | < | 1 | Î | |

21. Dropbox

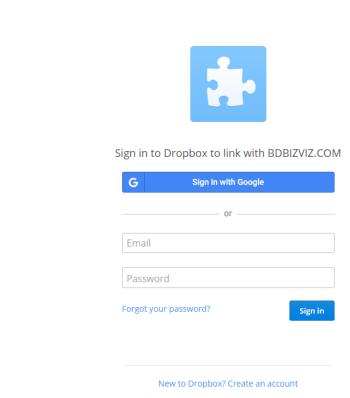
- i) Select 'Dropbox' connector from the Data Connector page.
- ii) The Dropbox Connector page opens.
- iii) Click the 'SELECT ACCOUNT' option for login to a Dropbox account.

| opbox Connector | | | |
|--------------------------|--|---|------------|
| Login to Dropbox account | | | |
| Data Connector Name * | | | |
| Description | | | |
| | | | |
| | | | |
| | | c | ANCEL SAVE |

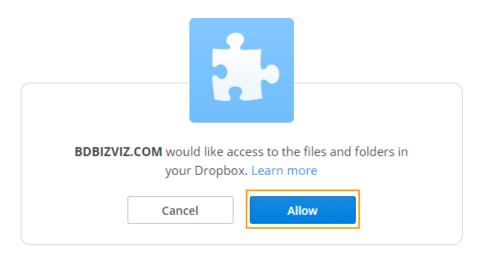


- iv) The 'Sign in' page of the Dropbox opens.
- v) Enter the credentials to Sign in.

**



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



- viii) The Dropbox connector page opens with the connected Dropbox account.
 - a. The user can click the 'CHANGE ACCOUNT' option if wish to change the selected account.
 - b. Enter a Data Connector Name.
 - c. Click the 'SAVE' option.



| ropbox Connector | | | |
|---|---|--|-------------|
| Login to Dropbox account | | | |
| CHANGE ACCOUNT | | | |
| Data Connector Name * Sample Dropbox Data Connector | 1 | | |
| Description | | | |
| | | | |
| | | | |
| | | | CANCEL SAVE |
| | | | |

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

| Data | Center | | , Data Connector added successfully! | | | | | | | N | EW |
|------|----------------------|--------------------------|---|---|---|---|---|------|----------|----------|----------|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Show | ng 368 (| out of 3 | 68 |
| 6 | Data Stores | Sample Dropbox Data Conn | nector | 9 | 6 | • | C | < | / | Î | ^ |
| | Data-Store Meta Data | Sample Amazon Marketplac | ce Data Connector | 5 | 6 | | C | < | 1 | Î | |

22. Salesforce

- i) Select the '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.

| Sales Force Conne | |
|-----------------------------|--------|
| Login to SalesForce account | |
| Data Connector Name * | |
| Description | |
| | |
| | |
| | CANCEL |

- 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.



| sales | sforce |
|-----------------------|-------------------|
| Username | |
| | |
| Password | |
| Lo | g In |
| Remember me | |
| Forgot Your Password? | Use Custom Domain |
| Not a customer? | Try for Free |

- v) After successfully logged in to the selected Salesforce account, the user gets redirected to the Salesforce connector page.
 - 1. Provide the Data Connector name.
 - 2. Describe the data connector (optional).
 - 3. Click the 'SAVE' option.

| Sales Force Conne | | |
|-----------------------------------|--|-------------|
| You Are SuccessFully Logged In | | |
| Sample Sales Force Data Connector | | |
| | | |
| | | CANCEL SAVE |

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

| Data | Center | | | | | | | | N | EW |
|------|----------------------|-----------------------------------|-----|---|----------|---|------|---------|----------|----------|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Show | ing 369 | out of 3 | 69 |
| 6 | Data Stores | Sample Sales Force Data Connector | II. | 6 | b | C | < | 1 | Î | ^ |
| | Data-Store Meta Data | Sample Dropbox Data Connector | II. | 6 | ۵ | C | < | 1 | Î | |

23. 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.
- iii) Click the 'SAVE' option after the data connection gets verified.

| ZohoBooks Data C |
|----------------------------------|
| Data Connector Name * |
| Sample ZOHO Books Data Connector |
| Description |
| |
| |
| User Name * |
| |
| Password * |
| |
| CANCEL SAVE |

- iv) A success message appears to confirm the creation of the new data connector.
- v) The newly created ZOHO Books Connector gets added to the Data Connectors list.

| Data Center | Data Connector added successfully! | | | | | | N | IEW |
|----------------------|------------------------------------|-----|----------|---|-------|-----------|----------|-----|
| Home | Data Connector Type | | | | | | | |
| Data Connectors | All | | | | | | | |
| Data Sets | Search Data Connectors | | | | Showi | ing 370 (| out of 3 | 170 |
| 😚 Data Stores | Sample ZOHO Books Data Connector | 5 6 | . | с | < | 1 | Î | Î |
| Data-Store Meta Data | Sample Sales Force Data Connector | 5 6 | | c | < | 1 | i. | |

24. QuickBooks

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

| QuickBooks Conne | | | |
|-----------------------------|--|--------|-----|
| Login to QuickBooks account | | | |
| Data Connector Name * | | | |
| Description | | | |
| | | | |
| | | CANCEL | AVE |



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

| mututickbooks | |
|--|--|
| Don't have an account? Sign up now. Sign in | |
| G Sign in with Google | |
| or | |
| Password | |
| Remember me | |
| 🔒 Sign In | |
| I forgot my user ID or password | |
| Intuit. business of life | |

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

| Tuickbooks. |
|--|
| Don't have an account? Sign up now. Let's make sure it's you |
| We'll send you a code to verify your info. This helps keep your account safe. Learn more |
| Choose one option: (a) Get a code texted to: ********************2563 |
| Get a code emailed to: v*****r@bdbizviz.com |
| Onfirm my account a different way (takes longer) |
| Cancel |
| •••••• densifia the |
| Intuit. simplify the business of life |
| 🧭 turbotax 🔞 quickbooks 🚳 proconnect 🚺 mint |

Note: the users can also sign in using the Google Account.

vii) After verifying the authenticity code, the user gets a new window asking to authorize BDBizViz. viii) Click the '**Connect**' option.



| ^b quickbooks. | Welcome, Vivek (Not you?) |
|---|---------------------------|
| Authorize Intuit to securely share your data to BDBizViz_1 | |
| d intition of the second sec | * |
| Big Data BizViz LLC BI | DBizViz_1 |
| When you select Connect we will grant BDBizViz_1 access to your QuickBooks Onli data about your company, data about your customers, suppliers, and/or employees, any updates you may make to your QuickBooks Online data after you connect. | ne data. This includes: |
| You can find a list of data here. | |
| Intuit and BDBizViz_1 may share the information in my Intuit and BDBizViz_1 accour BDBizViz_1 and its use of your information are subject to BDBizViz_1's Terms of Ser learn more about how Intuit uses your data, see our Privacy Statement. | |
| Disconnect BDBizViz_1 anytime from your My Apps page. | |
| Cancel | Connect |

- ix) 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.

| iickBooks Conne | | |
|----------------------------------|------|-------------|
| ogin to QuickBooks account | | |
| CHANGE ACCOUNT | | |
| ata Connector Name * | | |
| Sample QuickBooks Data Connector | | |
| Description | | |
| | | |
| | | |
| | | |
| | | |
| | | CANCEL SAVE |

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

| Data | Center | | | | | | | | N | IEW |
|------|----------------------|-----------------------------------|---|---|---|---|------------------------|---|---|-----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | Showing 372 out of 372 | | | |
| 6 | Data Stores | Sample QuickBooks Data Connector | 5 | ø | þ | С | < | 1 | Î | ĺ |
| | Data-Store Meta Data | Sample Google Form Data Connector | 3 | 6 | | C | < | 1 | Ĩ | |



25. Twitter

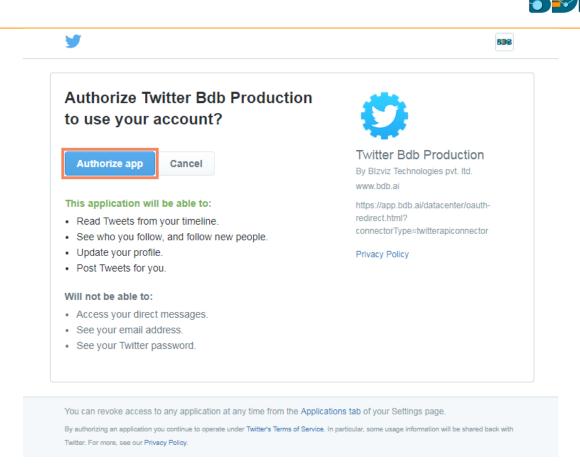
- i) Select '**Twitter'** connector type icon from the Data Connector page.
- ii) The Twitter Connector page opens.
- iii) Either select a Twitter account listed in the drop-down menu or add a new Twitter account.

| BDBizviz | | | • |
|---|---|--|-------|
| Note:If you are already loggedIn using one acco | unt and want to try using another account | t then first logout from https://twitter.com | |
| ata Connector Name * | | | |
| Sample Twiter Data Connector | | | |
| | | | |
| Description | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | CANCE | LSAVE |

- 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) Click the 'Authorize app' option to authorize the Twitter BDB production to use data from your account.

| 9 | Sign up for Twitter > |
|--|---|
| AutHorize Twitter Bdb Production to use your account? | 0 |
| Username or email | Twitter Bdb Production By Blzviz Technologies pvt. ltd. www.bdb.ai |
| Password Remember me - Forgot password? | https://app.bdb.ai/datacenter/oauth- redirect.html? connectorType=twitterapiconnector |
| Authorize app Cancel | Privacy Policy |
| 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. | |
| Will not be able to: Access your direct messages. See your email address. See your Twitter password. | |

vii) Another page opens asking permission to authorize Twitter BDB Production to use your account.



- viii) The Twitter Connector page opens with a notification that you are logged in to the selected account.
 - a. Enter a Data Connector Name.
 - b. Click the 'SAVE' option.

| Twitter Connector | | |
|-----------------------------|--|------|
| You are Logged in!! | | |
| Data Connector Name * | din using one account and want to try using another account then first logout from https://twitter.com | |
| Sample Twitter Data Connect | tor | |
| Description | | |
| | | |
| | | |
| | | |
| | CANCEL | SAVE |
| | | |

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



| Data | Center | | Data Connector added successfully! | | | | | | | N | EW |
|------|----------------------|-----------------------------|------------------------------------|---|---|---|---|------|---------|----------|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Show | ing 371 | out of 3 | 71 |
| 6 | Data Stores | Sample Twitter Data Connect | tor | 5 | ð | þ | G | < | / | Î | - |
| | Data-Store Meta Data | Sample ZOHO Books Data Co | onnector | 5 | ő | þ | G | < | 1 | Î | |

26. FTP Server

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

| FTP Server Data Co | |
|----------------------------------|--|
| Data Connector Name * | |
| Sample FTP Server Data Connector | |
| Description | |

- 3. Host: Enter database server details (from where the user wants to fetch data)
- 4. Port: The server port number
- 5. User Name: Enter a User Name (It should be the same as given in the connection server)
- 6. Password: Enter the Password (It should be the same as provided in the connection server)
- 7. Start Path: Give a defined path to start
- iii) Click the 'SAVE' option.

| Host * | | |
|--------------|-------------|---|
| | | |
| Port * | | |
| | | |
| User Name * | | |
| bizvizftp | | |
| Password * | | |
| | | |
| Start Path * | | |
| | | |
| | | |
| SFTP Server | * | |
| | | - |
| | CANCEL SAVE | |
| | | 1 |
| | | |

iv) The newly created FTP Server data connector gets added to the Data Connectors list



| Data | Center | | Data Connector added successfully! | | | | | | | N | EW |
|------|----------------------|----------------------------|------------------------------------|----|---|---|---|------|---------|----------|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Show | ing 374 | out of 3 | 74 |
| 6 | Data Stores | Sample FTP Data Connector |] | | ø | | C | < | / | Î | Â |
| | Data-Store Meta Data | Sample File Data Connector | _ | 07 | ø | è | C | < | 1 | Î | |

27. ServiceNow

- i) Select 'ServiceNow' connector type icon from the Data Connector page.
- ii) Users get directed to the Service Now Connector page.
- iii) Navigate to this the https://developer.servicenow.com/app.do#!/instance link
- iv) Provide the credentials to login
- v) A new page appears with the instance link
- vi) Refresh the instance
- vii) Copy the instance link and use in the 'Developer Instance URL' provided in the Service Now connector form.
- viii) 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
- ix) Click the 'SAVE' option to verify and save the new data connector details.

| Data Connector Name * | |
|-----------------------------------|-------------|
| Sample Service Now Data Connector | |
| Description | |
| stance User Name * | |
| admin | |
| assword * | |
| eveloper Instance URL * | |
| | |
| | CANCEL SAVE |

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

| Data Connector Type | | | | | | | | |
|---------------------------|---|---|---|---|-----|----------|----------|----|
| All | | | | | | | | |
| Search Data Connectors | | | | | Sho | owing 58 | 3 out of | 58 |
| ServiceNow Data Connector | 9 | ø | þ | G | < | 1 | Î | ^ |

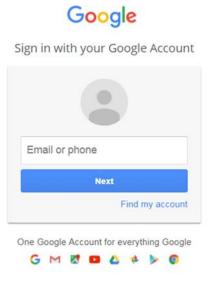


28. Google Forms

- i) Click the 'Google Forms' Data Connector icon from the Data Connector page.
- ii) The Google Form Data Connector page opens.
- iii) Click the 'SELECT ACCOUNT' option.

| oogle Form Conn | | | |
|------------------------------|--|--------|------|
| Login to Google Form account | | | |
| Data Connector Name * | | | |
| Description | | | |
| | | | |
| | | CANCEL | SAVE |
| | | | |

- iv) A page opens asking the user to Sign in with a Google Account.
- v) Enter the required credentials for the selected Google Account.



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



| Google | | | businessdataintelligence@gmail.com 👻 |
|--------|-----------------------|--------|--------------------------------------|
| | - BIZ√IZ would li | ke to: | |
| | 8 Have offline access | () | |
| | | Deny | |

- 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.

| oogle Form Conn | | | | |
|--|-----|--|-------------|--|
| You are Logged in! | | | | |
| Data Connector Name * Sample Google Form Data Conne | tor | | | |
| Description | | | | |
| | | | | |
| | | | CANCEL SAVE | |

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

| | Decision Platform | | | | | | | | P | ? | e |
|------|----------------------|---------------------------|------------------------------------|---|---|----|---|------|---------|----------|----|
| Data | Center | | Data Connector added successfully! | | | | | | | N | EW |
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | - | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Show | ing 372 | out of 3 | 72 |
| ő | Data Stores | Sample Google Form Data | Ionnector | 3 | ø | ۵ | c | < | 1 | Î | |
| ð | Data-Store Meta Data | Sample Twitter Data Conne | ctor | 9 | | ഷി | С | < | | | |

29. 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.



| acebook Ads Con | | | |
|-----------------------|--|--------|--|
| Select Account | | | |
| Add New Account | | | |
| Data Connector Name * | | | |
| Description | | | |
| | | | |
| | | | |
| | | CANCEL | |
| | | | |

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

| facebook | Sign Up |
|----------|--|
| | |
| | Log in to Facebook |
| | Email address or phone number |
| | Password |
| | Log In |
| | Forgotten account? - Sign up for Facebook Not now |
| | |

v) A new page appears to confirm whether the user wants to continue as the displayed name or want to edit it.



| e B B C |
|---|
| Bizviz will receive: your name and profile picture and email address. |
| 🗹 Edit This |
| Continue as |
| |
| Cancel |
| This doesn't let the app post to Facebook |
| Privacy Policy |

vi) A new window opens informing that BizViz would like to manage the ads, Facebook ads, and related states and display a list of the pages you manage.
 vii) Click the (OV) action to give neuroistical

| vii) | Click the ' OK ' | option | to g | give | permission | • | |
|------|-------------------------|--------|------|------|------------|---|--|
| | | | | | | | |

| Bizviz would like to manage your ads, access your Facebook ads and related stats and show a list of the Pages you manage. |
|--|
| Choose what you allow |
| |
| Not Now OK |
| NOLNOW |

- viii) The Facebook Ads Connector page re-opens with the notification that the user has logged in.
 - 1. Enter the Data Connector name.
 - 2. Provide Description for the data connector (optional).
 - 3. Click the 'SAVE' option.



| Facebook Ads Con | |
|--------------------------------|-------------|
| You are Logged in!! | |
| Data Connector Name * | |
| Sample Facebook Data Connector | |
| Description | |
| | |
| | |
| | |
| | CANCEL SAVE |
| | |

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

| ata Connector Type | | | | | | | | |
|------------------------------------|-----|---|----------|---|-------|-----------|-----------|----|
| All | | | | | | | | |
| Search Data Connectors | | | | | Showi | ing 263 (| out of 26 | 63 |
| Sample Facebook Ads Data Connector | 0)) | ø | <u>b</u> | c | < | 1 | Î | |
| SportAnalytics | | 6 | B | С | < | | Î | |

30. 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.

| oogle Adwords C | | |
|--|--|--------|
| Login to Google Adwords account SELECT ACCOUNT | | |
| Data Connector Name * | | |
| Description | | |
| | | |
| | | |
| | | CANCEL |

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 accourt | |
|-------------------------------------|-----------------|
| | Email or phone |
| Find my account | Next |
| | Find my account |

Create account

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

| | Google |
|----|---|
| On | e account. All of Google. |
| | Sign in with your Google Account |
| | crictix.analytics@gmail.com |
| | |
| | Sign in |
| | Stay signed in Forgot password? |
| | |
| | Sign in with a different account |
| | One Google account for everything Google G M 🕅 ◘ 🛆 🚸 🕨 © |

- 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 data access.

| Google | | | crictix.analytics@gmail.com 👻 |
|--------|-----------------------|------------|-------------------------------|
| | BD Biz∨iz would lik | ke to: | |
| | 8 Have offline access | <u>(</u>) | |
| | | Deny Allow | |



- viii) The Google AdWords connector page opens with a notification that the user has logged in to the selected Google account.
 - a. Provide data connector name.
 - b. Describe the data connector (optional).
 - c. Click the 'SAVE' option.

| Google Adwords C | | | | |
|---|----|--|--------|------|
| | | | | |
| You are Logged in! CHANGE ACCOUNT Data Connector Name * | | | | |
| Sample Google Adwords Data Connect | or | | | |
| Description | | | | |
| | | | | |
| | | | | |
| | | | CANCEL | SAVE |
| | | | | |

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

| Data | Center | | Data Connector added successfully! | | | | | | | N | EW |
|------|----------------------|---------------------------|------------------------------------|---|---|---|---|------|---------|----------|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Show | ing 375 | out of 3 | 75 |
| ő | Data Stores | Sample Google Adwords Dat | ta Connector | 5 | 6 | þ | C | < | 1 | Î | ^ |
| | Data-Store Meta Data | Sample FTP Data Connector | | 5 | 6 | ۵ | С | < | 1 | Î | |

31. 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).

| S | nowflake Connec |
|---|---------------------------------|
| | Data Connector Name * |
| | Sample Snowflake Data Connector |
| | Description |

- 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 account name.



- g. Provide the Database name.
- iii) Click the 'SAVE' option.

| User Name * | |
|------------------|--------|
| Password * | |
| Туре | |
| Without region 🔻 | |
| Account name * | |
| Database Name | |
| | CANCEL |
| | |

iv) Users get a message "Successfully connected...!" if the connection gets successfully verified.

| | Successfully connected! | |
|----|--|--|
| v) | Another success message appears to inform that the Dat | a connector has been added successfully. |

vi) The new Snowflake Data Connector gets created and added to the Data Connectors list.

| Data Connector Type | | | | | | | | | |
|-------------------------------------|----|---|---|----------|---|-------|----------|-----------|----------|
| All | | | | | | | | | |
| Search Data Connectors | | | | | | Showi | ng 264 (| out of 26 | 54 |
| Sample Snowflake Data Connector | | | 6 | | G | < | 1 | Î | ^ |
| Sample Google AdWords Data Connecto | or | 5 | 6 | b | G | < | 1 | Î | |

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...

| ote:If you are already logged in using one account and want to try using anoth | ier account then first logout from https://twitter.com | |
|--|--|--|
| ata Connector Name * | | |
| | | |
| escription | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

- iv) Authorize BDB Twitter Ads API connector to access data from the selected Twitter account.
 - a. Provide the credentials to log in to the Twitter account.
 - b. Click the 'Authorise app' option.

| y | Sign up for Twitter |
|--|---|
| Authorise Twitter ads Api Conn to use your account? | BPR |
| Username or email | Twitter ads Api Conn By Bizviz www.bdbizviz.com |
| Password Remember me - Forgotten your password? | http://localhost:8080/datacenter/oauth- redirect.html? connectorType=twitteradsapiconnector |
| Authorise app Cancel | Privacy Policy |
| 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 | |

- v) Another window opens to confirm the authorization process.
- vi) Click the 'Authorise app' option.



| 🔰 Home | About | Language: English 👻 |
|--------|---|---------------------|
| | Log in to Twitter | |
| | sales@bdb.ai | |
| | Password | |
| | Log in Remember me - Forgot password? | |
| | New to Twitter? Sign up now > | |
| | Already using Twitter via text message? Activate your account » | |

- vii) 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.

| witter Ads Conne | | | | |
|--|----------------------------------|--|------------------------------|--|
| You are Logged in!! | | | | |
| Note:If you are already loggedIn Data Connector Name * Sample Twitter Data Connector | using one account and want to tr | y using another account then first log | out from https://twitter.com | |
| Description | | | | |
| | | | | |
| | | | | |
| | | | | |

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

| Data | Center | | Data Connector added successfully! | | | | | | | N | EW |
|------|----------------------|------------------------------|------------------------------------|---|---|----------|---|------|---------|----------|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | | Show | ing 377 | out of 3 | 77 |
| 8 | Data Stores | Sample Twitter Data Connecto | or | 5 | 6 | D | C | < | 1 | Ĩ | |
| | Data-Store Meta Data | Sample Service Now Data Con | nector | 5 | 6 | | C | < | 1 | Î | |

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.



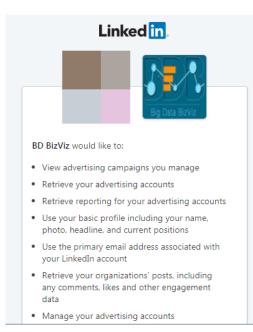
LinkedIn Ads Conn...

| 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 by clicking the 'Allow' option.





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

| LinkedIn Ads Conn | | |
|------------------------------|--------|------|
| | | |
| You are Logged in!! | | |
| Data Connector Name * | | |
| Sample LinkedIn Ads Data Cor | nector | |
| Description | | |
| | | |
| | | |
| | | |
| | CANCEL | SAVE |

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

| Data Sets Search Data Connectors | Data Connector added successfully | | | | | | | N | EW |
|----------------------------------|------------------------------------|---|---|---|---|------|---------|----------|----|
| Home | Data Connector Type | | | | | | | | |
| Bata Connectors | All | | | | | | | | |
| Data Sets | Search Data Connectors | | | | | Show | ing 378 | out of 3 | 78 |
| 😚 Data Stores | Sample LinkedIn Ads Data Connector | 9 | 6 | þ | C | < | 1 | Î | |
| Data-Store Meta Data | Sample Twitter Data Connector | 5 | 6 | ١ | G | < | 1 | Î | |

34. Postgre SQL

- i) Click the '**Postgre SQL**' Data Connector icon from the Data Connector page.
- ii) The Postgre SQL Data Connector page opens.
- iii) Provide the following information:
 - a. Data Connector name

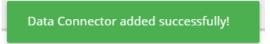
| SQL Data C | | | | |
|---------------------------|--|--|--|---------------------------------------|
| ctor Name * | | | | |
| PostgreSQL Data Connector | | | | |
| | | | | |
| | | | | |
| | ctor Name * PostgreSQL Data Connector | ctor Name * PostgreSQL Data Connector | ctor Name * PostgreSQL Data Connector | ctor Name * PostgreSQL Data Connector |

- b. Username
- c. Password
- d. IP/Host
- e. Port
- f. Database Name
- iv) Click the 'SAVE' option.



| User Name * | |
|---------------|-------------|
| User Name - | |
| Password * | |
| | |
| IP/Host * | |
| | |
| Port | |
| | |
| Database Name | |
| | |
| | CANCEL SAVE |
| | |

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



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

| Data | Center | | | | | | | | N | EW |
|------|----------------------|------------------------------------|---|---|----------|---|------|-----------|-----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Show | ing 378 (| out of 37 | 78 |
| ß | Data Stores | Sample Postgrey SQL Data Connector | 5 | 6 | ¢ | C | < | 1 | Î | |
| ۵ | Data-Store Meta Data | Sample Twitter Data Connector | 5 | 6 | <u>b</u> | C | < | / | Î | |

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 |



| iv) | A new page opens asking valid credential for a Google account. |
|-----|---|
| | Google |
| | One account. All of Google. Sign in with your Google Account |
| | |
| | businessdataintelligence@gmail.cor |
| | Next Find my account |
| | Create account |
| | One Google Account for everything Google |

G M 🛃 🖬 🛆 🎋 🕨 🌍

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

| Google | | | businessdataintelligence@gmail.com 👻 |
|--------|-----------------------|------------|--------------------------------------|
| | - BIZ∨IZ would | like to: | |
| | 8 Have offline access | 0 | |
| | | Deny Allow | |

- 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

| FireBase DB Conn | | |
|---|----------------|--------|
| You are Logged in! Data Connector Name * Sample FireBase Data Connector | CHANGE ACCOUNT | |
| Description | | |
| | | CANCEL |

vii) A success message appears.



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

| Data | Center | | | | | | | | NE | W |
|------|-----------------------------|--|-----------|---|---|---|-------|--------|-----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Be Home Data Connector Type | | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Showi | ng 378 | out of 37 | 78 |
| 6 | Data Stores | Home Data Connector Type All Data Sets Data Stores Data Stores Data Store Meta Data Data Connector Data Connec | ^ | | | | | | | |
| ۵ | Data-Store Meta Data | lnk 8apr | \$ | ø | ¢ | C | < | 1 | Î | |

36. Leadsquared

- i) Click the 'Leadsquared' Data Connector icon from the Data Connector page.
- ii) The Leadsquared Data Connector page opens.
- 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.

| eadSquared Data | |
|-----------------------------------|-------------|
| Data Connector Name * | |
| Sample Leadsquared Data Connector | |
| Description | |
| | |
| Access Key * | |
| | |
| Secret Key # | |
| | |
| api-us11USA | · |
| | CANCEL SAVE |
| | |

- 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.

| Data | Center | Data | Connector added successfully! | | | | | | N | EW |
|------|----------------------|----------------------------------|-------------------------------|---|---|---|------|-----------|----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Show | ing 378 (| out of 3 | 78 |
| ő | Data Stores | Sample Leadsquared Data Connecto | pr | ß | ¢ | C | < | 1 | Î | |
| | Data-Store Meta Data | Sample FireBase Data Connector | | 6 | ¢ | C | < | 1 | | |



37. Microsoft Dynamics

- i) Click the 'Microsoft Dynamics' Data Connector icon from the Data Connector page.
- ii) The Microsoft Dynamics Data Connector page opens.
- iii) Provide the following information:
 - a. Tenant ID/Directory ID
 - b. Resource URL
 - c. Client ID/ Application ID
 - d. Client Secret/ Keys
 - e. Add the given URL link to register your azure app. Follow the below given steps:
 - i. Login to your Azure Account as Admin
 - ii. Click Azure Active Directory
 - iii. Click App Registration
 - iv. Select Your App
 - v. Click 'Settings'
 - vi. Click reply URL
 - vii. Add the given URL (https://app.bdb.ai/datacenter/oauth-redirect.html)

| licroSoft Dynamic | |
|--|---|
| Tanant ID/ Directory ID * | ? |
| Resouce URL * | |
| Client_Id / Application ID * | |
| | ? |
| Client_Secret / Keys * | ? |
| Login To your Asure Account as admin \Rightarrow click Asure Active Directory \Rightarrow click app registration \Rightarrow select your app \Rightarrow click settings \Rightarrow click relpy URL \Rightarrow add This URL $=$ https://app.bdb.ai/datacenter/oauth-redirect.html | 2 |

- viii. Log in to the Microsoft Dynamics CRM account by using the 'SELECT ACCOUNT' option.
- ix. Provide the Data Connector Name.
- x. Describe the Data Connector (optional)
- xi. Click the 'SAVE' option.
- xii. A success message appears.
- xiii. The newly created Microsoft Dynamics Data Connector gets added to the Data Connectors list.

| ogin to MicroSoft Dynamics CRM account | | |
|--|--|--------------------|
|)ata Connector Name * | | |
| Description | | |
| | | |
| | | |
| | | |
| | | CANCEL SAVE |



38. Instagram Ads

- i) Click the 'Instagram Ads' Data Connector icon from the Data Connector page.
- ii) The Instagram Ads Data Connector page opens.
- iii) The user needs to login to an Instagram account by clicking on the 'SELECT ACCOUNT' option.

| stagram Ads Con | |
|-----------------------|--------|
| | |
| SELECT ACCOUNT | |
| Data Connector Name * | |
| Description | |
| | |
| | |
| | |
| | CANCEL |

- iv) Allow BDB to access data from the selected Instagram account by clicking the 'Allow' option.
- v) The Instagram Ads connector page opens with a notification that the user has been logged in to the selected Instagram Ads Data Connector.
- vi) Provide a title to the newly created Data Connector.
- vii) Click the 'SAVE' option to save the inserted information.

| nstagram Ads Con | | | |
|-------------------------------------|---|--|-------------|
| You are Logged in!! | | | |
| Data Connector Name * | | | |
| Sample Instagram Ads Data Connector | (| | |
| Description | | | |
| | | | |
| | | | |
| | | | |
| | | | CANCEL SAVE |

39. Fitbit

- i) Click the 'Fitbit' Data Connector icon from the Data Connector page.
- ii) The FITBIT Data Connector page opens.
- iii) Log in to a Fitbit account by clicking on the 'SELECT ACCOUNT' option.



| ITBIT Connector | ctor |
|-------------------------|-------|
| | |
| Login to FitBit account | |
| SELECT ACCOUNT | |
| Data Connector Name * | ame * |
| Description | |
| | |
| | |
| | |
| | |

iv) A new page opens asking the credentials for your Fitbit account.

| Welcome Back | |
|---------------------------------------|--|
| Continue with Facebook | |
| Continue with Google | |
| EMAIL | |
| Your email address PASSWORD | |
| Enter your password | |
| Except the logged in Forgot password? | |
| Login | |
| Want to try out Fitbit? Sign up | |

- v) A new page appears asking permission to get the data from the chosen Fitbit account.
- vi) Allow BDB to access data from the selected Fitbit account by clicking the 'Allow' option.
- vii) The Fitbit Ads connector page opens with a notification that the user has been logged in to the selected Instagram account.
- viii) Provide a title to the newly created Data Connector.
- ix) Click the 'SAVE' option to save the inserted information.

| TBIT Connector | | |
|------------------------------|--|-------------|
| Login to FitBit account | | |
| CHANGE ACCOUNT | | |
| Jata Connector Name * | | |
| Sample Fitbit Data Connector | | |
| Description | | |
| | | |
| | | |
| | | |
| | | |
| | | CANCEL SAVE |
| | | |



- x) A success message appears.
- xi) The new Fitbit Data Connector gets added to the list of Data Connectors.

| | | | Data Connector added successfully! | | | | | | | |
|---|-----------------|------------------------------|------------------------------------|---|---|---|---|-------|---------|----------|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | • | | | | | | | |
| - | Data Sets | Search Data Connectors | | | | | | Showi | ing 380 | out of 3 |
| | | | | | | | | | | |
| 6 | Data Stores | Sample Fitbit Data Connector | 7 | 5 | 6 | þ | C | < | / | ī |

40. YouTube

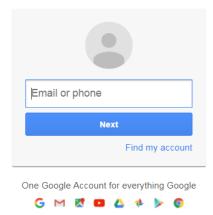
- i) Click the 'YouTube' Data Connector icon from the Data Connector page.
- ii) The YouTube Data Connector page opens.
- iii) The user needs to login to a Google account (which is connected to Login to the YouTube) by clicking on the 'SELECT ACCOUNT' option.

| YouTube Connector | | |
|---------------------------|--|--------|
| Login to You Tube account | | |
| | | |
| Description | | |
| | | CANCEL |
| | | |

iv) A new page appears asking credentials to log in to a Google account.



Sign in with your Google Account





v) After logging in the one Google account, the user needs to choose from the multiple Google accounts (in case of multiple Google accounts attached to single credentials).
 E.g., the 'nividhondemand' account has been selected in the below given image:

| Google | 3 | |
|---|---|--|
| Accounts Choose how to use Google: • BDI Systems (businessdataintelligence@gmail.com) • BDBIZVIZ Technologies (Big Data BizViz) • nividhondemand | Select an account BDI Systems businessdataintelligence@gmail businessdataintelligence@gmail BDBIZVIZ Technologies (Big D> Image: Dividhondemand | |

vi) Click the 'Allow' option to permit BDB to access YouTube data from the attached Google account.

| Google | | | nividhondemand 👻 |
|--------|-----------------------|------------|------------------|
| | BIZVIZ would like to: | | |
| | 8 Have offline access | () | |
| | | Deny Allow | |

- vii) The YouTube connector page opens with a notification that the user has been logged in to the selected Google account.
- viii) Provide a title to the newly created Data Connector.
- ix) Click the 'SAVE' option to save the inserted information.

| /ouTube Connector | | | |
|--------------------------|------|-------------|--|
| | | | |
| You are Logged in! | | | |
| CHANGE ACCOUNT | | | |
| Data Connector Name * | | | |
| Sample YouTube Connector | | | |
| Description | | | |
| | | | |
| | | | |
| | | | |
| | | CANCEL SAVE | |
| | | | |
| | | | |

x) A success message appears, and the newly created YouTube Data Connector gets added to the Data Connectors list.



| Data | Center | | Data Connector added successfully! | | | | | | | NE | w |
|------|----------------------|------------------------------|------------------------------------|---|---|---|---|-------|----------|-----------|----------|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | | Showi | ng 381 (| out of 38 | 1 |
| 6 | Data Stores | Sample YouTube Data Conne | ector | 9 | ø | þ | C | < | 1 | Î | ^ |
| | Data-Store Meta Data | Sample Fitbit Data Connector | r | 5 | 6 | þ | G | < | 1 | Î | |

41. Bing Ads

- i) Click the 'Bing Ads' Data Connector icon from the Data Connector page.
- ii) The Bing Ads Data Connector page opens.
- iii) Log in to a Bing Ads account by clicking on the 'SELECT ACCOUNT' option.

| Bing Ads Connector | |
|--------------------------------------|--------|
| Login to Bing Ads account | |
| SELECT ACCOUNT Data Connector Name * | |
| Description | |
| | |
| | |
| | CANCEL |

iv) A new page appears asking to sing in for the chosen Microsoft account.

| Microsoft | |
|----------------------|------------------------------------|
| crictix.analytics@gm | nail.com |
| Enter passw | ord |
| - | essing sensitive info, you need to |
| verify your password | a. |
| | a. |
| | a. |
| ••••• | |



- v) The Bing Ads connector page opens with a notification that the user has been logged in to the selected Microsoft account.
- vi) Provide a title to the newly created Data Connector.
- vii) Click the 'SAVE' option to save the inserted information.

| Bing Ads Connector | |
|---|--|
| You are Logged in: CHANGE ACCOUNT Data Connector Name * Sample Bing Ads Data Connector | |
| Description | |
| CANCEL | |

viii) A success message appears.

ix) The newly created Bing Ads Data Connector gets added to the list of Data Connectors.

| Data | Center | | Data Connector added successfully! | | | | | | N | EW |
|------|----------------------|----------------------------|------------------------------------|---|---|---|-------|--------|----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | • | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Showi | ng 682 | out of 6 | 82 |
| 6 | Data Stores | Sample Bing Ads Data Conne | ctor | ø | | C | < | / | Î | |
| ð | Data-Store Meta Data | bi_proc_apr18 | | 6 | ۵ | C | < | 1 | Î | |

42. HubSpot

- i) Click the 'HubSpot' Data Connector icon from the Data Connector page.
- ii) The HubSpot Data Connector page opens.
- iii) The user needs to login to a Hub Spot account by clicking on the 'SELECT ACCOUNT' option.

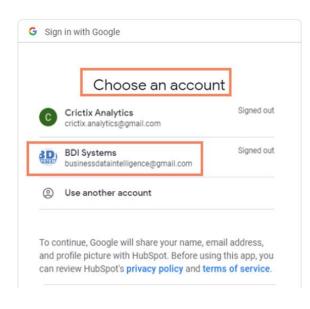
| bSpot Connector | | | |
|--------------------------|--|--------|------|
| ogin to Hub Spot account | | | |
| SELECT ACCOUNT | | | |
| ata Connector Name * | | | |
| escription | | | |
| | | | |
| | | | |
| | | | |
| | | CANCEL | SAVE |
| | | | |



iv) A new page opens asking the credentials to log in to a HubSpot account. Since we are using Google credentials so need to choose 'Sign in with Google' option.

| HubSpot | |
|--------------------------------|---------------|
| Don't have an account? Sign up | |
| Email address | |
| | |
| Password | Show Password |
| | |
| Forgot my password | |
| Remember me | |
| Log in | |
| | |
| | |
| G Sign in with Google | |
| Log in with SSO | |

v) Choose a Google Account from the listed accounts.



- vi) Enter the password for the selected account.
- vii) Click the 'Next' option.



| G Sign in with Google | |
|-------------------------|--------------------|
| Hi E | BDI |
| 🐏 businessdatainte | lligence@gmail.com |
| Enter your password | Ø |
| Forgot password? | Next |
| | |
| glish (United States) 👻 | Help Privacy Term |

viii) Choose an option from the given choices under the PRODUCTS option.

| https://app.hubspot.com/oauth/authorize | e?scope=contacts%20content%20bu | siness-intelligence%20oauth%20forms%20files%20tickets&redirect_uri=ht |
|---|---------------------------------|---|
| Choose an Accou | nt | |
| NAME ≑ | DOMAIN 🍦 | PRODUCTS |
| BDBizviz | bdb.ai 5404657 | Sales Free Service Free Marketing Free |
| Raj Sharma | hubspot-developers 5404697 | |

- ix) The HubSpot Data Connector opens with a notification that you have successfully logged in (Click the '**CHANGE ACCOUNT**' option to select another account).
- x) Provide a name for the HubSpot Data Connector.
- xi) Click the 'SAVE' option.

| bSpot Connector | |
|------------------------|-------------|
| 'ou are Logged in! | |
| CHANGE ACCOUNT | |
| ata Connector Name * | |
| ample HubSpot Conector | |
| | |
| escription | |
| | |
| | |
| | |
| | |
| | CANCEL SAVE |



xii) A success message appears, and the newly created HubSpot Data Connector gets added to the Data Connectors list.

| Data | Center | | Data Connector added successfully! | | | | | | N | EW |
|------|----------------------|----------------------------|------------------------------------|---|---|---|-------|-----------|----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | • | | | | | | | |
| 5 | Data Sets | Search Data Connectors | | | | | Showi | ing 383 (| out of 3 | 83 |
| 6 | Data Stores | Sample HubSpot Conector | | 5 | 6 | c | < | 1 | Ĩ | ^ |
| | Data-Store Meta Data | Sample Yelp Data Connector | | 5 | 6 | C | < | 1 | Î | |

43. Yelp

- i) Click the '**Yelp**' Data Connector icon from the Data Connector page.
- ii) The Yelp Data Connector page opens.
- iii) Provide the following information to create the Data Connector:
 - a. Data Connector Name
 - b. Description
 - c. Access Key
 - d. Click the 'TEST' option.

| Yelp Data Connector | |
|-----------------------|------------------|
| Data Connector Name * | |
| Description | |
| | |
| Access Key * | |
| | CANCEL TEST SAVE |

e. A success message appears to inform the successful connection developed.



f. The 'SAVE' option gets enabled.

| Yelp Data Connector | |
|----------------------------|------------------|
| Data Connector Name * | |
| Sample Yelp Data Connector | |
| Description | |
| Access Key * | |
| ACCES NY * | |
| | CANCEL TEST SAVE |



- g. Click the 'SAVE' option to save the connector information.
- h. A success message appears, and the newly created Yelp Data Connector gets added to the Data Connectors List.

| ata | Center | Data | Connector added successfully! | | | | | | | N | EW |
|-----|----------------------|-------------------------------|-------------------------------|---|---|----------|---|------|---------|----------|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Show | ing 382 | out of 3 | 82 |
| 6 | Data Stores | Sample Yelp Data Connector | | 3 | ø | b | C | < | 1 | Ĩ | Ì |
| S. | Data-Store Meta Data | Sample YouTube Data Connector | | 5 | 8 | b | C | < | 1 | Î | |

6.1.2. Data Connector List

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

Users can get the list of data connectors by clicking on the '**Data Connectors**' option provided at the top left side of the page.

| Decision Platform | | | | | | | ß | ? | θ |
|----------------------|------------------------------------|-----|---|---|---|-------|-----------|----------|----|
| Data Center | | | | | | | | N | EW |
| Home | Data Connector Type | | | | | | | | |
| Data Connectors | All | | | | | | | | |
| Data Sets | Search Data Connectors | | | | | Showi | ing 383 (| out of 3 | 83 |
| 者 Data Stores | Sample HubSpot Conector |))) | 6 | è | G | < | / | Î | - |
| Data-Store Meta Data | Sample Yelp Data Connector | | 6 | ۵ | C | < | / | | |
| | Sample YouTube Data Connector | | 6 | þ | C | < | / | Î | |
| | Sample Fitbit Data Connector | | 8 | è | C | < | 1 | Î | |
| | Sample LinkedIn Ads Data Connector | | 6 | þ | C | < | 1 | Î | |

| Option | Name | Task |
|----------|----------------|--|
| | New Data Set | Redirects the user to create a new Data Set |
| 6 | New Data Store | Redirects the user to create a new Data Store |
| C | Reconnect | Reconnects to the server |
| < | Share | Shares connector with the selected user(s) or group(s) |
| 1 | Edit | Edits the connector fields |
| Î | Remove | Removes a connector from the list |

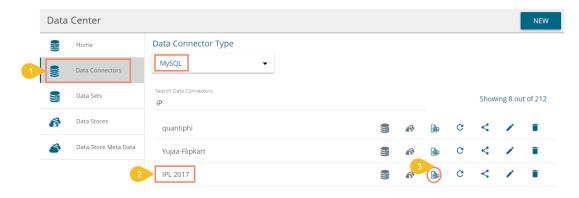
6.1.3. Creating Data Store/Data Set by using Query Builder

The query builder functionality is introduced to create database queries. It can be used to perform most database functions like 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 from the list.
- iii) Click on the New Query builder icon.



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

| Data Center | | | | | | | | | | | | | | | | | | | | | | | | NEV | V |
|-------------------------------|------|-----|----|--------|---------|------------|------|---|----|------|-----|---|---|---|---|---|---|---|---|---|------|---|---|-----|----|
| Database | | | | | | | | | | | | | | | | | | | | | | | Î | | |
| IPL2017 4 | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | 1 | | | | | 1 | | | | | | | | | | | | | | | | į. |
| Table Q | | 1 1 | | i. | | ÷ | | | i. | | | | | Ì | | | ÷ | | | | | | | | ł |
| | | 1 1 | | 1 | | 1 | | 1 | 1 | | | 1 | | | | 1 | 1 | 1 | | 1 | | | | | 1 |
| | | | | | | | | | | | | | 1 | | | 1 | | | | | | | | | 1 |
| IPL_2017scorecard | | | | | | | | | | | | | | | | | | | | | | | | | |
| _ | | | IP | PL_Pre | evious_ | Reco | ords | | | | | | | | | | | | | | | | | | |
| IPL_Player_Points_Each_Mat | | 1 | | i I | FTT | ΓF | | | i. | | | | | | | | | | | | | | | | i |
| IPL_Player_Points_Each_Mat | | | | 1 | Ħ | |) | | | | 1 1 | 1 | | | | j | | | 1 | | i | | i | | |
| | | | | 1- | | <u>ر</u> - | | | | | | | | | | | | | | | | | | | ł |
| IPL_Players_Percentile_Points | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | 1 1 | | 1 | | 1 | | 1 | 1 | | | | | | | | | | | | | 1 | 1 | | 1 |
| IPL_Previous_Records | | | | | | | | | | | | | | | | | | | | | | | | | į |
| | | | | 1 | | | | | 1 | | | | | | | | | | | | | | | i | 1 |
| | | | | | | {- | | | | | | | { | | { | | | | | | | | | | 1 |
| IPL_Previous_Records_copy | | | | 1 | | | | 1 | | | | | | | | | | | | | 1 | | 1 | | |

- vii) Click the 'Execute Query' \geq icon.
- viii) 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.



| | | | Balls | | No_Four | No_Six | Strike_Rate | | | | | | |
|-----------------------|------------------|----|-------|----------------------|---------|--------|-------------|---|---|---|----|------|--------------------------------|
| Kolkata Knight Riders | Morne Morkel | 0 | 0 | NIL | 0 | 0 | 0 | 4 | 0 | 1 | 16 | 4 | Sheikh Zayed Stadium, Abu Dhab |
| Kolkata Knight Riders | Gautam Gambhir | 0 | 8 | b Malinga | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Sheikh Zayed Stadium, Abu Dhab |
| Kolkata Knight Riders | Jacques Kallis | 72 | 46 | c Anderson b Malinga | 5 | 3 | 156.52 | 3 | 0 | 0 | 23 | 7.66 | Sheikh Zayed Stadium, Abu Dhab |
| Kolkata Knight Riders | Piyush Chawla | 0 | 0 | NIL | 0 | 0 | 0 | 3 | 0 | 1 | 15 | 5 | Sheikh Zayed Stadium, Abu Dhab |
| Kolkata Knight Riders | Sunil Narine | 0 | 0 | NIL | 0 | 0 | 0 | 4 | 0 | 4 | 20 | 5 | Sheikh Zayed Stadium, Abu Dhab |
| Kolkata Knight Riders | Suryakumar Yadav | 13 | 5 | not out | 3 | 0 | 260 | 0 | 0 | 0 | 0 | 0 | Sheikh Zayed Stadium, Abu Dhab |

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

| RES | SULT QUERY |
|-----|--|
| 1 | SELECT |
| 3 | FROM |
| 4 | IPL2017.IPL_Previous_Records t0 LIMIT |
| 6 | 1000 |
| | |
| | |

ix) After executing the query, the user gets two more options to '**Create Data Set**' and '**Create Data Store**' from the generated query.

| Data Center | | NEW | |
|-------------------------------|----------------------|-----|------------|
| Database | | 6 | i > |
| IPL2017 T | | | |
| Table Q | | | |
| IPL_2017scorecard | IPL Previous Records | | |
| IPL_Player_Points_Each_Matc | | | |
| IPL_Players_Percentile_Points | | | |
| IPL_Previous_Records | | | |

- x) The users can click the dragged table component.
- xi) 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.

The user can get filtered data by selecting the columns using the checkboxes provided next to the columns.



| IPL_F | Previous_Records 🧪 | 1 | | | | ∎ × |
|--------|---|----------------------|---------------------|----------------|----------------|----------|
| FILTE | R PREVIEW DATA | FOREIGN KEY REF. | | | | |
| Output | | Aggregate | | | | |
| | $Period_Yr_{long}$ | aggregate function 🔻 | select order type 🔻 | sort order 🛛 🔻 | where clause 🔻 | and/or 🔻 |
| | Venue _{string} | aggregate function 🔻 | select order type 🔻 | sort order 🛛 🔻 | where clause 🔻 | and/or 🔻 |
| | No_Six _{long} | count 💌 | select order type 🔻 | sort order 🛛 🔻 | where clause 🔻 | and/or 🔻 |
| | Maidens _{long} | sum 🔻 | select order type 🔻 | sort order 🛛 🔻 | where clause 🔻 | and/or 🔻 |
| , 🗆 | InningId _{iong} | aggregate function 🔻 | select order type 🔻 | sort order 🔻 | where clause 🔻 | and/or 🔻 |
| , 🗆 | player_dismissal_type _{string} | aggregate function 🔻 | select order type 🔻 | sort order 🛛 🔻 | where clause 🔻 | and/or 🔻 |

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

| PREVIEW DATA FOREIGN KEY REF. | | | | | | | | | | | | | |
|-------------------------------|------------------|------|-------|----------------------|---------|--------|-------------|------|---------|---------|---------|---------|---------------------|
| eam | Players | Runs | Balls | OutType | No_Four | No_Six | Strike_Rate | Over | Maldens | Wickets | RunBowl | Economy | Venue |
| olkata Knight Riders | Morne Morkel | 0 | 0 | NIL | 0 | 0 | 0 | 4 | 0 | 1 | 16 | 4 | Sheikh Zayed Stadiu |
| olkata Knight Riders | Gautam Gambhir | 0 | 8 | b Malinga | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | Sheikh Zayed Stadiu |
| olkata Knight Riders | Jacques Kallis | 72 | 46 | c Anderson b Malinga | 5 | 3 | 156.52 | 3 | 0 | 0 | 23 | 7.66 | Sheikh Zayed Stadiu |
| olkata Knight Riders | Piyush Chawla | 0 | 0 | NIL | 0 | 0 | 0 | 3 | 0 | 1 | 15 | 5 | Sheikh Zayed Stadiu |
| olkata Knight Riders | Sunil Narine | 0 | 0 | NIL | 0 | 0 | 0 | 4 | 0 | 4 | 20 | 5 | Sheikh Zayed Stadiu |
| olkata Knight Riders | Suryakumar Yadav | 13 | 5 | not out | 3 | 0 | 260 | 0 | 0 | 0 | 0 | 0 | Sheikh Zayed Stadiu |

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

E.g., In the below given image EMP and DEPT tables are joined based on a similar column 'Dno.'

| Decision Platform | | | 22 | ? | Θ |
|----------------------|---|------|----|---|-----|
| Data Center | | | | N | NEW |
| Database | | | | Î | > |
| QueryBuilder | * | | | | |
| Table | Q | | | | |
| DEPT | | DEPT | | | |
| DEPT_LOCATIONS | | | | | |
| EMP | | | | | |
| Project | | | | | |
| Works_ON | | | | | |

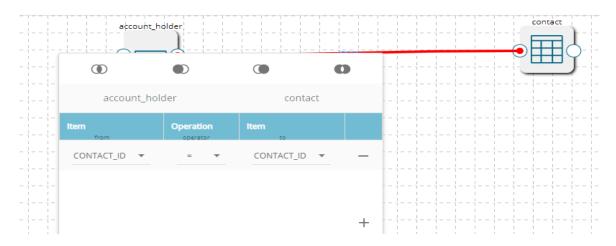
This column appears as 'FOREIGN KEY REF.' for the EMP table.



| C | enter | | | | | |
|---|-------------|--------------|------------------|------------------|-----------------|---|
| | EMP 🧪 | | | | | × |
| d | FILTER | PREVIEW DATA | FOREIGN KEY REF. | | | |
| L | Column Name | | | Reference Column | Reference Table | |
| | | Dno | | Dno | DEPT | |
| 1 | | | | | | |
| l | | | | | | |
| | | | | | | |
| k | | | | | | |
| L | | | | | | |
| | | | | | | |

Note:

- a. The Alias Name of the table and the 'Delete' option appear for the selected table while clicking on it.
- b. 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. Please note that auto-suggestion is provided to help the user with the join condition.



c. The user gets 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 displayed in the below image). 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 | | | v | | | NEW |
|------|----------------------|------------------------|----------------------|----------------------|-------------|-------------------|--------------------------|
| | Data Connectors | 0 | 2 | 3 | 4 | 5 | 6 |
| 5 | Data Sets | Getting Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| 6 | Data Stores | | | Data Connector Name | | Database Name | |
| | Data-Store Meta Data | Data Store Name * | | Myssql | | QBuilder | |
| | | | | | | | |
| | | *Use Ctrl+Space for as | sistance | | | | 2 |
| | | | | | | | CANCEL NEXT |

d. 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 '**edit in query builder**' to edit the query using the Query builder. The following image displays the '**edit in query builder**' \checkmark icon in the Data Store page.

| Data | Center | | | | | | NEW |
|------|----------------------|-----------------------|------------------------------|----------------------|-------------|-------------------|--------------------------|
| | Home | 0 | 2 | 3 | 4 | 6 | 6 |
| | Data Connectors | Getting Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| | Data Sets | | | Data Connector Name | | Database Name | |
| 6 | Data Stores | Data Store Name * | | IPL 2017 | | IPL2017 | |
| | Data-Store Meta Data | Query | IPL2017.IPL_Previous_Record: | | | | \bigcirc |
| | | | | | | | edit in query builder |
| | | *Use Ctrl+Space for a | ssistance | | | | CANCEL NEXT |

The user gets redirected to the Query Builder by clicking the 'edit in query builder' icon from the design Data Store or Data Set page.



| Data Center | | NEW |
|-------------------------------|----------------------|------|
| Database IPL2017 Table Q | | |
| IPL17_Team_Flags | IPL_Previous_Records | |
| IPL_2017scorecard | | |
| IPL_Player_Points_Each_Matc | | |
| IPL_Players_Percentile_Points | | |

Note: If the user manually changes or modifies the query statement then the query builder page gets disabled, and the '**Edit**' option in the query builder disappears.

| v | | 9 | -4 | 5 | 6 |
|--|------------------------------------|----------------------|-------------|-------------------|---------------------|
| Getting Data Data Type Definition | | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refre |
| | | Data Connector Name | | Database Name | |
| Data Store Name * | | IPL 2017 | | IPL2017 | |
| | | | | | |
| | | | | | |
| 1 SELECT * FROM IP | PL2017.IPL_Previous_Records t0 LIM | /IT 1000 as | | | |
| 1 SELECT * FROM IP | PL2017.IPL_Previous_Records t0 LIN | ИГТ 1000 as | | | |
| 1 SELECT * FROM IP | PL2017.IPL_Previous_Records t0 LIN | /IT 1000 as | | | |
| 1 SELECT * FROM IP | PL2017.IPL_Previous_Records t0 LIN | /IT 1000 as | | | |
| 1 SELECT * FROM IP | PL2017.IPL_Previous_Records t0 LIM | /IT 1000 as | | | |
| | | ИГТ 1000 as | | | |
| 1 SELECT * FROM IP *Use Ctrl+Space for assi | | ИГТ 1000 as | | | Q |

6.1.4. Reconnecting a Data Connector

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

| Data Center 3 | | | Successfully reconnected!! | NEW | | | | | | | w |
|---------------|----------------------|------------------------|----------------------------|-----|---|----------|---|-----------------|---|---|----|
| | Home | Data Connector Type | | | | | | | | | |
| | Data Connectors | All | • | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | | Showing 383 out | | | 33 |
| 6 | Data Stores | Sanity_sparksql | | | 6 | B | C | < | / | Î | ^ |
| | Data-Store Meta Data | mysql | | | 8 | 2 | C | < | - | Î | |
| | | test16 | | 5 | 8 | þ | G | < | / | Î | |

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.

| ·''/ | 50 | | | | | | | | | |
|------|------|----------------------|------------------------|----------|----------|----|----------------|-------|----------|------------|
| | Data | Center | | | | | | | | NEW |
| | | Home | Data Connector Type | | | | | | | |
| 1 | | Data Connectors | All | | | | | | | |
| | | Data Sets | Search Data Connectors | | | | | Showi | ng 383 d | out of 383 |
| | 6 | Data Stores | FitBit | Ĵ | 8 | þ | e ² | < | / | • |
| | | Data-Store Meta Data | hive-test | S | 8 | ¢ | C | < | 1 | • |
| | | | sanity_hive | S | 6 | ¢ | G | < | 1 | • |
| | | | Sanity_sparksql | 5 | 6 | ¢ | G | < | - | • |
| | | | mysql | | ø | ۱. | G | < | - | Î |

- 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).

| 3 Share Data Connector | × |
|---|----------|
| USER USER GROUP EXCLU | IDE USER |
| etl admin BI Prod User Dev User 6 | * |
| Platform User | |
| | × • |

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



| | Share Da | ta Connecto | or | | | > | < |
|---|---------------------------|-------------|----|-------|---------------|------|----------|
| C | USER | USER GROUP | | EXCLU | JDE USER | | 1 |
| | etl admin BI Prod User | ŕ | • | 7 | Platform User | * | |
| S | Dev User | | | > | | | J. |
| | | | | •• | | | J. |
| | | | | < | | | н |
| | | | | 44 | | | Ш |
| | | | | | | | J |
| | | | | | CANCEL | SAVE | |
| | | | _ | | | | • |

ix) A message appears 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 list of Data Connectors.
- ii) Select a Data Connector and click the 'Edit' 🖍 icon.

| Data | Center | | | | | | | | N | EW |
|------|-----------------|-------------------------|---|---|----------|---|------|------------|----------|----|
| | Home | Data Connector Type | | | | | | | | |
| | Data Connectors | All | | | | | | | | |
| | Data Sets | Search Data Connectors | | | | | Shov | ving 383 d | out of 3 | 83 |
| ñ | Data Stores | Sample HubSpot Conector | 5 | ø | d | c | < | \bigcirc | Ĩ | |
| | | | | | | | | | | |

- iii) The Data Connector page opens for the selected data connector.
- iv) Edit or modify the required details.
- v) Click the 'SAVE' option to save the edited details.



| HubSpot Connector | |
|--|-------------|
| | |
| Account : businessdataintelligence@gmail.com | |
| Data Connector Name * | |
| Sample HubSpot Conector | |
| Description | |
| | |
| | |
| | |
| | |
| | |
| | CANCEL SAVE |
| | |

vi) A success message appears to inform the user that the data connector has been updated.



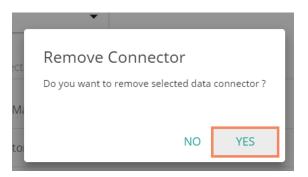
vii) The updated details get saved for the selected data connector.

6.1.7. Removing a Data Connector

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

| | Data | Center | | | | | | | | NEW |
|---|------|----------------------|------------------------|---|---|---|---|-------|----------|------------|
| | | Home | Data Connector Type | | | | | | | |
| 1 | | Data Connectors | All | | | | | | | |
| | 9 | Data Sets | Search Data Connectors | | | | | Showi | ng 383 c | out of 383 |
| | 6 | Data Stores | FitBit | | 6 | ¢ | C | < | 2 | |
| | 2 | Data-Store Meta Data | hive-test | | 6 | ¢ | c | < | 1 | |
| | | | sanity_hive | 5 | ø | þ | C | < | / | |
| | | | Sanity_sparksql | | 6 | ¢ | G | < | 1 | |
| | | | mysql | | 6 | þ | C | < | 1 | |

- 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.

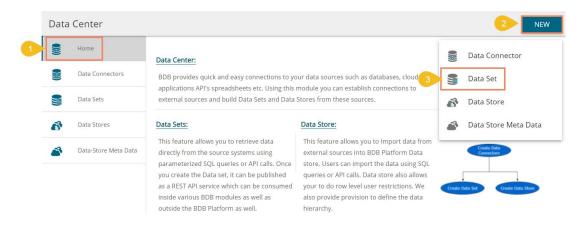
6.2. Data Set

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 homepage.
- ii) Click the '**NEW**' option.
- iii) Select the 'Data Set' option from the context menu.



- iv) A new page opens under Data Center module displaying all the available data connectors.
- v) Select a Connector Type from the 'Data Source' filter.
- vi) Select a data connector from the displayed list of Data Connectors.
- vii) Click the 'CREATE DATA SET' option provided next to the selected data connector.

| | Data | Center | | NEW |
|---|------|----------------------|--------------------------|-------|
| | | Home 5 | Data Source | |
| 4 | | Data Connectors | MySQL | |
| | 5 | Data Sets | Search Data Connectors | |
| | 6 | Data Stores | Claim_data CREATE DATA | A SET |
| | | Data-Store Meta Data | IPL 2017 CREATE DATA | A SET |

- viii) The 'Data Set' page opens with the following fields:
 - a. Service Name: Enter any user-defined name for the new data set.
 - b. **Description**: Provide a brief description of the Data Set (optional).
 - c. Data Connector Name: This is a pre-defined field based on the selected data connector.
 - d. Database Name: This is a pre-defined field based on the data connector chosen earlier.



| 8 Data Set | |
|---------------------|--|
| 9 Service Name * | |
| Sample Data Set | |
| 10 Description | |
| | |
| | |
| Data Connector Name | |
| IPL 2017 | |
| 12 Database Name | |
| IPL2017 | |

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

| 13 | Query | | | |
|----|-------|---|---|--------|
| | 6 | `IPL_Previous_Records`.`Wickets` AS `Wickets`, | | * |
| | 7 | ifnull(((`IPL_Previous_Records`.`Runs` / `IPL_Previous_Records`.`Balls`) * 100),0) AS `SR`, | | |
| | 8 | if((`IPL_Previous_Records`.`Balls` <> 0),1,0) AS `BatInn`, | | |
| | 9 | if((`IPL_Previous_Records`.`Over` <> 0),1,0) AS `BowlInn`, | | |
| | 10 | ifnull((`IPL_Previous_Records`.`RunBowl`/`IPL_Previous_Records`.`Over`),0) AS `ER` | | |
| | 11 | FROM `IPL_Previous_Records` | | |
| | 12 | WHERE (`IPL_Previous_Records`.`Period_Yr` IN (2013, | | |
| | 13 | 2014, | | |
| | 14 | 2015,2016,2017)) | | * |
| | *Use | Ctrl+Space for assistance | ? | |
| | | 14 VALIDATE | | CANCEL |

- ix) A message appears to inform the successful execution.
- x) The '**SAVE**' option gets enabled.

| | 15 Successfully Executed! |
|-------|---|
|)uery | |
| 6 | 1PL_Previous_Records1.1Wickets1 AS1Wickets1, |
| 7 | ifnull(((`IPL_Previous_Records`.`Runs` / `IPL_Previous_Records`.`Balls`) * 100),0) AS `SR`, |
| 8 | if((`IPL_Previous_Records`.`Balls` <> 0),1,0) AS `BatInn`, |
| 9 | if((`IPL_Previous_Records`.`Over` <> 0),1,0) AS `Bowlinn`, |
| 10 | ifnull((`IPL_Previous_Records`.`RunBowl` / `IPL_Previous_Records`.`Over`),0) AS `ER` |
| 11 | FROM `IPL_Previous_Records` |
| 12 | WHERE (`IPL_Previous_Records`.`Period_Yr` IN (2013, |
| 13 | 2014, |
| 14 | 2015,2016,2017)) |
| Use | Ctrl+Space for assistance |
| | 16 |
| | VALIDATE SAVE CANCEL |
| | VALIDATE SAVE CANCEL |



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

| 17 | Preview R | esult | | | | | | | | | × |
|----|-----------|-----------------------|----------------|------|-------|---------|----------|--------|---------|--------|---|
| | Period_Yr | Team | Players | Runs | Balls | Wickets | SR | Batinn | Bowlinn | ER | A |
| | 2014 | Kolkata Knight Riders | Morne Morkel | 0 | 0 | 1 | 0 | 0 | 1 | 4 | |
| | 2014 | Kolkata Knight Riders | Gautam Gambhir | 0 | 8 | 0 | 0 | 1 | 0 | 0 | |
| | 2014 | Kolkata Knight Riders | Jacques Kallis | 72 | 46 | 0 | 156.5217 | 1 | 1 | 7.6667 | Ţ |

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

xiii) A newly created Data Set gets added to the 'Data Sets' List.

| | Home | Data Connector Type | Data Connector | Publish Status | | | | | |
|---------|-----------------|---------------------|----------------|----------------|---|---|---------|---------|-----------|
| | Data Connectors | All | All | ✓ All | • | | | | |
| | Data Sets | Search Data Sets | | | | | Showing | 2463 ot | ut of 246 |
| 3 | | Search Data Sets | | | | | | | |
|) () | Data Stores 18 | Sample Data Set | | <u>*</u> | 0 | 1 | < | / | Î |

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

| Option | Name | Task |
|----------|--------------------|--|
| ⊥ | Download | To download the Data Set |
| 0 | View Link | To display the Data Set link |
| 1 | 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 |
| 1 | Edit | To edit the Data Set fields |
| Î | Remove | To remove the selected data set from the list |

6.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

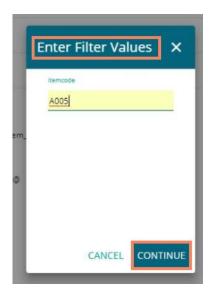
Users can insert dynamic filter condition via the query service to an RDBMS Data Set.

- 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.

| Query | |
|--|----------------------|
| 1 select date(tran_date) as dt, item_code , item_name, | |
| 2 itemamt as sm | |
| 3 from ccddb.bill | |
| 4 Where item_code=@itemcode@ | |
| 5 limit 100 | |
| 6 | |
| | |
| | |
| | |
| *Use Ctrl+Space for assistance | 0 |
| | VALIDATE SAVE CANCEL |



- iv) A new window opens 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 to save the Data Set form.
- ix) The newly created dataset gets saved with the filter value under the list of the Data Sets.

| Data | Center | | | | | | | | | N | EW |
|------|----------------------|---------------------|----------------|---|----------------|---|---|---------|----------|----------|----|
| | Home | Data Connector Type | Data Connector | | Publish Status | | | | | | |
| | Data Connectors | All | All | • | All | • | | | | | |
| 3 | Data Sets | Search Data Sets | | | | | | Showing | ; 2463 o | ut of 24 | 63 |
| 6 | Data Stores | Sample Data Set | | | <u>*</u> | Ø | 1 | < | / | Î | |
| | Data-Store Meta Data | goals 🖪 | | | <u>+</u> | 0 | 1 | < | / | Î | |

Note:

- a. Use 'Ctrl+Space' to get assistance while writing a query.
- b. Click the '**Help Center**' icon ⁽²⁾ 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.



| tati | | - |
|-------|---|---|
| He | lp Center | × |
| 1. Ir | n query table name should be in brackets | |
| | e.g:- [table] | |
| 2. Ir | n final select statement can't use column name as Table.Column we should give alias name to these type of columns. | |
| | eg:- a.year -> a.year as year | |
| 3. In | n final select statement cannot use any column alias name in single or double quotes | |
| | e.g:- In Final select Statement alias name of column should not be like this:- 'Alias Name' It should be without single quotes like this: - Alias Name | |
| 4. Ir | n final select statement can't use space in column alias name it should be single word.Or two words should be concatenate by underscore(_) | |

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

| Data | Center | | | | | | | | | | NE |
|------|----------------------|---------------------|----------------|---|-------------|------|---|---|-----|----------|----------|
| | Home | Data Connector Type | Data Connector | | Publish Sta | atus | | | | | |
| | Data Connectors | MySQL | IPL 2017 | • | All | | - |] | | | |
| | Data Sets | Search Data Sets | | | | | | | Sho | owing 39 | out of 3 |
| Ď | Data Stores | Sample Data Set | | | | ŧ | 0 | 1 | < | / | |
| - | Data-Store Meta Data | ipldata 🖪 | | | | + | Ø | 4 | < | | Î |

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.

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

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

| Admin Module n Settings | | | | + Add Fields |
|----------------------------|--------|---|-----|--------------|
| caller display na | Manual | caller display name | No | - × |
| skill | Manual | skill | No | • × |
| userid | Manual | ▼ userid | Yes | • × |
| Department | Manual | Department | Yes | • × |
| date_key | Manual | ▼ date_key | Yes | • × |



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

| Data Connector Name | | |
|---|----------|--------|
| oracle_dec10_UATSanity | | |
| Database Name | | |
| ORCL | | |
| | | |
| Query | | |
| 1 select * from NLPDATA 2 where DATE_KEY* [ENV.DATE_KEY] | | |
| *Use Ctrl+Space for assistance | 0 | |
| | VALIDATE | CANCEL |

- 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 as displayed below).

| My Documents 🗲 demo | | |
|---------------------|----------------------------|--------------|
| | | |
| | Verb edge and success | К 7 |
| | Yearly sales and expense | к'я |
| | 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 an existing 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.



| Share With User | Share With Group | Exclude User | |
|------------------|------------------|--------------|--|
| priya | A | testUser | |
| Mahendra | | | |
| karthik | > | | |
| Raghvendra Singh | >> | | |
| BDB | < | | |
| admins | •• | | |
| cluster_two | | | |
| clusters | - | | |

- viii) Access the dashboard from the updated user's account to whom it was shared.
- ix) Open the shared dashboard; the dashboard displays only permitted data by the admin.

| Decision Platform | | | |
|-----------------------|----------------------------|--------------|--------------|
| Shared Documents > de | mo | | |
| | | | |
| | Yearly sales and expense | | K 71 K 72 |
| | 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.



| | | 1 NEW |
|---|---|----------------------|
| | | Data Connector |
| 2 | 3 | Data Set |
| | ß | Data Store |
| | ۲ | Data Store Meta Data |

- 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.

| | Data | Center | | NEW |
|---|------|----------------------|--|-----------------|
| | | Home | Data Source | |
| 3 | | Data Connectors | Google Analytics | |
| | | Data Sets | Search Data Connectors | |
| | 6 | Data Stores 5 | Sample Google Analytics Data Connector | CREATE DATA SET |
| | 2 | Data-Store Meta Data | faas | CREATE DATA SET |
| | | | New_GoogleAnalytics | CREATE DATA SET |

- vii) Users are redirected to a new Data Set form for Google Analytics Data Set.
- viii) Fill in the following information:
 - a. Dataset 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.

| Dat | a Set | | |
|------|--------------------------------------|--|--|
| Da | taset Name * | | |
| De | scription | | |
| Dati | a Connector Name | | |
| | mple Google Analytics Data Connector | | |
| | sinessdataintelligence@gmail.com | | |

- 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.



| 8 Data Selectio | n | | |
|-----------------|------------|--|---|
| Web Property * | | | |
| BdBizViz UA | 22551973-4 | | • |
| All Web Site | Data | | - |

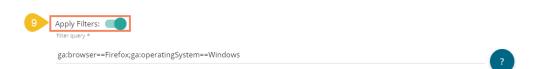
iii. Dimensions: Select the required dimensions using the drop-down menu (The selected dimensions display below with 'ga' suffix).

| Dimensions | |
|--|---|
| User Type, Count of Sessions, Session Duration, Campaign, Source, Keyword Match Type | • |
| Selected Dimensions ga:userType ga:sessionCount ga:sessionDurationBucket ga:campaign ga:source ga:adKeywordMatchType | ļ |

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

| Metrics * | |
|--|---|
| Users , Bounce Rate , Session Duration | • |
| Selected Metrics ga:users ga:bounceRate ga:sessionDuration | |

Note: **Select Web Property**, **Select View**, and **Metrics** are the mandatory fields to create a Google Data Set. f. **Apply Filter**: Enable the filter option. The filter query displays below.



- g. Date Type: Select a Date Type using the given options- 'Fixed Type' and 'Dynamic Type.'
 - i. Fixed Type: Define a time range by specifying dates using the 'From date' and 'To date' options.
 - ii. **Dynamic Type**: Select an option from the drop-down menu to define the time range.

| Date Type * | |
|---------------------|---|
| Dynamic type | • |
| Select Date Range * | |
| 7 Days ago | · |

h. Click the 'PREVIEW DATA' option.



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



| | | | | | | CANCEL | PREVIEW DA | ATA SAVE |
|---------------|-------------------|--------------------------|-------------|--------------------|-----------------------|----------|---------------|--------------------|
| Preview of 10 | rows are shown be | low | | | | | | |
| ga:userType | ga:sessionCount | ga:sessionDurationBucket | ga:campaign | ga:source | ga:adKeywordMatchType | ga:users | ga:bounceRate | ga:sessionDuration |
| New Visitor | 1 | 0 | (not set) | (direct) | (not set) | 9 | 100.0 | 0.0 |
| New Visitor | 1 | 0 | (not set) | 182.75.180.61:8080 | (not set) | 3 | 100.0 | 0.0 |
| New Visitor | 1 | 0 | (not set) | 192.168.1.15:8080 | (not set) | 1 | 100.0 | 0.0 |
| New Visitor | 1 | 0 | (not set) | google | (not set) | 17 | 100.0 | 0.0 |
| New Visitor | 1 | 0 | (not set) | timesjobs.com | (not set) | 3 | 100.0 | 0.0 |
| New Visitor | 1 | 117 | (not set) | google | (not set) | 1 | 0.0 | 117.0 |
| New Visitor | 1 | 12 | (not set) | (direct) | (not set) | 1 | 0.0 | 12.0 |
| New Visitor | 1 | 13 | (not set) | google | (not set) | 1 | 0.0 | 13.0 |
| New Visitor | 1 | 138 | (not set) | google | (not set) | 1 | 0.0 | 138.0 |
| New Visitor | 1 | 145 | (not set) | google | (not set) | 1 | 0.0 | 145.0 |

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.

| Home | Data Connector Type | Data Connector | Publish Stat | us | | | | | |
|-----------------|---------------------|----------------|--------------|----|---|------|-----------|----------|----|
| Data Connectors | All | All | ✓ All | | • | | | | |
| Data Sets | Search Data Sets | | | | | Show | ing 600 (| out of 6 | 00 |
| | | | | | | | | | |

6.2.3. Creating a New FTP Data Set

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

| | NEW |
|---|----------------------|
| | Data Connector |
| 5 | Data Set |
| 6 | Data Store |
| ۲ | Data Store Meta Data |

- 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

| Data | Center | | NEW |
|------|----------------------|---------------------------|----------------|
| | Home 2 | Data Source | |
| | Data Connectors | FTPServer • | |
| | Data Sets | Search Data Connectors | |
| 6 | Data Stores | Sample FTP Data Connector | REATE DATA SET |
| ٢ | Data-Store Meta Data | Test FTP CI | REATE DATA SET |

The FTP Data Set form opens iii)

- 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

| Sample FTP Data Set | | |
|---------------------------|--|--|
| Description | | |
| Data Connector Name | | |
| Sample FTP Data Connector | | |
| | | |

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

| Selected File : SFTP test.xlsx | |
|--|-----------------|
| Desktop IRONMAN.xlsx SFTP test.xlsx Get data test.xlsx RECHECK EMPTY SHEETS.xlsx ExcelConnector SFTP test2.xlsx salary_details_2013_14_12.xlsx salary_details_2013_14_12.csv | |
| Choose a sheet using the drop-down menu. | GET SHEETS SAVE |

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



- viii) A success message appears to assure the creation of a new dataset.
- ix) The newly created FTP Data Set gets added to the Data Sets list.

| | | _ | | ccessfully! | | | | | |
|----------|--------------------------|--------------------------------------|----------------|----------------|---|---|---------|----------|----------|
| | Home | Data Connector Type | Data Connector | Publish Státůs | | | | | |
| | Data Connectors | All | All | ✓ All | - | · | | | |
| | | | | | | | | | |
| | Data Sets | Search Data Sets | | | | | Showing | g 2464 o | ut of 24 |
| } | Data Sets Data Stores 15 | Search Data Sets Sample FTP Data Set | | <u>*</u> | Ø | | | ; 2464 o | ut of 24 |

6.2.4. Creating a CA PPM Data Set

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

i) The user can log in to the BDB Platform using the CA PPM authentication option. Provide your valid credentials for Login and click the '**Continue**' option.

| Decision Platform |
|---------------------|
| Email * |
| Password * |
| Auth Type CA PPM |
| Continue |

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ii) Select the 'Data Center' module from the Apps menu.





- iii) The Data Connector homepage opens.
- iv) Click the 'NEW' option.
- v) Select the 'Data Set' option from the context menu.



vi) Select the default data connector 'CA' from the data connector list.

Or

Choose the CA Data Connector Type from the drop-down menu and select the default CA Data Connector from the list.

vii) Click the 'CREATE DATA SET' option for the CA data connector.

| | 5 8 Da | ata Center | | | | | | | | |
|---|--------|-------------------|------------------------|-----|--|--|--|--|--|--|
| | | Home | 6 Data Source | | | | | | | |
| 5 | | Data Connectors | | | | | | | | |
| | | Data Sets | Search Data Connectors | | | | | | | |
| | 6 | Data Stores | 7 CA 8 CREATE DATA | SET | | | | | | |
| | ٢ | Data-Store Meta D | ta | | | | | | | |

- viii) A form opens to create a new Data Set.
- ix) 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

| 9 Data Set | |
|----------------|-------------|
| | |
| Service Name * | |
| Service URL | · |
| | CANCEL SAVE |
| | |

c. Mandatory Filter: A list of the selected mandatory filter based on the service URL displays.

| 10 | Mandato | ry Filter |
|----|---------|-------------------|
| | quer: | _log_date |
| | quer: | _log_date_from |
| | quer: | _log_date_to |
| | quer | _log_date_in |
| | quer: | _environment |
| | quer: | _environment_from |

d. Custom Filter: Select the 'Custom Filter' options using the check marks in the boxes.

| 11 | Custom | Filter |
|----|----------|-----------------------|
| | ~ | quer:reportid |
| | ~ | quer:reportid_from |
| | ~ | quer:reportid_to |
| | | quer:reportid_in |
| | ~ | quer:report_name |
| | | quer:report_name_from |

e. Click the 'SAVE' option.





x) A success message appears to assure that a new data set has been created.



xi) The newly created Data Set gets added to the data set list.

| Home | Data Con | nector Type | Data Connector | P | ublish Status | | | | | |
|-----------------|-------------|-----------------|----------------|---|---------------|---|---|-----|---------|----------|
| - | All | - | All | - | All | • | | | | |
| Data Connectors | | | | | | | | | | |
| Data Sets | Search [| Data Sets | | | | | | Sho | owing 3 | out of 3 |
| | | | | | | | | | | |
| 🛐 🛛 Data Stores | 14 Sample 0 | CA PPM Data Set | 4 | | <u>+</u> | 0 | 1 | < | 1 | Î |

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 the '**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.

| | | | √ fs | | AGEMENT | | | | | | | | | | | | | | | |
|--------|---|---|----------|---|---------|---------------|--------|---|----------|--------|---|---------------|---|----|---|--------|---|----------|---------|--------|
| | | в | с | D | E | F | G | н | | | к | | м | N | 0 | р | | R | s | |
| 4 | A | | 1.46E+12 | U | E 1 | F 3.28E+11 | 152527 | 0 | 301747 | , 0 | | L 1.46E+12 | 0 | IN | 0 | ۳ 0 | Q | | online | 000000 |
| 4 5 | | | 1.46E+12 | | 1 | 3.28E+11 | 152527 | 0 | 301747 | 0 | | 1.46E+12 | 0 | | 0 | 0 | 0 | | ONLINE | |
| 6 | 0 | | 1.46E+12 | | 1 | 5.200711 | 140966 | 0 | 301747 | 0 | 0 | 1.406+12 | 0 | | 0 | 0 | 0 | | ONLINE_ | |
| 7 | 0 | | 1.46E+12 | | 1 | | 140966 | 0 | 301748 | 0 | 0 | | 0 | | 0 | 0 | 0 | | ONLINE_ | |
| 8 | | | 1.46E+12 | | 1 | 3.28E+11 | 130558 | 0 | 301749 | 0 | - | 1.46E+12 | 0 | | 0 | 0 | 0 | | ONLINE | |
| 9 | 0 | | 1.46E+12 | | 1 | 5.200111 | 126701 | 0 | 301745 | 0 | 0 | 1.400.12 | 0 | | 0 | 0 | 0 | | ONLINE | |
| 0 | 0 | | 1.46E+12 | | 1 | | 126701 | 0 | 301775 | 0 | 0 | | 0 | | 0 | 0 | 0 | | ONLINE | |
| 1 | | | 1.46E+12 | | 1 | 3.28E+11 | 126701 | 0 | 301775 | 0 | | 1.46E+12 | 0 | | 0 | 0 | 0 | | ONLINE | |
| 2 | | | 1.46E+12 | | 1 | 3.28E+11 | 126701 | 0 | 301775 | 0 | 0 | 1.46E+12 | 0 | | 0 | 0 | 0 | | ONLINE | |
| 3 | | | 1.46E+12 | | 1 | 3.28E+11 | 126701 | 0 | 301775 | 0 | 0 | 1.46E+12 | 0 | | 0 | 0 | 0 | | ONLINE | |
| 4 | 0 | | 1.46E+12 | | 1 | | 140966 | 0 | 301748 | 0 | 0 | | 0 | | 0 | 0 | 0 | | ONLINE | |
| 5 | | | 1.46E+12 | | 1 | 3.28E+11 | 140966 | 0 | 301748 | 0 | 0 | 1.46E+12 | 0 | | 0 | 0 | 0 | 3.28E+11 | - | |
| 6 | | | 1.46E+12 | | 1 | 3.28E+11 | 140966 | 0 | 301748 | 0 | 0 | 1.46E+12 | 0 | | 0 | 0 | 0 | 3.28E+11 | | |
| 7 | | 1 | 1.46E+12 | | 1 | 3.28E+11 | 140966 | 0 | 301748 | 0 | 0 | 1.46E+12 | 0 | | 0 | 0 | | 3.28E+11 | | |
| 8 | | 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 |
| 9 | 0 | 0 | 1.46E+12 | | 1 | | 158403 | 0 | 301775 | 0 | 0 | | 0 | | 0 | 0 | 0 | 2089443 | ONLINE | ORDER |
| 0 | 0 | 0 | 1.46E+12 | | 1 | | 158403 | 0 | 301775 | 0 | 0 | | 0 | | 0 | 0 | 0 | 2089444 | ONLINE | ORDER |
| 1 | | 1 | 1.46E+12 | | 1 | 3.28E+11 | 160693 | 0 | 301702 | 0 | 0 | 1.46E+12 | 0 | | 0 | 0 | 0 | 2084959 | ONLINE | ORDER |

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 homepage.
- ii) Click the '**NEW**' option.
- iii) Select the 'Data Store' option from the context menu.

| Data Center | | | | | | | | | |
|--|---|---|---|--|--|--|--|--|--|
| Data Center: | | | Data Connector | | | | | | |
| BDB provides quick and easy connection | | 5 | Data Set | | | | | | |
| | | 8 | Data Store | | | | | | |
| Data Sets: | Data Store: | ۲ | Data Store Meta Data | | | | | | |
| directly from the source systems using parameterized SQL queries or API calls you create the Data set, it can be publi | external sources into BDB Platform Data . Once store. Users can import the data using SQL shed queries or API calls. Data store also allows | | Create Data Convectore Data Set Create Data Store | | | | | | |
| | actors BDB provides quick and easy connection applications API's spreadsheets etc. Us external sources and build Data Sets and build Data Sets: S Data Sets: Meta Data This feature allows you to retrieve data directly from the source systems using parameterized SQL queries or API calls you create the Data set, it can be publi- as a REST API service which can be con | Build canter Data Sets: Meta Data This feature allows you to retrieve data directly from the source sush as a REST API service which can be consumed This feature allows you to retrieve data directly from the source sor API calls. Data store is a a REST API service which can be consumed This feature allows you to import data from external sources into BDB Platform Data store. | Data Center. BDB provides quick and easy connections to your data sources such as databases, cloud applications API's spreadsheets etc. Using this module you can establish connections to external sources and build Data Sets and Data Stores from these sources. s Data Sets: Meta Data This feature allows you to retrieve data directly from the source systems using parameterized SQL queries or API calls. Once you create the Data set, it can be published as a REST API service which can be consumed This feature allows you to do row level user restrictions. We your to do row level user restrictions. We | | | | | | |

- iv) A new page opens.
 - a. Select a Connector Type from the 'Data Source' filter (E.g., MySQL data source is selected in the following image).
 - b. Select a data connector from the Data Connector list.
 - c. Click the 'CREATE DATA STORE' option provided next to the selected data connector.

| Data | Center | NEW |
|------|----------------------|--|
| | Home 4 | ata Source |
| | Data Connectors | MySQL - |
| | Data Sets | Search Data Connectors hirring_data |
| 6 | Data Stores | Prod DB BDB_Hiring CREATE DATA STORE |
| 2 | Data-Store Meta Data | hiring_data 6 CREATE DATA STORE |

v) The 'Getting 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 | 2 | 3 | 4 | | 6 |
|---------------------------------|---|-------------------------|-------------------------|-------------|-------------------|--------------------------|
| Getti | ng Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| Data S | Store Name * | | Data Connector Name | | Database Name | |
| Sam | ple Data Store | | Hiring | | BDB_Hiring_Data | |
| 2 3 4 5 6 7 8 | SELECT candidate_id as NAME as Name, gender as Gend source as Sourc referral_of as Re designation as D team as Team, | er, e, eferralOf, | anisation, | | | |
| *Use | Ctrl+Space for as | sistance | | | | 0 |
| | | | | | С | ANCEL |

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.

| Dimensions | | | | Measures | | Time | |
|----------------|-----------------------|------------|---|-----------------------|---------|----------------------|---------|
| Source | 123 | () | • | PreviousCTC | Abc 🕓 🕯 | ExpectedJoinningDate | Abc 123 |
| ReferralOf | <mark>✓</mark> 123 | () | 1 | OfferedCTC | Abc 🕓 | BillStartDate | Abc 123 |
| Designation | <mark><</mark> 123 | () | | ExperiencePerCTC | Abc 🕓 | | |
| Team | 123 | () | | MonthlySalary | Abc 🕓 | | |
| PreviousOrgani | 123 | <u>(</u>) | | UsdBilling | Abc 🕓 | | |
| Skills | <mark><</mark> 123 | () | • | CurrentMonthlyPayment | Abc 🕓 🗸 | | |

Note:

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



| Options | Description |
|---------|--------------------|
| Abc | Move to Dimensions |
| 123 | Move to Measures |
| () | Move to Time |

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

6.3.1.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

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

| | | 3 | 4 | 6 | 6 |
|--------------|----------------------|--|---------------------------------|------------------------|--------------------------|
| Setting Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| Fields | | Hierarchy Definition | | | Ð |
| Aho name | A | Drill Def- 1 Team — Designation | name — | | X |
| AM Gend | er | | name | | × |
| Abe SOURC | e | Drill Def- 2 expected_joining_date: | expected_joining_date: month | expected_joining_date: | - × |
| Abs Desig | nation | vear 4 | montn | Gate | |
| Abs Team | | | | | |
| | • | | | | |
| | | | | | _ |
| PREVIOUS | | | | | CANCEL NEX |

Note:

- a. Click the '**PREVIOUS**' option to go back to the previous tab.
- b. Click the '**Remove**' option (in the Drill Def box) to remove the defined hierarchy using the selected option.
- c. The '**Date Drill**' functionality is available for the Time dimensions. By default, the Time dimensions can be split into Year>Month>Date hierarchy.

Users can define the date-drill by dragging once a time dimension into a '**Drill Def**' box.

E.g., Hierarchy for the '**Opening**' time dimension has been defined as shown below:

| Drill Def- 2 | | | | |
|--------------|-------------------|---|------------------|---|
| OPENING: | OPENING: month | _ | OPENING: date | _ |



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.

| | | | 4 | 5 | 6 |
|------------------|-------------------------|-------------------------|-------------|----------------------|--------------------------|
| Getting Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| Select Dimension | | | | | CLEAR |
| Distinct Quer | У | | | | 2 GENERATE |
| 1 SELECT DIST | INCT gender AS Gende | r FROM hiring_dat2 | | | |

- 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.

| 5 Ba | atch Query | 4 GENERATE |
|---------|--|---------------|
| 1 | SELECT candidate_id AS CandidateId | |
| 2 | ,NAME AS Name | |
| 3 | ,gender AS Gender | |
| 4 | ,source AS Source | |
| 5 | ,referral_of AS ReferralOf | |
| 6 | ,designation AS Designation | |
| 7 | ,team AS Team | |
| 8 | ,previous_organisation AS PreviousOrganisation | |
| 9 | ,skills AS Skills | |
| PR | REVIOUS | CANCEL 6 NEXT |

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.



| | | | | 5 | 6 |
|--------------|-------------------------|-------------------------|-------------|----------------------|--------------------------|
| Getting Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| Dimension | User | Property | | (+) | |
| name | Count | ry | | _ | |
| | | | | | |
| PREVIOUS | | | | C/ | ANCEL NEXT |

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

| | | | | | 6 |
|---------------|-------------------------|-------------------------|-------------|----------------------|--------------------------|
| Getting Data | Data Type Definition | Hierarchy Definition | Batch Query | Data Restrictions | Schedule Data Refresh |
| Schedule (| Configuration | | | | |
| DAILY | WEEKLY | MONTHLY | YEARLY | | |
| Day 1 | of every | r <u>1</u> r | month(s) | | |
| O The First | t 🔻 Monday | ▼ of every 1 | month(s) | | |
| Start time 12 | ▼ : 00 | ~ | | | |

- 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 to receive the notification email regarding the Data Store.



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

| Refresh Now | | |
|---------------------------|--------|--------|
| Enable Email Notification | | |
| Email Address * | | |
| PREVIOUS | CANCEL | FINISH |

- 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.

| | Data Connectors | Data Connector Type | Data Connector | | | | | |
|---|-----------------|---------------------|----------------|---|--|-----|---------|----------|
| 8 | Data Sets | MySQL | hiring_data | • | | | | |
| 3 | Data Stores | Search Data Stores | | | | Sho | owing 1 | out of 1 |

| Option | Name | Task |
|-----------|----------------------------|--|
| 0 | Latest Scheduler Status | Displays the latest scheduler status via a pop-up window |
| C | Refresh Data | Refreshes data for a datastore |
| C < | Share Data Store | Shares a datastore to/for the selected user(s) or group(s) |
| Ð | Add Synonyms to Data Store | Adds more synonyms to a datastore |
| / | Edit | Edit the datastore fields |
| Î | Remove | Remove a data store from the list |

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

This section describes steps to create a Data Store using a Flat File.

- i) Navigate to the Data Center homepage.
- ii) Click the '**NEW**' option.
- iii) Select the 'Data Store' option from the context menu.



| Data | Center | 2 NEW | | | |
|-----------|----------------------|--|--|--------|----------------------------|
| | Home | | Data Connector | | |
| | Data Connectors | | BDB provides quick and easy connections to your data sources such as databases, cloud applications API's spreadsheets etc. Using this module you can establish connections to | | |
| Data Sets | | external sources and build Data Sets and Data | · · · · | 6 | Data Store |
| 6 | Data Stores | Data Sets: | Data Store: | 8 | Data Store Meta Data |
| 2 | Data-Store Meta Data | This feature allows you to retrieve data directly from the source systems using parameterized SQL queries or API calls. Once you create the Data set, it can be published | This feature allows you to Import data from external sources into BDB Platform Data store. Users can import the data using SQL queries or API calls. Data store also allows | | Create Data Connectore |
| | | as a REST API service which can be consumed inside various BDB modules as well as outside the BDB Platform as well. | your to do row level user restrictions. We also provide provision to define the data hierarchy. | Create | Data Set Create Data Store |

- iv) A new page opens.
 - a. Select a Connector Type from the '**Data Source**' filter (E.g., MySQL data source is selected in the following image).
 - b. Select a data connector from the Data Connector list.
 - c. Click the 'CREATE DATA STORE' option provided next to the selected data connector.

| Data | Center | | NEW |
|------|----------------------|---|-----|
| | Home 4 | Data Source | |
| | Data Connectors | File | |
| | Data Sets | Search Data Connectors | |
| 6 | Data Stores 5 | Sample File Data Connector 6 CREATE DATA STOR | E |
| 2 | Data-Store Meta Data | test CREATE DATA STOR | E |

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

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.



| 1 | 2 | 3 | | 5 |
|----------------------------|----------------------|-----------------------|-------------------|------------|
| Getting Data | Data Type Definition | Hierarchy Definition | Data Restrictions | Options |
| Data Store Name * | | 2 Data Connector Name | | |
| Sample Flat File Data Stor | 2 | Sample File Data Co | nnector | |
| Hiring_227data | • | | | |
| 5 Sheet Layout * | | | | |
| Column Headers | • | | | |
| | | | | CANCEL NEX |

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.

| Dimensions | | | | Measures | | | Time | |
|----------------|-----------------------|------------|---|---------------|-------|---|-----------------------|---------|
| gender | <mark><</mark> 123 | 0 | * | usd_billing | Abc 🕓 | | expected_joining_date | Abc 123 |
| source | <mark>✓</mark> 123 | () | | candidate_id | Abc 🕓 | | experience_Year | Abc 123 |
| skills | <mark>/</mark> 123 | 0 | | id | Abc 🕓 | | | |
| previous_organ | <mark>/</mark> 123 | () | | offered_ctc | Abc 🕓 | | | |
| team | <mark><</mark> 123 | 0 | | previous_ctc | Abc 🕓 | | | |
| name | 12 : | | - | expyrsper_ctc | Abc 🕓 | + | | |

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.



| Field | s | | Hierarchy Definition | + |
|------------|-----------------------|------|--|---|
| | - | • | Drill Def- 1 | |
| Abo | designation | | team - designation - name - | × |
| Abe | referral_of | | Drill Def- 2 | |
| Abo | joining_status | - 11 | expected_joining_date:expected_joining_date:expected_joining_date:date | × |
| () | expected_joining_date | | | |
| () | experience_Year | - | | |

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.

| O etting Data | Data Type Definition | Wierarchy Definition | 4 Data Restrictions | Options |
|----------------------|-----------------------------|-------------------------|------------------------|---------|
| Dimension | 3 User Proper | ty | 1+ | |
| team | Country | | _ | |

Step 5 – Options

- i) The 'Options' tab opens.
- ii) Click the '**FINISH**' option to complete the Data Store creation process.



| | | | | 5 |
|--------------|-------------------------|-------------------------|-------------------|---------------|
| Getting Data | Data Type Definition | Hierarchy Definition | Data Restrictions | Options |
| PREVIOUS | | | | CANCEL FINISH |

iii) A success message appears.



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

| Data | Center | | | | | | | | | N | IEW |
|------|----------------------|----------------------------|----------------|---|---|---|---|------|---------|----------|-----|
| | Home | Data Connector Type | Data Connector | | | | | | | | |
| | Data Connectors | All | All | • | | | | | | | |
| | Data Sets | Search Data Stores | | | | | | Show | ing 197 | out of 1 | 97 |
| 6 | Data Stores | Sample Flat File Data Stor | e | | • | C | < | • | / | Î | |
| | Data-Store Meta Data | Sample Google Sheet Dat | a Store | | 0 | C | < | Ð | 1 | | |

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

i) Select the 'Data Store' option 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 the 'CREATE DATA STORE' option.

| Data | Center | | NEW |
|------|----------------------|--------------------------------------|---------------------|
| | Home 2 | Data Source | |
| | Data Connectors | Google Sheet | |
| | Data Sets | Search Data Connectors Hirl | |
| 6 | Data Stores | HiringData_GoogleSheet | CREATE DATA STORE |
| 2 | Data-Store Meta Data | 6Feb Hiring Data | CREATE DATA STORE |
| | | Hiring Data 11 Jan WS | CREATE DATA STORE |
| | | Hiring Data in Google Sheet for Demo | CREATE DATA STORE |
| | 3 | Hiring Data in Google Sheet | 4 CREATE DATA STORE |

v) The 'Getting Data' tab opens.

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

| Getting Data | Data Type Definition | Hierarchy Definition | Data Restrictions | Schedule Data Refresh |
|-------------------------|-------------------------|-------------------------|-------------------|--------------------------|
| Data Store Name * | | | | |
| API Connector based D | Data Store | | | |
| Data Connector Name | | | | |
| Hiring Data in Google S | Sheet | | | |
| Data set List * | | | | |
| Hiring Data Test New | | | | |
| | | | | |

- vi) The 'Data Type Definition' tab opens.
 - 1. The user can 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 Selfservice BI Report.
 - 3. Click the '**NEXT**' option to proceed.

| imensions | | | | Measures | | | Time | |
|---------------|--------------------|------------|---|--------------|-------|---|---------------------|---------|
| currentstatus | 123 | 6 | ^ | offeredctc | Abc 🕓 | • | expectedjoiningdate | Abc 123 |
| comments | 123 | () | | expyrsperctc | Abc 🕓 | | | |
| gender 10 | 123 | () | | experience | Abc 🕓 | | | |
| referralof | <mark>✓</mark> 123 | 0 | | usdbilling | Abc 🕓 | | | |
| source | <mark>✓</mark> 123 | 0 | | previousctc | Abc 🕓 | | | |
| team | 123 | () | * | candidate_id | Abc 🕓 | - | | |



- 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 a 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.

| Getting Data | Data Type Definition | Hierarchy Definition | Data Restrictions | Schedule Data Refres |
|--------------------|----------------------|-------------------------------------|------------------------------------|----------------------|
| Fields | 13 Hie | rarchy Definition | | + |
| Also currentstatus | | orill Def- 1 | | |
| Abo | te | eam - designation - name - | | × |
| Ann comments | | orill Def- 2 | | |
| Abo gender | e | xpectedjoiningdate: expectedjoining | gdate: — expectedjoiningda date | ··· – × |
| Abo referralof | | | | |
| Abo source | | | | |
| | • | | | |

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.

| ata Type Definition | Hierarchy Definition | Data Restrictions | Schedule Data Refresh |
|-----------------------------|--|-------------------|-----------------------|
| | | | |
| 17 User Property | | | |
| | | | |
| Country | | | |
| | User Property Country | | |

- 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 the 'FINISH' option.



| chedule Configuration | a Type Definition | Hierarchy Definition | Data Restrictions | Schedule Data Refresh |
|-----------------------|---------------------|----------------------|-------------------|-----------------------|
| DAILY WEEKLY | 10NTHLY YEAR | LY | | |
| DAILY WEEKLY | IONTHLY YEAR | LY | | |
| - | | | | |
| Day 1 of every | 1 month(s |) | | |
| The First 💌 Monday | ☞ of every 1 | month(s) | | |
| Start time 12 💌 : 00 | ~ | | | |

- 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.

| Data | Center | 23 | Data Store created successfully! | | | | | | N | EW |
|------|-----------------|--------------------------|----------------------------------|---|---|---|------|-----------|----------|----|
| | Home | Data Connector Type | Data Connector | | | | | | | |
| | Data Connectors | All | All | | | | | | | |
| | Data Sets | Search Data Stores | | | | | Show | ing 196 (| out of 1 | 96 |
| ð | Data Stores 24 | Sample Google Sheet Data | Store | 0 | C | < | • | / | Î | |
| | | | | | | | | | | |

Note:

- a. The 'Getting Data' tab opens by default while creating a new data store.
- b. Click the 'PREVIOUS' option to get redirected on the previous page.
- c. The user 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' dropdown menus.

| Data | Center | | | | | | | NEW |
|------|----------------------|------------------------------------|---|---|---|----|---------|----------|
| | Home | Data Connector Type Data Connector | | | | | | |
| | Data Connectors | MySQL | | | | | | |
| | Data Sets | Search Data Stores | | | | Sh | owing 3 | out of 3 |
| 8 | Data Stores | test_nlp synonyms | 0 | C | < | Ð | 1 | Ĩ |
| 3 | Data-Store Meta Data | TestHiring | 0 | C | < | Đ | 1 | |
| | | workflow_mar8 | 0 | C | < | • | - | Î |

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.

| | Data | Center | | | | | | | N | EW |
|---|------|----------------------|------------------------------------|---|---|------------|-------|----------|----------|----|
| | | Home | Data Connector Type Data Connector | | | | | | | |
| | | Data Connectors | All - All - | | | | | | | |
| | | Data Sets | Search Data Stores | | | | Showi | ng 197 (| out of 1 | 97 |
| 1 | 8 | Data Stores 2 | Sample Flat File Data Store | 0 | C | ~ 3 | Ð | / | Î | ^ |
| | ٢ | Data-Store Meta Data | Sample Google Sheet Data Store | 0 | C | < | Ð | / | Î | |

- iv) All the Attributes (fields names) option display in a list form.
- v) Select a field.
- vi) Click the 'Add Synonyms' + icon.

| NLP Synonyms: Sample Flat File Data Store |] | | | × |
|---|--------|------------|-----|----|
| 4 Attributes | Search | | | ۹ |
| 5 current_status | | _ 6 | + | ^ |
| designation | | \equiv | + | |
| de gender | | \equiv | + | |
| joining_status | | \equiv | + | |
| name | | \equiv | + | |
| ih previous_organisation | | \equiv | + | • |
| ามี | | | SAV | /E |

- vii) A new window opens with the default synonyms get displayed at the bottom.
- viii) Use the space given next to the default synonyms to add new synonyms.

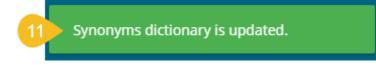


| NLP Synonyms: Sample Flat File Data Store | | | | × |
|---|--------|----------|-----|----|
| Attributes | Search | | | ۹ |
| current_status | | ≡ | + | ^ |
| designation | | \equiv | + | |
| gender | | \equiv | + | |
| n joining_status | | \equiv | + | Ŧ |
| Synonyms Selected for: current_status | | | | Â |
| current status × currentstatus × | Status | | | |
| di Aliren chianans | | | SAV | /E |

- ix) Click the 'Enter' key to add the new synonym to the displayed list.
- x) Click the 'SAVE' option.

| Synonyms Selected for: curr | rent_status | | | ^ | |
|-----------------------------|-----------------|----------|--------------------|----------|---|
| | 9 | | L | | |
| current status X | currentstatus X | Status X | Enter to add value | | ļ |
| | • | | | 10 | |
| | | | | SAVE | |
| | | | | | 1 |

xi) A success message appears to confirm that the synonym dictionary is updated with the newly added synonym.



Note: Steps to Add Synonyms for a Dimension Value.

- 1. Click the 'Add Values' as an option from the list of the displayed fields.
- 2. A new box opens with the selected Dimension.
- 3. Use the search bar to find specific dimensions values.
- 4. All the available values for the selected dimension get displayed.
- 5. Select a Value from the displayed choices and click the 'Add Synonyms' $^+$ icon.
- 6. Insert new synonym using the given space next to the default synonyms.
- 7. Click the 'Save' option to save the added synonyms.

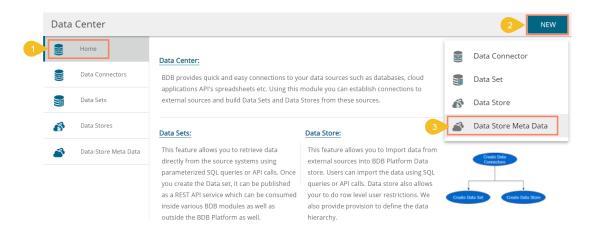


| NLP Synonyms: Sam | ple Flat File Data | Store | : | | | × |
|--------------------------|--------------------|-------|---|-------------------------|-----|------|
| Attributes | Search | | 2 | Values: designat | ion | × |
| current_status | \equiv | + | 3 | qa | 1 | Q |
| designation | | + | | QA Manager | | + |
| er gender | = | + | | QA Lead | | 5-+ |
| joining_status | Ξ | + | | QA Engineer | | + |
| name | Ξ | + | • | QA Architect | | + |
| Synonyms Selected for: Q | A Lead | | | | | • |
| QALead X QA T | eam Lead | | | | | |
| с т. | | | | | • | SAVE |

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 homepage.
- ii) Click the '**NEW**' menu.
- iii) Select the 'Data Store Meta Data' option from the 'NEW' context menu.



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



| | 2 | 3 | 4 |
|-----------------------------|----------------------|-------------------------|-------------------|
| 4 Meta Store Details | Data Type Definition | Hierarchy Definition | Data Restrictions |
| Data Store Name * | 6 | ES Index Name(Optional) | |
| Sample Data Store Meta Data | | 343703577bizvizsynonym | * |

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

| Meta Store Details | 2 B Data Type Definition | 3 Hierarchy Definition | (4) Data Restrictions |
|---------------------------|----------------------------------|---------------------------------|--------------------------|
| Dimensions Name | + Measure Name Measures | + Time Name | + |
| dimension_bdb_order_id | X 123 () measure_bdb_account_hc | older_id X Abc 🕓 time_bdb_creat | ted_date X Abc 123 |
| dimension_bdb_space_key | X 123 () measure_bdb_total_amou | unt X Abc 🕓 | |
| dimension_bdb_location_id | X 123 () measure_bdb_location_dr | rop_off_id 🗙 Abc 🕓 | |
| | measure_bdb_total_comm | nission X Abc 🕓 | |
| | g dimension_bdb_Customer | r_Classifica 🗙 Abc 🕓 | |
| | 9 | | |
| PREVIOUS | | | 10 CANCEL |

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 |
| (L) | Move to Time |

- xi) The Hierarchy Definition tab options.
- xii) Click the 'Add' option + provided in the Hierarchy Definition window.
- xiii) A new 'Drill Def' box gets added to the page.
- xiv) Drag and drop the dimensions or time options to define a hierarchy.
 - a. Dimensions have to be manually pulled to create a hierarchy.
 - b. Time dimension creates hierarchical sequence from higher to lower time values, e.g., year->month->date by pulling it once in the Drill Def boxes.
- xv) Click the 'NEXT' option.



| Meta Stor | re Details [| Image: Constraint of the second se | 4 strictions |
|-----------|-------------------------|---|-----------------|
| Fields | | Hierarchy Definition | + |
| Abc | dimension_bdb_order_id | 14 dimension_bdb_space_key - dimension_bdb_order_id - | × |
| Abc | dimension_bdb_space_ke | Drill Def- 2 | |
| Abc | dimension_bdb_location_ | | × |
| S | time_bdb_created_date | < | |
| | | | |
| | | | 15 |
| PREVIOUS | | CANG | |

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

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

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

xix) Click the 'FINISH' option.

| Meta Store Details | Data Type Definition | Hierarchy Definition | 16 Data Restrictions |
|-------------------------|--------------------------|----------------------|----------------------|
| Dimension | 18 User Property | | |
| dimension_bdb_space_key | city | | |

- xx) A success message appears to confirm that the configuration got saved.
- xxi) The newly created Meta Data gets added to the list displayed on the left pane of the page.

| Data | Center | 20 Surgerfulled | | | | NEW | v |
|------|----------------------|-----------------------------|---|------|-----------|------------|---|
| | Home | Search Data Stores | | Show | ing 364 (| out of 364 | 4 |
| | Data Connectors | Sample Data Store Meta Data | • | | Ð | | * |
| 5 | Data Sets | YearwiseCLV | 0 | 1 | 0 | - | 1 |
| 8 | Data Stores | master | 0 | 1 | O | Î | |
| 2 | Data-Store Meta Data | gaTraffic | 0 | 1 | O | Î | |

| Option | Name | Task |
|--------|---------------|--|
| 0 | Store Details | Displays the Store information via a pop-up window |



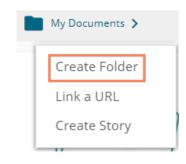
| 1 | Edit | Edits the data store metadata fields | |
|---|--------------------------|--|---|
| Ð | Add Synonyms to Metadata | Redirects the user to add synonyms to the selected | |
| - | Store | Metadata store. | I |
| Î | Remove | Removes the data store metadata from the list | 1 |

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 homepage.
- 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.

| Create | Folder | |
|------------|--------|------|
| Name * | | |
| Sample F | older | |
| Descriptio | on | , |
| | | /i |
| | Close | Save |
| | | |
| 0.0 | | |

ix) A success message appears.



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

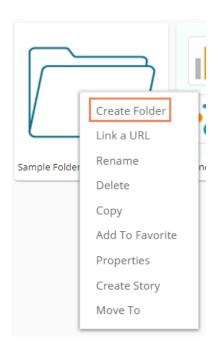


• Options Assigned to a Folder

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) A new window pops-up.
- v) Fill in the following information:
 a.Name: Enter a folder name
 b.Description: Describe the folder (optional)
- vi) Click the 'Save' option.



| Create | Folder | |
|--------------------------------|----------|------|
| _{Name} * Sample Su | ubFolder | |
| Descriptio | | |
| Descriptio | 011 | |
| | | |
| | Close | Save |
| | | |
| | | |

- vii) A success message appears for the folder creation.
- viii) A new (sub) folder gets created inside to the selected folder.

| My Documents > Sample Fo | lder > | | |
|--------------------------|---------------------|------------------------|------------------|
| • ↓ ↓ | II ▲ € ••• •• •• | | |
| Business Story | Business Story | Sample URL | Sample SubFolder |
| | | | |
| | | | |
| | | | |
| | | | |
| | | Folder created success | fully! |

Note: Users can create multiple 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)



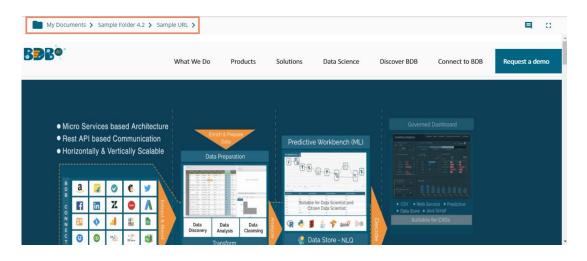
vi) Click the 'Save' option.

| Mod | lify Linked | URL | | | |
|-------------------|-------------|-----|---|-------|---------------------------------|
| 1 Name * Sampl | le URL | | Type URL * https://bdb.ai/product- overview | 3 | Description Product Overview |
| URL P | arameter | Add | | | 0 |
| | | | | | Close Save |

- vii) A success message appears.
- viii) The URL gets created in the selected folder.

| My Documents > Sam | ple Folder 4.2 🗲 | | | Search | ٩ |
|--------------------|------------------|------------------------|------------------|--------|---|
| II ▲ € ** | الا ال ب ال | | | | |
| Business Story | Business Story | 7 Sample URL | Sample SubFolder | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | 6 Link url created suc | cessfully! | | |

ix) The user can see the linked URL link by opening the URL link.



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).
 - 4. Click the 'Save' option to save the information.

| Link a URL Name * Sampe URL | Type URL * https://bdb.ai/product- overview // | Description Product Overview |
|-----------------------------------|---|---------------------------------|
| ir Parameter Name Param 1 | Select properties Enter N User Properties City | Remove |
| Parameter Name Param 2 | Select properties Select s System Properties Toker | n Remove |
| | | Close Save |

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.



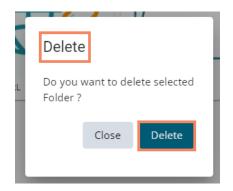
| Rename | |
|-------------------|------------|
| New Name * | |
| Sample Folder 4.2 | |
| | Close Save |
| | |

iv) The folder gets renamed.

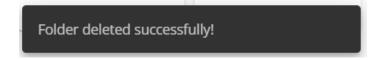
| | | | | | III 🖻 🛛 🖯 |
|------------------|---------------|----------------------------|--------------|-------------------|----------------------------------|
| My Documents 🗲 | | | | Search | o, ₹ Date : |
| | | ı ⊿ ⊄ •• ≁ ⊪" | II ▲ ⊄ * | | ill ∡ ⊄ *; № 10 th |
| Shared Documents | Hide and Show | Test Story | Sample Story | Sample Folder 4.2 | Business Story |

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) A success message appears to confirm the action.



vi) The selected folder gets removed from the platform.

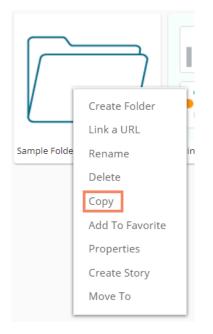
Note: The 'Delete' option is not available to the folders shared as the Public Documents.



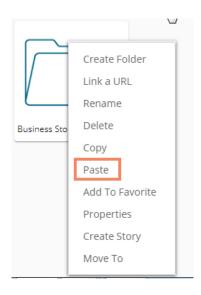
7.1.5. Copying a Folder

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 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



| Γ | Create Folder | | |
|---|---------------|--|--|
| L | Link a URL | | |
| | Paste | | |
| | Create Story | | |

- 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

| • | √ ∿ ∎ | | | J |
|------|---------------------|------------|--------|---|
| ampl | Paste | | | |
| l | Name * Copy of S | ample Fold | er 4.2 | |
| | | Close | Save | |
| | | | | |

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.

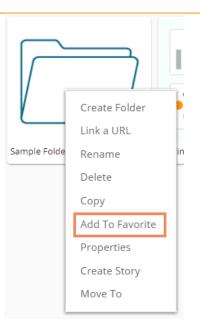


7.1.6. Adding/Removing a Folder to/from Favourites

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

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

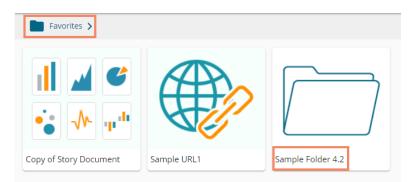




iv) A message appears, "Folder added to favorites!"



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



- vi) Open the 'Favorites' documents space.
- vii) Navigate to the folder you wish to remove.
- viii) Use the right-click on it to get the '**Remove from Favorites**' option.
- ix) Click the '**Remove from Favorites**' option.





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

| Favorites > | | |
|------------------------|-------------|--------------------------------|
| il ⊿ ⊄ ** ∿ יי | | |
| Copy of Story Document | Sample URL1 | |
| | | |
| | | |
| | | |
| | | Folder removed from favorites! |

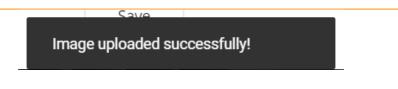
7.1.7. Properties

- 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 to save the update.

| Properties Sample Folder Properties | × |
|-------------------------------------|--|
| Created By: | testo |
| Kind: | Folder |
| Where: | My Documents |
| Created: | Wed Apr 24 2019 19:41:37 GMT+05:30 (India Standard Time) |
| Modified: | Wed Apr 24 2019 19:41:37 GMT+05:30 (India Standard Time) |
| Version: | 4.3.0 |
| Description: | |
| Upload Image: | Choose Files No file chosen Save |

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.

| Create Story |
|-----------------|
| Name * Story |
| Description // |
| Close Save |
| |

vii) The user gets a new page to select a data store for the story.

| My Documents > Sample Folder 4.2 > Story | | E : |
|--|------------------------|------------|
| Empower Business Users to Explore Data and Discover Actionable Insights in Seconds | Choose your data store | |
| States in the second states in | Search | ٩ |
| | ExpSummary | |
| | ExpData | |
| Montharting Producers Degrade participations Degrade participations Degrad | ExpData | |
| | S wttestmrv | |
| | S WTGA | |
| 1117 | 🛢 Test | |
| | SalesAndCollection | |
| | Excel Test | |
| | Sales&Collection | |
| | Inventen/Datalle | |



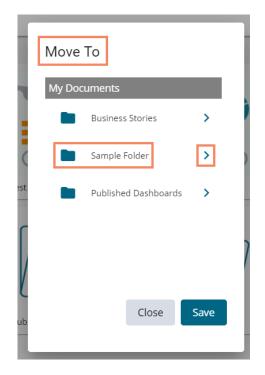
viii) Navigate to the folder.

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) A new window opens displaying the available folders inside the selected folder
- vii) Click the 'Save' option.



| Move | еТо | ٦ |
|-------|---------------------|---|
| ← Sai | mple Folder | |
| • | Sample Folder | Ì |
| t 🗖 | Published Dashboard |) |
| | | 7 |
| | Close Save | |

viii) A success message appears.



ix) The folder gets moved to the targeted folder.

| My Documents 🗲 Samp | le Folder 🗲 |
|---------------------|---------------------|
| | |
| Sample Folder 4.2 | Published Dashboard |

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

7.2. Linking a URL

The users can connect to 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.

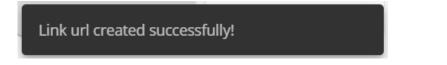


| My Documents 🗲 |
|----------------|
| Create Folder |
| Link a URL |
| Create Story |

- 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.

| Link a URL | | | | |
|-----------------|-----|-----------------|---------------|------|
| 1 Name * | | 2 Type URL * | | |
| Sample URL | | https://bdb.ai/ | 3 Description | 1 |
| ne | | | | |
| 4 URL Parameter | Add | | | |
| - · · · | | | | |
| | | | Close | Save |
| / | | | | |
| | | | | |

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.

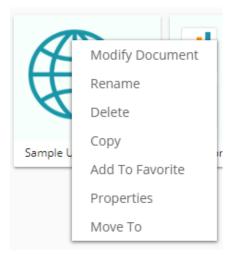




• Options Assigned to a URL

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.



| Modify Linke | ed URL | | | | And the second s | |
|------------------------|--------|-------------------------------|------------|-----------|--|-----------|
| 1 Name * Sample URL | | 2 Type URL* https://bdb.ai | I <u>(</u> | Descripti | | <i>li</i> |
| 4 URL Parameter | Add | | | | 5 | |
| | | | | | Close Save | |

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.

| Rename | | |
|---------------------------|-------|------|
| New Name * Sample URL1 | | |
| | | |
| | Close | Save |

vi) A success message appears.



vii) The linked URL document gets 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 new window appears to confirm the deletion.
- iv) Click the 'Delete' option.

| | Delete | 2 | * * * | |
|----|------------------|-------------|--------------|---|
| ne | Do you File ? | want to del | ete selected | C |
| | | Close | Delete | |
| L | _ | | _ | |

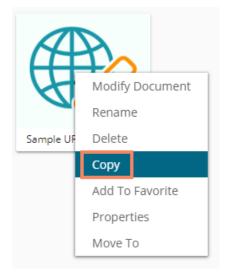
v) The selected URL file gets removed.

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 a 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.



| Γ | Create Folder |
|----|---------------|
| Ι. | Link a URL |
| | Paste |
| | Create Story |

- 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.

| e | Paste Name * Copy of So | ample URL | 1 | |
|---|-------------------------------|-----------|------|--|
| | | Close | Save | |

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

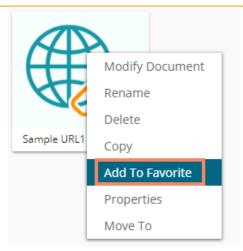
| My Documents > | | | | Search | o 🗲 Name 🚦 |
|------------------|------------------|---|----------------------------|---------------------|------------|
| Shared Documents | Business Stories | to to the company of | Copy of Sales Geo Analysis | Copy of Sample URL1 | 0 3 0 S |
| Sample Folder | Sample URL1 | | | | |

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

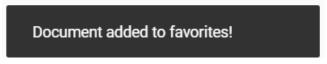
Users can add a URL document to or remove it from the 'Favorites' section.

- 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!"



Document removed from favorites!

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.
 - i. Click the 'Copy Link' icon to copy the open document link of the Link URL.
 - ii. Click the 'Choose Files' option to upload an image.
 - iii. Click the 'Save' option to save the updates.

| Properties | × |
|---------------------------------|--|
| Sample URL | Share With User Share With Group Exclude > |
| | Link URL |
| Created: | My Documents Wed Apr 24 2019 19:44:05 GMT+05:30 (India Standard Time) Wed Apr 24 2019 19:44:05 GMT+05:30 (India Standard Time) |
| Version: Open Document Link: | 4.3.0 https://uat.bdb.ai/home/#/opendocument?data=undefin |
| Description: Upload Image: | website landing page Choose Files No file chosen Save |
| | |

- b. Share With User: The linked URL document is shared with the selected user(s).
 - 1. Select the 'Share With User' on the Properties window.
 - 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.



| Sample URL | Share With User Sh | nare With Group | Exclude > |
|--|--------------------|-----------------|-----------|
| priya Mahendra karthik Raghvendra Singh BDB admins cluster_two clusters | testU | Jser | * |

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.
 - 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.



| Sample URL | Share With User | Share With Group | Exclude > |
|--|-----------------|------------------|-----------|
| Kpmg Group testUserGroup Poweruser Permission BizViz Partners Demo Viewers ABCGroup ETLTest | × × 4 | UserGroup | |

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



- 5. The document gets shared with the selected group(s).
- **Note:** If a URL file is shared with the user(s) or group(s) using the '**Share With**' option, then it opens as a view only copy for the selected user or selected user group.
 - d. Exclude User: The selected user cannot access the linked URL file.
 - 1. Select the '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.

| perties Shar | e With User | Share V | Vith Group | Exclude (| Jser |
|---------------|-------------|---------|----------------|-----------|------|
| Ranjit | ▲ | | vidyaPrdBizviz | Space | * |
| Arun | | _ | | | |
| Kadandale | | > | | | |
| Rub | | •• | | | |
| Mahadevan | | < | | | |
| archana_prd | | | | | |
| Administrator | | | | | |
| | - | | | | ~ |



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.

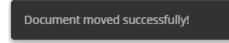
| Move To My Documents | | | | | | | | |
|-------------------------|------------------------|--|--|--|--|--|--|--|
| te | Business Stories | | | | | | | |
| | Sample Folder | | | | | | | |
| l • | Published Dashboards > | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Close Save | | | | | | | |
| | | | | | | | | |

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

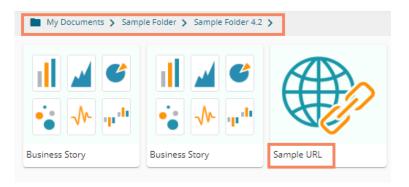
| 1 | Move To | |
|----|---------------------|--|
| | ← Sample Folder | |
| Sa | Sample Folder | |
| | Published Dashboard | |
| | Sample Folder 4.2 | |
| | | |
| | | |
| | Close Save | |
| ١. | | |



viii) A success message appears.

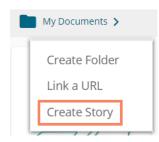


ix) The URL gets moved to the selected space.



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.

| | Create Story |
|------------|--------------------------|
| 2 | Name * Business Story |
| ast - 2 | Description |
| - | Close Save |
| | |



vii) The story document gets created, and the following page opens by default.

| My Documents > Business Story > | | Ξ. 0 |
|---|--|------|
| Empower Business Users to Explore Data and Discover Actionable Insights in Seconds | Choose your data store | |
| | Search | ٩ |
| | ExpSummary | |
| | Se ExpData | |
| | ExpData | |
| | wttestmrv | |
| Discover Actionable Insights in Seconds | Se WTGA | |
| | Test | |
| | Coloradoral Collection | |

- viii) Navigate back to the 'My Documents' space.
- ix) The newly created Story document gets added to the My Documents space.

| My Documents > | | |
|------------------|----------------|-------------------------|
| | | 0 15 2 5 |
| Shared Documents | Business Story | Timeline,mixed,gbar,bar |

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.)

| Shared Documents > | | |
|------------------------|----------|--|
| 1 🖌 🐸 | ıl | 4 |
| Copy of Story Document | Test Sto | Modify Document Rename Delete Copy Add To Favorite Properties |
| | l | Move To |



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.

| Becision Elesigner | | | | | | | | | |
|--------------------|--------------------|---|---|---|-------------------|-------------|---|---|---|
| + New - | Workspaces (2) | Ð | G | Q | Dashboards (6) | | | | Q |
| 🚔 Manage | All Dashboards | | | | Filter saver | ſ | | Î | : |
| Cpen 🗸 | Workspace1 | | 1 | Î | Data Drill | [↑] | 6 | Î | ÷ |
| ★ Preferences | Campaign Analytics | | | | Custom Component | († | 6 | Î | : |
| Save as | - | | - | _ | Dell Engel to a | _ | | - | |
| 🝞 Help | Trash | | | × | Drill-Funnel-type | (†) | 0 | • | : |
| 😃 Exit | | | | | Hide and Show | [↑] | 6 | Î | ÷ |
| | | | | | Language Mapping | ſ | 0 | Î | : |

- iii) The user gets redirected to a new wizard to choose a user or user group or exclude the user.
- iv) Use a check mark to choose the desired action.
- v) Click the '**Publish**' option.

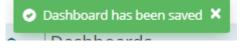
| Publish | | × |
|-----------------------------|-----------------------------------|------------|
| Name | Filter saver | |
| Description | Published from dashboard designer | <i>li</i> |
| USER LIST | USER GROUPS EXCLUDE USER | |
| Search | | |
| Will | | |
| testUser testUser@bdb.ai | | |
| priya | | |
| | | |
| | Publi | ish Cancel |

vi) A success message appears to confirm that the Dashboard is published.

Oashboard has been published ×

vii) Another success message appears to inform the user that the dashboard has been saved.





viii) 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) Select a published dashboard on My Documents or Public Documents.
- iii) Use a right-click on the published dashboard to open various credited options in a context menu.

| | Modify Document |
|--------------|-------------------|
| | Rename |
| | Delete |
| (10) (15) (| Сору |
| Filter saver | Add To Favorite » |
| | Properties |
| | Move To |
| | |

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.

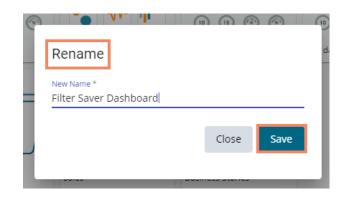
| | Modify Dashboard | |
|---|--|--|
| • | Name* Filter saver | 2 Description Published from dashboard designer |
| ł | Select Dashboard Choose Files No file chosen | |
| 4 | Dashboard Parameter Add | 5 Close Save |

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 the 'Save' option.



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



| My Documents 🗲 | | | | |
|---------------------------------------|------------------------|---------------|---------------------|------------------|
| Shared Documents | 0 0 0 0 0 0 Deta Drill | 0 0 0 0 0 | Business Story | 10 10 20 S |
| i l ⊿ ⊄ ** ∿ ₽ ⁴ | | | 0 0 0 0 | |
| Sample Story | Published Dashboards | Sample Folder | Sales | Business Stories |
| | | | | |
| | | | Document renamed su | ccessfully! |

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.

| Ľ. | | | (10) (15) (** | |
|--------|--------------------|-------------|---------------|---|
| ne | Delete | e | | b |
| * A A* | Do you v File ? | want to del | ete selected | |
| 5 | | Close | Delete | |
| 5 | | | | |

v) A success message appears.



vi) 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.



| | Modify Document |
|--------------|-------------------|
| | Rename |
| | Delete |
| (10) (15) (| Сору |
| Filter saver | Add To Favorite भ |
| | Properties |
| | Move To |

- 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) Click the 'Paste' option.

| Γ | Create Folder |
|---|---------------|
| L | Link a URL |
| L | Paste |
| Ľ | Create Story |

- vii) A new window opens.
- viii) The dashboard name displays prefix '**Copy of-**' before the original name of the dashboard (E.g., *Filter Saver Dashboard* gets a new name *Copy of Filter Saver Dashboard*).
- ix) Click the 'Save' option.

| li | Paste | | 0 15 1* | |
|----|---------------------|---------------|---------|---|
| | Name * Copy of F | ilter Saver [| Dashbo | 4 |
| | | Close | Save | |
| | | 000. | | |

x) The selected dashboard gets copied with a different name

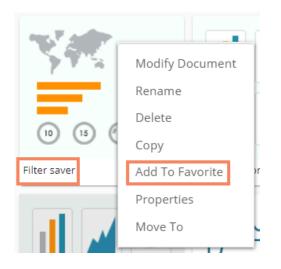


| My Documents 🗲 | | |
|------------------|------------------------|----------------------------|
| | 0 0 0 | 0 5 6 6 |
| Shared Documents | Filter Saver Dashboard | Copy of Filter Saver Dashb |

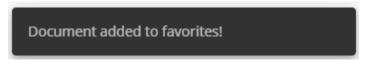
7.4.5. Adding/Removing a Dashboard to/from Favorites)

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.



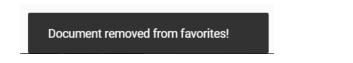
- v) Open the 'Favorites' section.
- vi) Use right-click on the dashboard to get the remove option.



vii) Click the 'Remove From Favorite' option.

| Favorites > | | | Search |
|-----------------------------------|------------|-------------|--------------------------|
| יים איים וו יים ייים איים ייים | | | (1) Remove From Favorite |
| Copy of Story Document | Test Story | Sample URL1 | Filter Saver Dashboard |

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



ix) The dashboard gets removed from the Favorites.

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
 - i. Click the 'Copy Link' icon to copy the open document link of the published Dashboard.
 - ii. Click the 'Choose Files' option to upload an image.
 - iii. Click the 'Save' option to save the update.

| Properties | × |
|------------------------|--|
| Filter Saver Dashboard | Share With User Share With Group Exclude > |
| Created By: | Will |
| Kind: | HTML5 |
| Where: | My Documents |
| Created: | Thu Apr 25 2019 19:14:35 GMT+05:30 (India Standard Time) |
| Modified: | Thu Apr 25 2019 19:14:35 GMT+05:30 (India Standard Time) |
| Version: | 4.3.0 |
| Open Document Link: | https://app.bdb.ai/home/#/opendocument?data=eyJ1c2V |
| Description: | Published from dashboard designer |
| Upload Image: | Choose Files No file chosen Save |
| | |
| | |

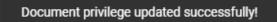


Note: Users can copy the document URL link by clicking the '**Copy**' option given in the Properties window.

- b. Share With User: The dashboard gets shared with the selected user(s).
 - 1. Select 'Share With User' on the Properties window
 - 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

| Fi | ilter Saver Dashboard Properties | Share With User | Share With Group | Exclude |
|----|--|-----------------|------------------|---------|
| | priya Mahendra karthik Raghvendra Singh BDB admins cluster_two clusters | × × | testUser | |

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



- 5. The dashboard gets shared with the selected user(s).
- c. Share With Group: The dashboard gets shared with the selected group(s).
 - 1. Select 'Share With Group' on the Properties window
 - 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.

| | Filter Saver Dashboard | | | |
|---|------------------------|-----------------|------------------|-----------|
| < | Properties | Share With User | Share With Group | Exclude > |
| | Kpmg Group | A | UserGroup | |
| | testUserGroup | | | |
| | Poweruser | > | | |
| | Permission | •• | | |
| | BizViz Partners | < | | |
| | Demo Viewers | •• | | |
| | ABCGroup | | | |
| | ETLTest | _ | | |
| | | Ţ | | • |

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

Document privilege updated successfully!

- 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.
 - 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.



| Properties | | | | | | × |
|--------------------|-----------------|---|---------|-------------|----------|----------|
| Filter Saver Dashb | oard | | | | | |
| < perties | Share With User | | Share W | /ith Group | Exclude | User > |
| | | _ | | | | |
| Ranjit | | ^ | | vidyaPrdBiz | vizSpace | <u> </u> |
| Arun | | | | | | |
| Kadandale | | | > | | | |
| Rub | | | •• | | | |
| Mahadevan | | | < | | | |
| archana_prd | | | | | | |
| Administrato | r | | | | | |
| | | ÷ | | | | |
| | | | | | Close | Save |

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.

| Move | То | |
|--------|-----------------------|--|
| My Doo | cuments | |
| | Business Stories | |
| | Sample Folder | |
| | Published Dashboards | |
| | Copy of Sample Folder | |
| | | |
| | Close Save | |



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

| Move | То | |
|-------|---------------------|------|
| ← San | nple Folder | |
| | Sample Folder | > |
| | Published Dashboard | > |
| | Sample Folder 4.2 | > |
| | | |
| | | |
| | Close | Save |
| | | |

viii) A success message appears.



ix) The dashboard gets moved to the selected space.

| My Documents > Sample Fo | older > | |
|--------------------------|-----------|-------------------|
| | | |
| Filter Saver Dashboard | Sampe URL | Sample Folder 4.2 |

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.

| | | | | | Save Filter Se | elect filter |
|--|---------------|--|--------------------------|----------|----------------|--------------|
| /ear wise Expense & Revenue | Revenu | ae across cont California | | 5 A | country | / |
| USA | 6,0 | Population 12 Ingth 5,678 | | | USA | , |
| USA | | 000 | | | | |
| USA | - 2,0 Tite | Revenue 10 | | | state | |
| USA 📥 | yAX | 0 | | | | |
| USA | -2.0 | 200 | | | California | ~ |
| USA | -a/s | | alifornia California Cal | lifornia | city | |
| USA | | xAxis | Title | | City | |
| USA | (IDD D | | | 6.2 | Search | |
| USA | GDP R | tanking (2018) of the top 10 countries | | 53 | | |
| USA | | | | | 🗹 San Jose | |
| USA USA USA USA USA USA USA USA | | | | | San Franscisco | |
| USA | | | | | 🔲 San Diego | |
| USA | | | | | San Diego | |
| USA | | San Jose | San Jos | e | 🔲 Santa Clara | |
| USA | | 3401.7007 3401.7007 12 6 5.575 4,500 2.953.531 2.357.28 | | | Buffalo | |
| USA | | | | | | |
| USA 🗧 | | 2,905,051 | 2,397,28 | 18 | NY City | |

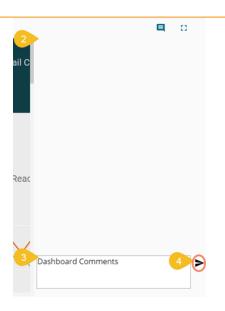
b. Steps to Insert a Comment

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

| My Documents > Sample Folder > Filter Saver D | ashboard > | | | |
|---|------------|---|------------|--------|
| | | | | Save |
| Year wise Expense & Revenue | K M | Revenue across continents in a decade | к л 2 У | |
| USA | | 6,000 4,000 | | USA |
| USA USA USA USA | | S. 0 -2,000 California California California California California California | | Califo |
| | | GDP Ranking (2018) of the top 10 countries | K 7 | Sear |
| USA USA | | | | s |
| USA | | | | |

- 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 inserted comments gets displayed in the 'Comments' window.



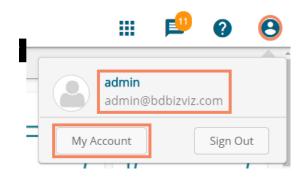
Note:

- 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 logged in user displays.
- iv) Click the '**My Account**' option.



v) Users get redirected to the following page:



| ▲ Information ★ Prefer | rences 🛛 🔒 Ch | ange Password | | | | | | |
|------------------------|---------------|----------------|--|----|----------|-------------------------|------------------|------|
| | | | | CE | dit | API token access | | |
| Information | | | | | | Show | | |
| Em | ail admir | n@bdbizviz.com | | | _ | Reset | | |
| Full Nar | ne admir | n | | | | | | |
| Mobile Numb | er Mobi | leNumber | | | | Password Expiry Co | nfiguration | |
| Land Line Numb | er Land | Line Number | | | | Password Never Expires | () Yes | O No |
| Addre | ss Addre | ess | | | | Delist Mobile Devic | e | |
| | | | | | | You have not register a | ny Mobile device | |
| | | | | | <u>h</u> | | | |

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.

| nail admin@bdbizviz.cor | | | |
|-------------------------|------------------|------------------|------------------|
| | n | | |
| me admin |] | | |
| ber MobileNumber | | | |
| ber Land Line Number | | | |
| ess Address | | | |
| | ber MobileNumber | ber MobileNumber | ber MobileNumber |

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

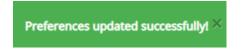
The Administrator can change the preference settings of the users using this module from the left side of the pane.

Follow the below given steps to change preference settings

- i) Click 'Preferences' using the My Account menu row.
- ii) The 'Document Settings' option appears.
- iii) Use a radio button to select either of the choices out of:
 - a. Folder
 - b. Document
 - c. Shared
- iv) As per the selected choice, a drop-down menu appears (E.g., The following image displays 'Folder' drop-down since Folder isselected from the Select Type).
- v) Select a folder (or document) from the respective drop-down menu.
- vi) Click the 'Save' option.

| 1 Informa | ★ Preferences | Change Password | | | |
|-----------|-------------------------------|-----------------|-----------|----------|--------|
| Pref | erences | | | | |
| 2 Docu | ument Settings Select Type | Folder | ODocument | O Shared | |
| | 4 Folder | Select Any One | | | • |
| | | | | | 5 Save |

vii) A pop-up message appears to assure that the preferences have been updated.



Note: Folders and documents get 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.

| 1 Information | * Preferences | Change Password | |
|----------------------|---------------|------------------|------|
| Char | ge Password | | |
| Old | Password | DId 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

| API to | ken access |] | |
|----------|------------------|------|--|
| API toke | en is not availa | ble. | |
| Create | | | |

- b) A new API token gets created.
- c) The following details appear after creating an API tokena. Show: By clicking this option the API token is displayed
 - b. Reset: By clicking this option the API token gets reset

| API token access |
|--------------------------------------|
| |
| Show |
| 64768039628CB22062823C74C0A638051113 |
| Pecat |

b. Password Expiry Configuration



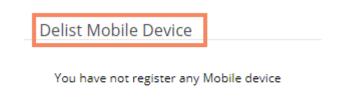
- i. Password expiry limit can be configured via this option.
- ii. The user needs to select either of the choices for the 'Password Never Expires' out of 'Yes' or 'No' options.
- iii. click the 'Save' option.

| Password Expiry Co | 1 | |
|------------------------|-------|------|
| Password Never Expires | Yes | O No |
| | Clear | Save |

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

The BDB 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 BDB platform; it is automatically enabled when you first install the system - it cannot be disabled. The BDB 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 BDB 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: The User can configure the AD or CA PPM authentication options through the Administration module.

10. Signing Out

The following steps describe how to log out from the BDB Platform.

- i) Click the '**User**' icon 😌 on the Platform homepage.
- ii) The details of the logged in user appears.
- iii) Click the 'Sign Out' option.



iv) The user successfully signs off from the BDB Platform.

Note: Clicking on the 'Sign Out' option redirects the user back to the Log in page of the BDB platform.