

Admin Guide

Platform R-4.4

Contents

1. About this Guide	6
1.1. Document History.....	6
1.2. Overview	6
1.3. Target Audience	6
2. Introduction	6
2.1. Introducing the BDB Platform	6
2.2. Supported Web Browsers	7
3. Getting Started with the BDB Platform	7
3.1. Accessing the BDB Platform	7
3.1.1. Forgot Password Option.....	8
3.1.2. Force Login	10
3.2. Platform Homepage.....	11
3.2.1. Apps Menu	11
3.2.2. Notification Option	11
3.2.3. Help Menu	14
3.2.4. User Menu	15
3.2.5. Available Documents	15
3.2.6. Navigation Bar	17
3.2.7. Ordering Documents.....	17
4. Administration	19
4.1. Accessing the Administration Module.....	19
4.2. Administration Options.....	21
4.2.1. Document Management	21
4.2.2. Configurations and Settings	23
4.2.3. Authentication	40
4.2.4. Session.....	44
4.2.5. Schedule Monitoring.....	45
4.2.6. Server Monitoring.....	46
4.2.7. Audit Trail	47
4.2.8. Encryption	49
4.2.9. Language	50
4.2.10. Migration.....	56

4.2.11.	License.....	65
4.2.12.	Form Settings.....	67
5.	User Management.....	68
5.1.	Accessing the User Management Page.....	68
5.2.	Creating a New User Group	69
5.2.1.	Assigning Group Custom Fields	72
5.3.	Creating a New User	73
5.3.1.	Default User Role	75
5.4.	User Status	78
5.4.1.	Activating an Expired User Account.....	79
6.	Data Center	79
6.1.	Data Connector	79
6.1.1.	Creating a Data Connector	79
6.1.2.	Data Connector List.....	139
6.1.3.	Creating Data Store/Data Set by using Query Builder	139
6.1.4.	Reconnecting a Data Connector	145
6.1.5.	Sharing a Data Connector.....	145
6.1.6.	Editing a Data Connector.....	147
6.1.7.	Removing a Data Connector	148
6.2.	Data Set.....	149
6.2.1.	Creating a New Data Set using RDBMS or Big Data Connector	149
6.2.2.	Creating a New Data Set Using API Connectors	155
6.2.3.	Creating a New FTP Data Set	158
6.2.4.	Creating a CA PPM Data Set	160
6.3.	Data Store	163
6.3.1.	Creating a New Data Store	164
6.3.2.	Creating a New Data Store Using a Flat File Data Connector	169
6.3.3.	Creating a New Data Store Using an API Data Connector.....	173
6.3.4.	Adding Synonyms to a Datastore.....	177
6.4.	Data Store Meta Data	179
7.	Option.....	182
7.1.	Creating a Folder	182
7.1.1.	Creating a Folder (Sub-Folder).....	183
7.1.2.	Linking a URL.....	184
7.1.3.	Renaming a Folder	186
7.1.4.	Deleting a Folder.....	187

7.1.5.	Copying a Folder	188
7.1.6.	Adding/Removing a Folder to/from Favourites.....	189
7.1.7.	Properties	191
7.1.8.	Creating a Story	191
7.1.9.	Moving a Folder	192
7.2.	Linking a URL	194
7.2.1.	Modifying a Document (URL information)	195
7.2.2.	Renaming a URL Document.....	196
7.2.3.	Deleting a URL Document	197
7.2.4.	Copying a URL Document.....	198
7.2.5.	Adding/Removing a URL Document to/from Favorites	199
7.2.6.	Properties	200
7.2.7.	Moving a URL File.....	203
7.3.	Creating a Story	204
7.3.1.	Modifying a Document.....	208
7.3.2.	Renaming a Story Document.....	208
7.3.3.	Deleting a Business Story	209
7.3.4.	Copying and Moving a Business Story.....	209
7.3.5.	Adding/Removing a Story Document to/from Favorites	211
7.3.6.	Properties	213
7.3.7.	Move To.....	216
7.3.8.	Report Burst.....	218
7.4.	Published Dashboard on the BDB Platform	220
7.4.1.	Modifying a Dashboard	222
7.4.2.	Renaming a Dashboard	223
7.4.3.	Deleting a Dashboard.....	224
7.4.4.	Copying and Moving a Dashboard	224
7.4.5.	Adding/Removing a Dashboard to/from Favorites).....	225
7.4.6.	Properties	227
7.4.7.	Moving a Dashboard.....	230
7.4.8.	Insert Comments.....	231
7.5.	Published Forms on the BDB Platform	232
7.5.1.	Modifying a Form.....	234
7.5.2.	Renaming a Form.....	235
7.5.3.	Deleting a Form	236
7.5.4.	Copying a Form	236

7.5.5.	Adding a Form to Favorite.....	238
7.5.6.	Properties.....	239
7.5.7.	Moving a Form.....	242
7.5.8.	Insert Comments.....	244
8.	My Account.....	245
8.1.	Information.....	246
8.2.	Preferences.....	247
8.3.	Changing Password.....	247
8.4.	Other Related Options.....	248
9.	Securing Platform: Authentication.....	249
9.1.	Enterprise.....	249
9.2.	Windows AD.....	249
9.3.	Clarity.....	250
10.	Signing Out.....	250

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
BDB Platform	4.4	June 7 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)

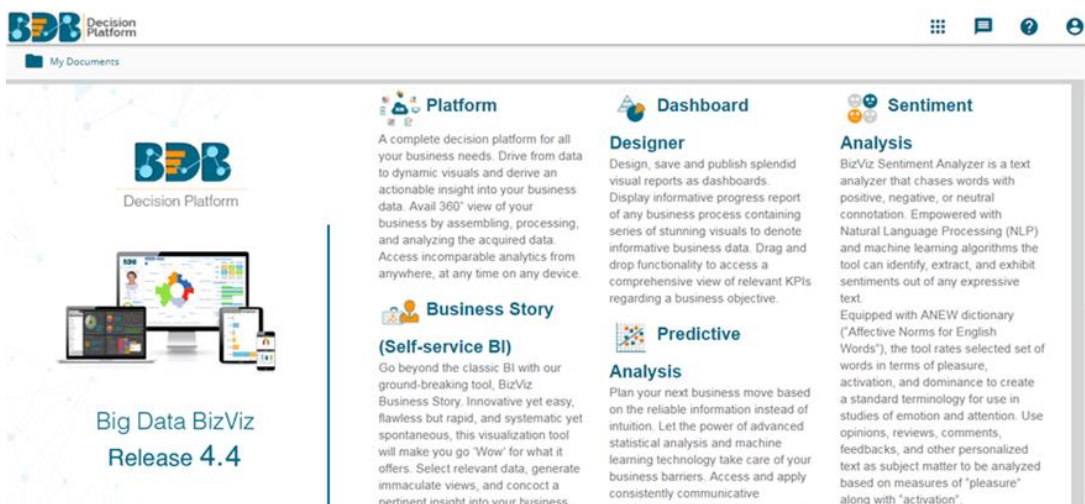
3. Getting Started with the BDB Platform

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) Select an '**Auth Type**' option using the drop-down menu.
- iv) Click the '**Continue**' option.

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

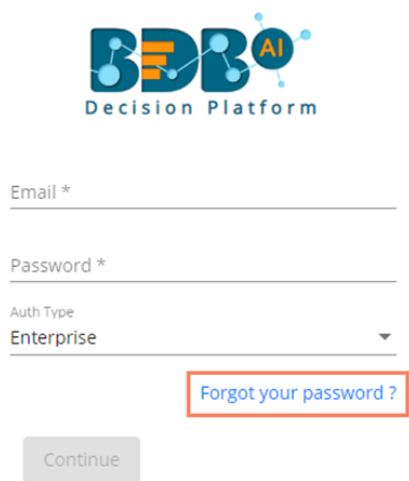


Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

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 the '**Forgot your password?**' option.



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

- 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.



Having trouble signing in?

To reset your password, enter the email address you use to sign in to BizViz. This can be your email address associated with your account.

Email *

admin@bdb.ai

[Sign in](#)

Continue

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

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

Password reset Link has been sent to your mail.

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



Reset Password

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

New Password *

Confirm New Password *

Continue

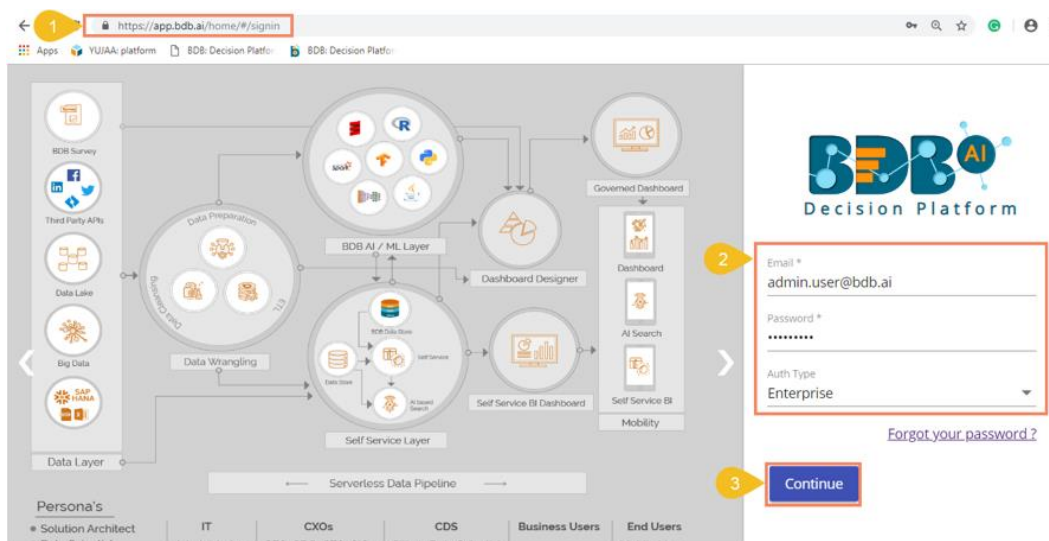
Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)

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

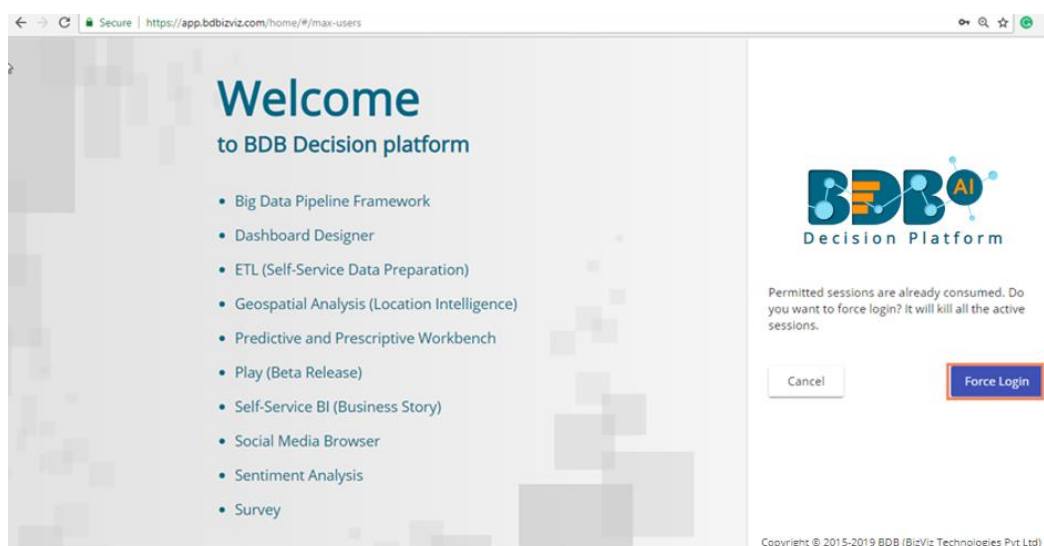
3.1.2. Force Login

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

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



- iv) The user 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.

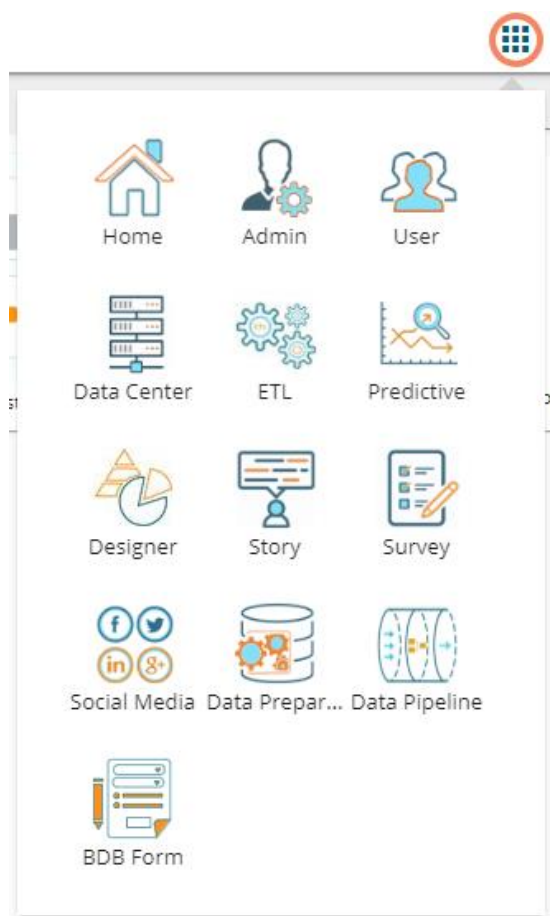
3.2. Platform Homepage

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 get displayed.



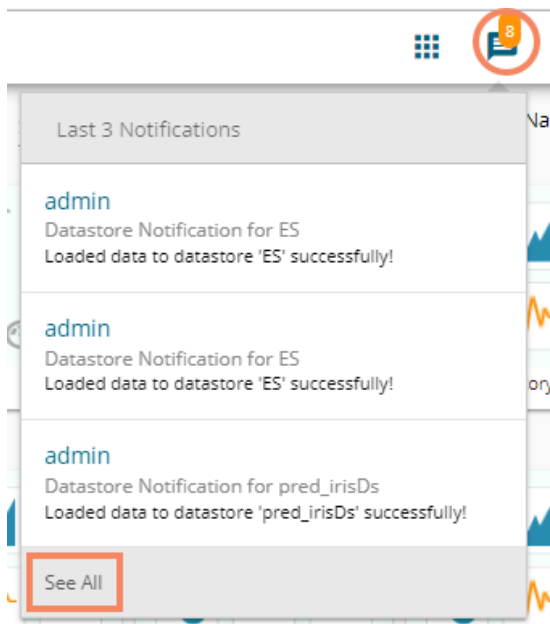
Note: Users can select and open various applications by using the specific App icon provided under the 'Apps' menu window.

3.2.2. Notification Option

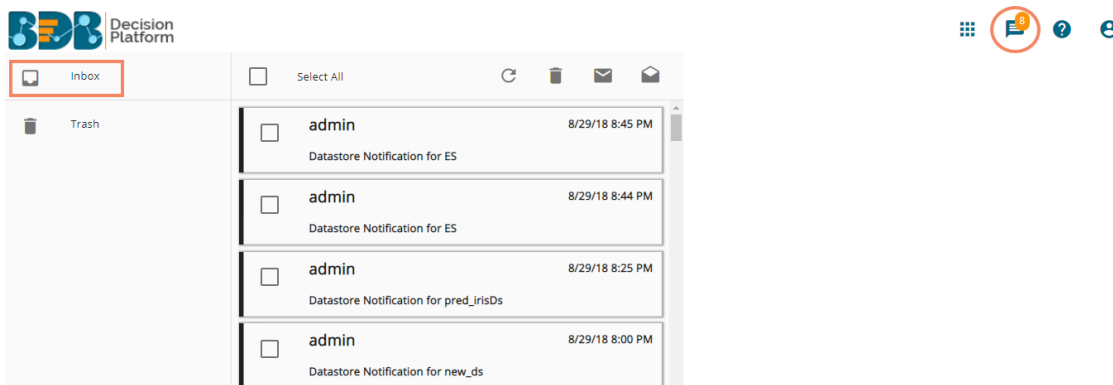
The Notification feature is a way to send and receive messages between people and from processes to people.

By default, Inbox and Trash folders are provided.

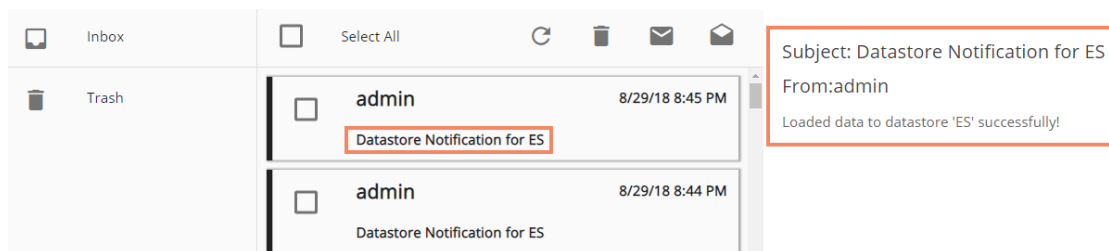
- i) Navigate to the Platform homepage.
- ii) Click the '**Notification**' option.
- iii) A window opens with the latest notifications.
- iv) Click the '**See All**' option.



- 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.)



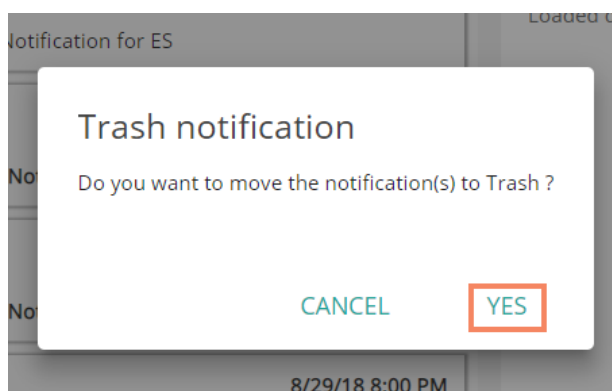
- vi) Click on a notification message from the 'Inbox' folder to get the details of the selected message.



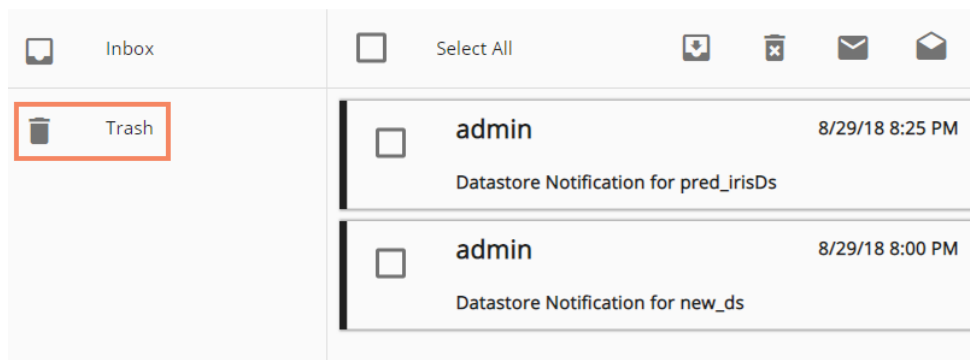
Icons provided on the inbox window:

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

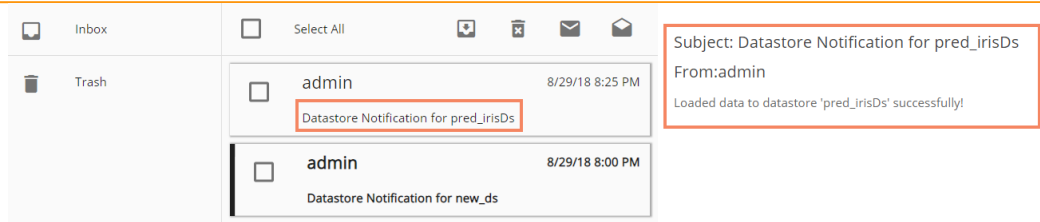
- vii) Click the **'Trash'** icon from the header panel of the notification inbox.
- viii) A message window appears to confirm the action of moving the selected notification to Trash.
- ix) Click the **'YES'** option to move the notification(s) to Trash.



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

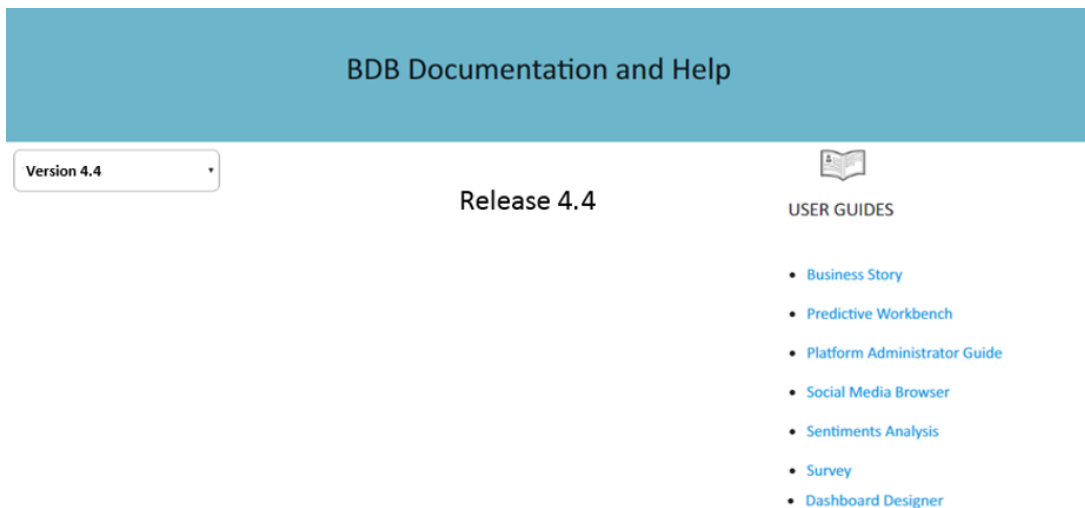
Note: The alert messages display while performing the following actions:

- 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.




3.2.4. User Menu

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

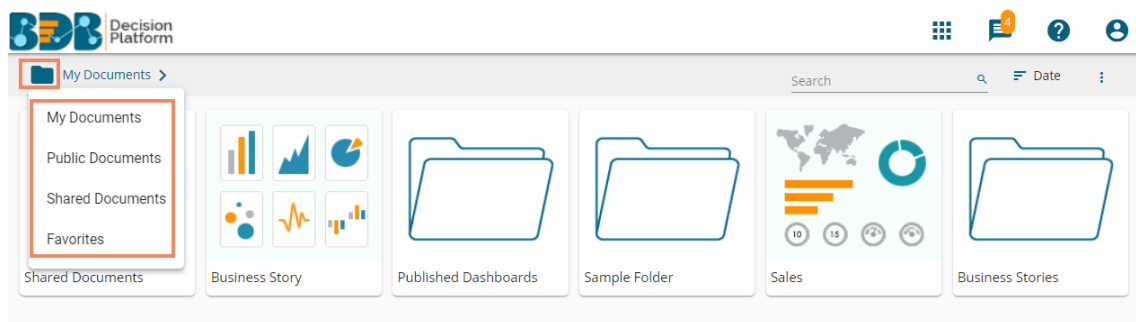
- i) Navigate to the Platform homepage
- ii) Click the 'User'  option
- iii) Displays the following options:
 - a. **My Account:** Displays account details of the logged in user
 - b. **Sign Out:** Helps to sign out from the Platform

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

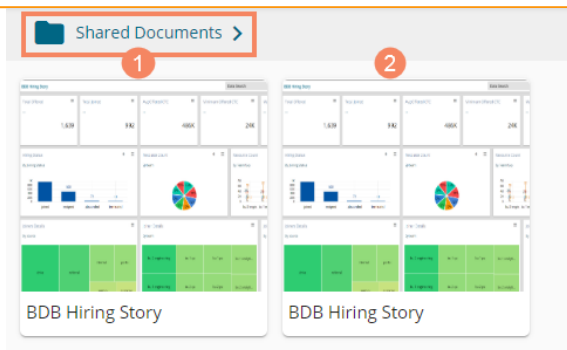
3.2.5. Available Documents

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

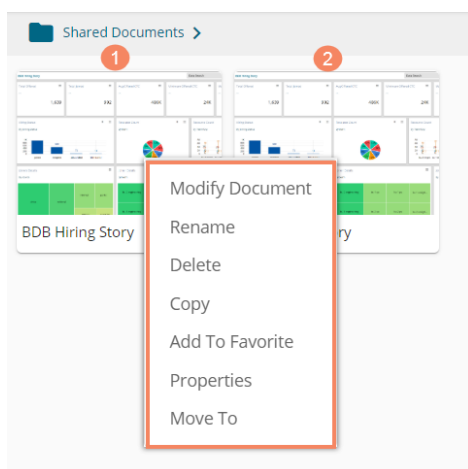
1. My Documents
2. Public Documents
3. Shared Documents
4. Favorites



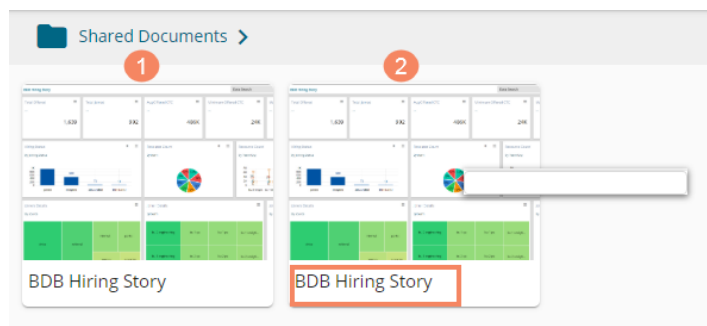
- **My Documents**
 - 'My Documents' lists all the documents created by the user or assigned to the user
 - The documents are displayed as thumbnails
- **Public Documents**
 - The 'Public Documents' folder is available to all users
 - Users can view documents shared by others
- **Shared Documents**
 - The documents shared by users can be part of the 'Shared Documents'
 - The users receive a 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.

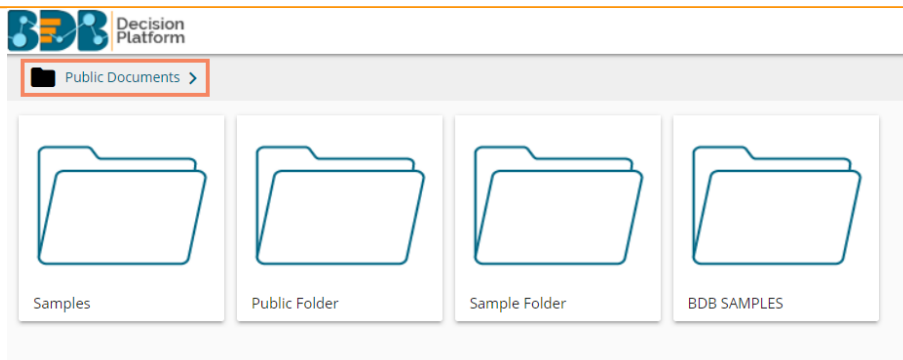


- **Favorites**

- 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:

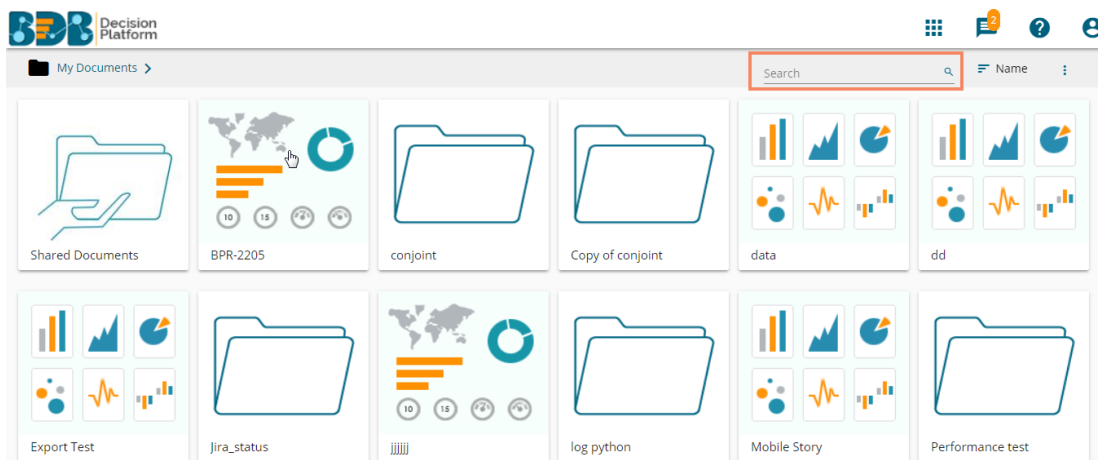
- a. The **'My Documents'** space opens by default while opening the BDB Platform homepage.
- b. The users are provided with some sample folders and documents by default. E.g., the following image displays the sampled folders available in the Public Documents.



3.2.6. Navigation Bar

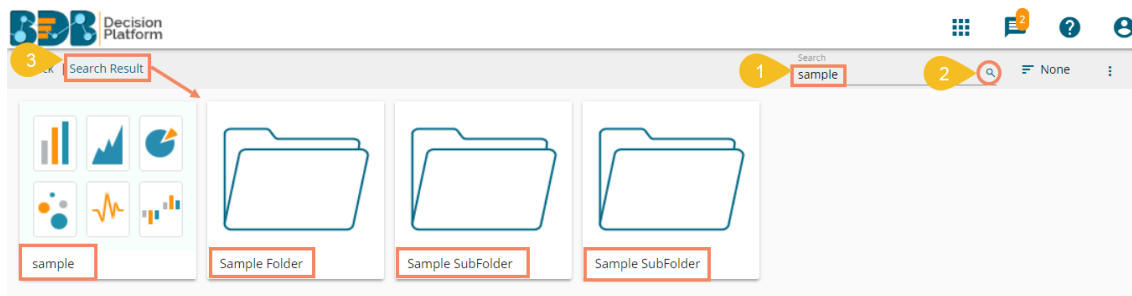
The administrator can search for a specific document by typing the title of the document in the Navigation bar.

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



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

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



3.2.7. Ordering Documents

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

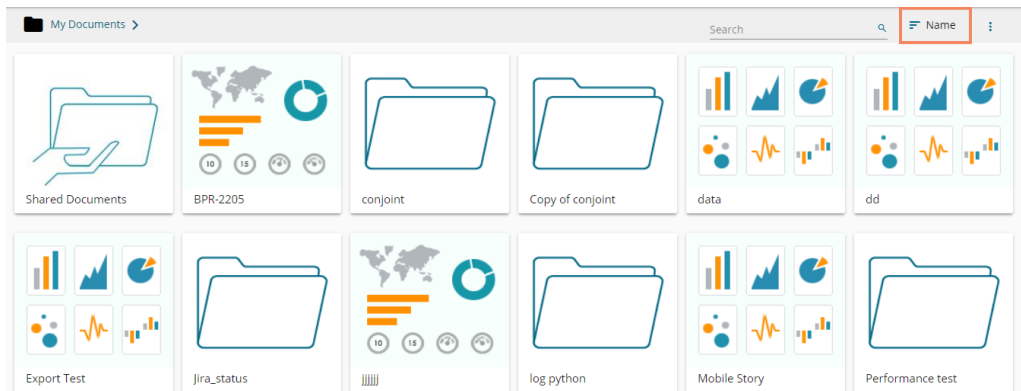
The following options are provided to display the available documents on the platform homepage:

1. Alphabetical/Name (Ascending and Descending)

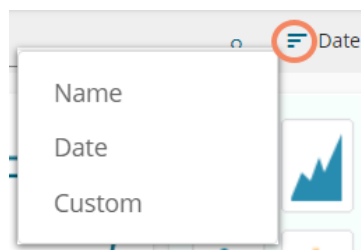
2. Date (Ascending and Descending)

3. Custom

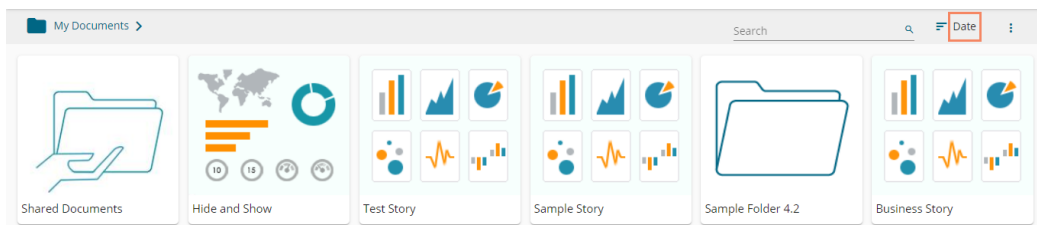
- i) Click the **'Order By'** icon on the platform homepage.



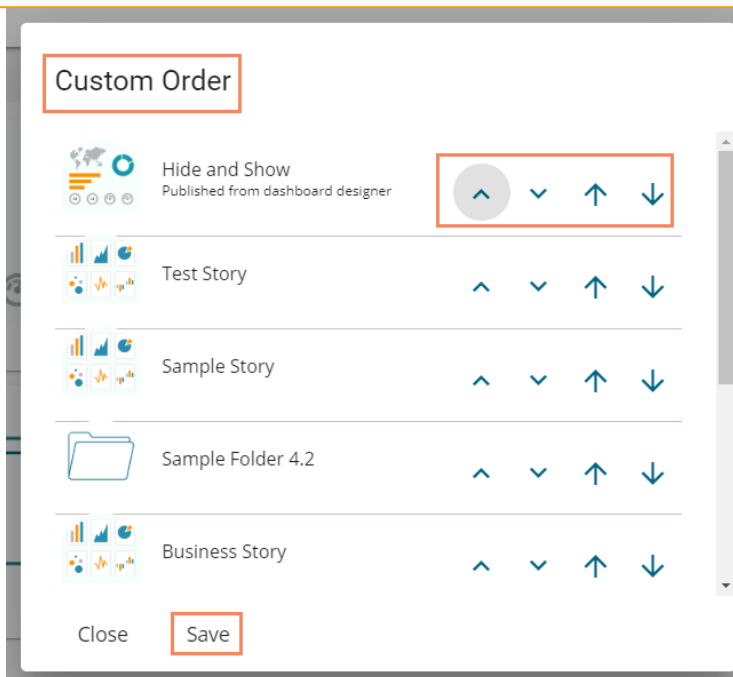
- ii) A context menu opens with the following sorting options:
- Name: Sort documents by their name in ascending or descending order (Ascending is the default order)
 - Date: Sort documents by date by using this option
 - Custom: Manually drag and change the order of documents



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

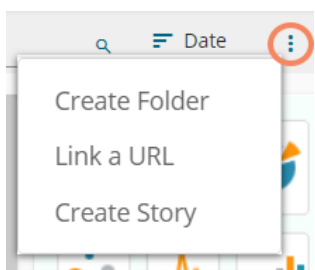


- v) Users can set a customized order of the document by choosing the **'Custom'** order option.
- vi) By selecting the **'Custom'** option, the user gets directed to a new window.
- vii) Set a customized order of displaying the available documents or folders by using the given arrows.
- viii) Click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



Note:

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

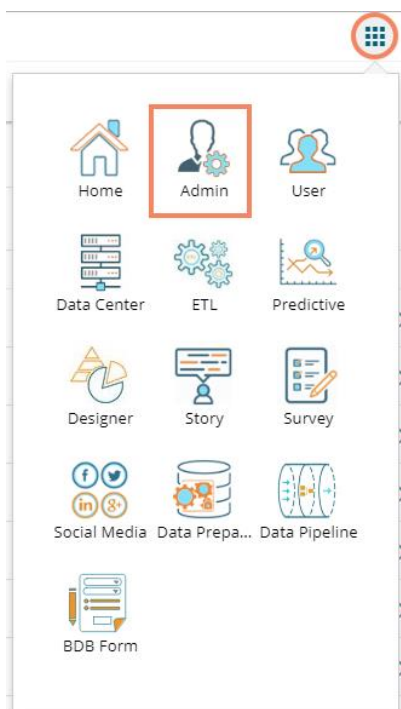



4. Administration

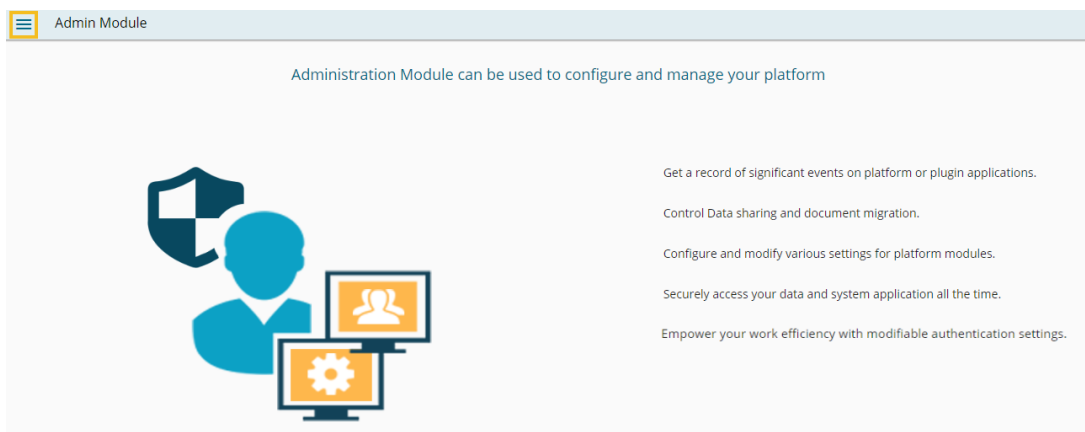
The Administrator manages the entire BDB Platform through this module. It controls all the general and user-specific configuration settings for various plugin applications provided in the platform.

4.1. Accessing the Administration Module

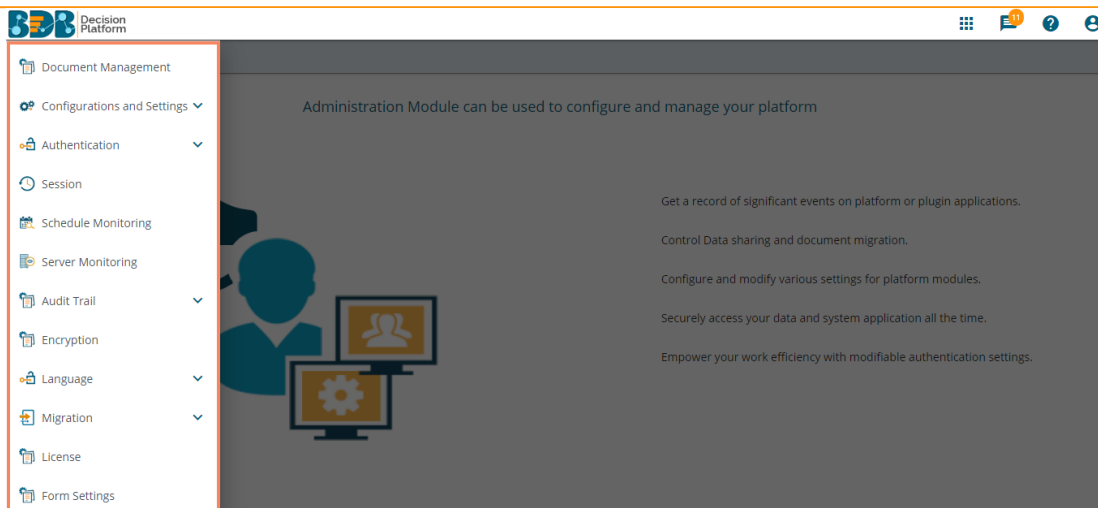
- i) Navigate to the Platform homepage.
- ii) Click the **'Apps'** icon.
- iii) A menu appears containing all the available plugins.
- iv) Select and click the **'Admin'** plugin.





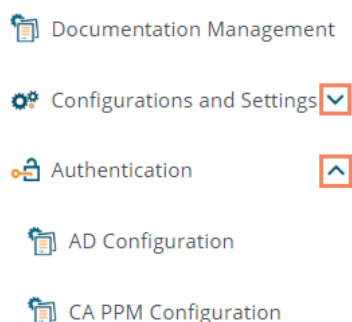
- v) Users get directed to the '**Admin Module**' page.
- vi) Click the '**Menu**'  icon.



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



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



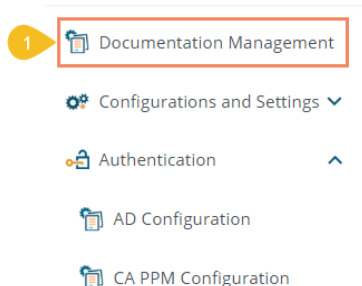
4.2. Administration Options

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

4.2.1. Document Management

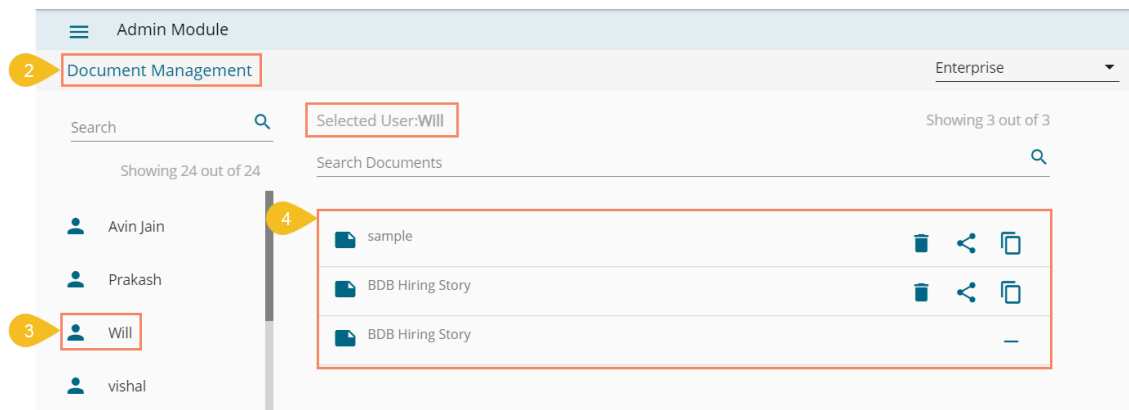
This feature allows an administrator to view all the documents created by a specific user. The user specific documents can be shared or deleted by the administrator via this module. The Document Management tile appears in the Administration module.

i) Click the **'Document Management'** option from the Administration Page.



ii) Users get directed to the **'Document Management'** window.

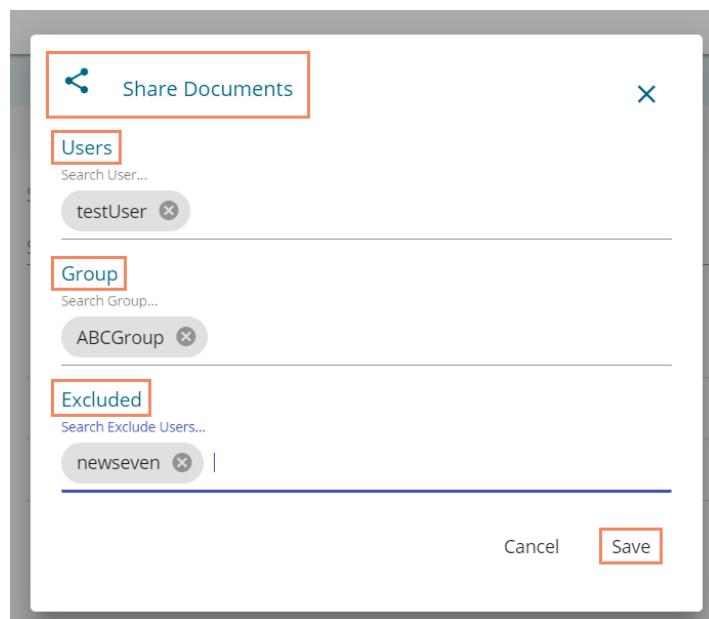
- iii) Select a user from the 'Users' list.
- iv) A list of documents created by that user displays.



Icon	Name	Description
	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
	Copy	Redirects to Copy the selected document to another user(s)

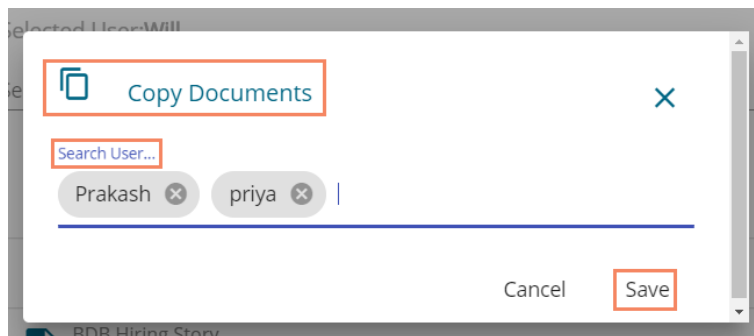
Note:

- 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.



- 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

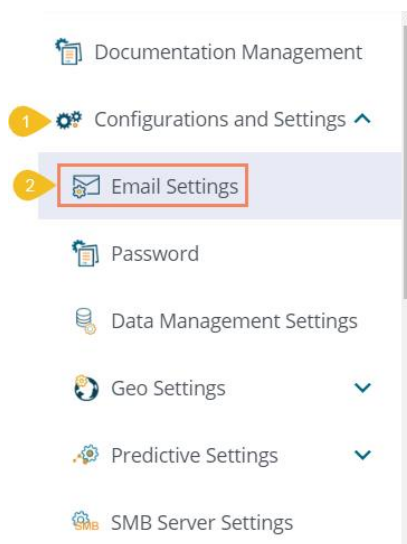



4.2.2. Configurations and Settings

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.



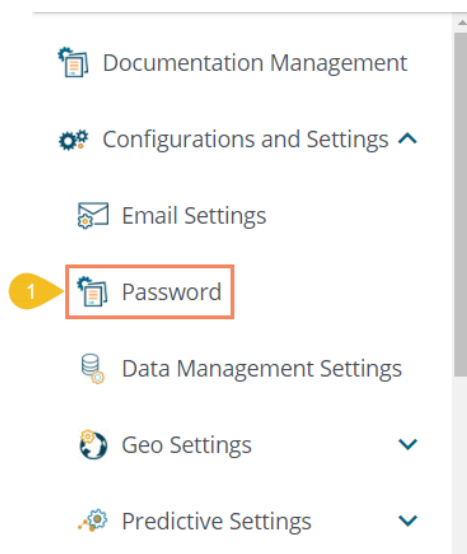
- iii) The '**Email Server Settings**' window appears with the following fields:
 - **Email Host:** SMTP host address
 - **Email Port:** Port number of SMTP
 - **Encryption Type:** Select an encryption type from the drop-down menu
 - **Email From:** Enter authenticated credentials of the sender
 - **Email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

v) Click the **'Refresh'** 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.

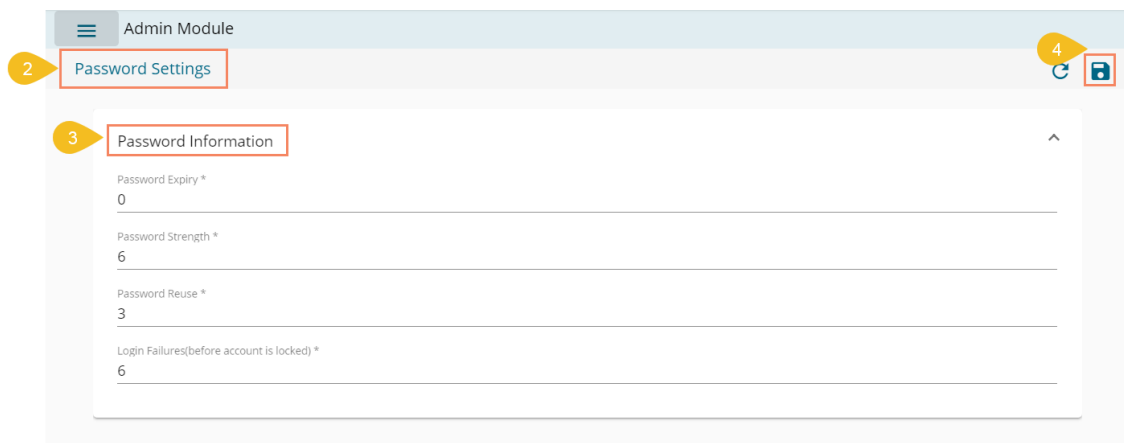


ii) The **'Password Settings'** page appears.

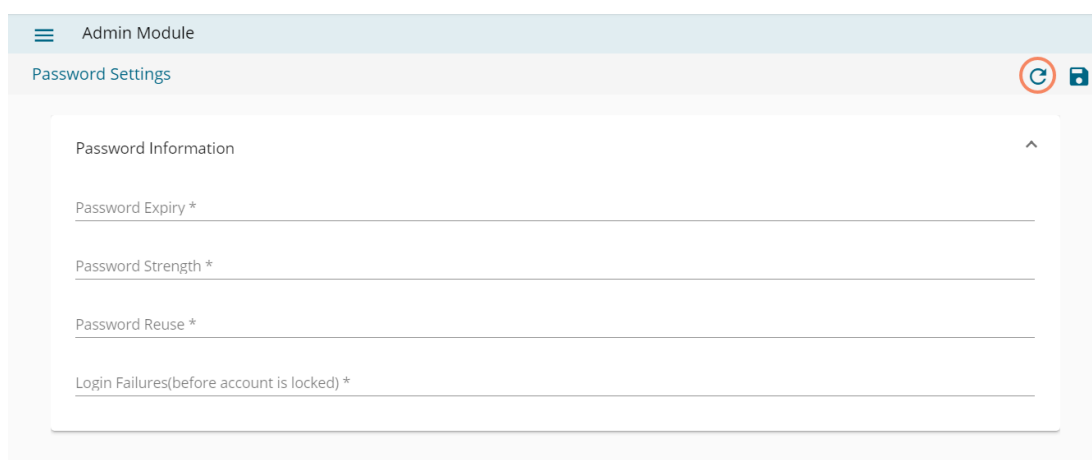
iii) Provide the following information:

- **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.



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



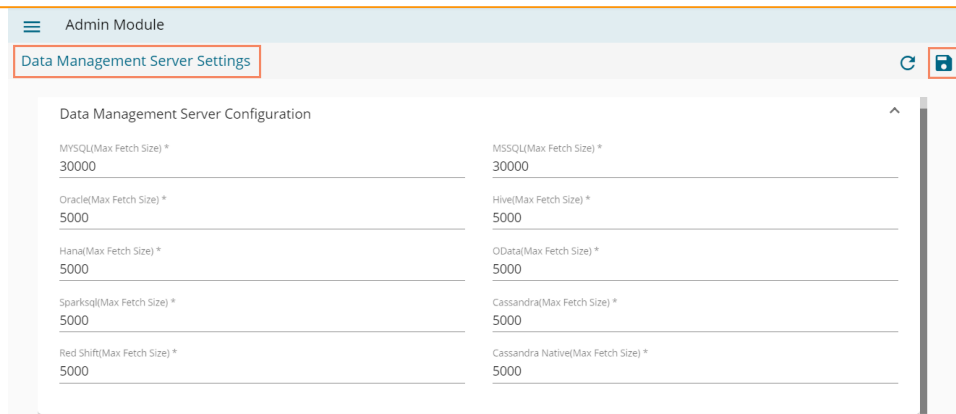
Note:

- 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@)

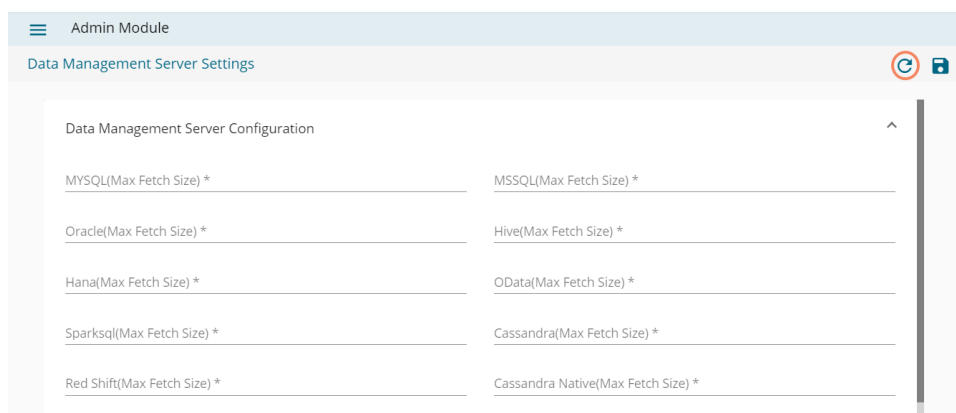
4.2.2.3. Data Management Settings

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.



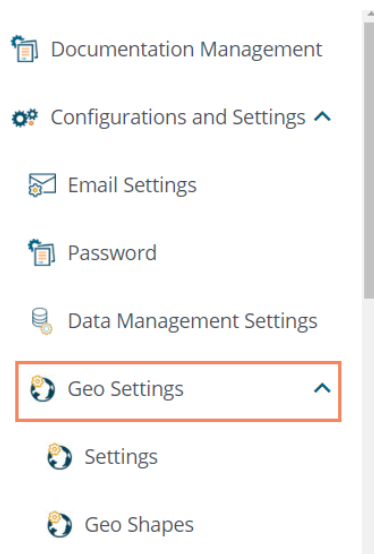
v) Click the **'Refresh'** icon to erase the entered information.



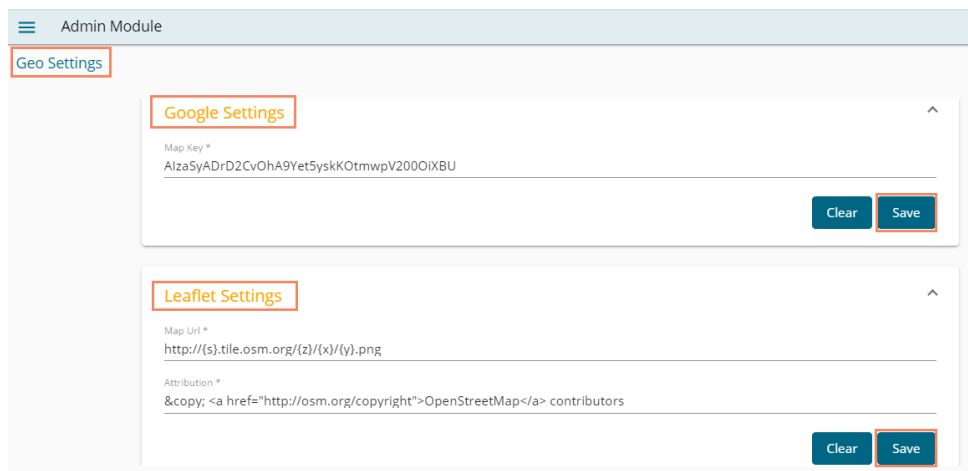
4.2.2.4. Geo Settings

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

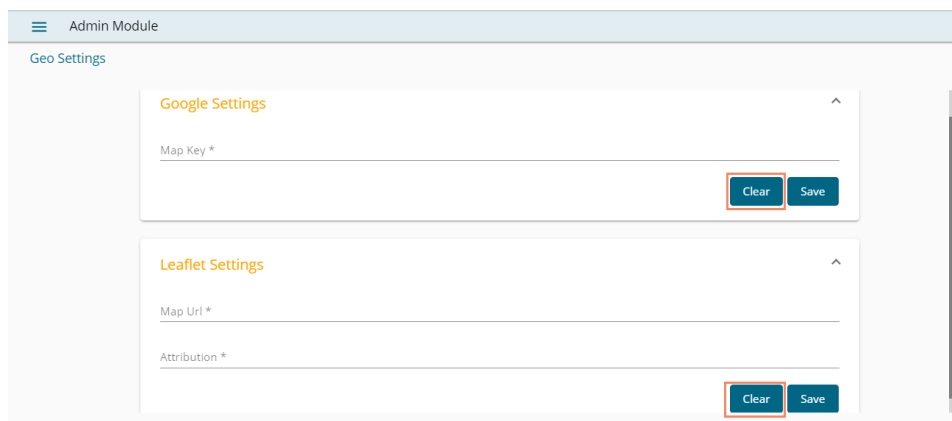


- **Settings**
 - a. Click the **'Settings'** option.
 - b. The **'Geo Settings'** page opens displaying the **'Google Settings'** and **'Leaflet Settings'** options
 - c. Fill in the following information for the **'Google Map'**:
 - i. **Map Key:** Enter the map key that has been provided by Google (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.




The screenshot shows the 'Geo Settings' page in an 'Admin Module'. It contains two main sections: 'Google Settings' and 'Leaflet Settings'. In the 'Google Settings' section, the 'Map Key' field is filled with 'AlzaSyADrD2CvOhA9Yet5yskOtmwpV200OIXBU'. In the 'Leaflet Settings' section, the 'Map Url' field is filled with 'http://{s}.tile.osm.org/{z}/{x}/{y}.png' and the 'Attribution' field is filled with '© OpenStreetMap contributors'. Both sections have 'Clear' and 'Save' buttons.

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



This screenshot shows the same 'Geo Settings' page as the previous one, but the 'Clear' buttons for both the 'Google Settings' and 'Leaflet Settings' sections are highlighted with red boxes, indicating they should be clicked to clear the information.

- **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

Geo Shapes + Polygon

Search Q

Id	UserName	Actions
10059776	USA Country	
10059777	USA State Level	
10059778	USA States FM	
293470208	USA Geo Shape	

Items per 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

Create Geo Shapes ^

Shape Name *

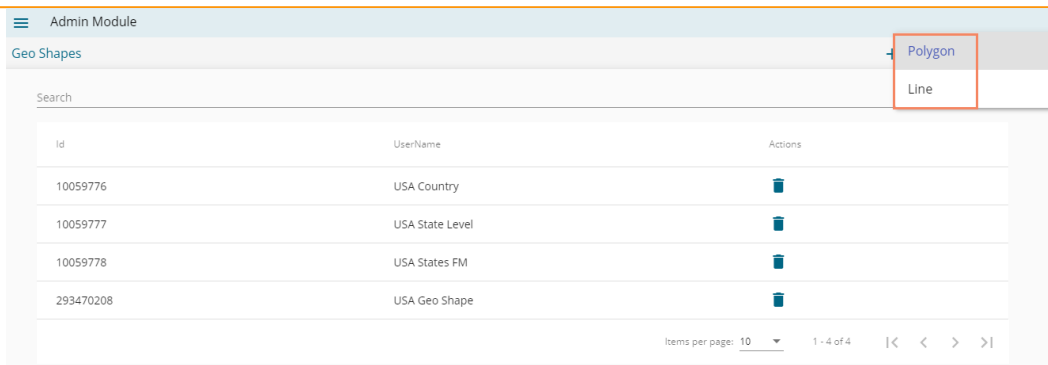
Geometry Type * Area Type *

No file chosen

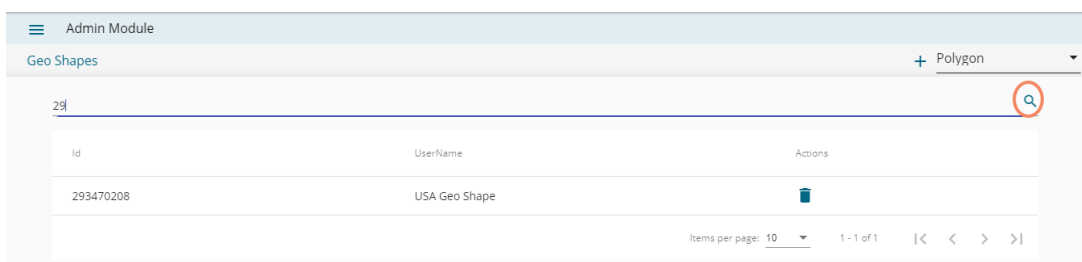
- g. A message will pop-up to assure that the file has been uploaded.
- h. All the uploaded Geo Shape files get displayed in the list format.

Note:

- a. Select a Geometry Type using the drop-down menu.
 - i. Polygon
 - ii. Line

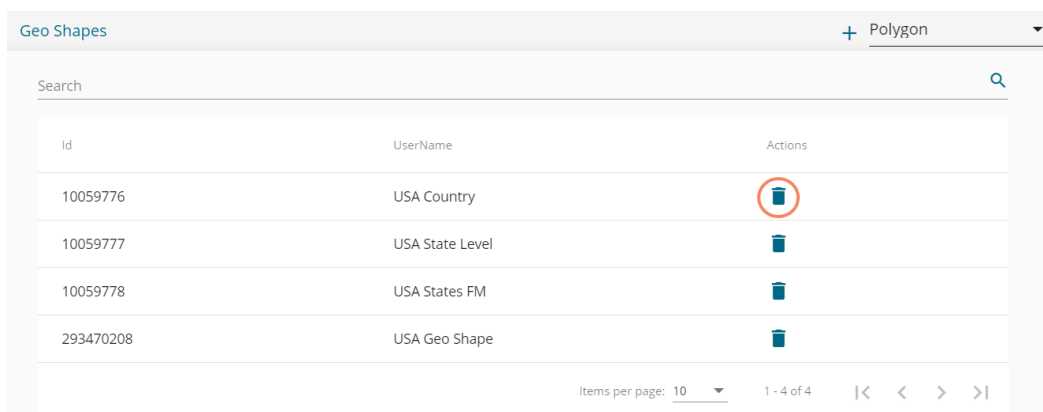


b. Use the 'Search' space to search a Geo Shapefile from the displayed list.

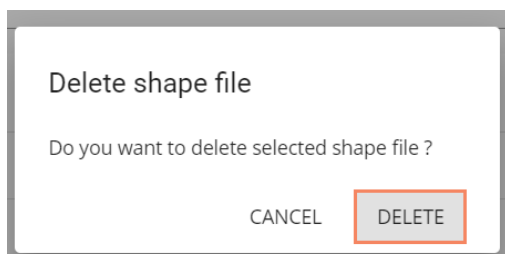


c. Deleting a Geo Shape File

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



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

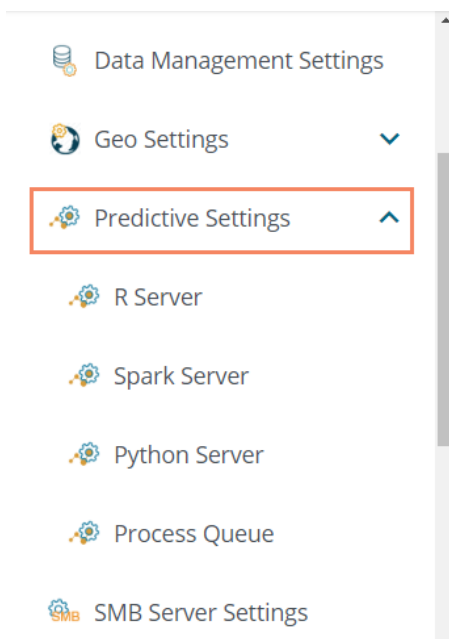


v. The selected Geo Shapefile gets removed from the list.

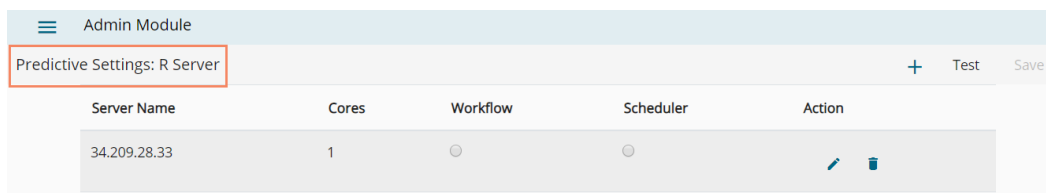
4.2.2.5. Predictive Settings

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



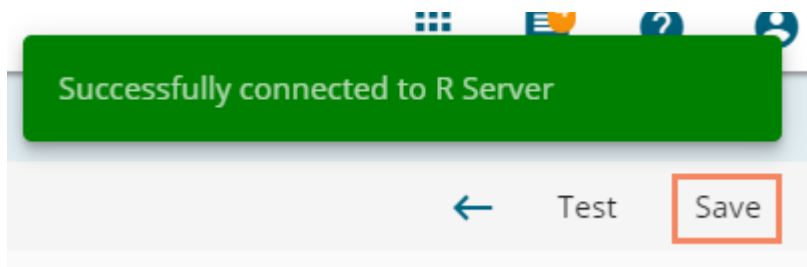
- **Steps to Create a New R-Server**
 - a. Navigate to the '**Predictive Settings**' admin option
 - b. Click the '**R Server**' option
 - c. R Server page under Predictive Settings opens with the details of the existing R Servers



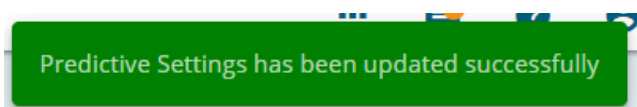
- d. Click the '**Create New Server**' icon
- e. A scrollable window opens asking Basic Information for new R Server
- f. Provide the following information to configure a new R server:
 - i. IP Address: IP address of the R-server
 - ii. Port: R-Server's port number
 - iii. User Name: Enter a username 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.

- 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.



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




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

Server Name	Cores	Workflow	Scheduler	Action
34.209.28.33	1	<input type="radio"/>	<input type="radio"/>	
R server	1	<input checked="" type="radio"/>	<input checked="" type="radio"/>	

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

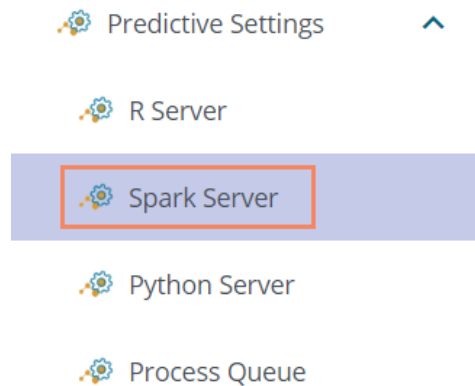
settings.


- c. The Administrator can configure multiple R-Servers, but the process execution happens on a single server at a time.
Click the **'Delete'**  icon to remove the selected server configuration details from the list.

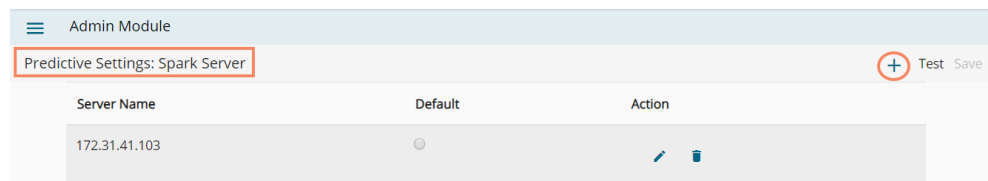
- **Spark Server Settings**

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



- 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.

Create Spark Server

← Test Save

Basic Information

Host *

Port * User Name *

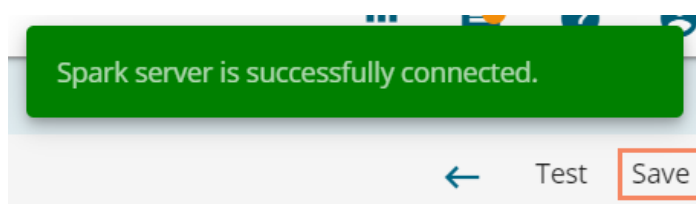
Password * Spark Server Name *

Jetty Configuration Url *

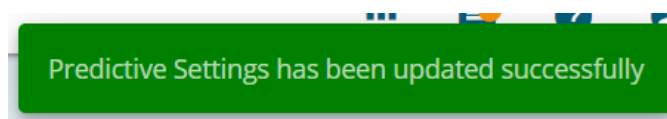
Application *

Spark Server Protocol HTTP HTTPS

- 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.



- 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

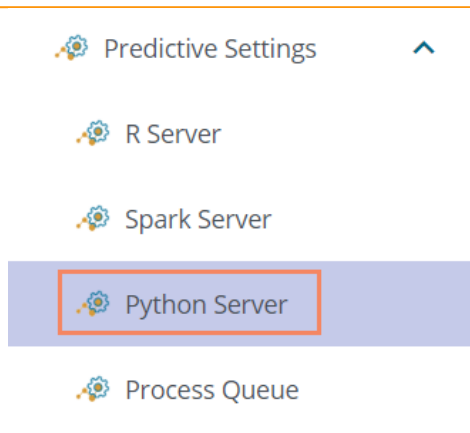
Predictive Settings: Spark Server + Test Save


Server Name	Default	Action
172.31.41.103	<input type="radio"/>	
Spark Server	<input checked="" type="radio"/>	

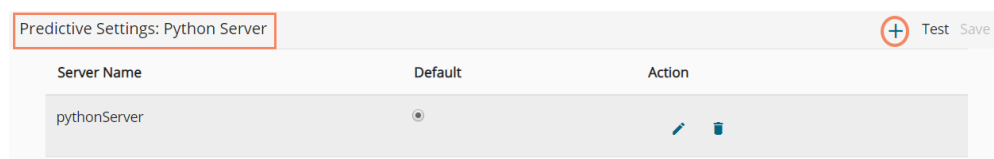
- **Python Server**

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

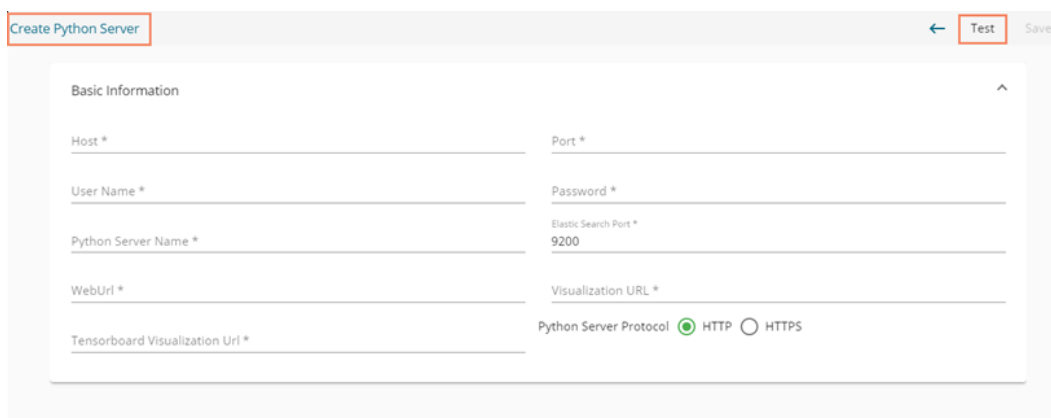
- a. Navigate to the 'Predictive Settings' admin option.
- b. Click the 'Python Server' option.



- c. The Python Server page under Predictive Settings opens.
- d. Click 'Create New Server'  icon to add a new Spark server confirmation.

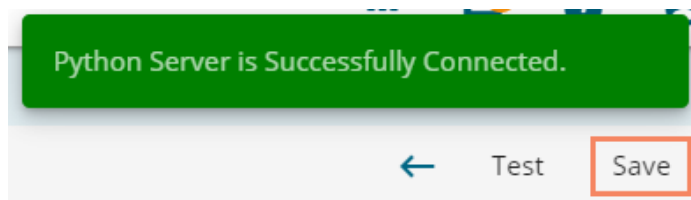


- e. The 'Create Python Server' configuration window opens.
- f. Provide the following information:
 - i. Host: Host address of the Spark server
 - ii. Port: Spark server's port number
 - iii. User Name: Enter a username to log in to the Spark server
 - iv. Password: Enter the password for the above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

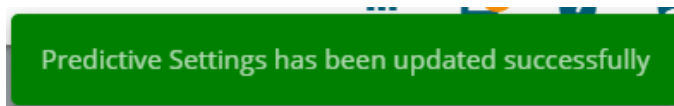


- h. A message will pop-up to assure about the connection.
- i. The 'Save' option gets enabled.

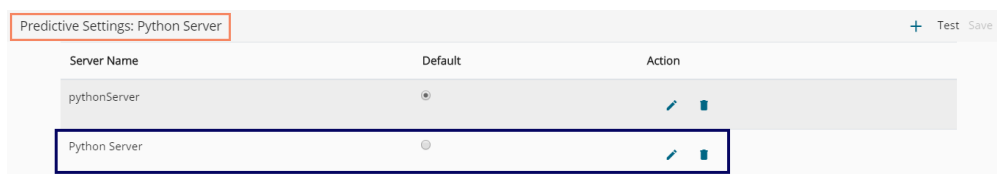
- j. Click the **'Save'** option to save the verified Python server information.



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



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



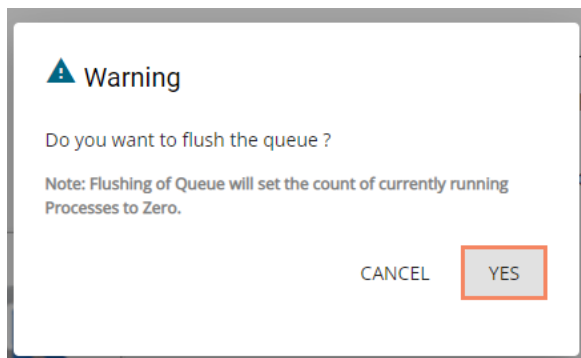
Note:

- a. Click **'Edit'** icon to modify an existing python server configuration
- b. Click **'Delete'** 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.

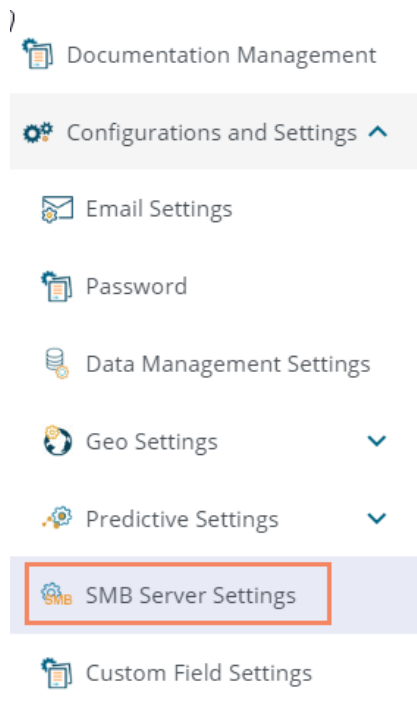
- i) Click the **'Process Queue'** option from the Predictive Settings configuration options.
- ii) The Process Queue page opens.
- iii) Click the **'Reset Queue'** option.
- iv) A warning message appears asking whether the user wants to flush the queue.
- v) Click **'YES'** to set the count of currently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




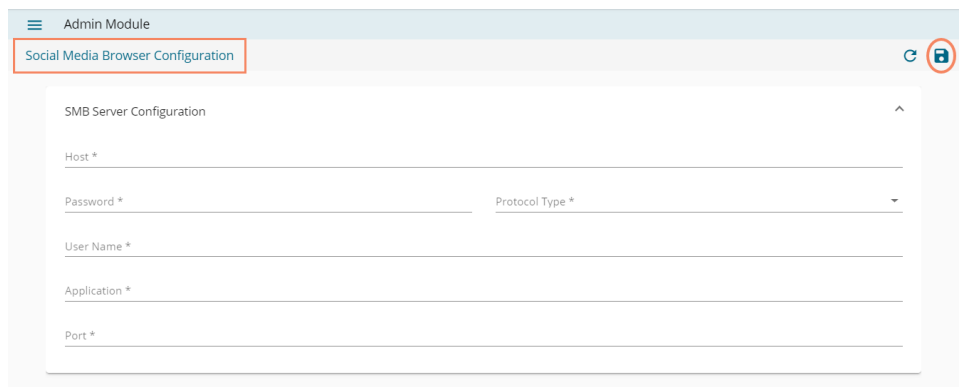
4.2.2.6. SMB Server Configuration

This section covers Social Media Browser configuration details.

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




- 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**'  icon.



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

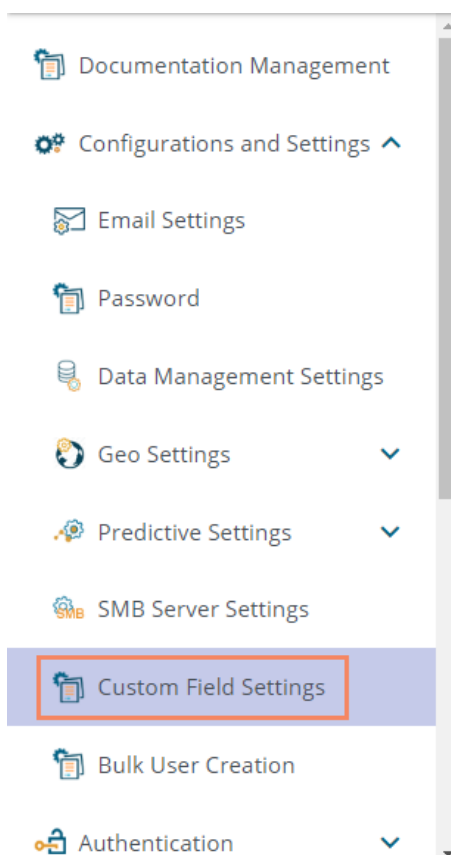
SMB Server Settings has been updated successfully.

Note: Click the 'Refresh'  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'**  icon to save the inserted custom fields.

Custom Settings + Add Fields  

Custom Field Information ^				
Key	Input Type	Description	Mandatory	Delete
State	Manual	state of user	No	
country	User LookUp	country of user	No	
component	Manual	component	No	
Gender	User LookUp	gender	No	
Language	Manual	user language	No	

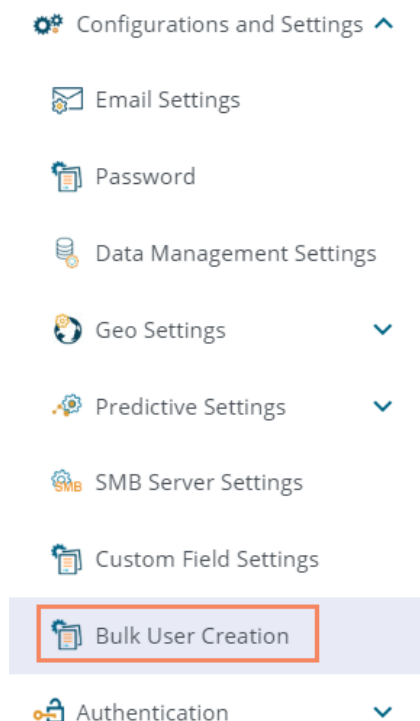
Note:

- a. Click **'Add Fields'** option to add a new custom field.
- b. Click the **'Refresh'**  icon to erase the inserted custom fields information.
- c. Click the **'Delete'**  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.

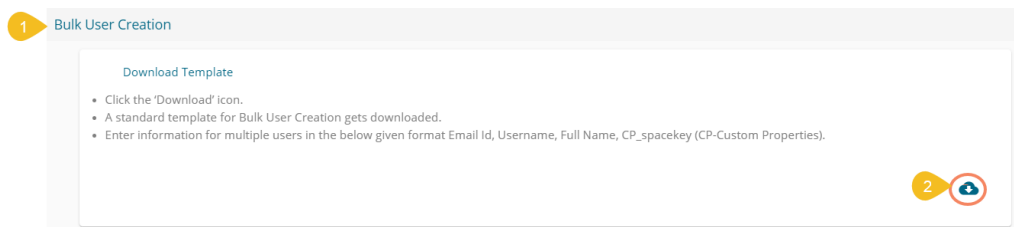
- i) Click the **'Bulk Users Creation'** option from the Configuration and Settings options.



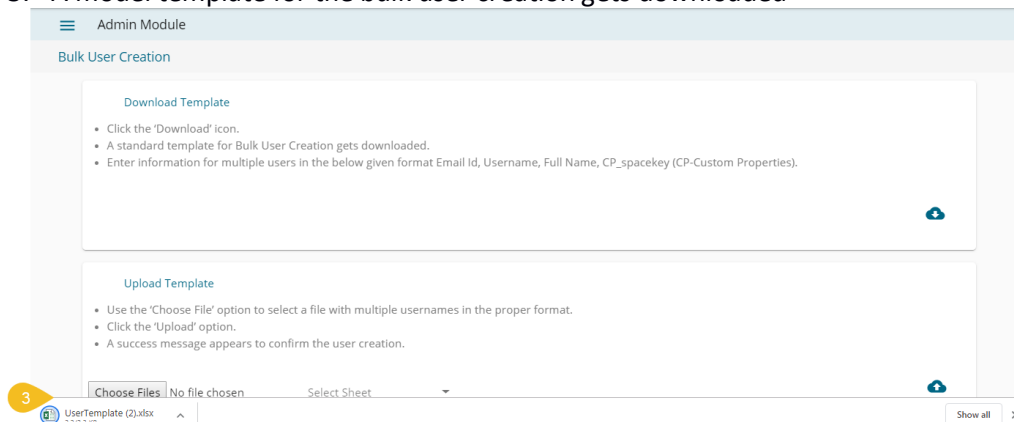
- ii) The 'Bulk User Creation' page opens.
- iii) The Bulk User Creation gets completed in two steps, as explained below:

Step- 1 Download the Standard Template

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



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

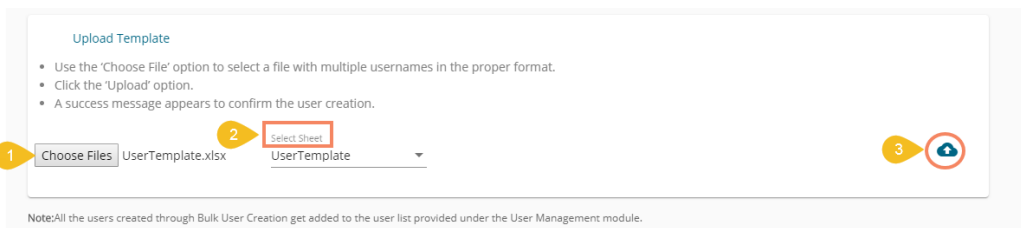


4. The admin can insert multiple users in the downloaded user template
5. Use the following format (as shown in the image) to enter the user details

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

Steps-2 Upload a file with multiple usernames

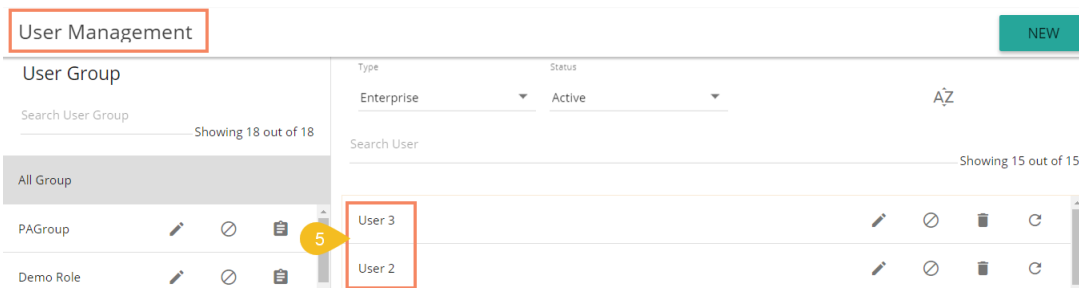
6. Navigate to the 'Bulk User Creation' page
7. Use the 'Choose File' option to select the file with multiple usernames
8. Click the 'Upload' option



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.



Note:

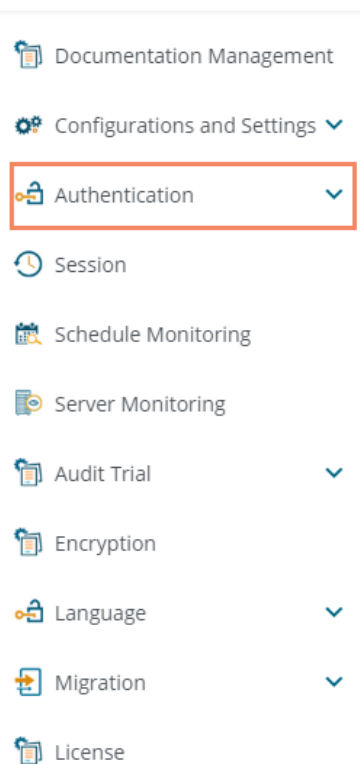
- a. The users created through the 'Bulk User Creation' functionality get added to the 'View Role' user group by default.
- b. The admin can manually provide a user group to the users created via the 'Bulk User Creation' option. The administrator can allow different user groups to the users created via 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

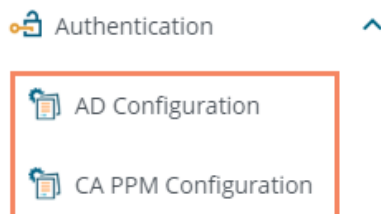
The administrator can configure windows AD or CA Clarity accounts by applying the below given settings:

4.2.3.1. Active Directory Configuration

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



- 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 Directory Settings

1 Configuration 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 Directory Settings

AD Configuration Settings Saved

1 Configuration 2 Parameters 3 SYNC CONFIGURATION

Parameter Information

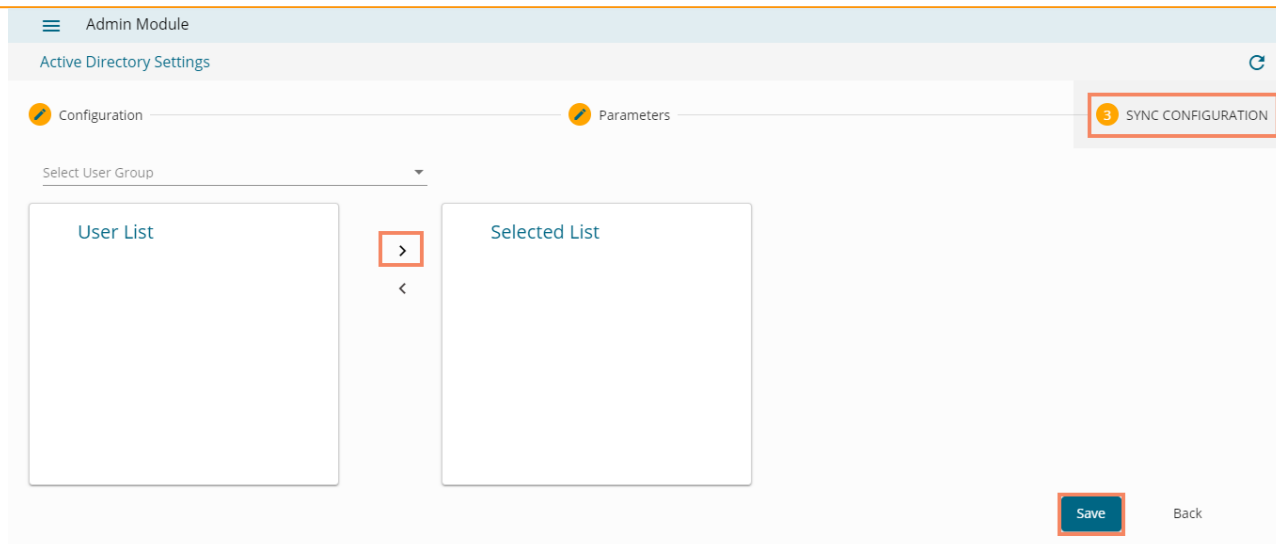
Custom Fields

User Property	Active Directory Property	Delete
User Property State	Active Directory Property State	X

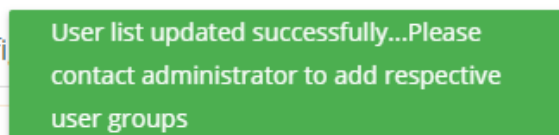
+ Add Column

Back Next

- 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





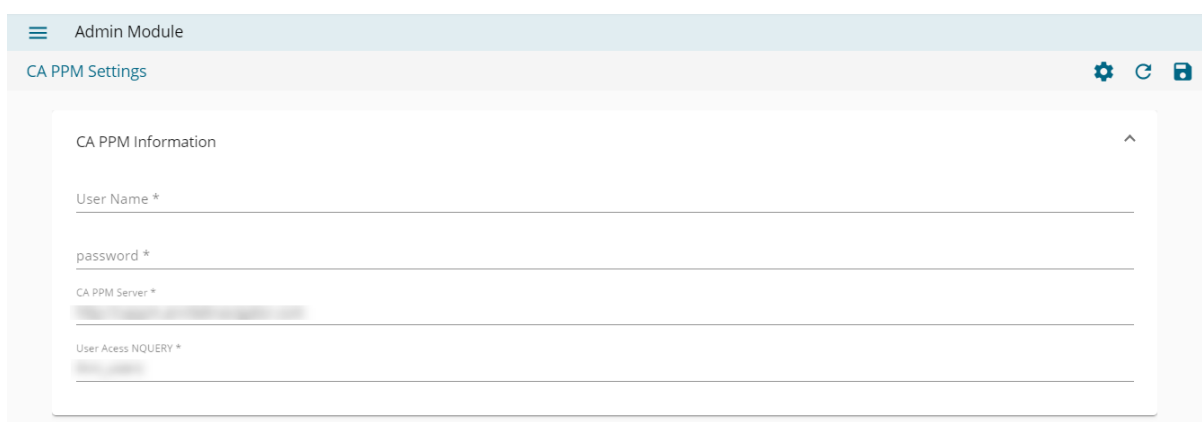
xiv) A message appears to confirm that the user list has been updated.





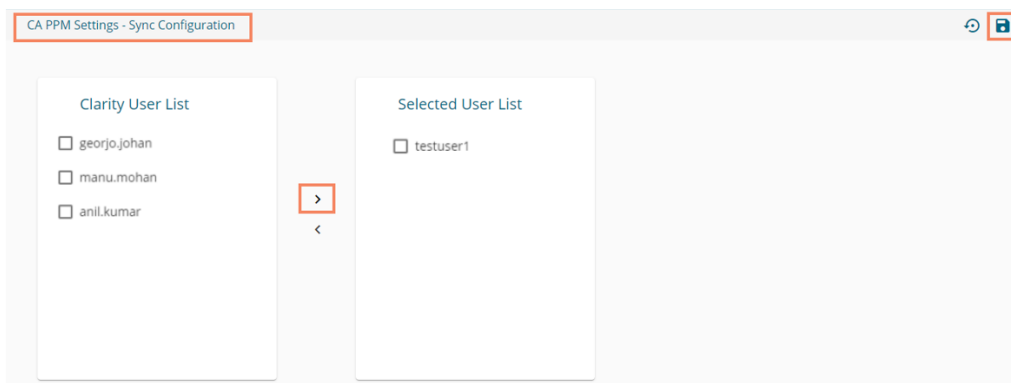
4.2.3.2. CAPP M Configuration

This section explains how to configure Clarity.

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





- e. Once you get confirmation that CAPP M configuration details are saved, click the **'Synchronize'**  icon.
- 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 the user list update.

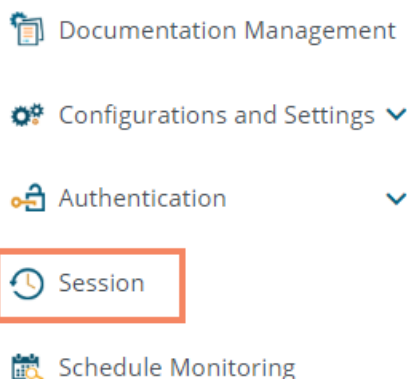
Note:

- a. Click the **'Reset'**  icon to erase the entered CA PPM Information.
- b. Click the **'Back'**  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.

Active Sessions Admin

Active Admin Session Search

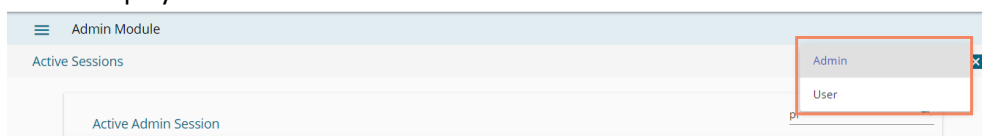
<input type="checkbox"/>	UserName	Email Id	Active Sessions
<input type="checkbox"/>	Avin Jain	[REDACTED]	6
<input checked="" type="checkbox"/>	priya	[REDACTED]	3
<input type="checkbox"/>	Prakash	[REDACTED]	23

Items per page: 5 | 1 - 3 of 3 | < > >>

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:



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

Active Sessions Admin

Active Admin Session pr

<input type="checkbox"/>	UserName	Email Id	Active Sessions
<input type="checkbox"/>	priya	[REDACTED]	3
<input type="checkbox"/>	Prakash	[REDACTED]	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.

Documentation Management

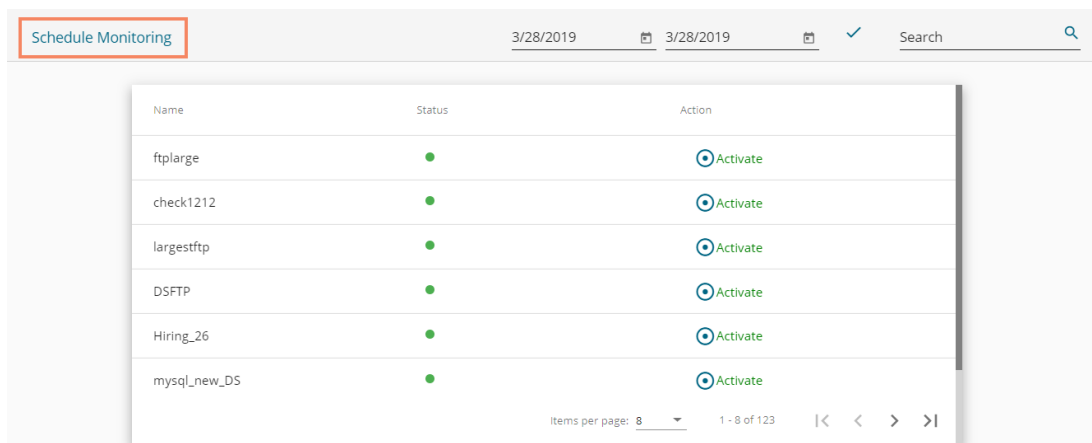
Configurations and Settings

Authentication

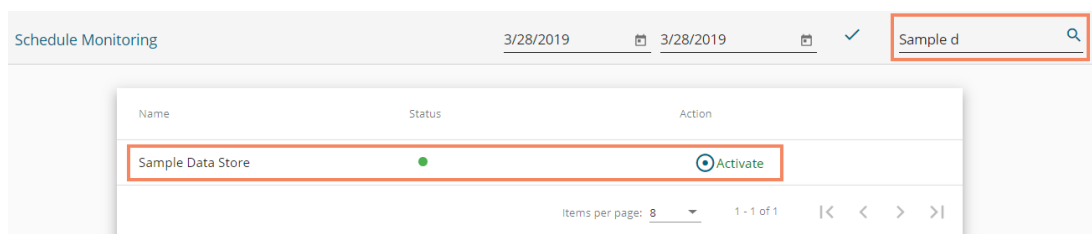
Session

Schedule Monitoring

- ii) The **'Schedule Monitoring'** page appears with a list of data stores displaying their current Status and Action.



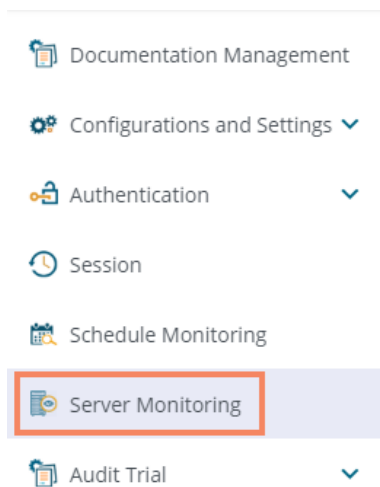
- iii) Search and display a specific scheduled data store using the **'Search'** space.



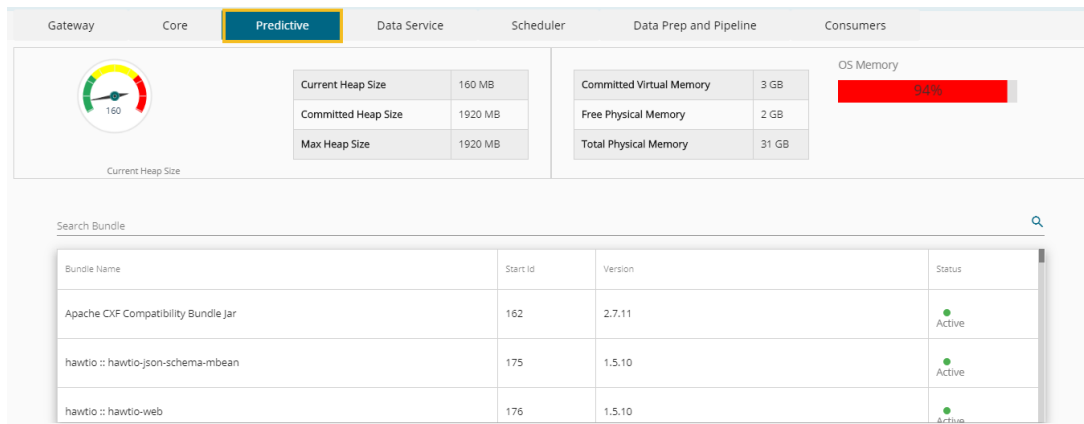
4.2.6. Server Monitoring

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.



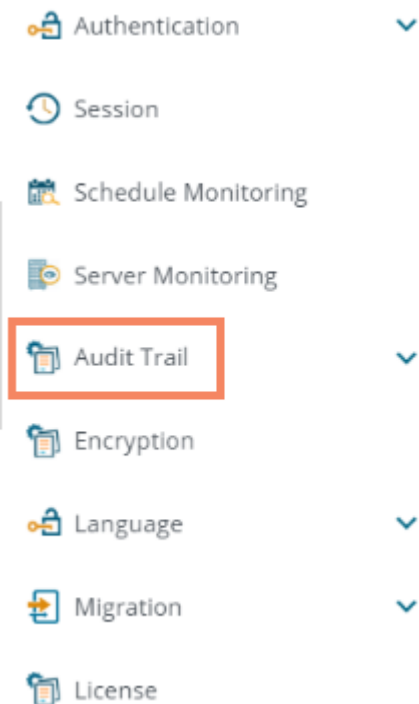
- ii) The **Server Monitor** page appears with various nodes presenting various modules of the BDB Platform.
- iii) Select a node to display the node-specific server details. E.g., the Predictive node is selected in the below given details:



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



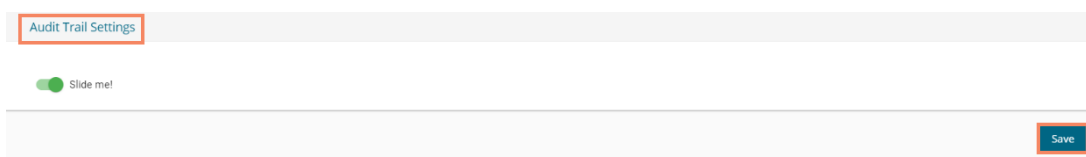
- ii) Two options get displayed
 1. Audit Trail Settings
 2. Audit Trail List



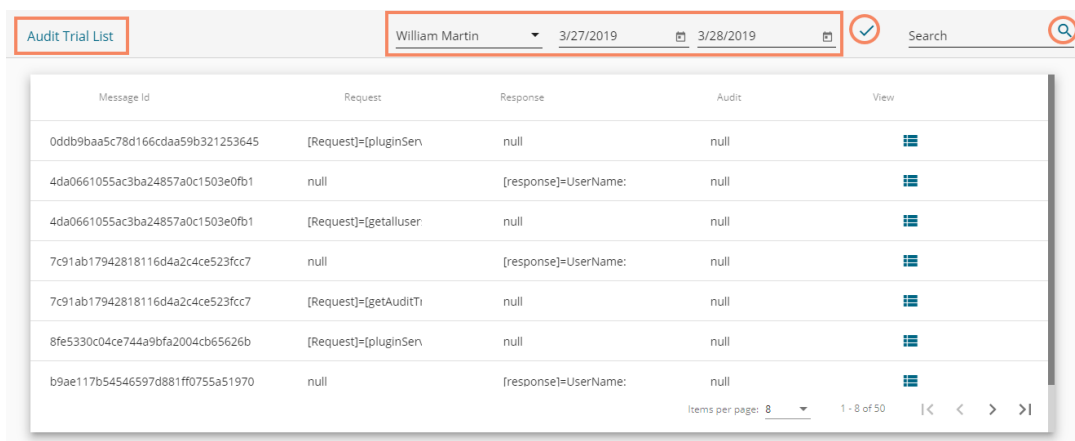
Audit Trail Settings

Audit Trail List

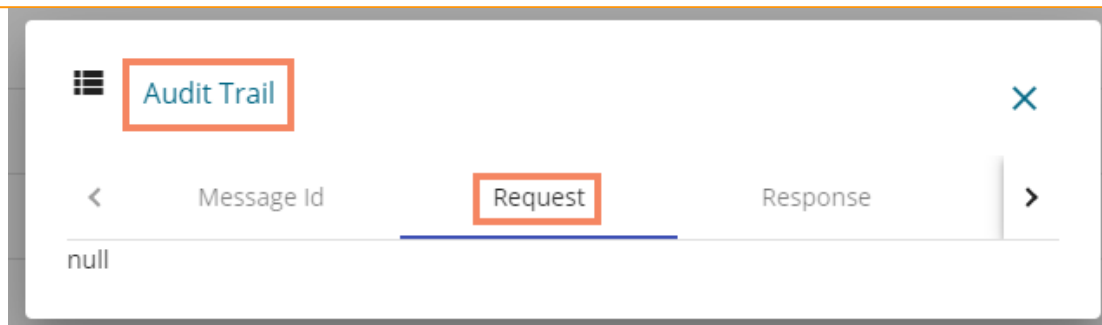
- iii) Click the **'Audit Trail Settings'** option
- iv) The **'Audit Trail Settings'** window opens
 1. Enable the Radio button to enable Audit Trail
 2. Click the **'Save'** option



- v) Click 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



- 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.

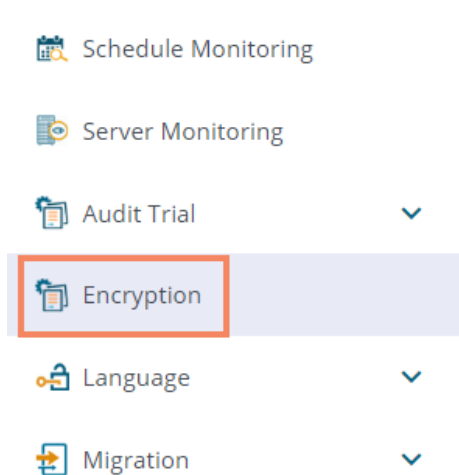



4.2.8. Encryption

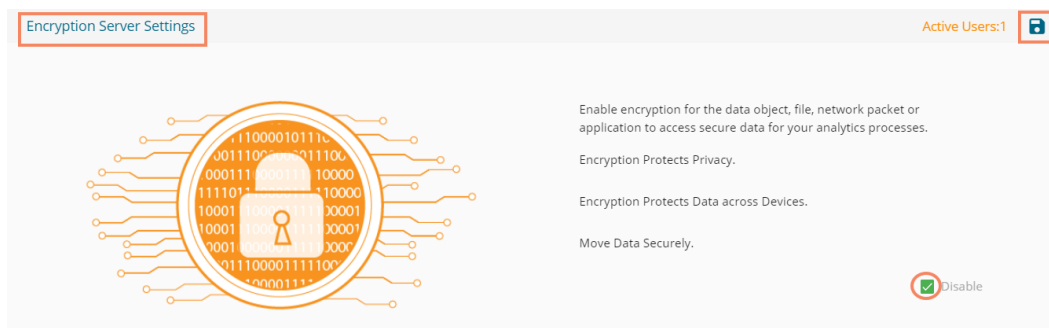
Encryption is the process of encoding a message or information in such a way that only authorized users can access it. The primary purpose of this technology is to protect the privacy of digital data stored on computer systems or transmitted via the Internet or other computer networks.

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.



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.

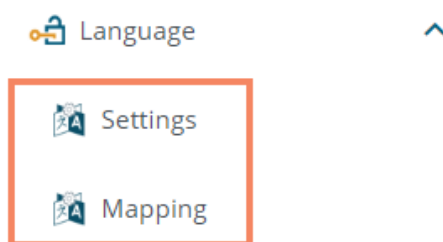
The Language option requires three steps to complete the process:

Step-1: Language Settings

Step-2: Language Mapping

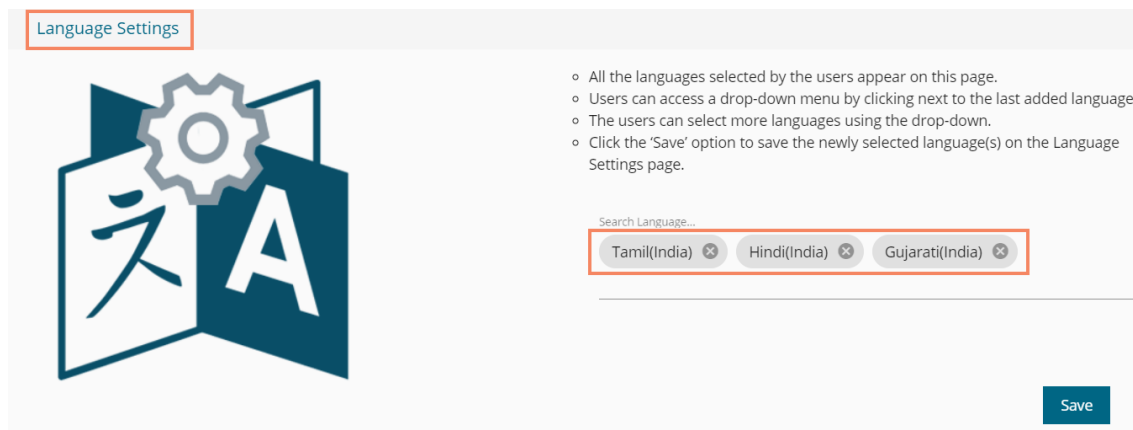
Step-3: Configuring the Required Dashboard Settings

- 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.



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



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.

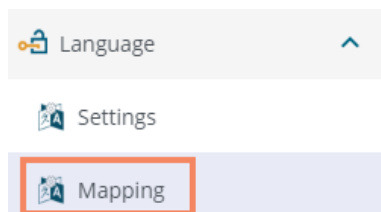


7. The Language Setting gets updated, and a message appears to inform the same.

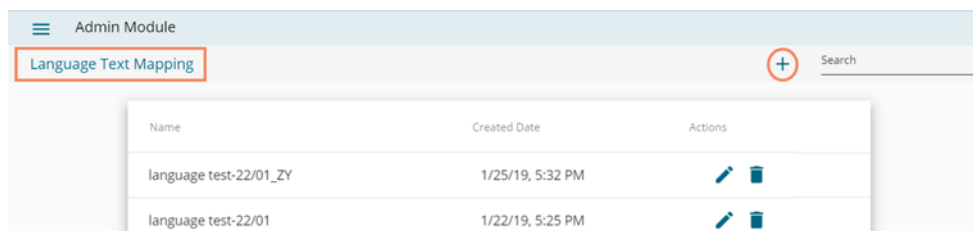


iv) **Configuring the Language Mapping Part**

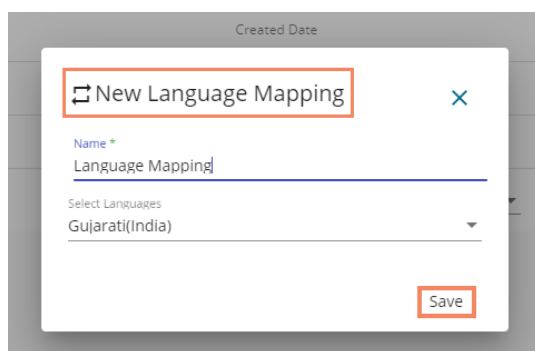
1. Select and open the 'Mapping' option from the list of Language admin options.



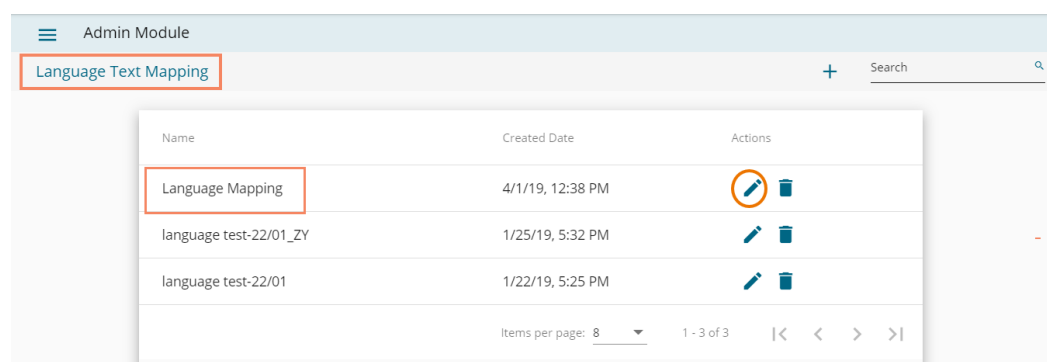
2. Language Text Mapping page opens with the list of available language mapping options.
3. Click the **'Add New'** + icon to add a new Language Text Mapping.



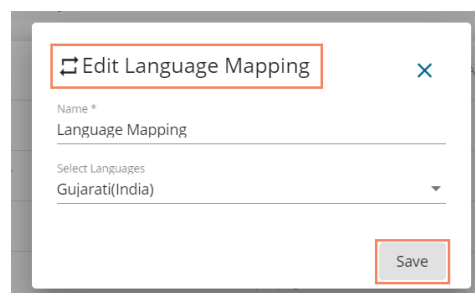
4. The **'New Language Mapping'** window opens.
 - a. Provide a name for the new Language Mapping
 - b. Select a language or multiple languages using the drop-down menu
 - c. Click the **'Save'** option.



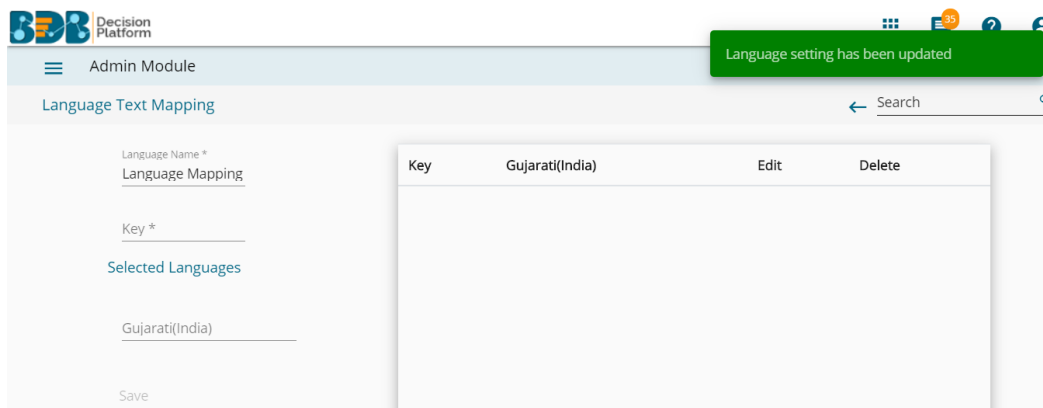
5. The newly created Language Mapping gets added to the list.
6. Click the **'Edit'** icon.



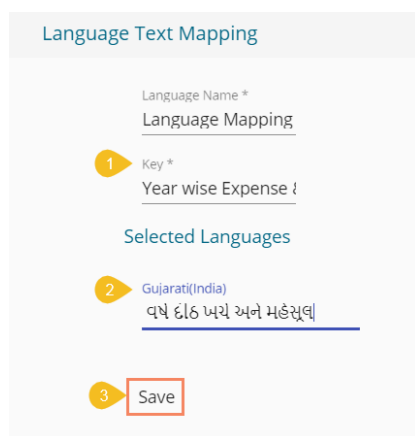
7. The **'Edit Language Mapping'** window opens.
8. Click the **'Save'** option.



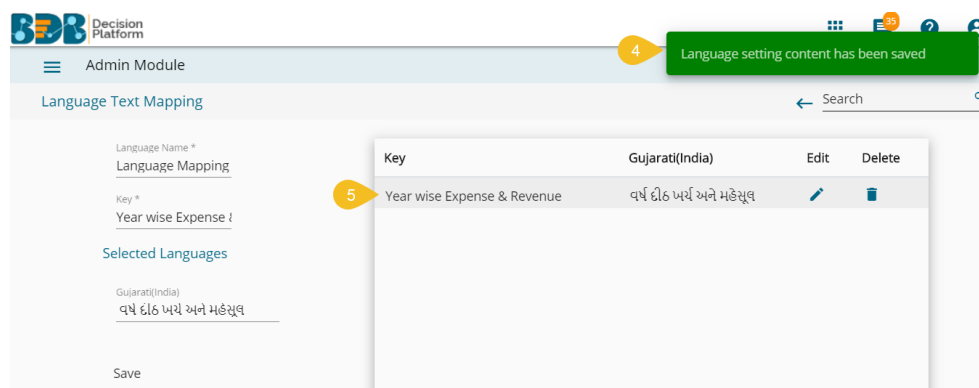
9. The selected Language Mapping option gets updated, and a message appears to confirm the same.



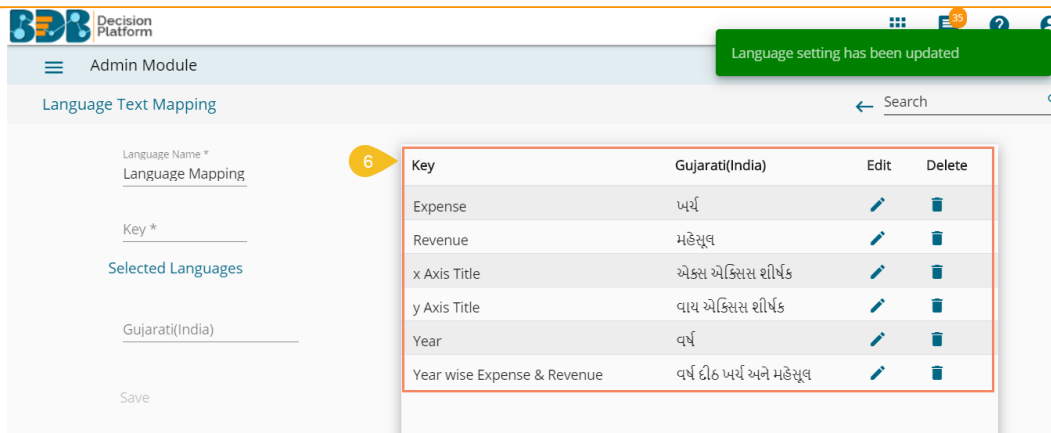
10. Add various key terms and their synonyms using the steps given below:
 - a. Insert a key from the selected dashboard.
 - b. Provide the translated synonym of the key in the given space.
 - c. Click the 'Save' option.



- 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.

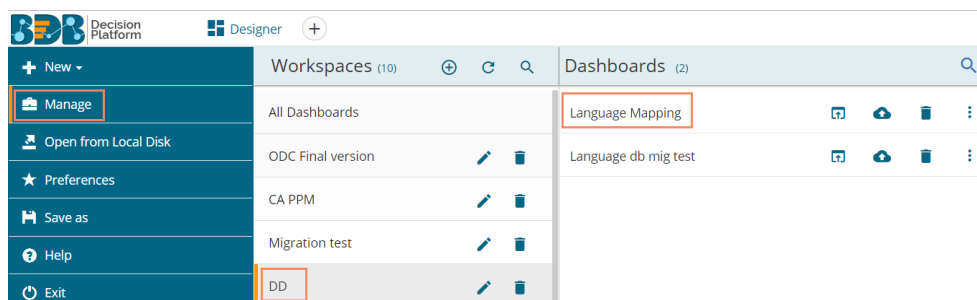


11. Users can save more terms to the newly created language settings using the same set of steps:

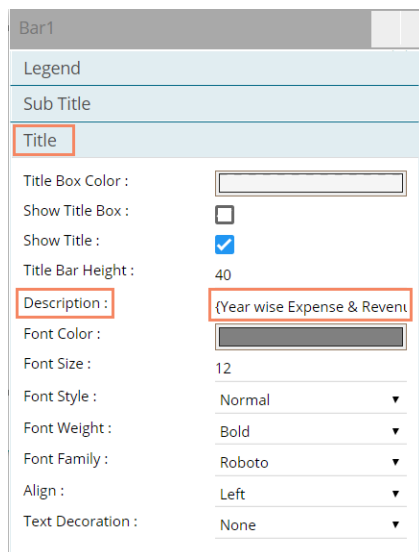


v) **Configuring the Dashboard Settings**

1. Select a saved dashboard using the Designer plugin.

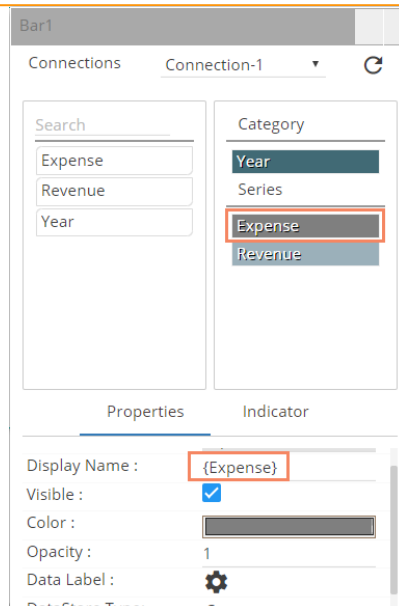



2. Access the 'Title' properties of the dashboard and make sure that the title description is provided in the “{}” brackets (if not then modify it accordingly)

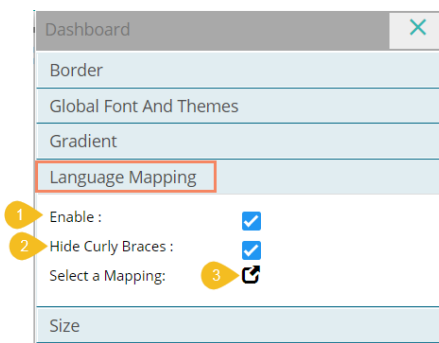


Note:

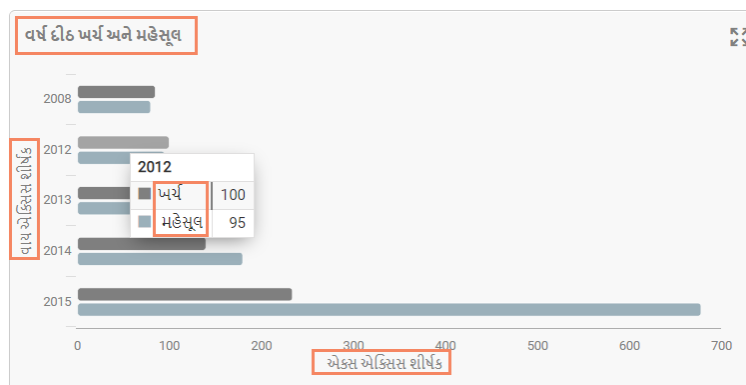
- Use “{}” brackets for all the descriptive text that you want to translate by the newly created Language Mapping. E.g., Tooltip, Description of X and Y Axis, etc.
- Use Data Set Properties to Configure the Categories and Series description for the language mapping, as shown below:



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.



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



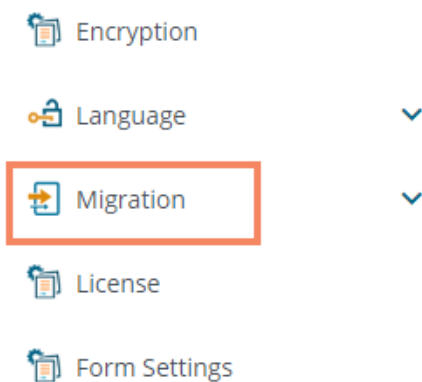
Note:

- 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

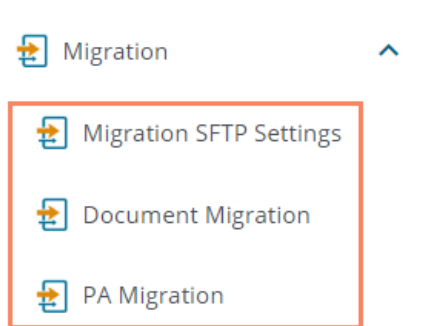
4.2.10. Migration

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.

- i) Click the '**Migration**' admin option.




- 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'  icon to verify the connection.



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



Connected Successfully.

- 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.



Saved Successfully.

4.2.10.2. Document Migration

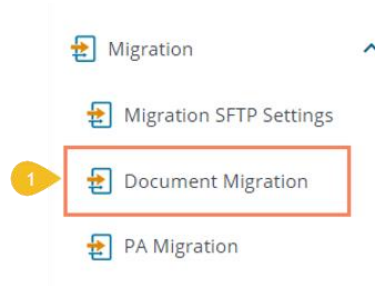
Users can migrate a business story or dashboard using the Document Migration option from

the Admin module. The entire migration task has three phases:

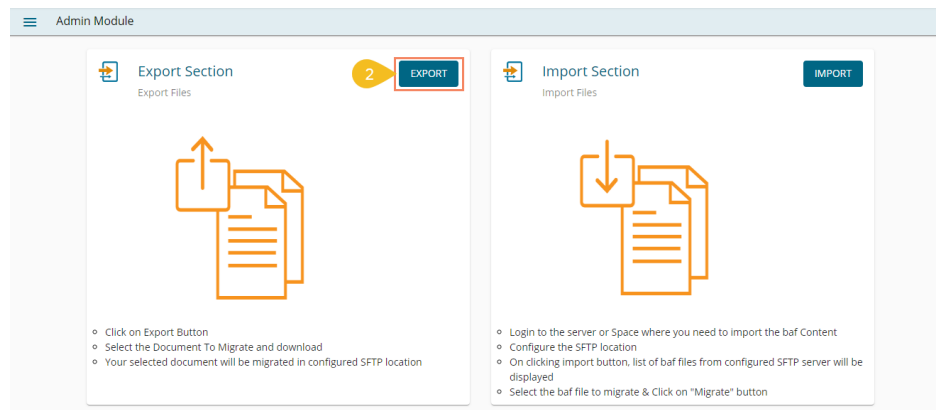
- 1) Configuring an SFTP Server: the SFTP server location should be similar for import and export account.
- 2) Export: users can select a document from using a source user account and download it to the SFTP server.
- 3) Import: users need to open this option using a destination user account where the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

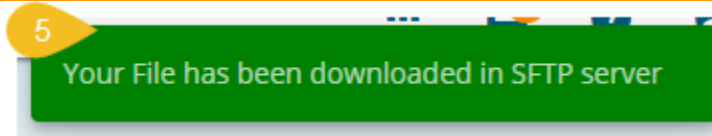


- iii) A page opens with the list of documents available for export
- iv) Click the **'Download'** icon for the document (story/dashboard) that you want to export.

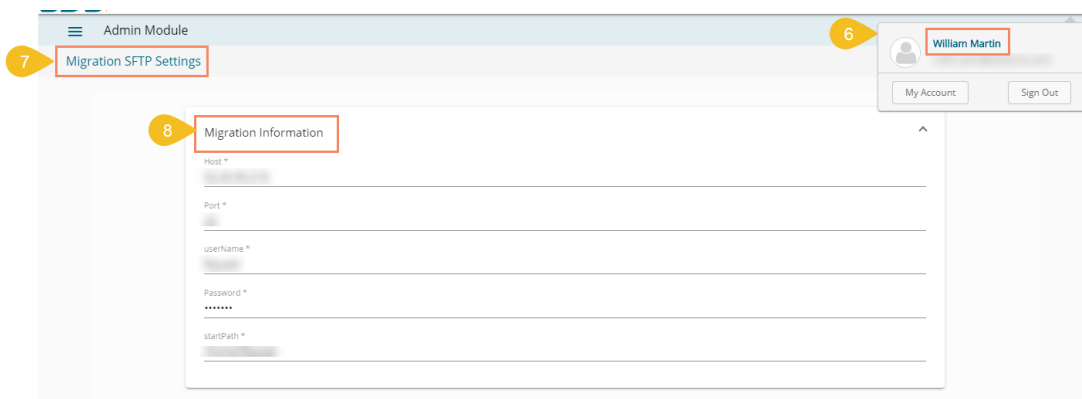


Note: Only stories and dashboards display the download icon, the listed folders do not display the download icon.

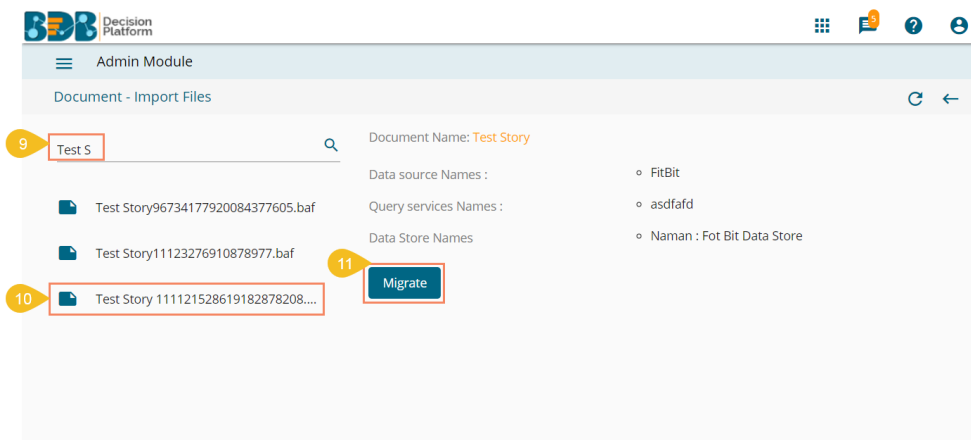
- v) A success message appears after the download process to confirm the download of the selected file in the SFTP server.



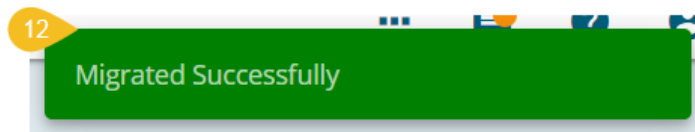
- vi) Then log in as a different user to the server or space where you need to import the baf content
- vii) Navigate to Migrate SFTP Settings
- viii) Configure the SFTP location (**SFTP location for the source and destination account should be similar to use the document migration functionality**)



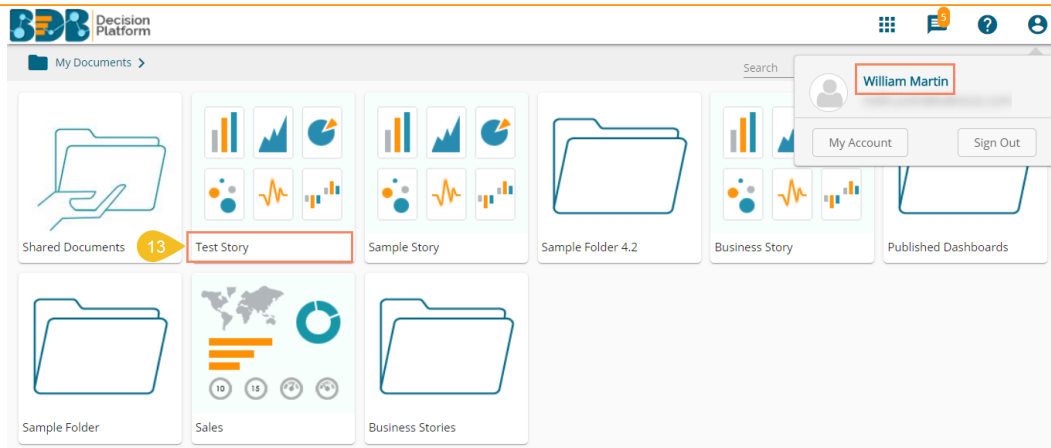
- ix) By clicking the **'IMPORT'** button from the Document Migration page, the Import Section lists all the baf files from the configured SFTP server.
- x) Search and Select the baf file you want to migrate and click on it.
- xi) Click the **'Migrate'** option from the right-side panel displaying the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



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

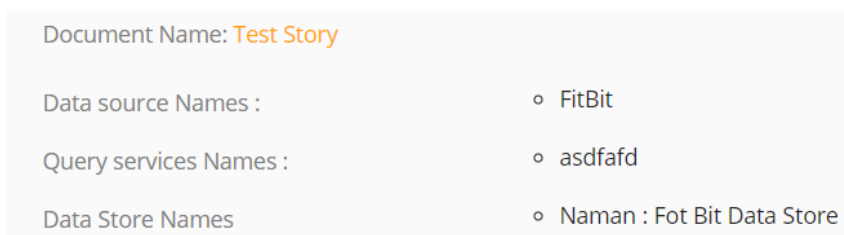


- xiii) The migrated document gets displayed on the platform homepage.

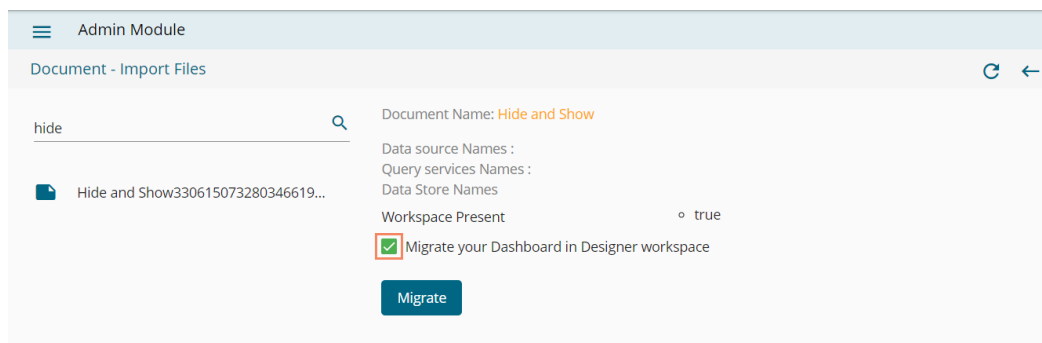


Note:

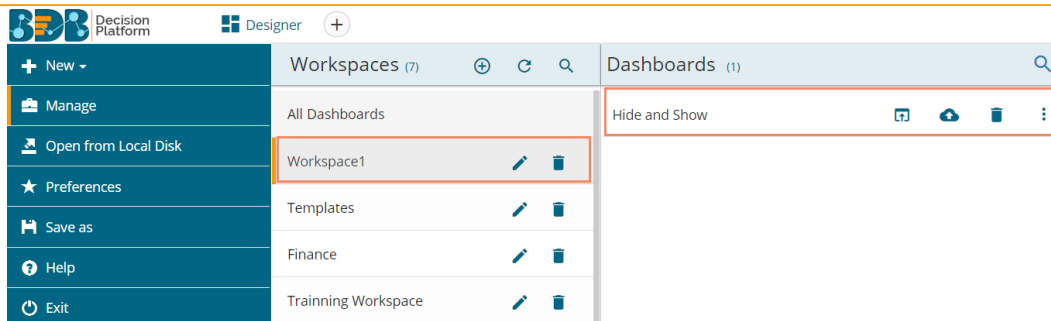
- a. If the selected dashboard or story is created based on an RDBMS connector, the data connector details get displayed on the right-side panel. E.g., for the given example of Test Story document, the following details of data source names, query service names, and data store names are displayed.



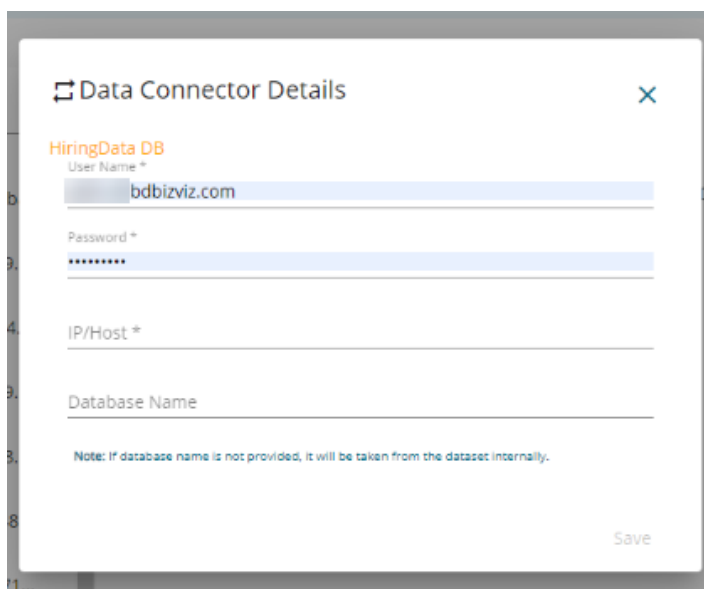
- b. Users can also migrate the imported dashboard in the Designer workspace by using a check mark in the given box (as shown in the following image):



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



- 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. Username
 2. Password
 3. IP/Host
 4. Database Name
 - ii. Click the **'SAVE'** option



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

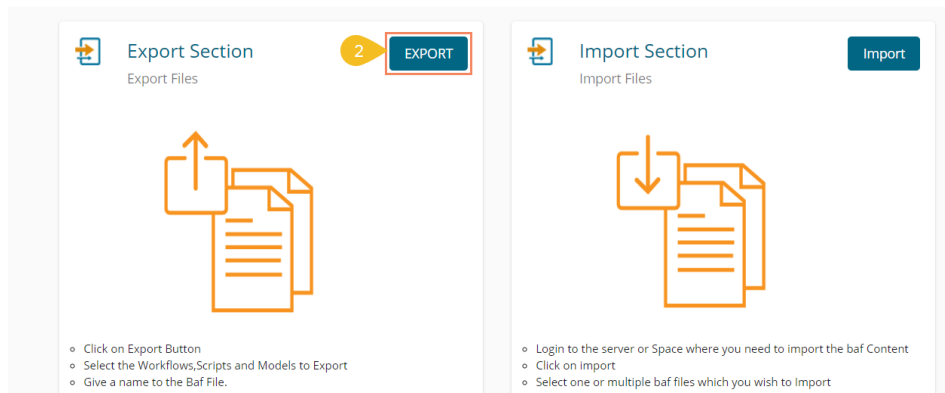
Migration ^

Migration SFTP Settings

Document Migration

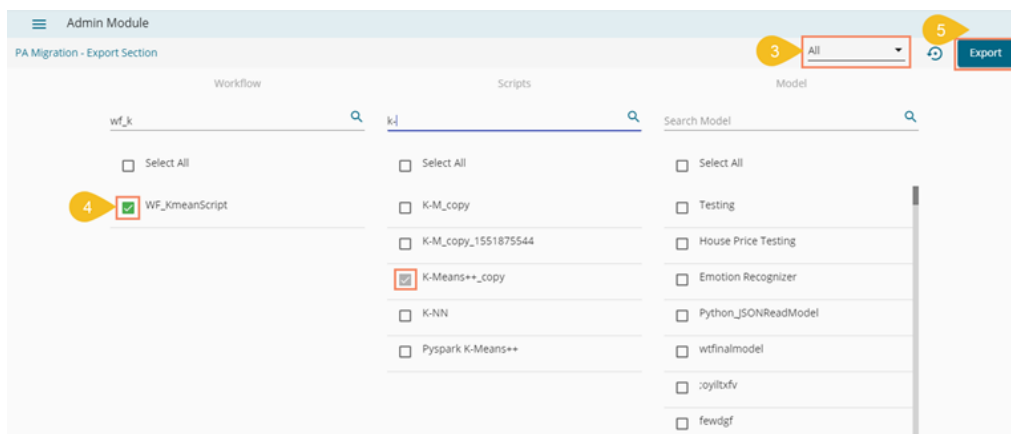
1 Migration

ii) Click the **'EXPORT'** option from the next screen.



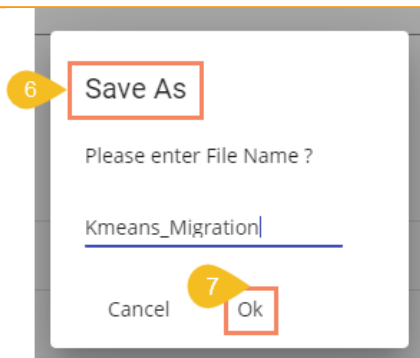
iii) The Export Section for PA Migration opens.

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.

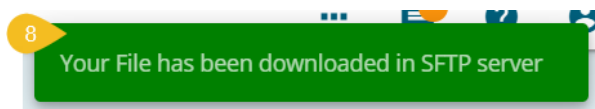


iv) The **'Save As'** window opens to provide a file name.

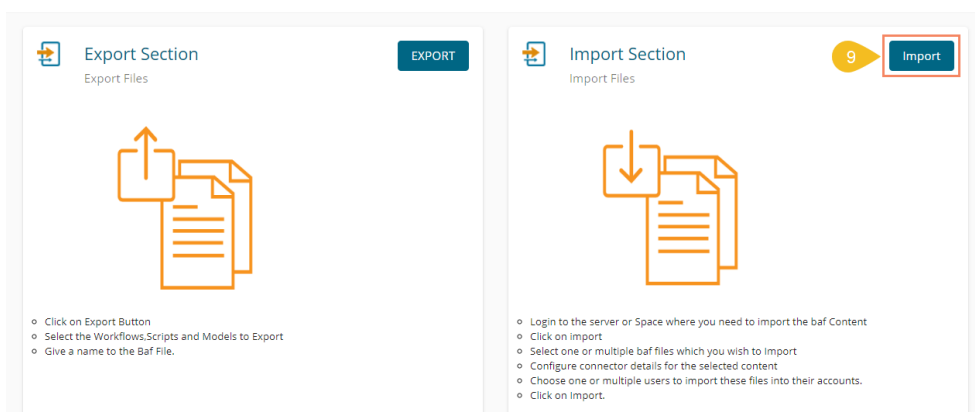
1. Give the file name
2. Click the **'OK'** option



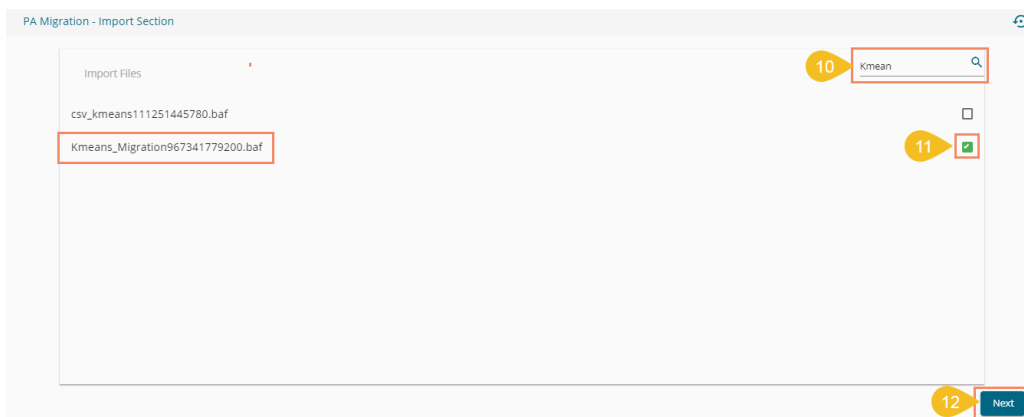
- v) A notification message appears to inform that the file has got successfully downloaded in SFTP server.



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



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



- 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

Admin Module

PA Migration - Import Section

13 **Configure Data Connector**

Kmeans_Migration967341779200.baf

1 mysql_DB

Database Type: mysql

Database Name: [redacted]

Target IP: [redacted]

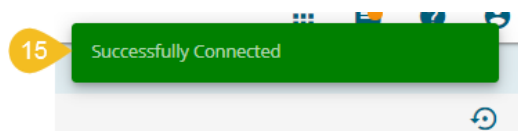
Target Port: [redacted]

Target Username: [redacted]

Target Password: [redacted]

14 **Next**

xiii) A success message appears



xiv) The user gets redirected to select a destination user

1. Select user/users from the displayed list
2. Click the 'Next' option to proceed

PA Migration - Import Section

Search User

wi

	User Name	Email Id	Last Login Date
16 <input checked="" type="checkbox"/>	Will	[redacted]	1554368717924

17 **Back** **Next**

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

xvi) Click the 'Import' option.

PA Migration - Import Section

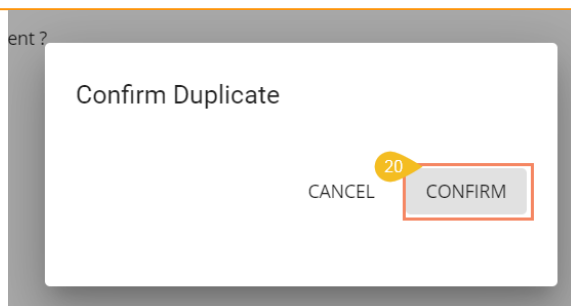
What would you like to do with duplicate content ?

Overwrite Replicate

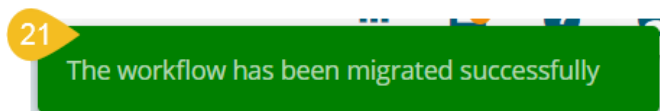
18

19 **Back** **Import**

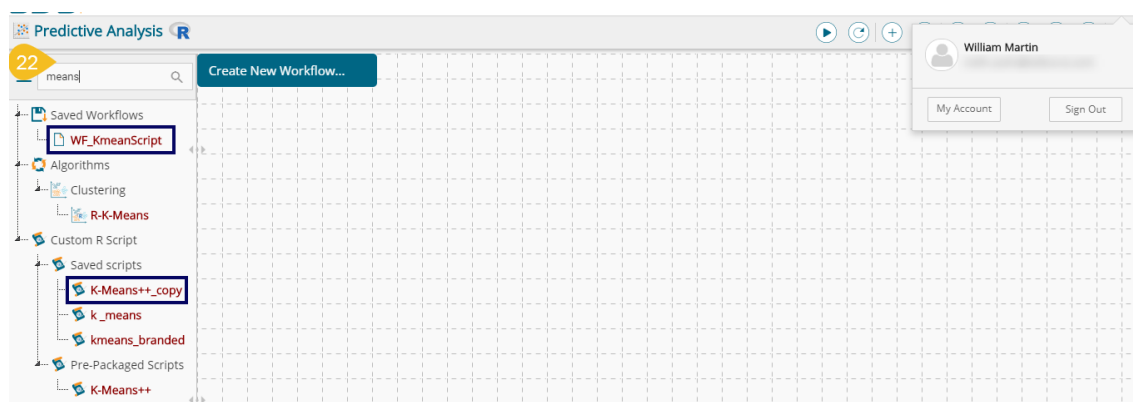
xvii) A confirmation message appears.



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



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

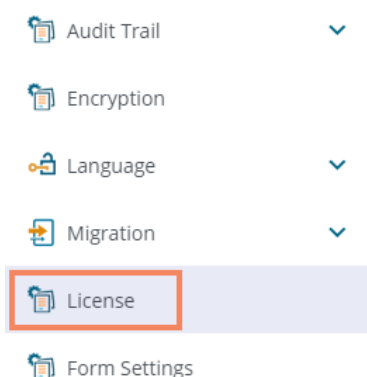


Note: The users can click the 'Back' icon to go on the previous screen.

4.2.11. License


The License 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.

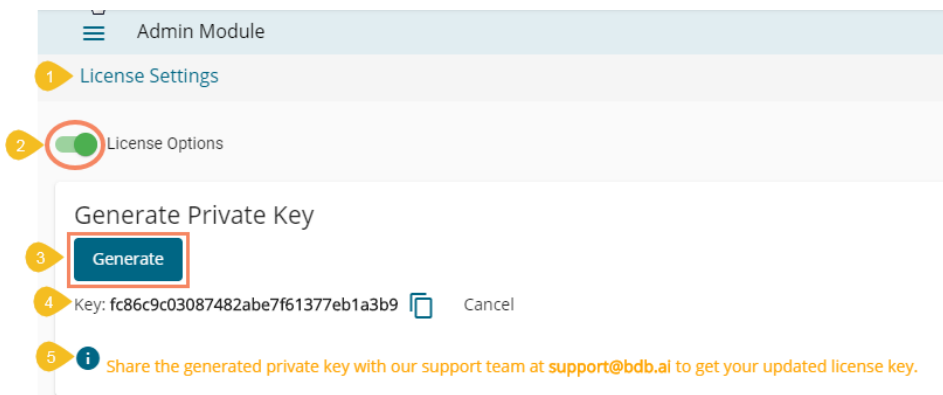
- i) Access the 'License' admin option using the panel.



- ii) The License Settings page opens displaying the active session with customer name and product type.
- iii) Enable the '**License Options**' using the radio button to update the License Users.



- iv) After enabling the 'License Settings' radio button, the following options appear on the page:
 - a. Generate Private Key
 - b. Update License
- v) Follow the below given steps to configure the displayed 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'  icon to copy the Private 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

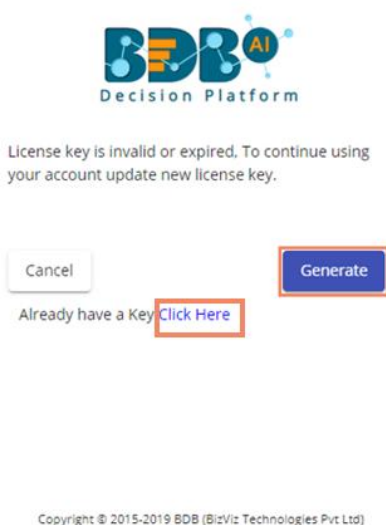
1 License Key *

Enter the license key received from our support team in the given space and click SAVE option to update the licenses.

Cancel 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.

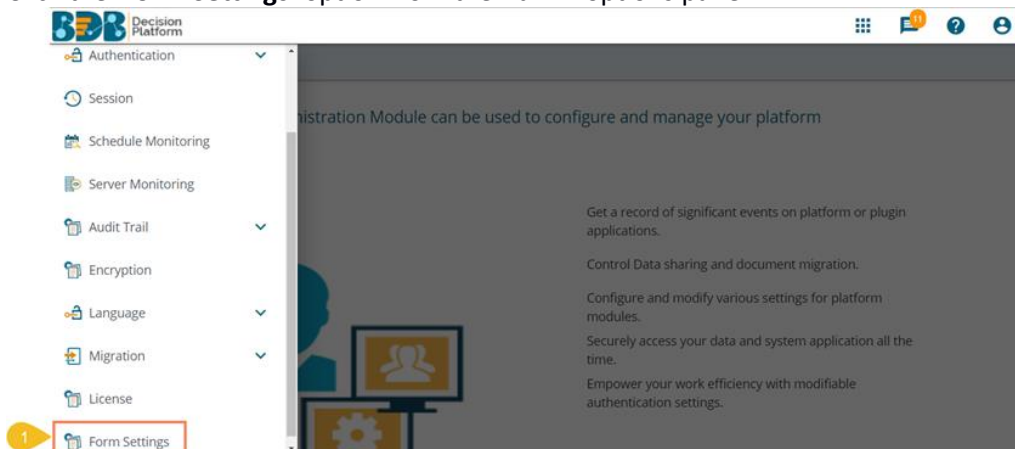
1. Click the ‘**Generate**’ option to get a new private key (which needs to be shared with the support team at support@bdb.ai to receive the License Key).
2. Choose the ‘**Click Here**’ option, if you have already received the License key from the BDB support team.



4.2.12. Form Settings

The Form Settings admin option provides database details for saving the data of forms.

- i) Click the ‘**Form Settings**’ option from the Admin options panel.



- ii) The ‘**Form Settings**’ page opens.

- iii) Enter the database details to save the form data as mentioned below:
 - a. Username: Use read-only credentials
 - b. Password: Use a valid password
 - c. Host: Provide Host address
 - d. Port: Provide the port number
 - e. Database Name: Provide a database name
- iv) Click the **'Save'** option to save the entered settings information.

Note:

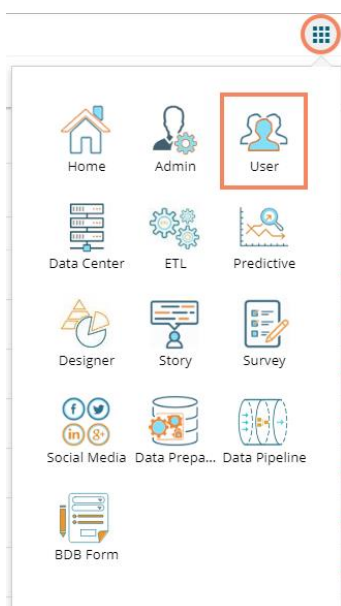
- a. Click the **'Clear'** option to erase the entered database settings details.
- b. All the fields for the 'Form Settings' are mandatory.

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.

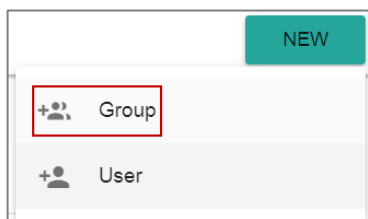


ii) The User Management page opens.


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

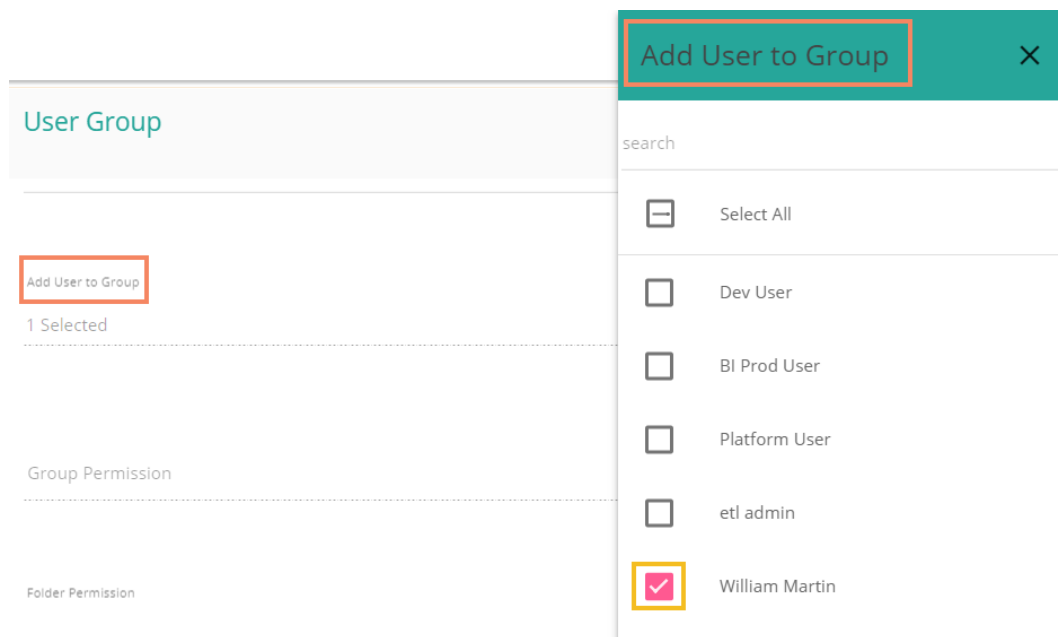
5.2. Creating a New User Group


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

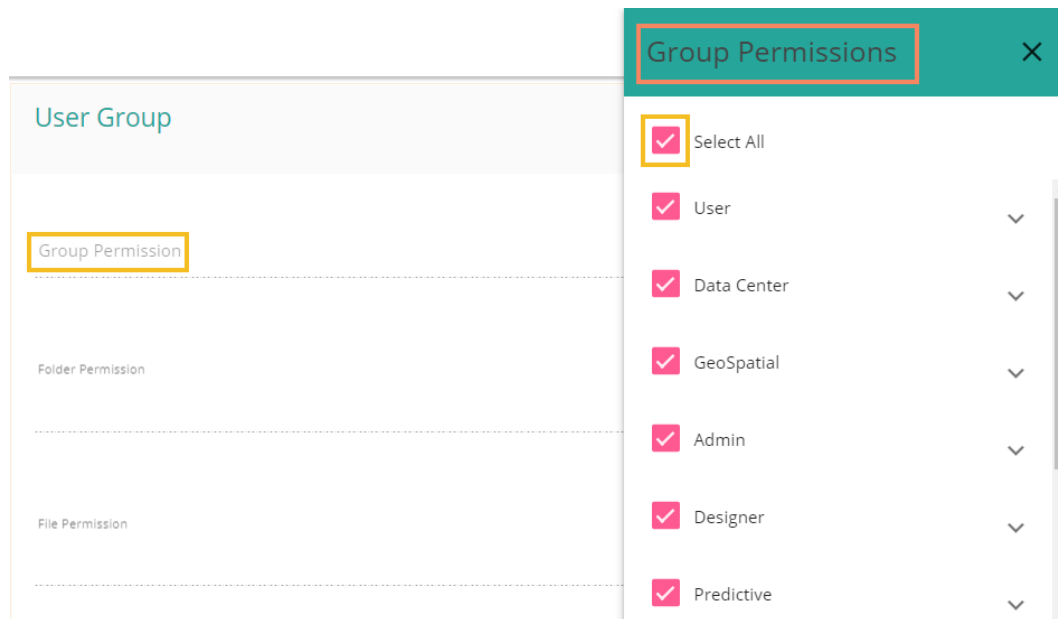



- iv) Provide the following information for a new User Group:
 - a. **Group Name:** Enter a name for the user group (The group name should not exceed 20 words)
 - b. **Description:** Describe the user group (optional) (The description should not exceed 150 words)

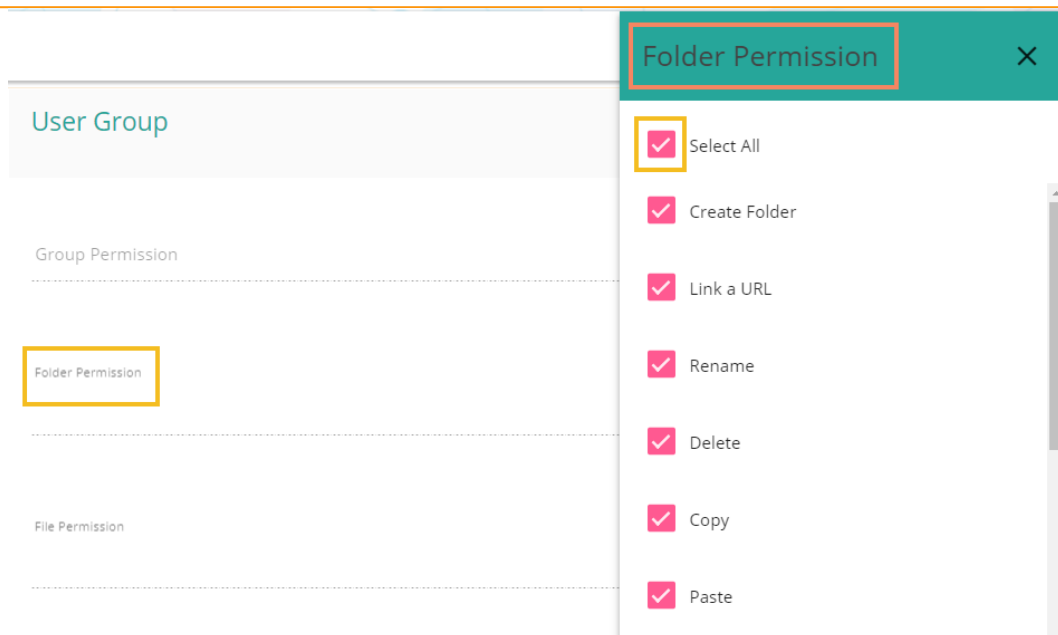
- c. **Add User to Group:** Click the 'Add' button  and select User(s) by using a checkmark in the box from the displayed list of users.




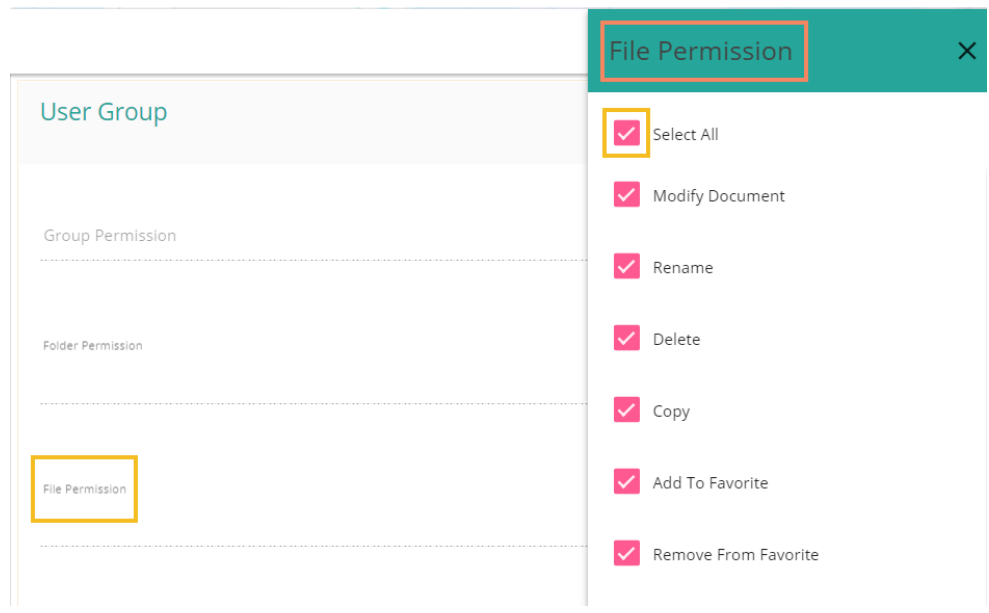
- d. **Group Permission:** Click the 'Add' button  provided next to the Group Permission option. Assign various plugin/app rights to the User Group via the 'Group Permissions' menu list (It is Mandatory).



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



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



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



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

User Management

User Group

Search User Group Showing 13 out of 13

All Group

Sample User Group				
BI Trainees				
ETLTest				
ABCGroup				
Demo Viewers				

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

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

5.2.1. Assigning Group Custom Fields

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

- Click '**Assign Custom Field**' option provided next to a user group.
- The '**Assign Custom Field to Group Users**' page opens.
- Select a Custom Field using the drop-down menu.
- A new field displays to assign the '**Field Value**' for the selected custom field.
- Click the '**Add**' icon to select user.
- Click the '**SAVE**' option.

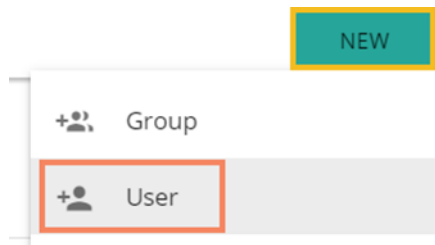
- A message will pop-up to assure that the group custom fields are updated successfully.

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.



- 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

A screenshot of the 'New User' form. The title 'New User' is in a teal box at the top left. At the top right are 'CANCEL' and 'SAVE' buttons. The form contains the following fields:

- Email:** Input field with 'jmartin@abc.com' and a character count of '11 / 20'.
- Short Name:** Input field with 'John Martin' and a character count of '11 / 20'.
- Full Name:** Input field with 'John Martin' and a character count of '11 / 20'.
- Description:** Input field with a character count of '0 / 150'.
- Password:** Password input field with a character count of '8 / 16'.
- Confirm Password:** Password input field.

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

Custom Fields


State
California

City *
Sacramento

Manager *
David

Department
Dev.]

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

Add User to Group 

0Selected

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

New User

Description

Password *

.....

Confirm Password *

.....

Add User to Group

1Selected

Add User to Group ×

search

no

Select All

TestGroupAnoop

NonAdmin Group

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

Type: Enterprise Status: Active A-Z

Search User Showing 85 out of 85

John Martin				
userTestAudit				
GKTESTFOUR				
GKTESTTHREE				
uhuihuhu				
Buser				

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

Note:

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

5.3.1. Default User Role

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

- i) Select the '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

0 Selected +

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

Type	Status	
Enterprise	Active	AZ
Search User		Showing 86 out of 86
David Brown		
John Martin		
userTestAudit		

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

Email *

davin.brown@bdb.ai

Password *

.....

Auth Type

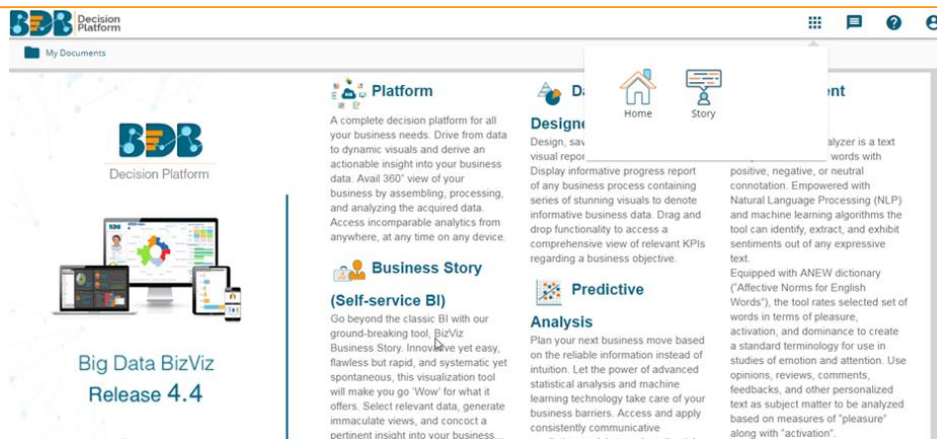
Enterprise

[Forgot 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.



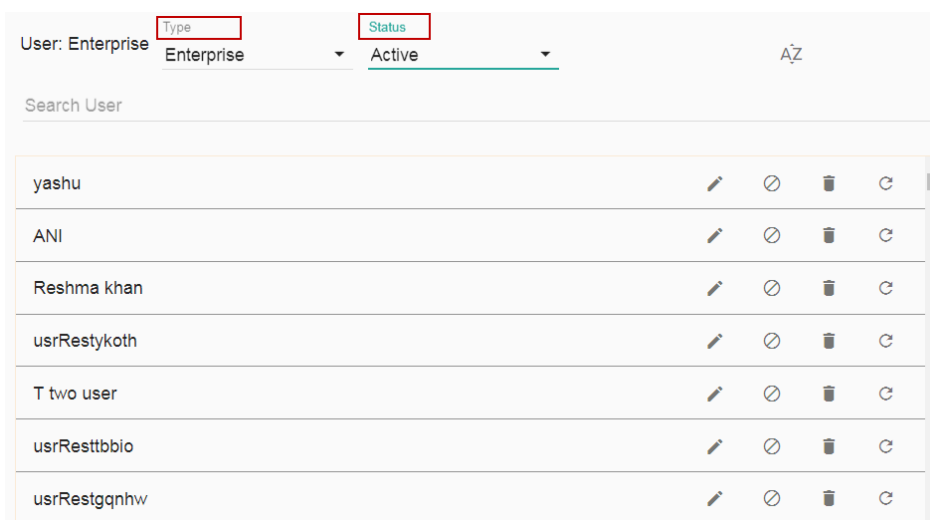
Note: The BDB Platform provides some category of users (as explained below):

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.

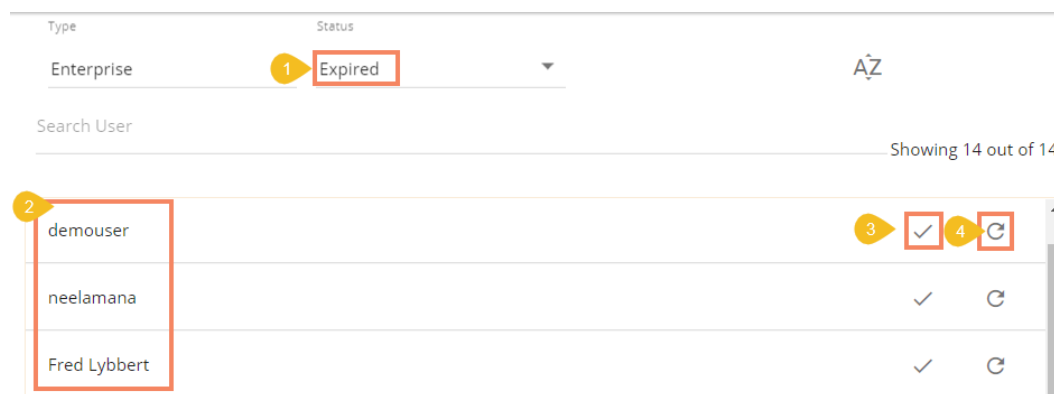
- i) Navigate to the User Management page.
- ii) Users can see two drop-down menus.
 - a. **Type:** It contains the following authentication types as drop-down options
 - i. Enterprise
 - ii. Window AD
 - iii. CA PPM
 - b. **Status:** It includes the following user status as drop-down options
 - i. Active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



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

5.4.1. Activating an Expired User Account

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



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


6. Data Center

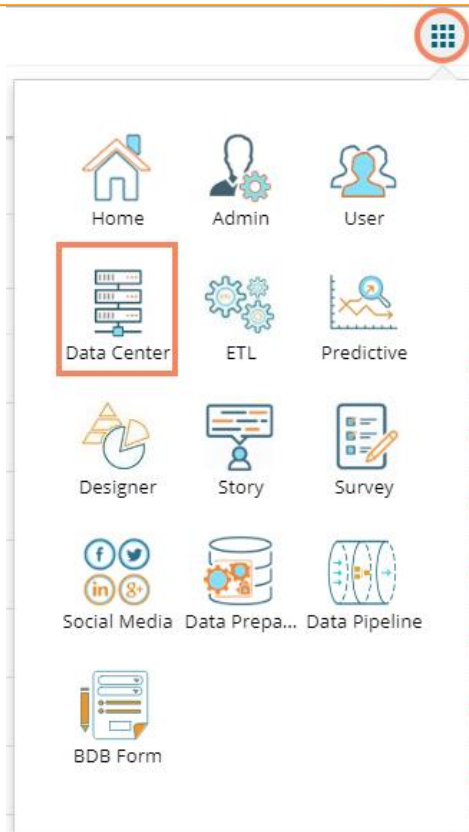
This section explains how to connect with multiple databases to create data service and elastic search-based Data Store. It also describes steps to create data store metadata.

6.1. Data Connector

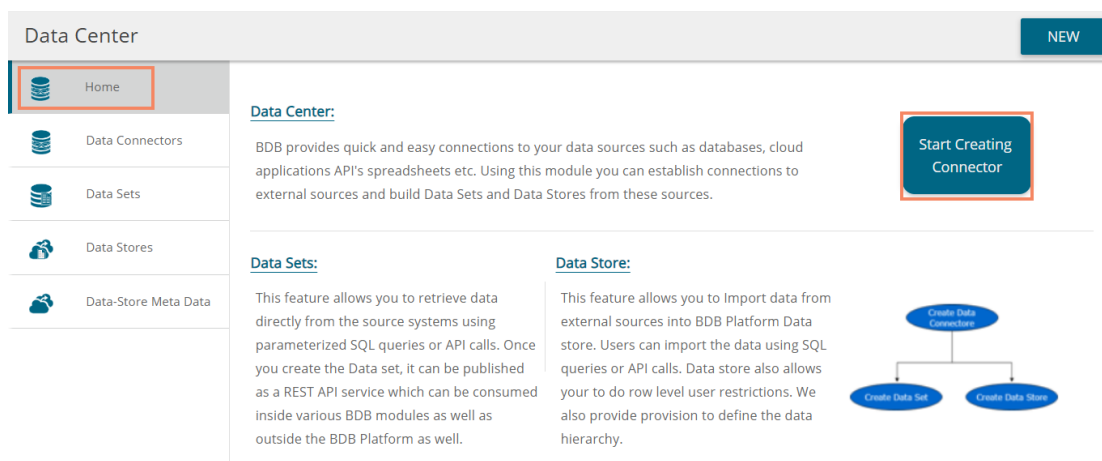
BDB Decision Platform offers a wide choice of data connectors ranging from RDBMS, Big Data, and File types to various API connectors to develop a connection to your data in any form.

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.

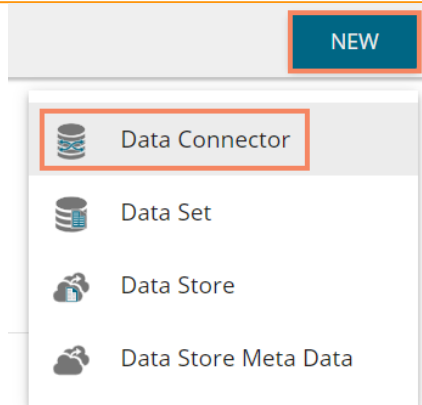


OR

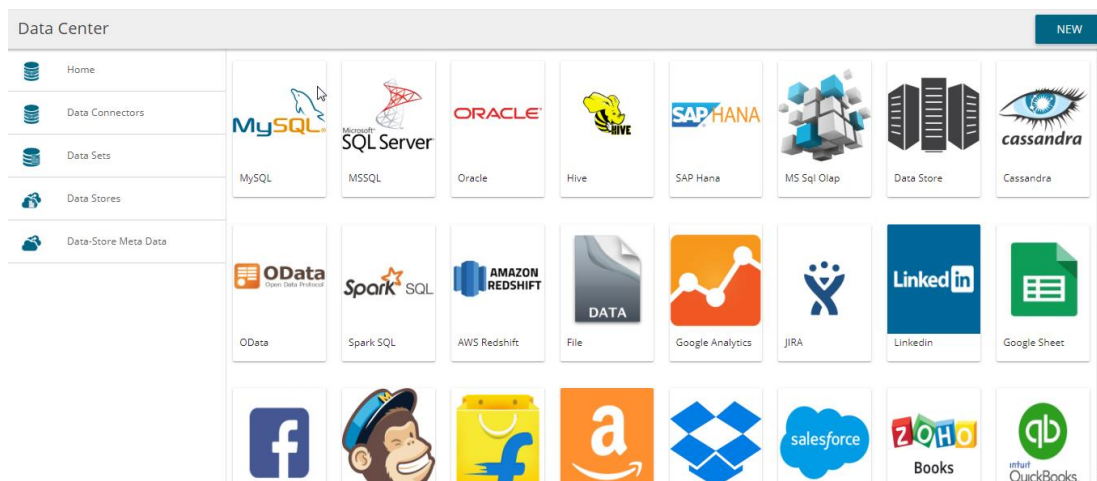
Click the **'NEW'** option.

A context menu opens with the following options:

- a. Data Connector
 - b. Data Set
 - c. Data Store
 - d. Data Store Meta Data
- iv) Select the **'Data Connector'** option from the context menu.

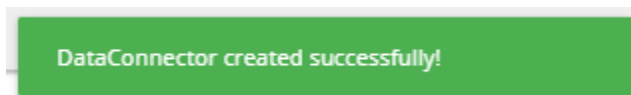


v) A new page with all the available data connector types opens.

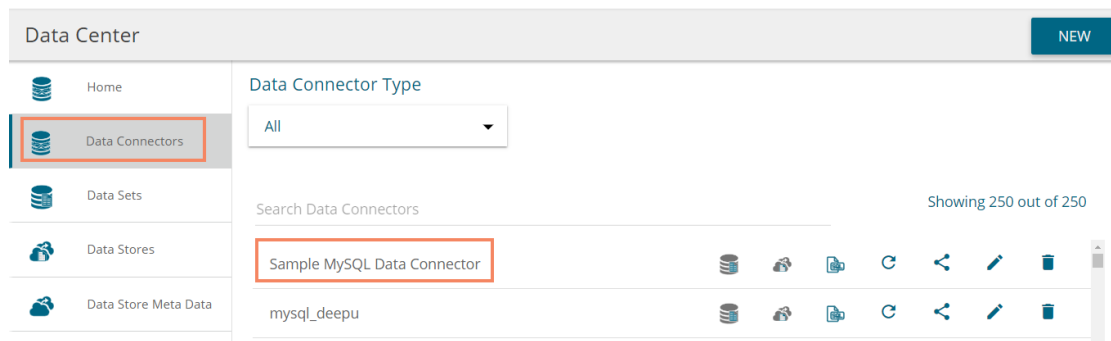


- vi) By selecting a connector type, users need to configure that connector.
- vii) Users need to fill in the required details for the selected data connector.
(Please note that based on the selected connector type the required information may vary.)
- viii) Verify the data connection and save it by clicking the **'SAVE'** option.
E.g. The following image displays details to be filled to create a MySQL Data Connector.

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



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



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

User Name *

**Use Read only credential*

Password *

IP/Host *

Port *

Database Name *

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)

MSSQL Data Conn...

Data Connector Name *

Description

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

User Name *

**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)

Oracle Data Conne...

Data Connector Name *

Description

- iii) **Username:** Enter a Username (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 *

4. Hive Data Connector

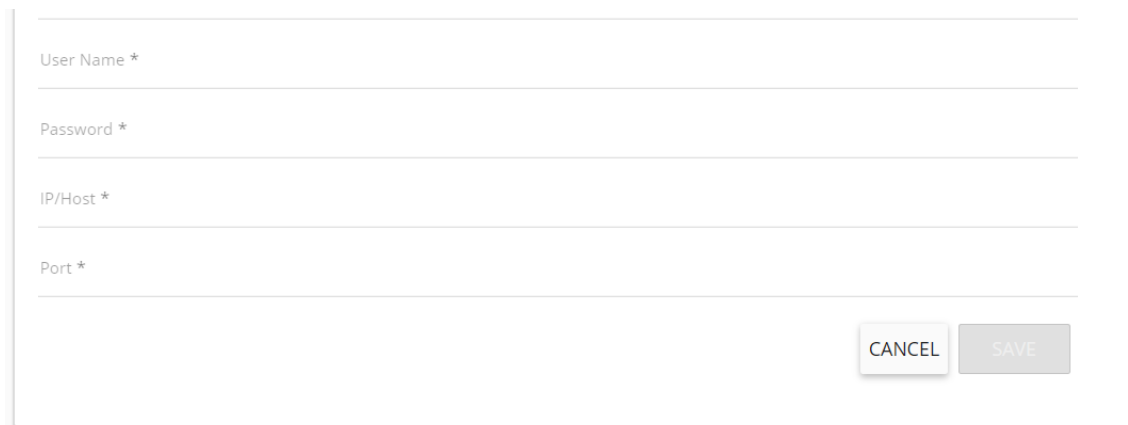
- i) **Data Connector Name:** A user-defined name to identify the data source
- ii) **Description:** Describe the data connector (optional)

Hive Data Connector

Data Connector Name *

Description

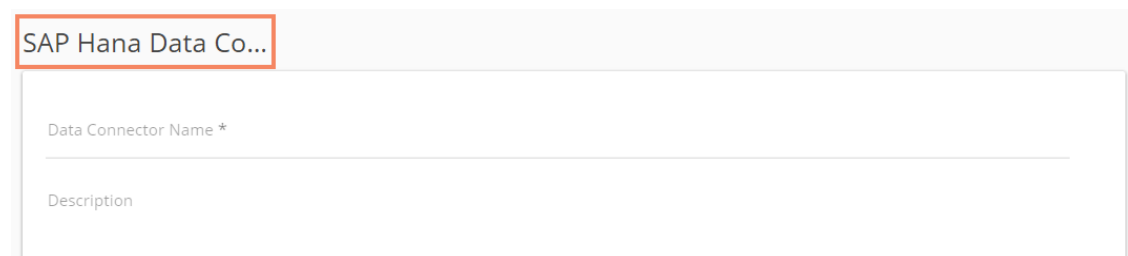
- iii) **Username:** Enter a Username (It should be the same as given in the connection server)
- iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
- v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
- vi) **Port:**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



A screenshot of a web form with four input fields and two buttons. The fields are labeled 'User Name *', 'Password *', 'IP/Host *', and 'Port *'. The 'CANCEL' button is on the left and the 'SAVE' button is on the right.

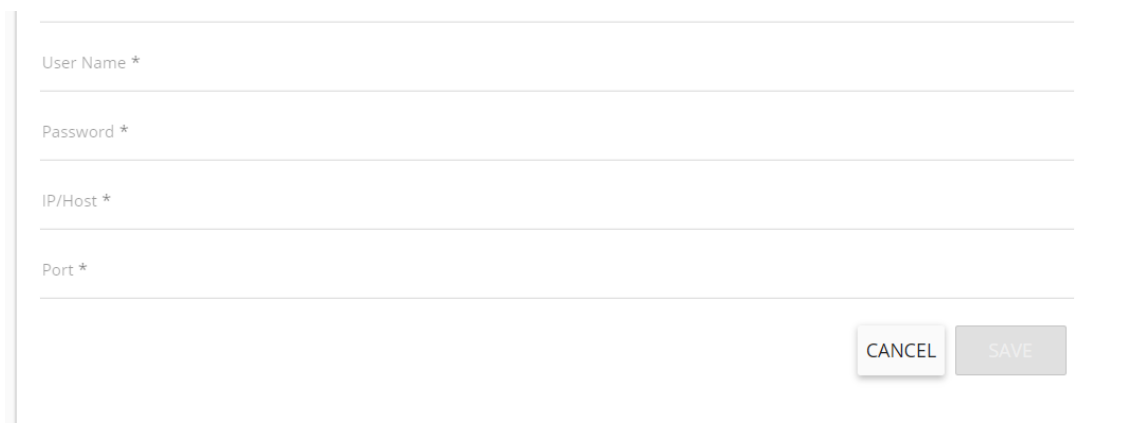
5. SAP Hana Data Connector

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



A screenshot of a web form titled 'SAP Hana Data Co...'. It has two input fields: 'Data Connector Name *' and 'Description'. The 'Description' field is currently empty.

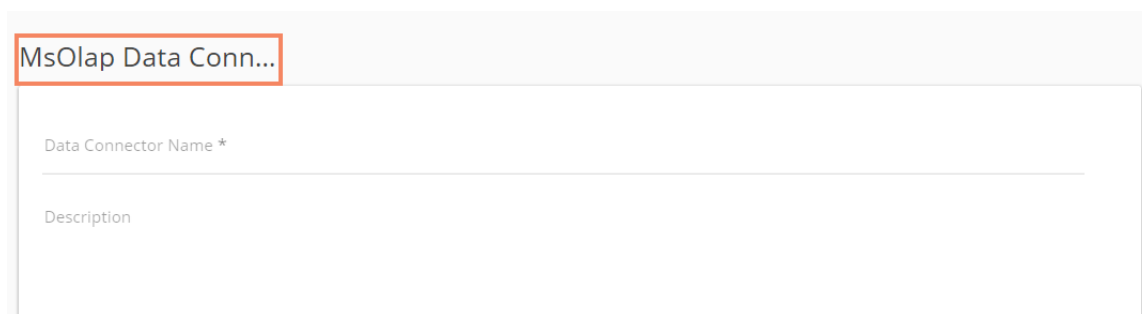
- iii) **Username:** Enter a Username (It should be the same as given in the connection server)
- iv) **Password:** Enter the Password (It should be the same as provided in the connection server)
- v) **IP/HOST:** Enter database server details (from where the user wants to fetch data)
- vi) **Port:**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



A screenshot of a web form with four input fields and two buttons. The fields are labeled 'User Name *', 'Password *', 'IP/Host *', and 'Port *'. The 'CANCEL' button is on the left and the 'SAVE' button is on the right.

6. MSSQL OLAP Data Connector

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

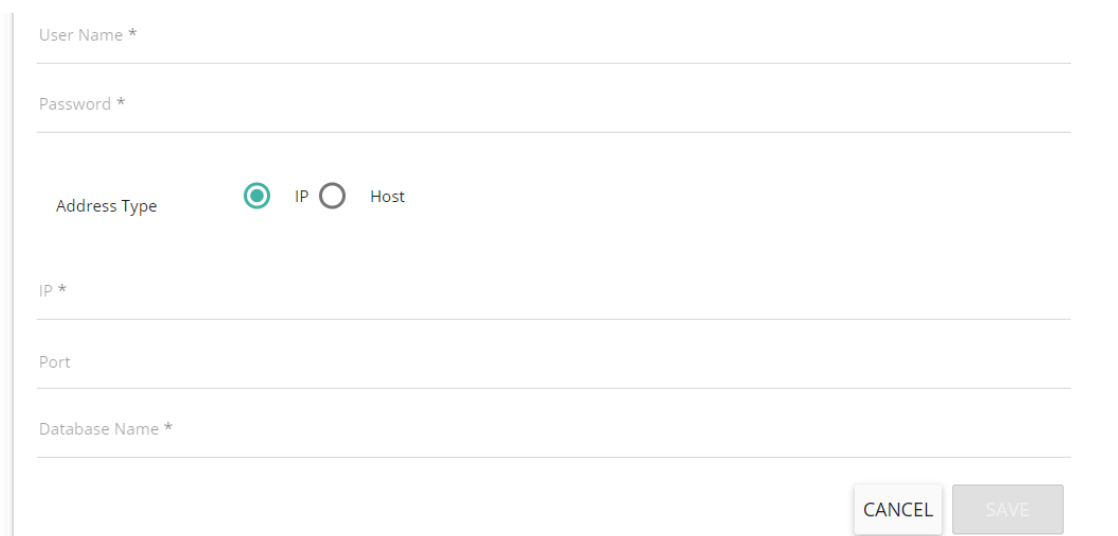


MsOlap Data Conn...

Data Connector Name *

Description

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



User Name *

Password *

Address Type IP Host

IP *

Port

Database Name *

CANCEL 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 * ▼

8. Cassandra Native Data Connector

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

Cassandra Native ...

Data Connector Name *

Description

- iii) **Username:** Enter a Username (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

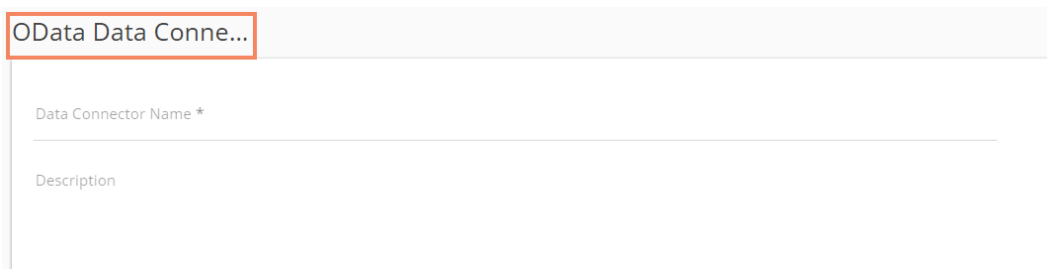
Consisten...

ONE ▼

9. O Data Connector

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

ii) **Description:** Connection Details



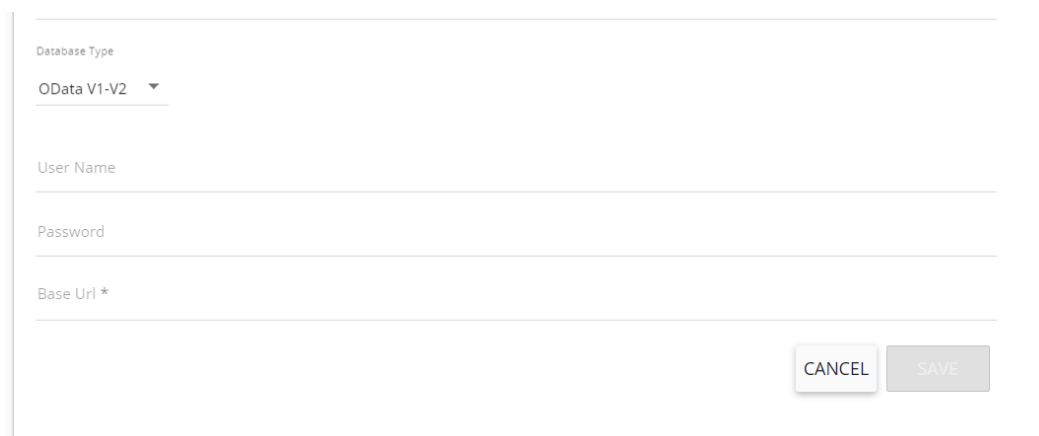
The screenshot shows a form titled "OData Data Connector" with two input fields: "Data Connector Name *" and "Description".

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) **Username:** Enter a Username (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

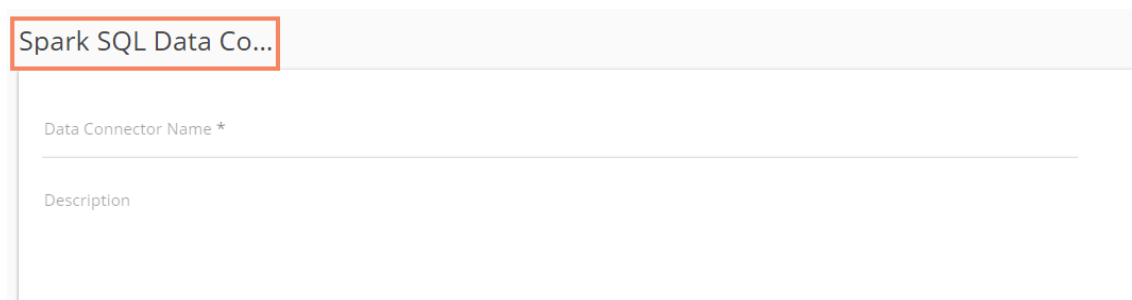


The screenshot shows a form with a "Database Type" dropdown menu set to "OData V1-V2". Below the dropdown are input fields for "User Name", "Password", and "Base Url *". At the bottom right, there are "CANCEL" and "SAVE" buttons.

10. Spark SQL Data Connector

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

ii) **Description:** Connection Details



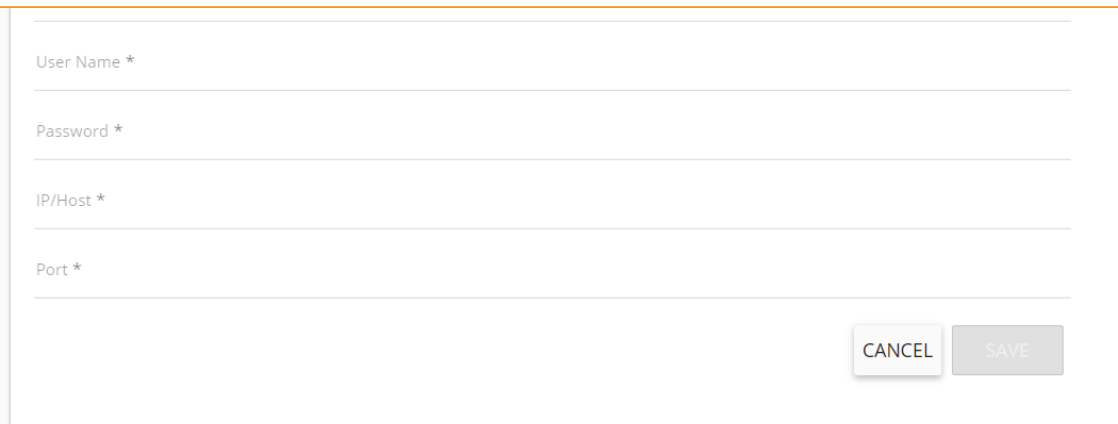
The screenshot shows a form titled "Spark SQL Data Connector" with two input fields: "Data Connector Name *" and "Description".

iii) **Username:** Enter a Username (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 *

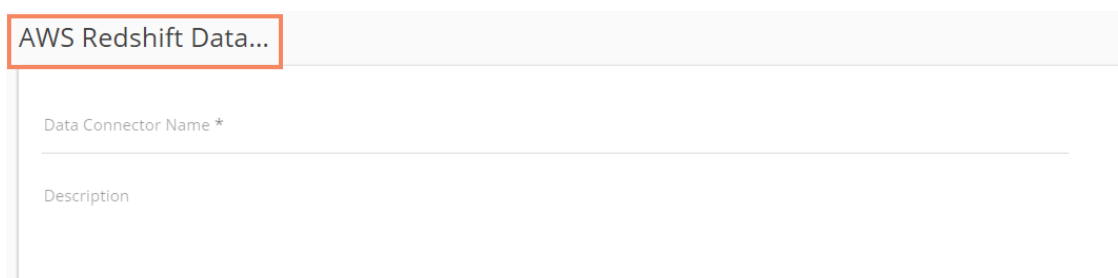
IP/Host *

Port *

CANCEL SAVE

11. AWS Redshift

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

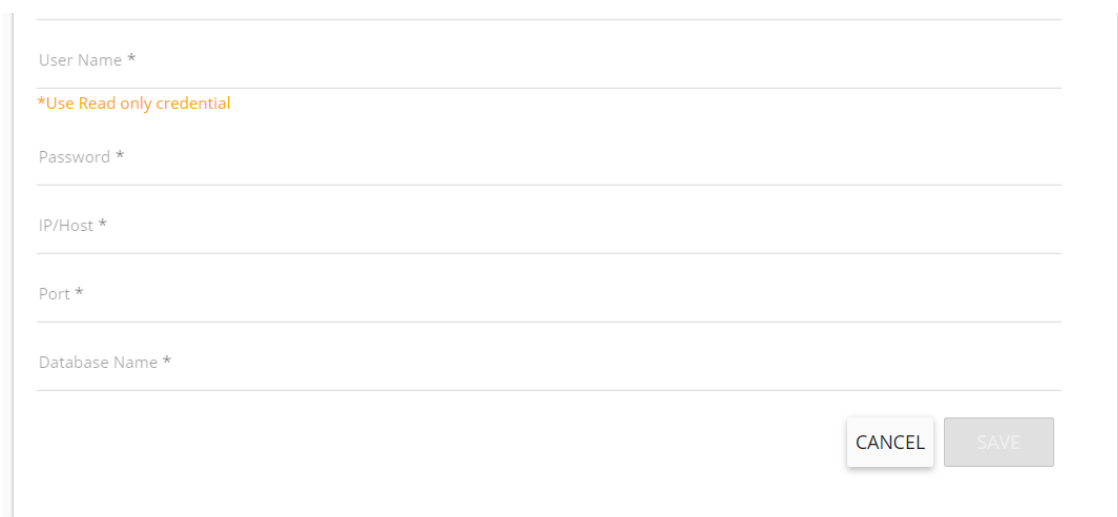


AWS Redshift Data...

Data Connector Name *

Description

- iii) **Username:** Enter a Username (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 SAVE

12. File

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

- ii) **Description:** Connection details (optional).
- iii) Click the **'SAVE'** option.

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

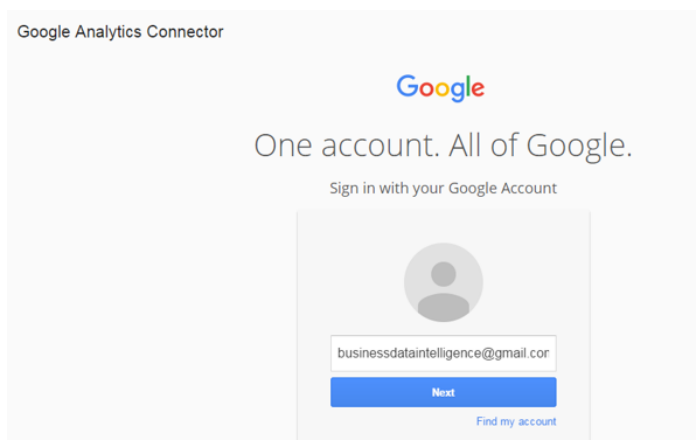
Note: Users need to select a file from the system while creating a datastore based on the file connector.

13. Google Analytics Connector

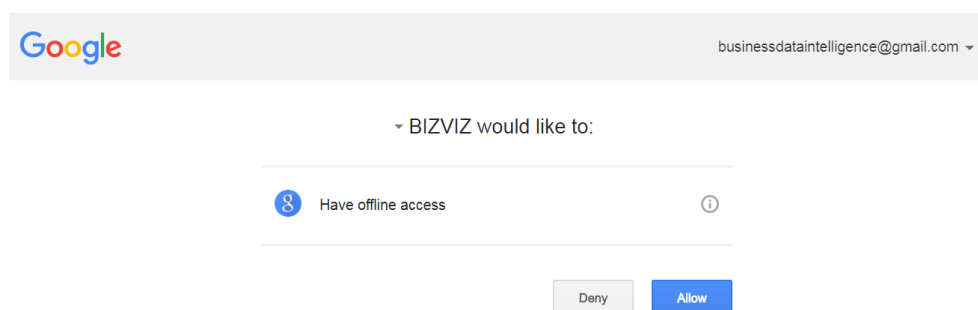
- i) Navigate to the Data Connector page by using the **'NEW'** context menu.
- ii) Click the **'Google Analytics'** connector.

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

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

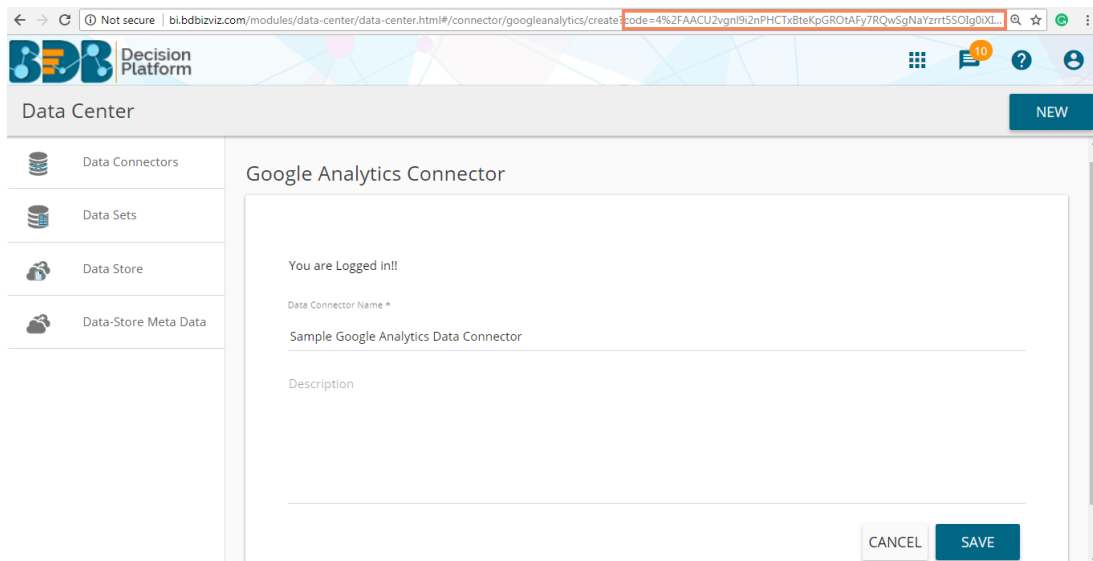


- b. Give access to the analytics data by clicking the 'Allow' option.



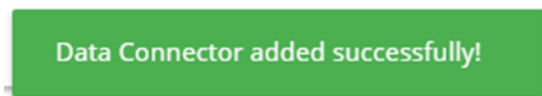
- c. Users get redirected to the data connector form with an authorization code in the URL, after getting the access permission. The form mentions that the user has been logged in to the selected Google account.

- 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.

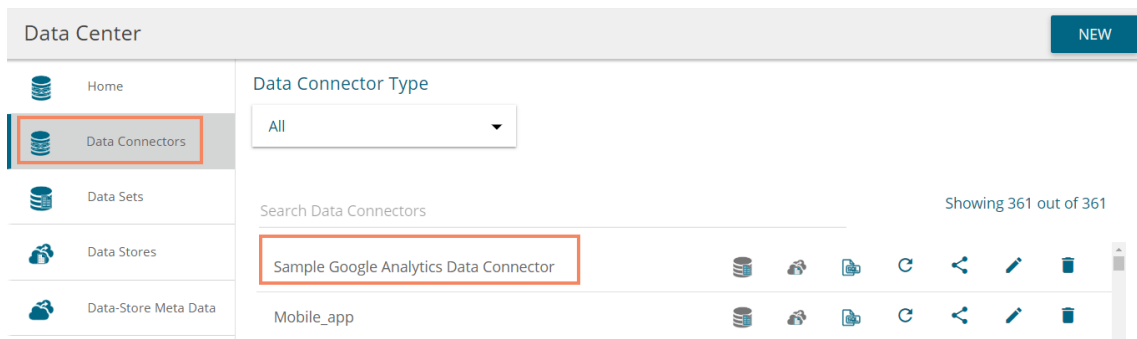


Note: The user can **'CANCEL'** the connector if wished to do so from the current page.

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



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



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.

Google Analytics C...

businessdataintelligence@gmail.com

Data Connector Name *

Sample Google Analytics Data Connector

Description

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) **Username:** Enter a Username (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.

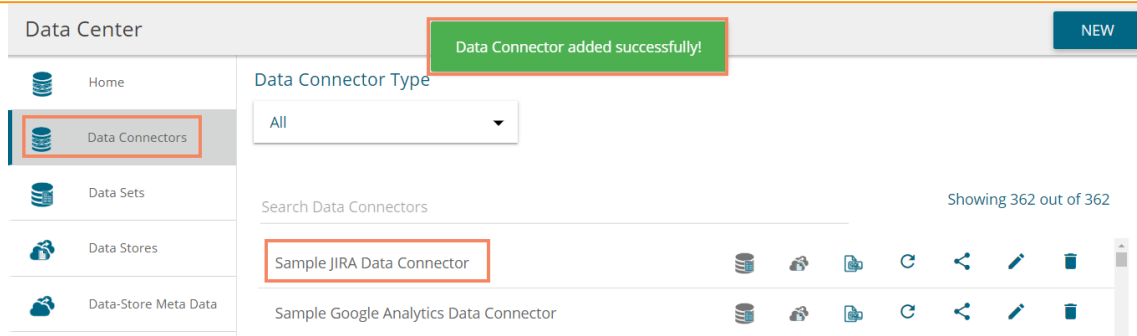
User Name *

Password *

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

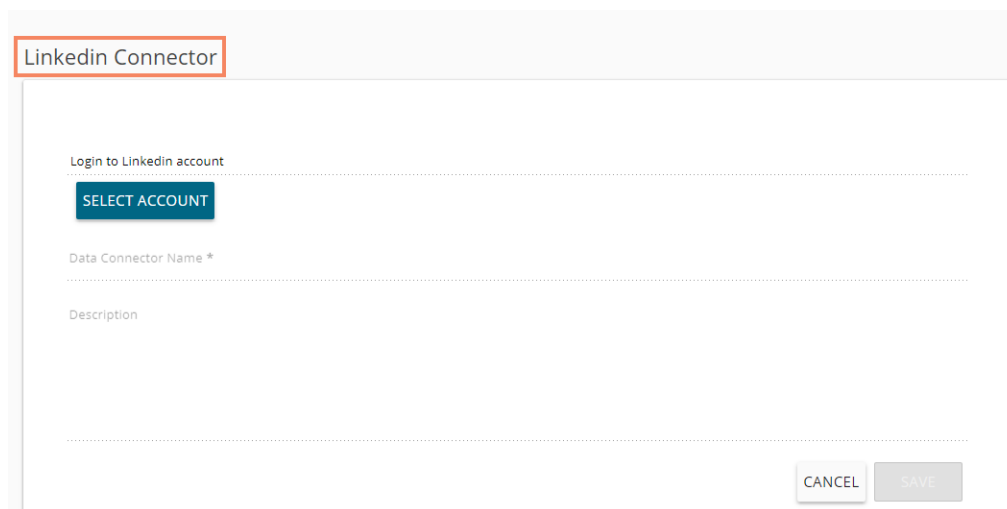
CANCEL SAVE

- 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.

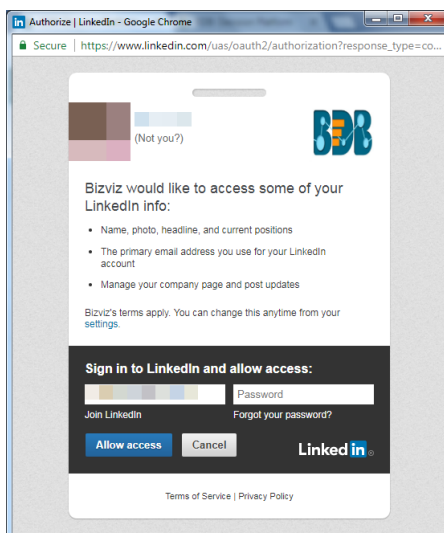


15. LinkedIn

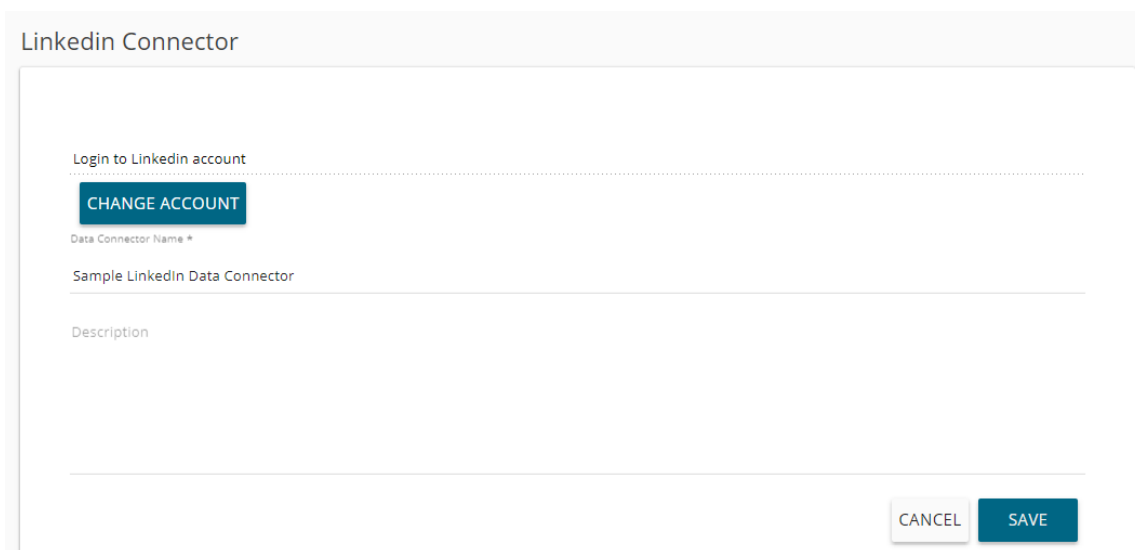
- i) Select the **'LinkedIn'** connector from the Data Connector page.
- ii) The user gets redirected to select a LinkedIn account.
- iii) Click the **'SELECT ACCOUNT'** option.



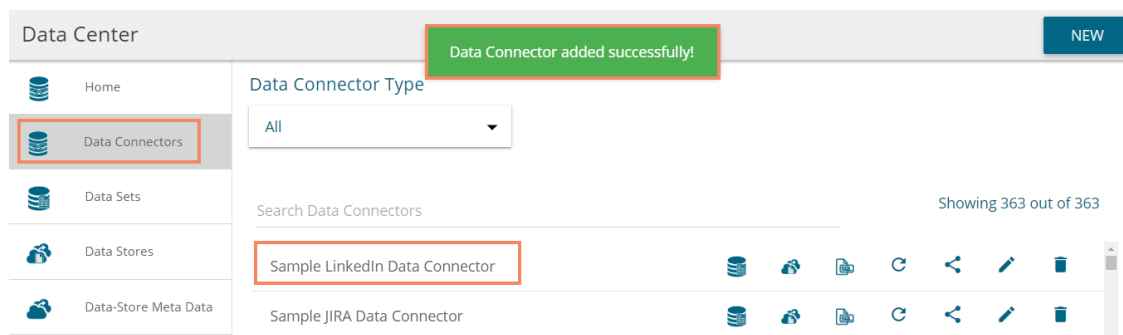
- iv) A new window opens.
 1. Log in to a valid LinkedIn account.
 2. Click **'Allow access'** option to provide permission to BDB for accessing data from the selected LinkedIn account.



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



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



16. Google Sheet

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

Google Sheet Con...

Login to Google Sheet account

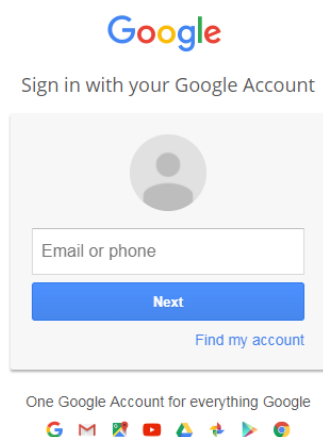
SELECT ACCOUNT

Data Connector Name *

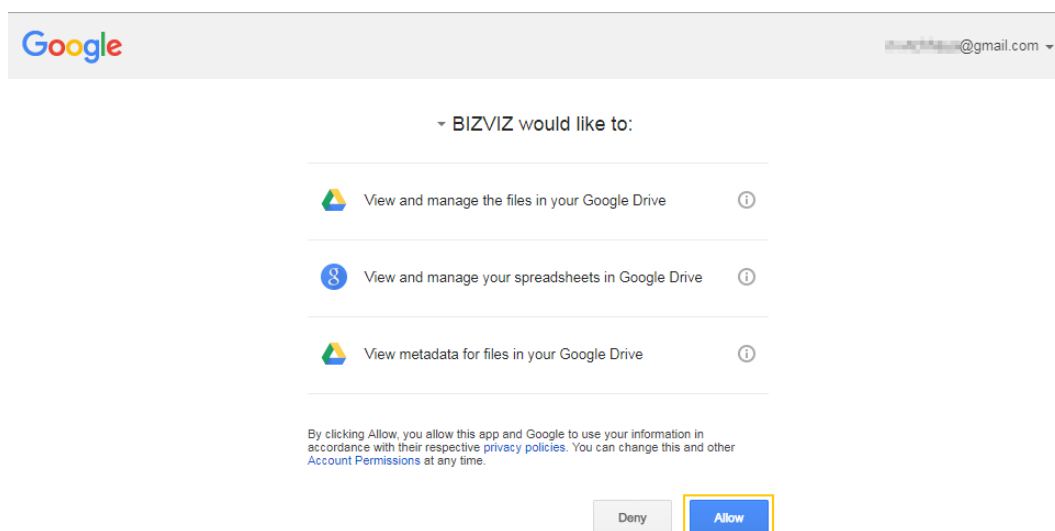
Description

CANCEL SAVE

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

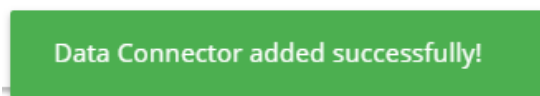


- v) A new page opens asking users to share their information with BizViz.
- vi) Click '**Allow**' to share the same.



- 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.

- ix) A success message appears as displayed below.



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

17. Facebook

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

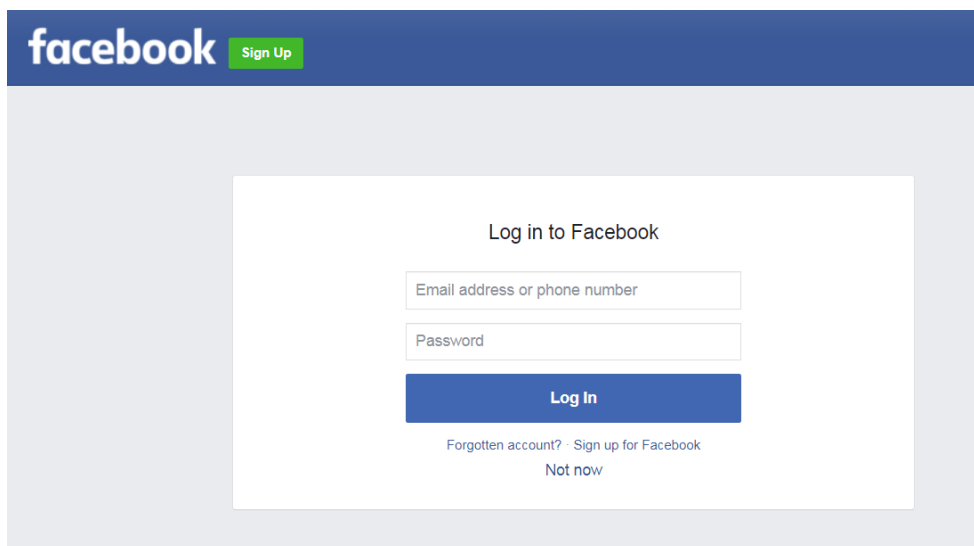
Facebook Connector

Select Account ▾

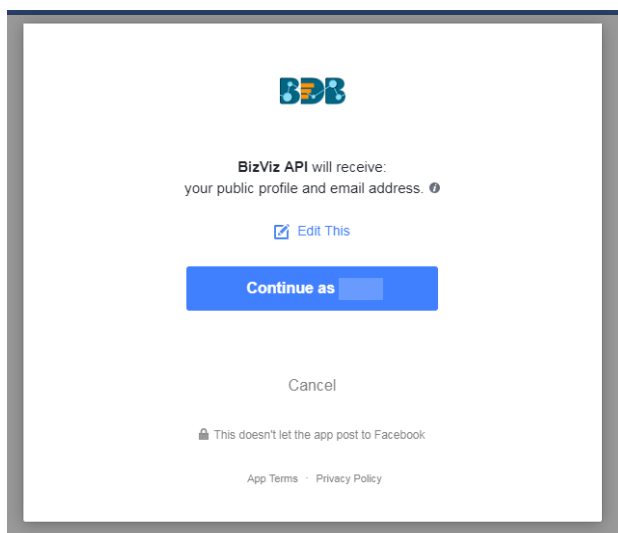
Data Connector Name *

Description

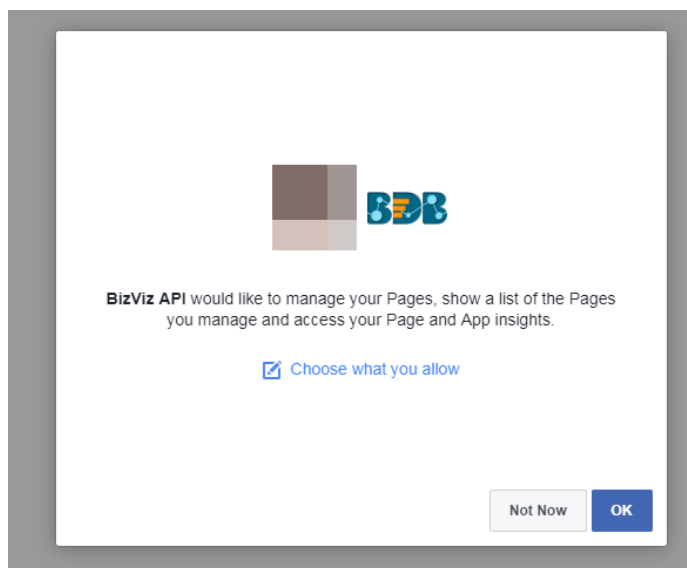
iv) Enter the credentials for a Facebook account for login



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



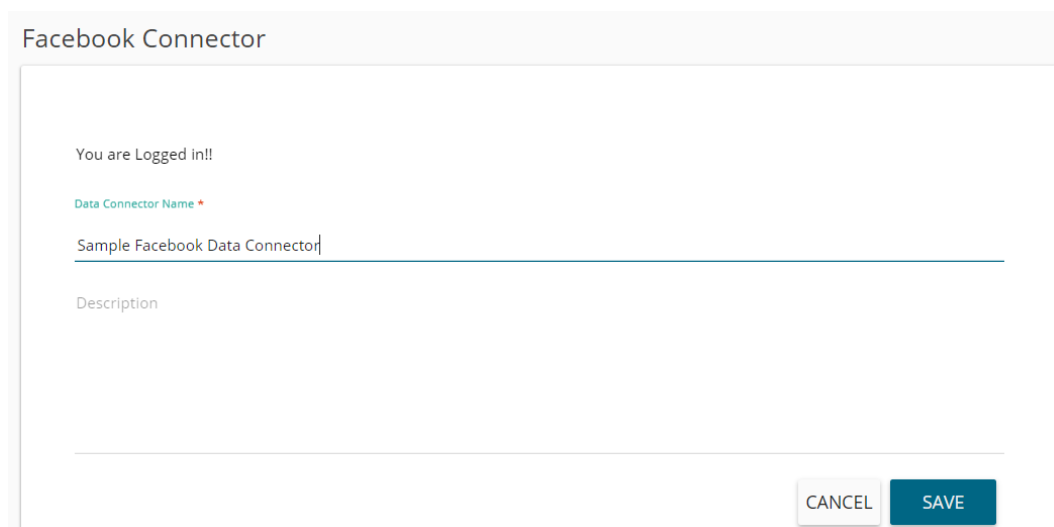
vii) Select the 'OK' option to allow the selected options from Facebook account.



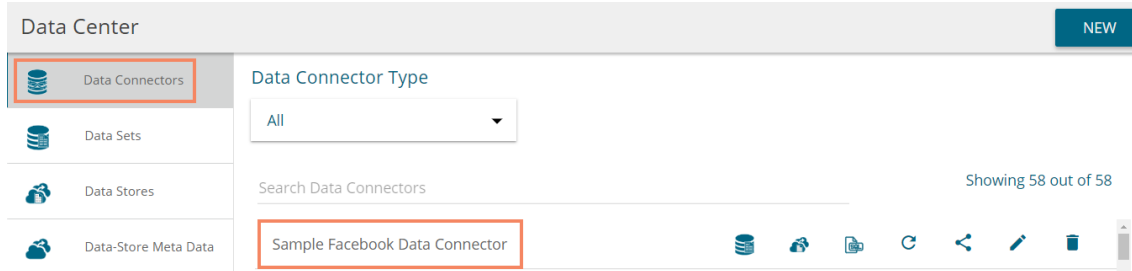
viii) By selecting the continuation option, users are notified as logged in to the selected account redirected to the Facebook Connector page

ix) Provide a title for the data Connector

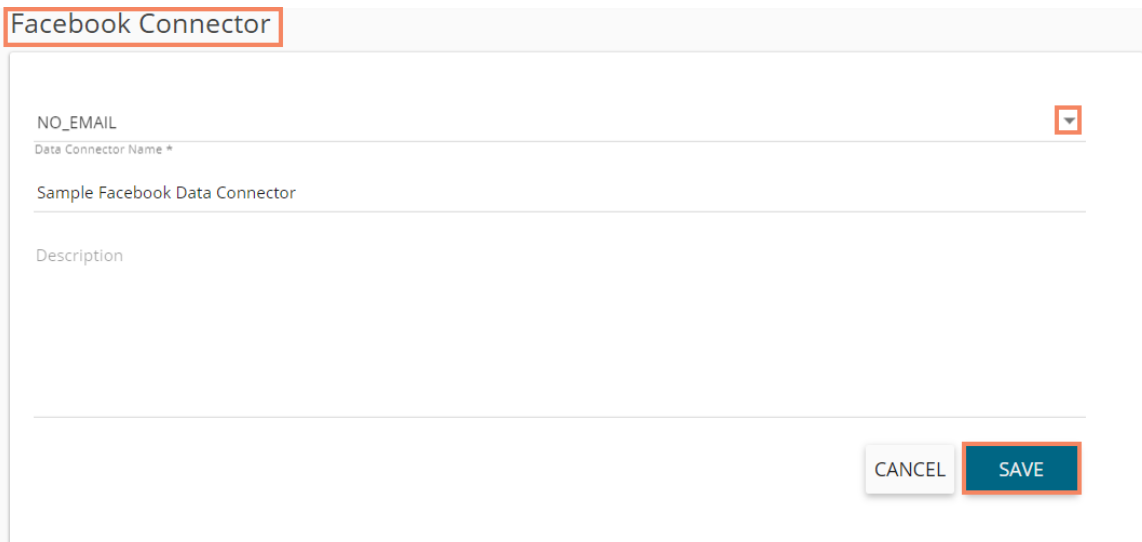
x) Click the 'SAVE' option



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

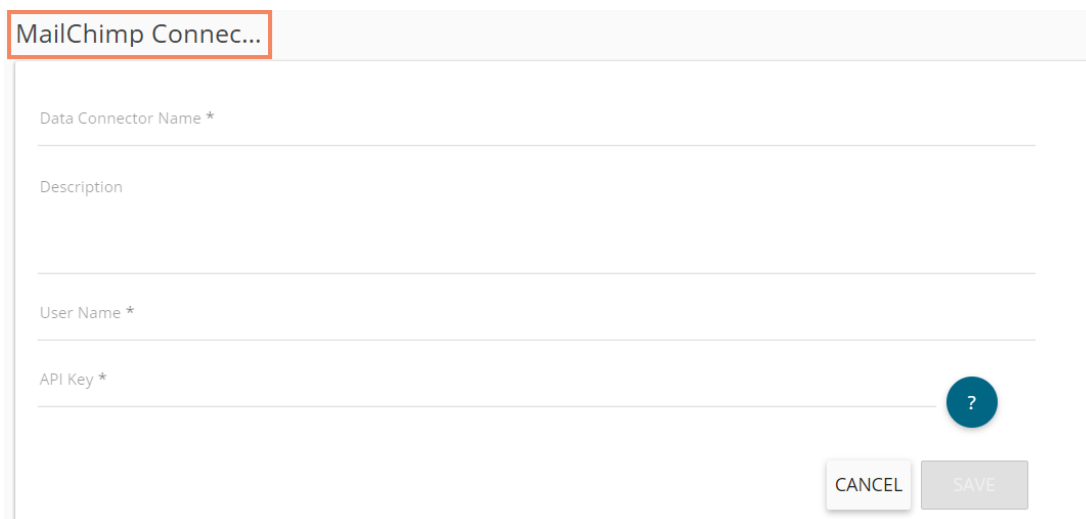


Note: The below given page opens if the user selects an account using the **'Select Account'** drop-down menu. In this scenario, the user needs to provide only the Data Connector name, Description (optional) and click the **'SAVE'** option to create a new Facebook Data Connector.



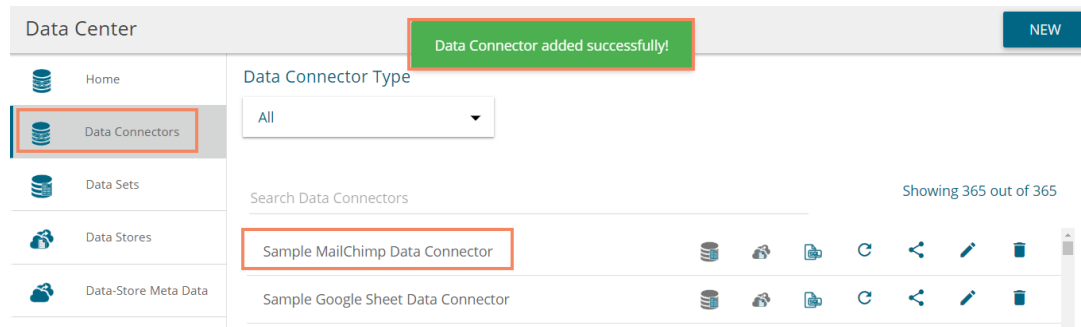
18. MailChimp

- 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. Username
 - d. API Key
- iv) Click the **'SAVE'** option.



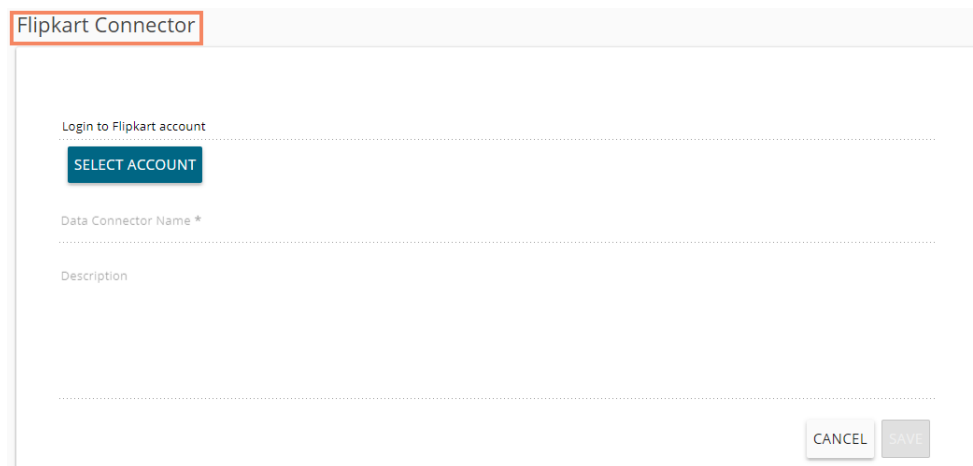
- v) A success message appears.

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

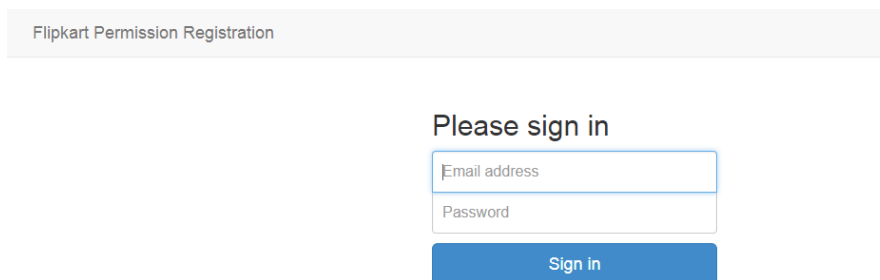


19. Flipkart

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



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



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

Flipkart 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 Connectors | Data Sets | Data Stores | Data-Store Meta Data

Data Connector Type: All

Search Data Connectors

Showing 366 out of 366

Sample Flipkart Data Connector					
Sample MailChimp Data Connector					
Sample Google Sheet Data Connector					

20. Amazon

- Select the 'Amazon Marketplace' connector from the Data Connector page.
- The Amazon Marketplace Connector page opens.
- Select a link using the drop-down menu.
- Provide the following information:
 - Seller id
 - MWS Auth Token
 - Click 'VERIFY ACCOUNT' option

Amazon Marketpla...

IN - https://mws.amazonservices.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.

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

21. Dropbox

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

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



Sign in to Dropbox to link with BDBIZVIZ.COM

G

Sign in with Google

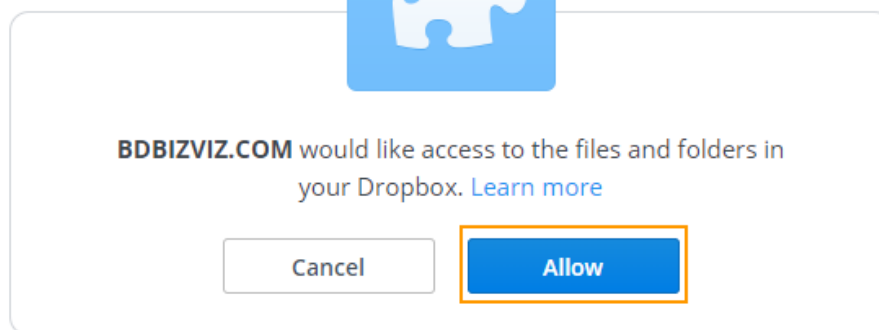
or

[Forgot your password?](#)

Sign in

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

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



- 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.

Dropbox Connector

Login to Dropbox account

CHANGE ACCOUNT

Data Connector Name *

Sample Dropbox Data Connector

Description

CANCEL SAVE

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

Data Center

Data Connector added successfully!

NEW

Home

Data Connectors

Data Sets

Data Stores

Data-Store Meta Data

Data Connector Type

All

Search Data Connectors

Showing 368 out of 368

Sample Dropbox Data Connector

Sample Amazon Marketplace Data Connector

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

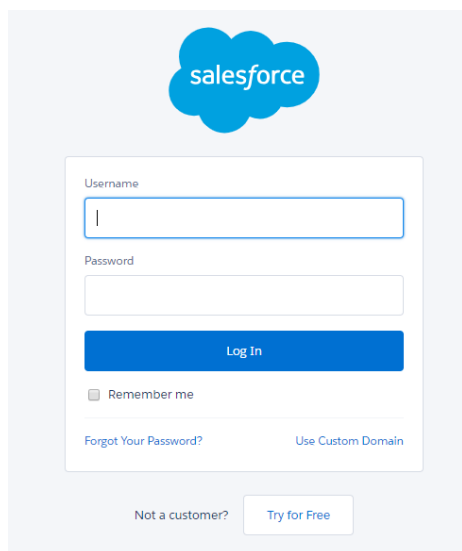
SELECT ACCOUNT

Data Connector Name *

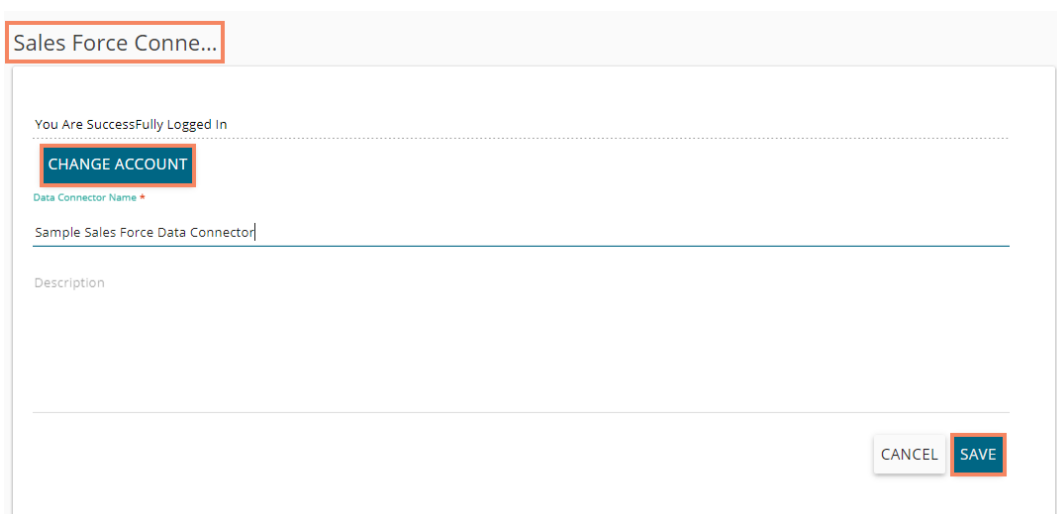
Description

CANCEL SAVE

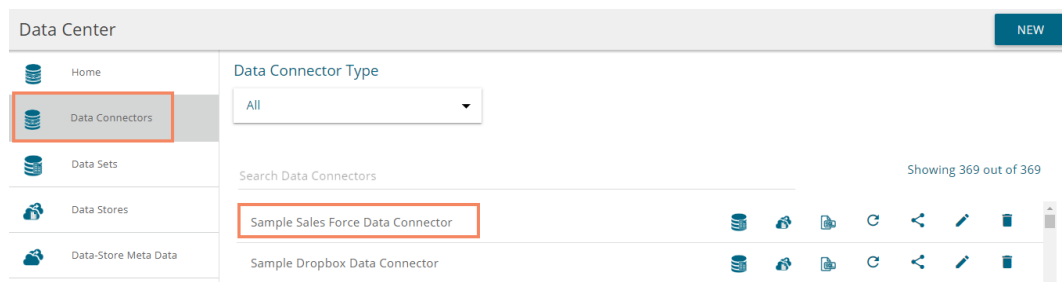
- iv) Users get the Salesforce login page.
 1. Insert the valid username.
 2. Provide the correct password for your account.
 3. Click the 'Log In' option.



- v) After successfully logged in 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.



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



23. ZOHO Books

- i) Select **'ZOHO Books'** connector from the Data Connector page.

- ii) The Zoho Books Data Connector page opens.
 - a. Provide Username.
 - b. Give a valid Password for the account.
- iii) Click the **'SAVE'** option after the data connection gets verified.

- 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.

24. QuickBooks

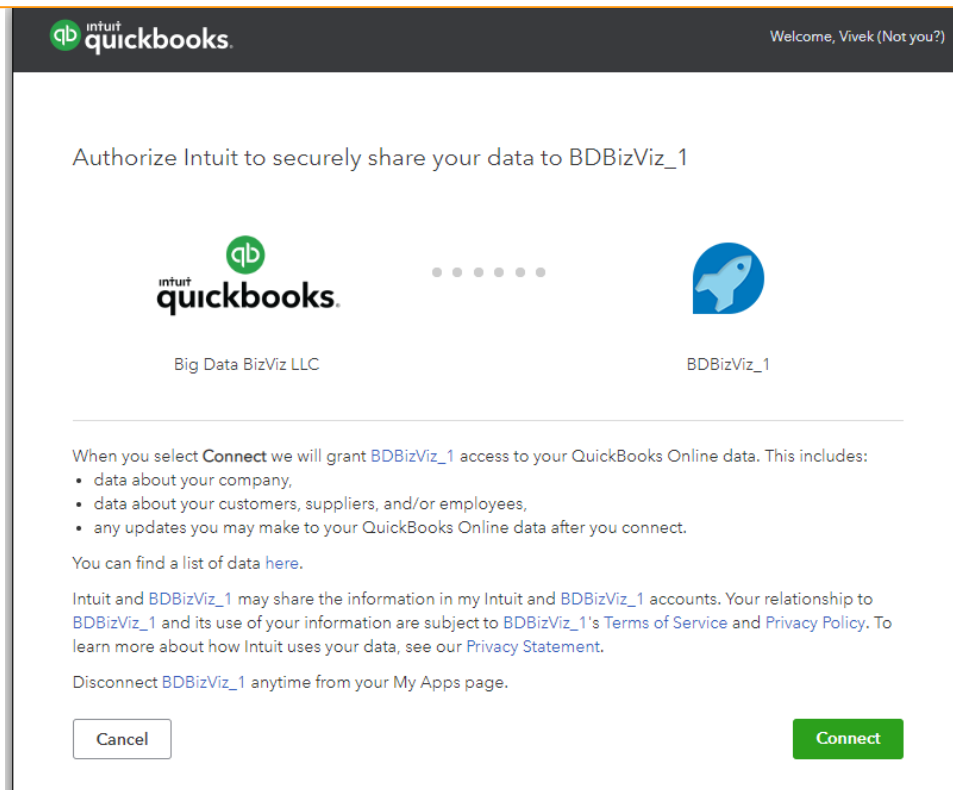
- i) Select the **'QuickBooks'** connector from the Data Connector page.
- ii) The QuickBooks Connector page opens.
- iii) Click the **'SELECT ACCOUNT'** option for login to a QuickBooks account.

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

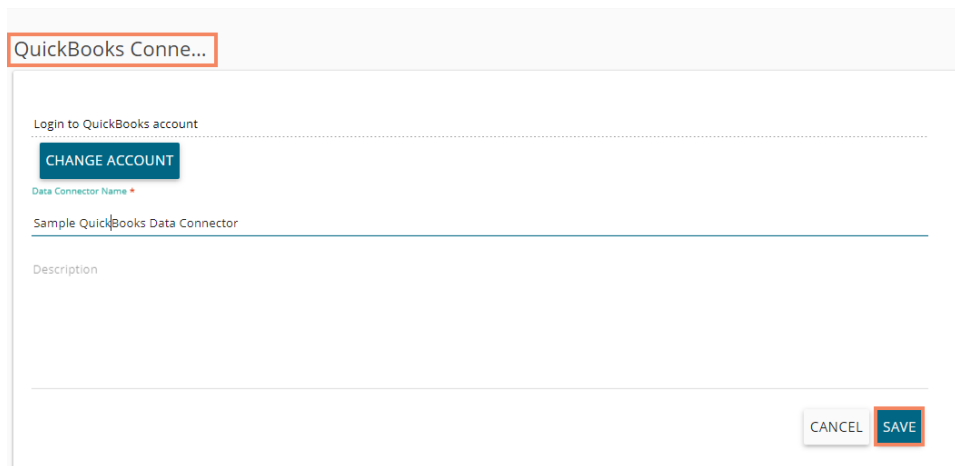
- vi) Users receive a code to assure the authenticity of the selected account. The users get verification code through the registered email or mobile.

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

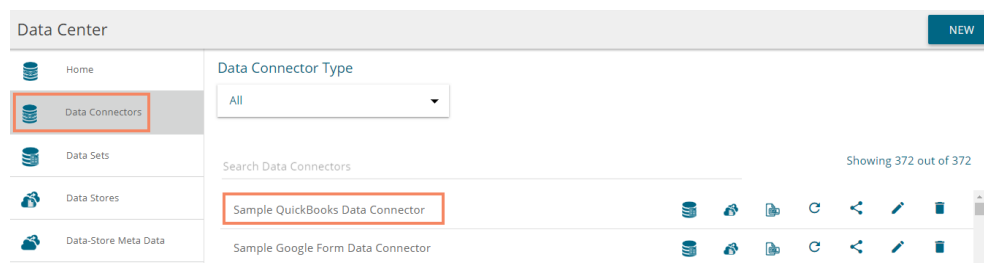
- vii) After verifying the authenticity code, the user gets a new window asking to authorize BDBizViz.
- viii) Click the 'Connect' option.



- 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.



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



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.

- 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.

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



Authorize Twitter Bdb Production to use your account?

Authorize app

Cancel



Twitter Bdb Production

By Blizviz Technologies Pvt. Ltd.
www.bdb.ai

https://app.bdb.ai/datacenter/oauth-redirect.html?connectorType=twitterapiconnector

[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.

You can revoke access to any application at any time from the [Applications](#) tab of your Settings page.

By authorizing an application you continue to operate under [Twitter's Terms of Service](#). In particular, some usage information will be shared back with Twitter. For more, see our [Privacy Policy](#).

- 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!!

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

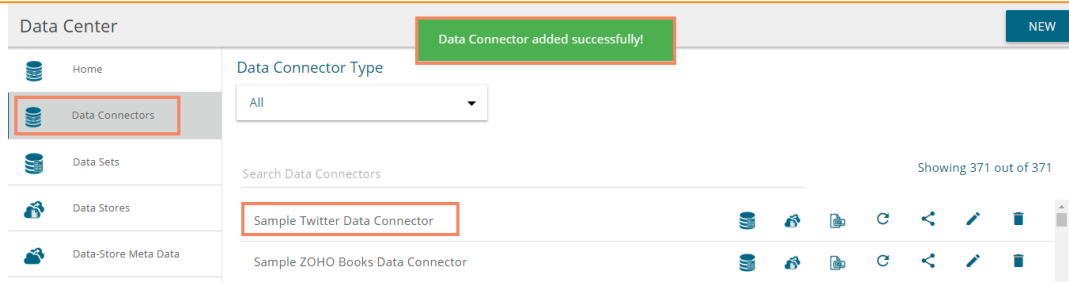
Data Connector Name *

Sample Twitter Data Connector|

Description

CANCEL SAVE

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

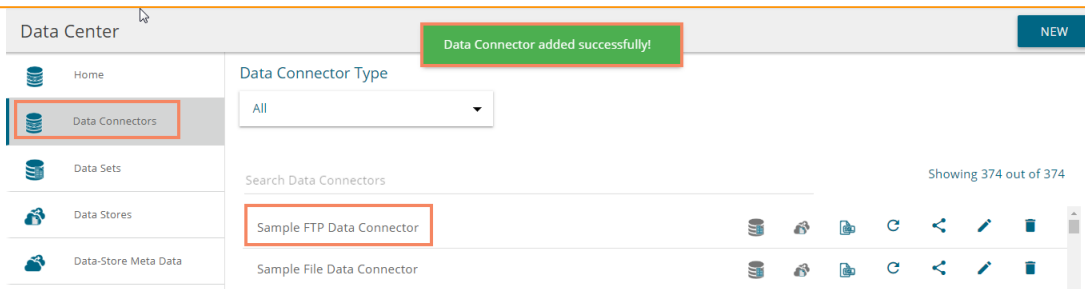


26. FTP Server

- 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

3. Host: Enter database server details (from where the user wants to fetch data)
 4. Port: The server port number
 5. Username: Enter a Username (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.

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



27. ServiceNow

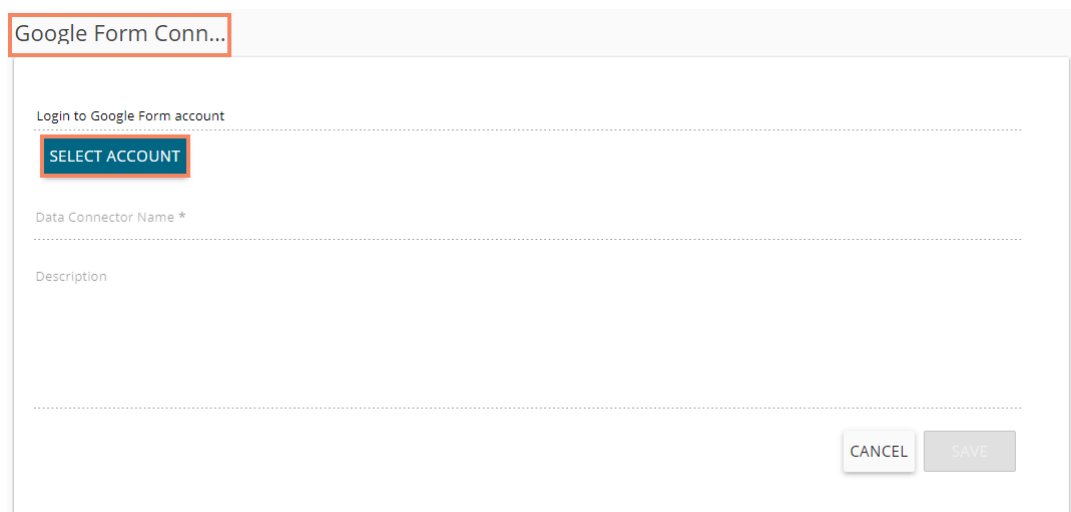
- i) Select '**ServiceNow**' connector type icon from the Data Connector page.
- ii) Users get directed to the Service Now Connector page.
- iii) Navigate to this the <https://developer.servicenow.com/app.do#!/instance> link
- iv) Provide the credentials to login
- v) A new page appears with the instance 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.

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

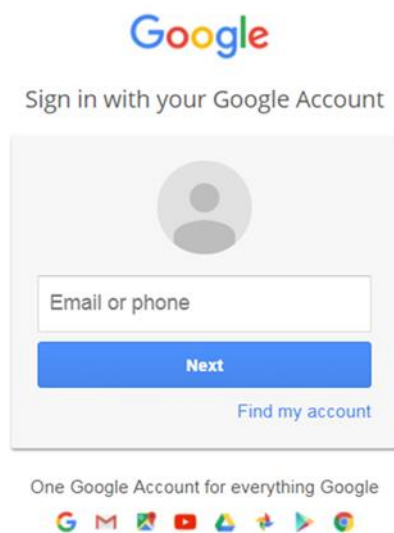


28. Google Forms

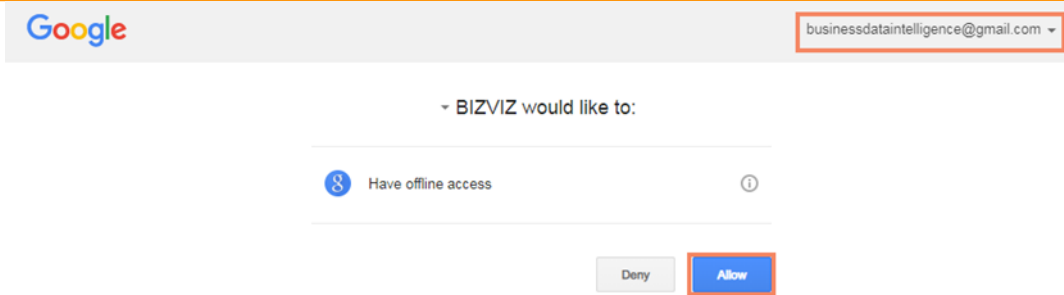
- i) Click the **'Google Forms'** Data Connector icon from the Data Connector page.
- ii) The Google Form Data Connector page opens.
- iii) Click the **'SELECT ACCOUNT'** option.



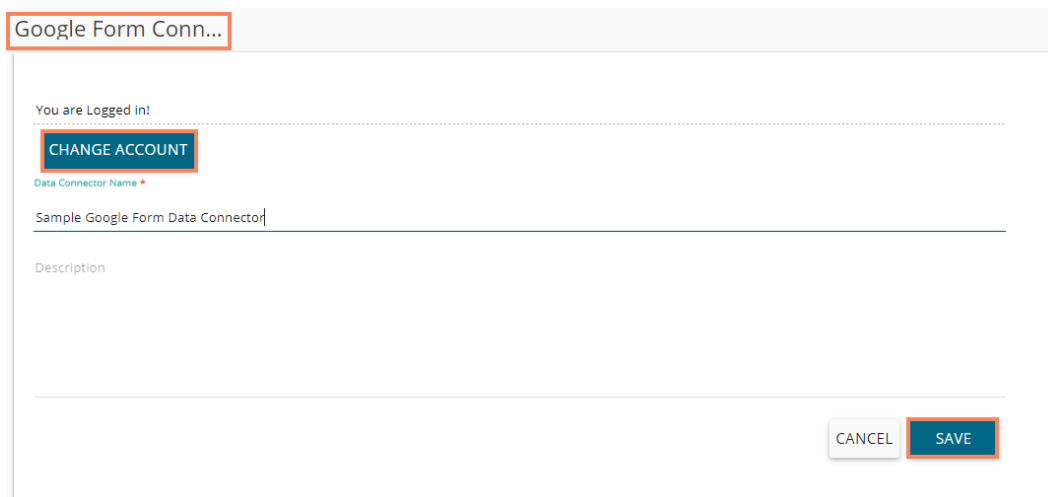
- iv) A page opens, asking the user to Sign in with a Google Account.
- v) Enter the required credentials for the selected Google Account.



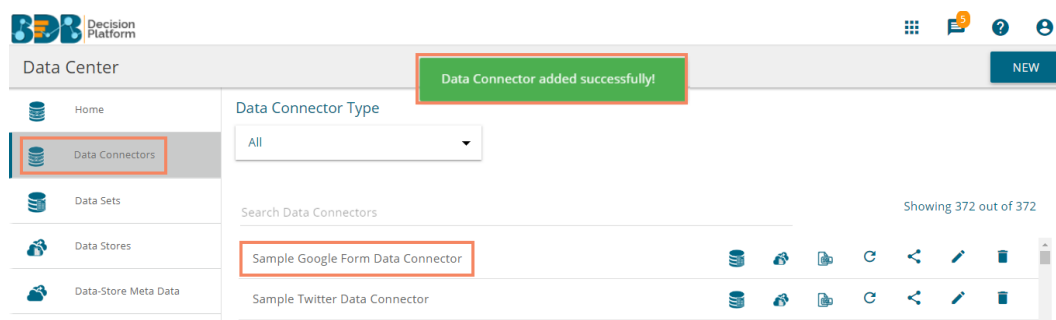
- vi) Allow BDB to access data from the selected Google account by clicking the **'Allow'** option.



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

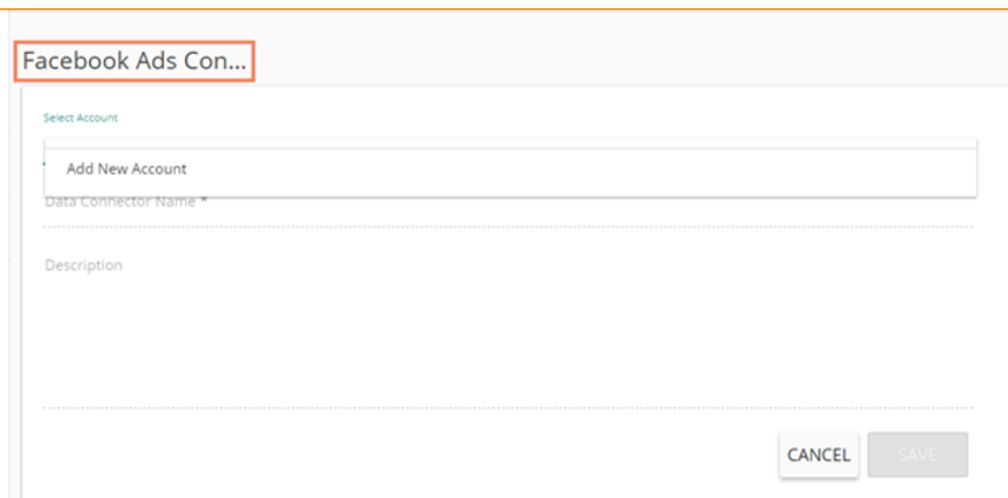


- viii) A new Google Form data connector gets created and added to the Data Connector List.



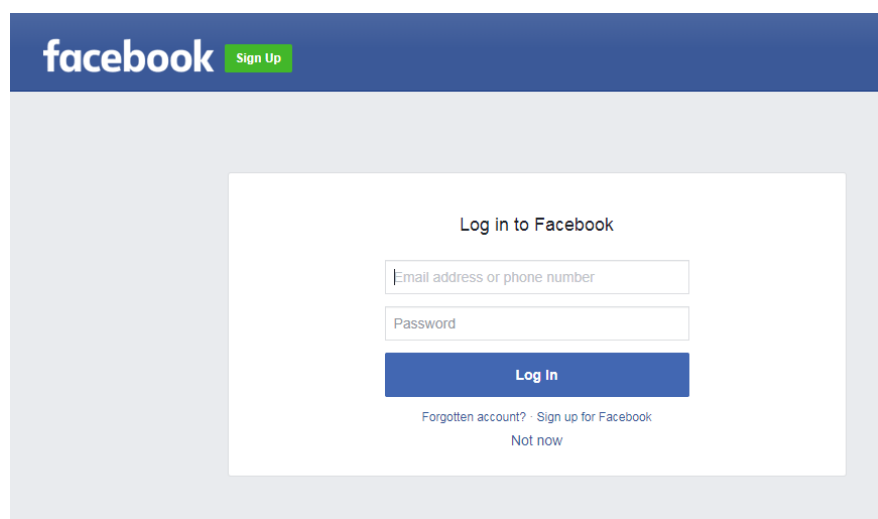
29. Facebook Ads

- 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.



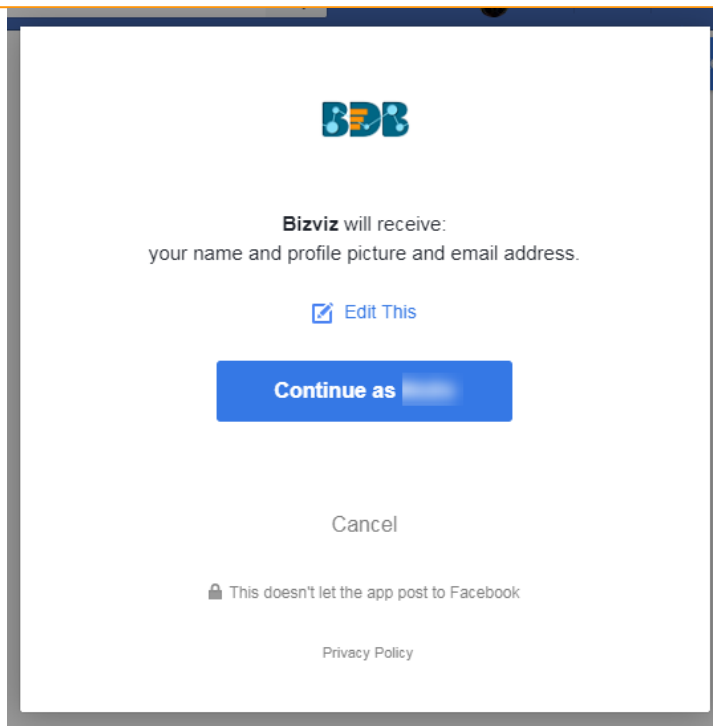
The screenshot shows a web form titled "Facebook Ads Con...". At the top, there is a "Select Account" section with a dropdown menu currently showing "Add New Account". Below this is a "Data Connector Name" field with a dropdown arrow. A "Description" field is located below that. At the bottom right of the form, there are two buttons: "CANCEL" and "SAVE".

- 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

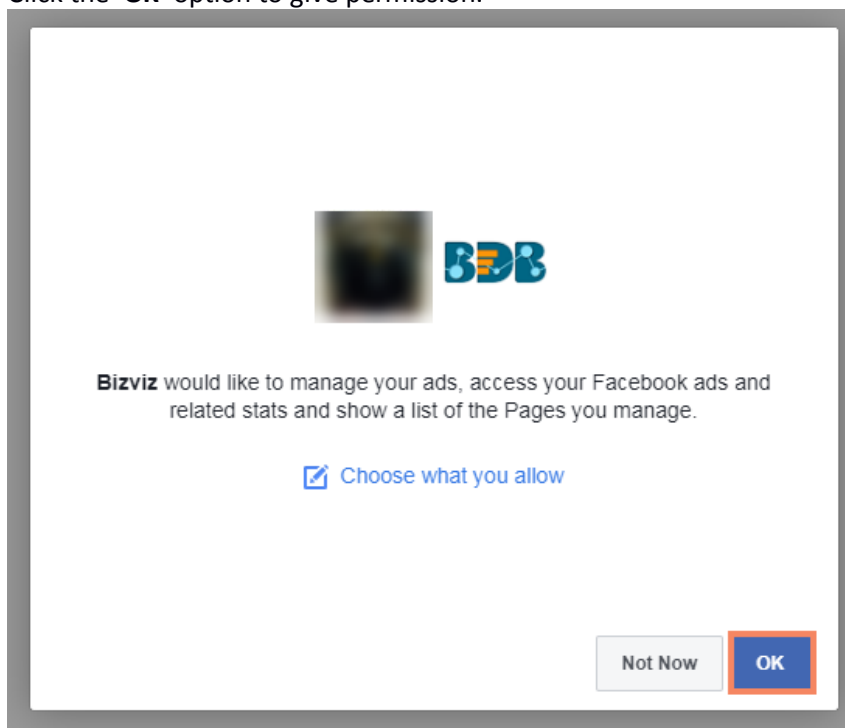


The screenshot shows the Facebook login page. At the top left is the "facebook" logo with a "Sign Up" button next to it. The main content area is titled "Log in to Facebook" and contains two input fields: "Email address or phone number" and "Password". Below these fields is a blue "Log In" button. At the bottom of the login area, there are links for "Forgotten account?", "Sign up for Facebook", and "Not now".

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



- 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 'OK' option to give permission.



- 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.

Data Connector Type

All

Search Data Connectors

Showing 263 out of 263

Sample Facebook Ads Data Connector						
SportAnalytics						

30. Google AdWords

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

Google Adwords C...

Login to Google Adwords account

SELECT ACCOUNT

Data Connector Name *

Description

CANCEL SAVE

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

[Create account](#)

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



One account. All of Google.

Sign in with your Google Account

[Sign in with a different account](#)

One Google account for everything Google



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

- 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.

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

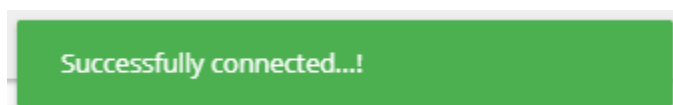
31. Snowflake

- 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).

- 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.

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



- v) Another success message appears to inform that the Data connector has been added successfully.
- vi) The new Snowflake Data Connector gets created and added to the Data Connectors list.

32. Twitter Ads

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

Twitter Ads Conne...

Select Account

Add New Account

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

Data Connector Name *

Description

CANCEL
SAVE

- iv) Authorize BDB 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.

Sign up for Twitter >

Authorise Twitter ads Api Conn to use your account?

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

Authorise app
Cancel

Twitter ads Api Conn

By Bizviz
www.bdbbizviz.com

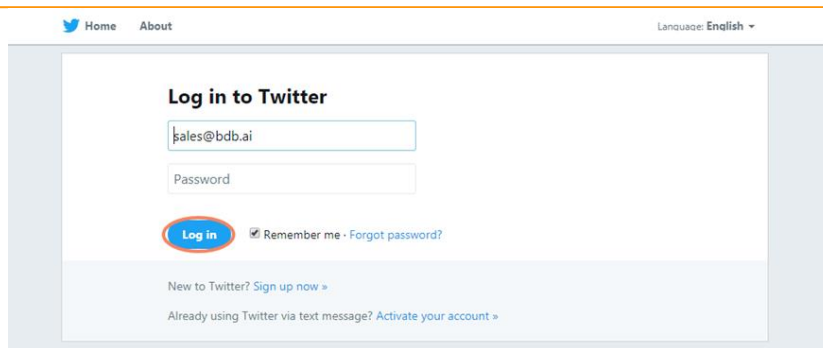
http://localhost:8080/datacenter/oauth-redirect.html?
connectorType=twitteradsapiconnector

[Privacy Policy](#)

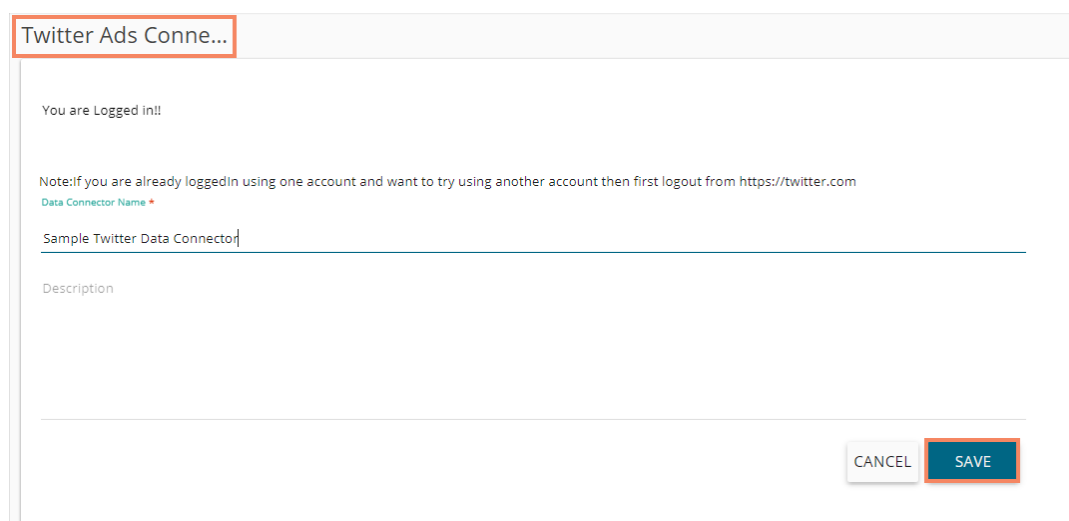
This application will be able to:

- 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

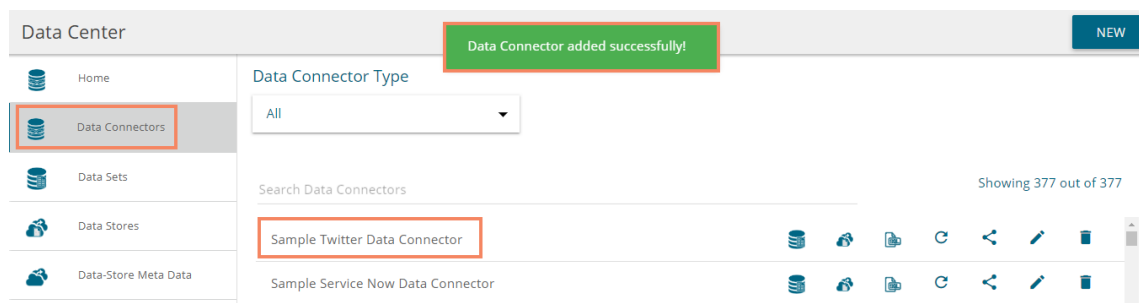
- v) Another window opens to confirm the authorization process.
- vi) Click the **'Authorise app'** option.



- 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.



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



33. LinkedIn Ads

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

LinkedIn Ads Conn...

Select Account

Add New Account

Data Connector Name *

Description

CANCEL SAVE

iv) The LinkedIn Login page opens for signing into the account.

LinkedIn Sign in Join now

LinkedIn

Email address or phone number

Password

Cancel Sign In

Forgot password? Join now

LinkedIn © 2018 User Agreement Privacy Policy Conn

v) Allow BDB to access data from the selected LinkedIn account by clicking the 'Allow' option.

LinkedIn

BD BizViz

BD BizViz would like to:

- View advertising campaigns you manage
- Retrieve your advertising accounts
- Retrieve reporting for your advertising accounts
- Use your basic profile including your name, photo, headline, and current positions
- Use the primary email address associated with your LinkedIn account
- Retrieve your organizations' posts, including any comments, likes and other engagement data
- Manage your advertising accounts

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

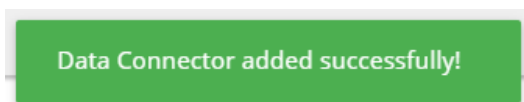
- vii) A new LinkedIn Ads Data connector gets created and added to the Data Connector List.

34. Postgre SQL

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

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

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

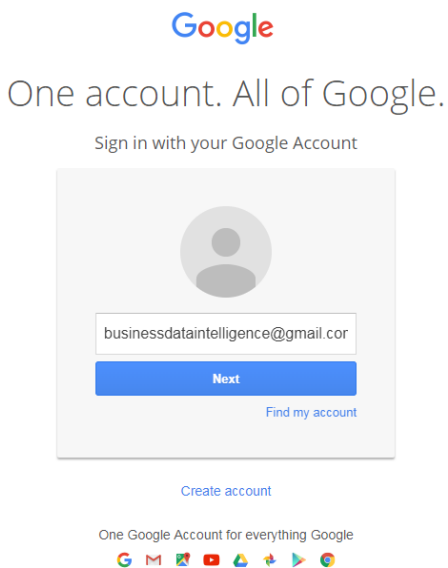


vi) A new Postgre SQL data connector gets created and added to the Data Connectors list.

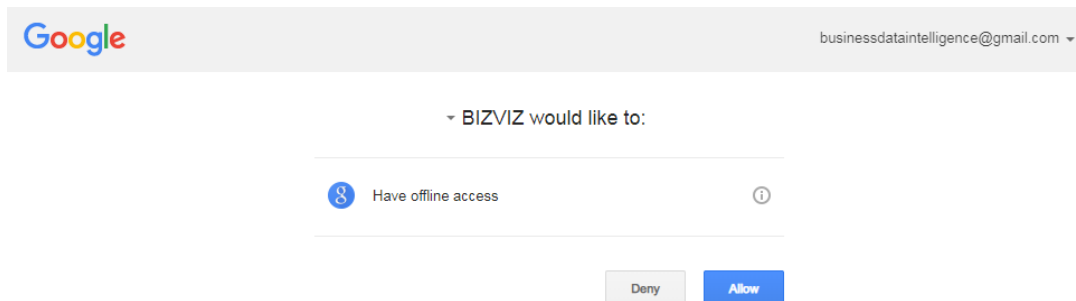
35. Firebase

- 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.

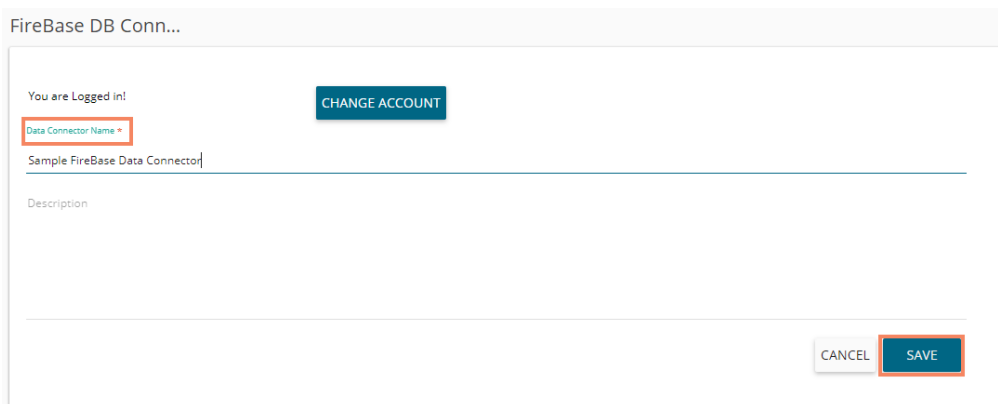
iv) A new page opens asking valid credential for a Google account.



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

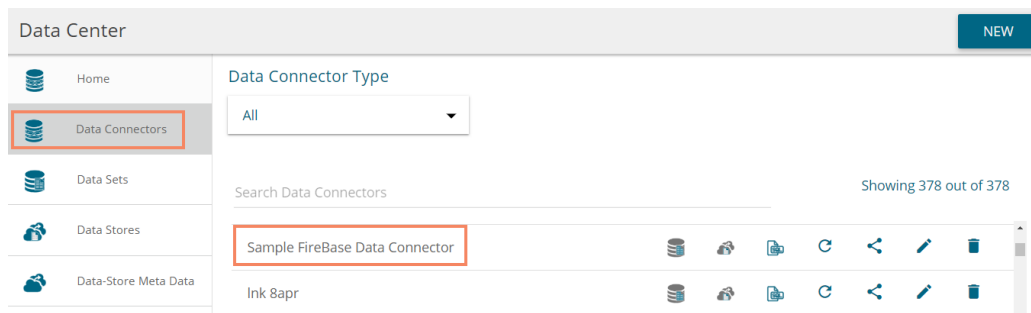


- vi) The Firebase Data Connector page opens with a notification that the users is successfully logged in to the selected account
 - a. Provide the Data Connector name
 - b. Describe the Data connector (optional)
 - c. Click the 'SAVE' option



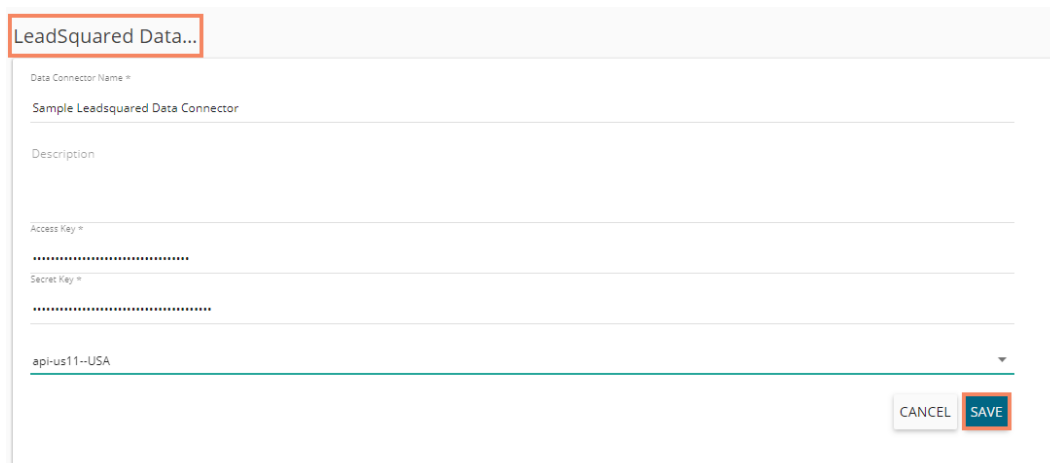
vii) A success message appears.

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

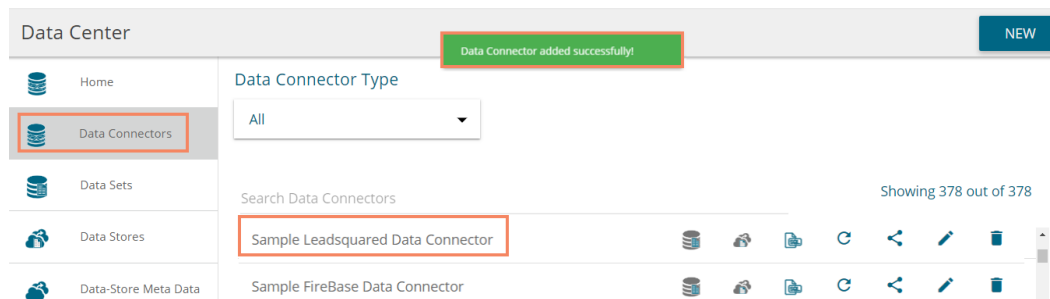


36. Leadsquared

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

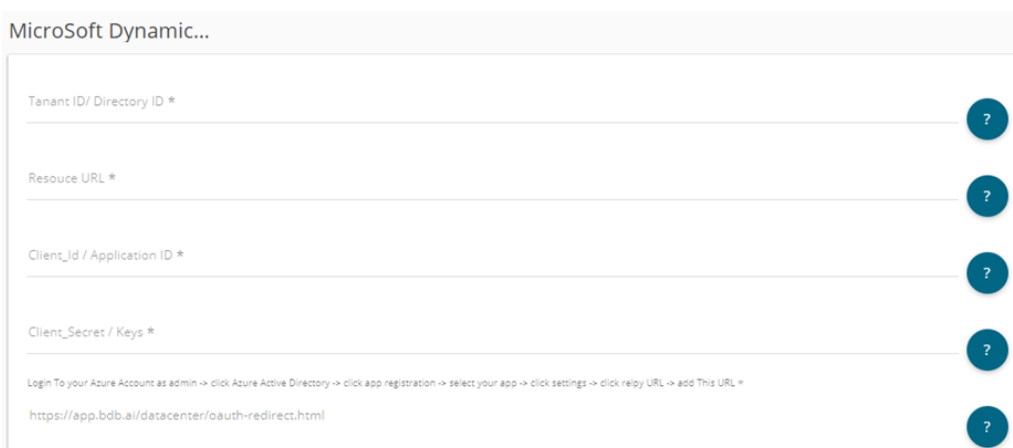


- v) A success message appears to inform that connection has been developed.
- vi) A new Leadsquared data connector gets created and added to the Data Connectors list.

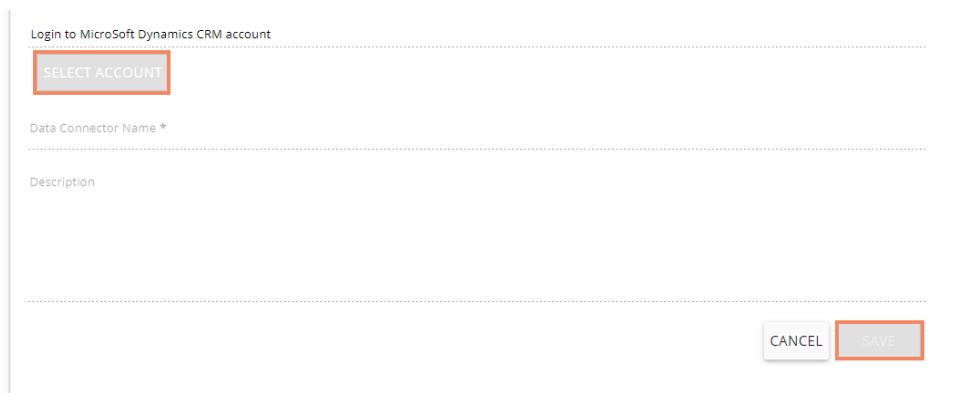


37. Microsoft Dynamics

- 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>)

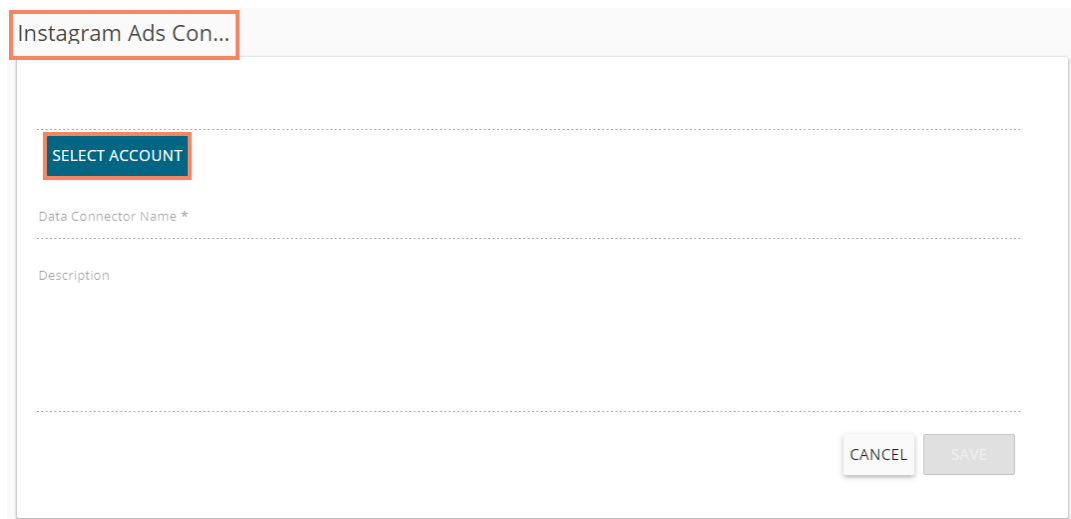


- viii. Log in to the Microsoft Dynamics CRM account by using the '**SELECT ACCOUNT**' option.
- ix. Provide the Data Connector Name.
- x. Describe the Data Connector (optional)
- xi. Click the '**SAVE**' option.
- xii. A success message appears.
- xiii. The newly created Microsoft Dynamics Data Connector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

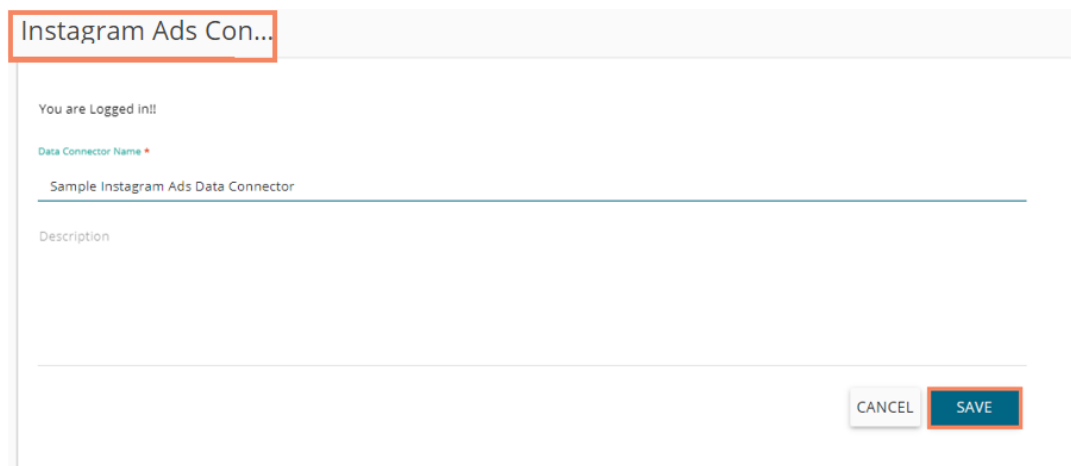


38. Instagram Ads

- 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.



- 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.



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.

FITBIT Connector

Login to FitBit account

SELECT ACCOUNT

Data Connector Name *

Description

CANCEL SAVE

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

fitbit

Welcome Back

Continue with Facebook

Continue with Google

EMAIL
Your email address

PASSWORD
Enter your password

Keep me logged in [Forgot password?](#)

Login

Want to try out Fitbit? [Sign up](#)

India About Us Help Privacy Policy Terms of Service Cookie Consent ©2019 Fitbit, Inc. All rights reserved.

- 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.

FITBIT Connector

Login to FitBit account

CHANGE ACCOUNT

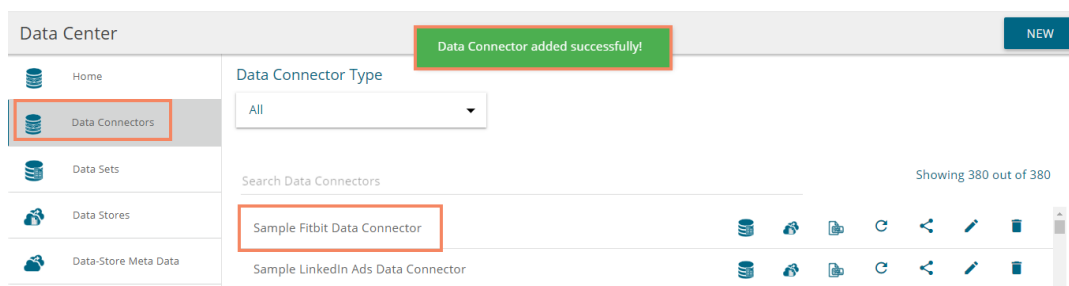
Data Connector Name *

Sample Fitbit Data Connector

Description

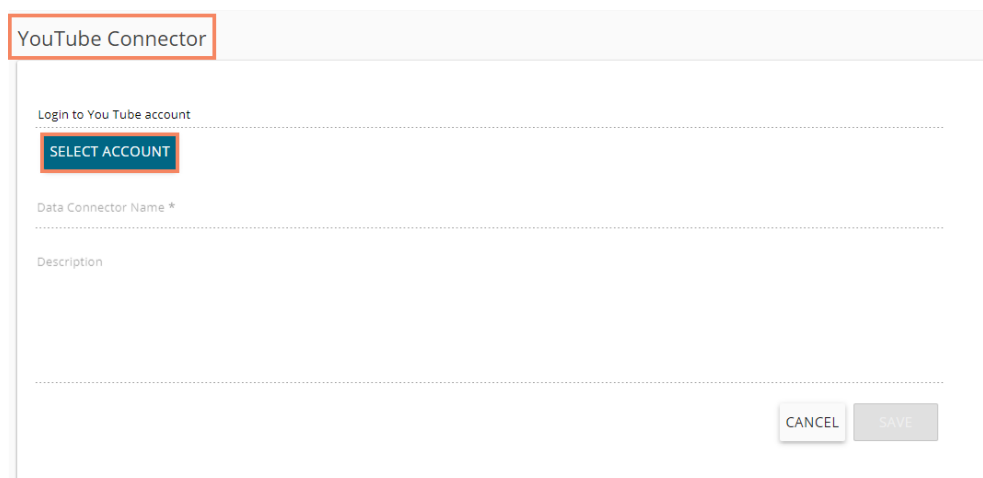
CANCEL **SAVE**

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

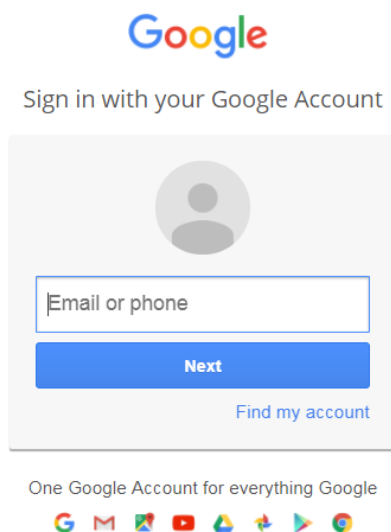


40. YouTube

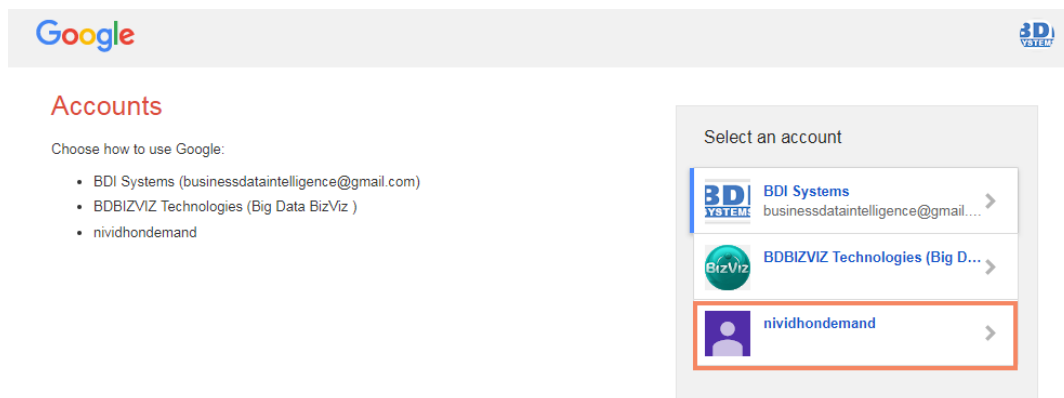
- i) Click the '**YouTube**' Data Connector icon from the Data Connector page.
- ii) The YouTube Data Connector page opens.
- iii) The user needs to login to a Google account (which is connected to Login to the YouTube) by clicking on the '**SELECT ACCOUNT**' option.



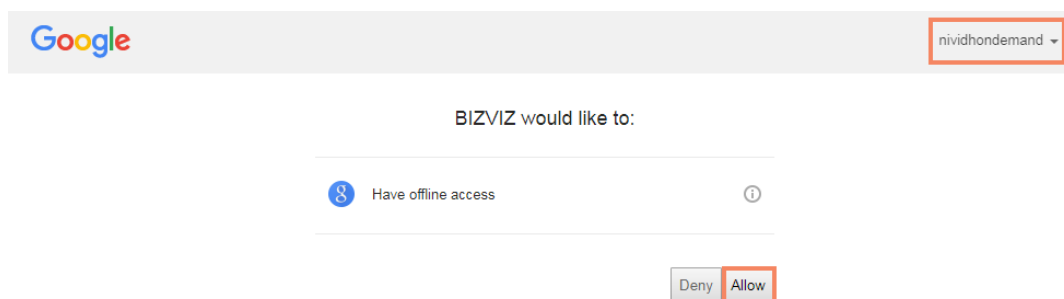
- iv) A new page appears asking credentials to log in to a Google account.



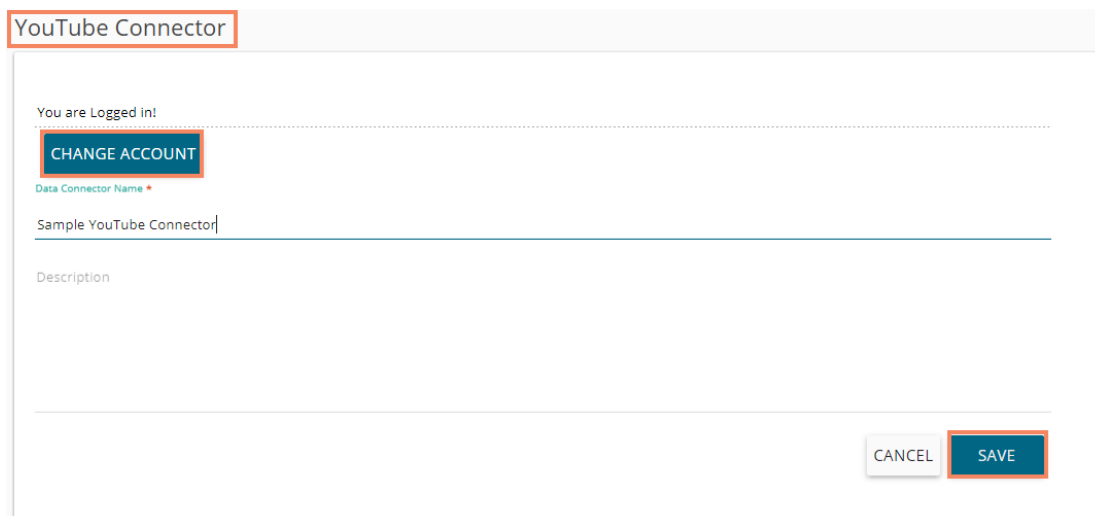
- v) After logging in the one Google account, the user needs to choose from the multiple Google accounts (in case of multiple Google accounts attached to single credentials).
E.g., the **'nividhondemand'** account has been selected in the below given image:



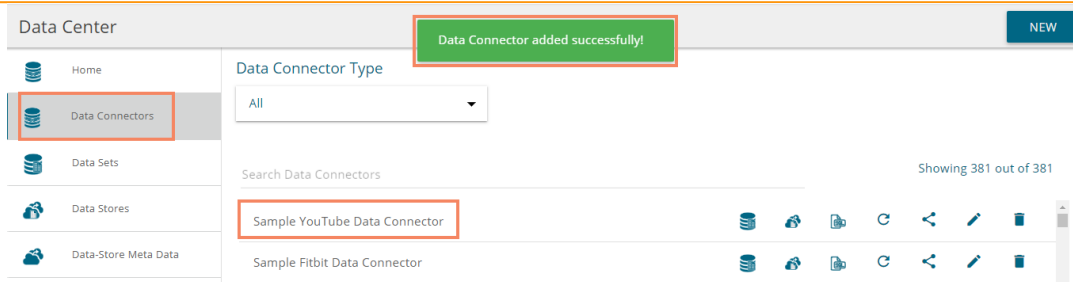
- vi) Click the **'Allow'** option to permit BDB to access YouTube data from the attached Google account.



- 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.



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



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.

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

- 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 **SAVE**

- 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!** **NEW**

Home

Data Connectors

Data Sets

Data Stores

Data-Store Meta Data

Data Connector Type: All

Search Data Connectors

Showing 682 out of 682

Sample Bing Ads Data Connector						
bi_proc_apr18						

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.

HubSpot Connector

Login to Hub Spot account

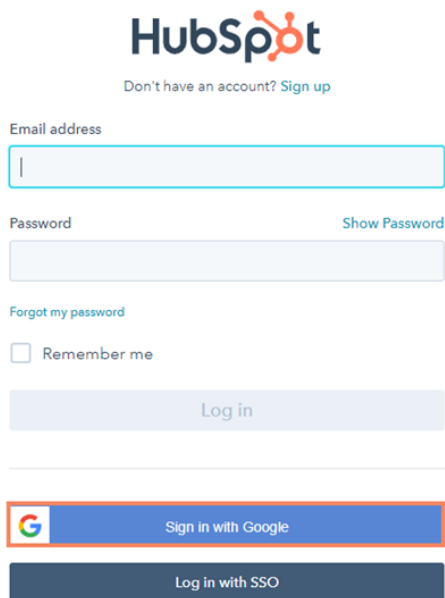
SELECT ACCOUNT

Data Connector Name *

Description

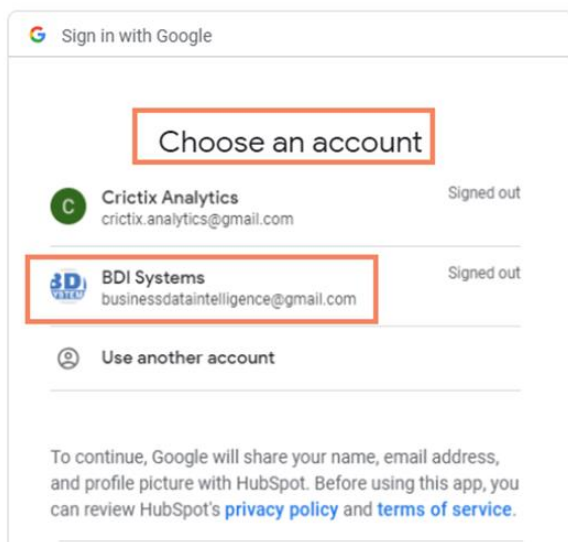
CANCEL **SAVE**

- 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.



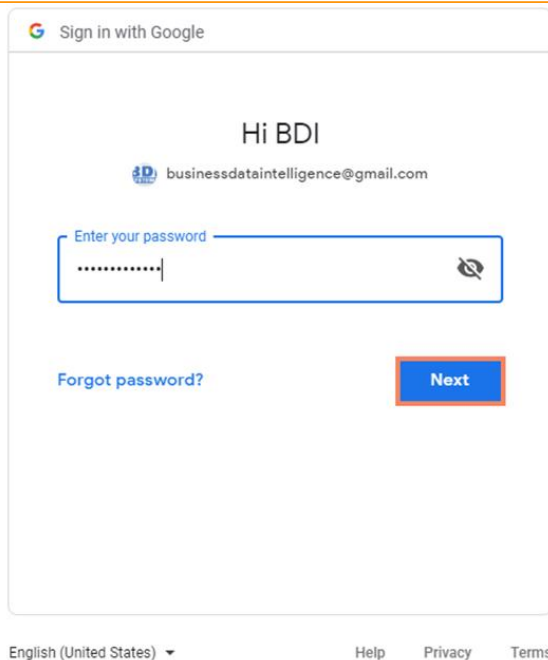
The image shows the HubSpot login page. At the top is the HubSpot logo and a link to 'Sign up' for users without an account. Below this are input fields for 'Email address' and 'Password', with a 'Show Password' link. There is a 'Forgot my password' link and a 'Remember me' checkbox. A 'Log in' button is present. Below the main form are two additional options: 'Sign in with Google' (highlighted with a red box) and 'Log in with SSO'.

- v) Choose a Google Account from the listed accounts.

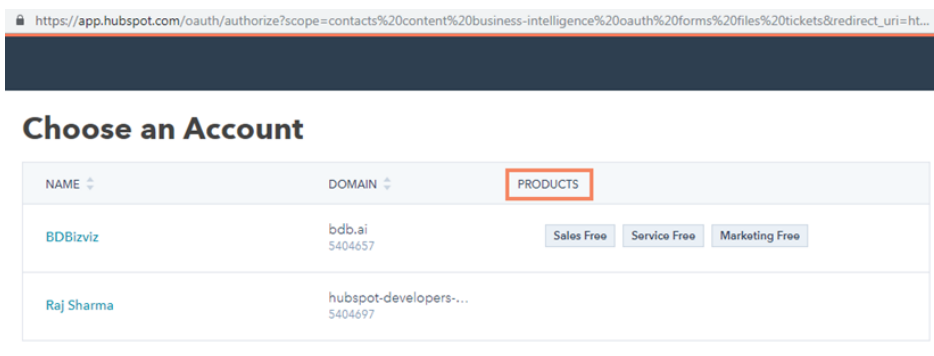


The image shows the 'Sign in with Google' screen. It prompts the user to 'Choose an account'. Two accounts are listed: 'Cricitix Analytics' (cricitix.analytics@gmail.com) and 'BDI Systems' (businessdataintelligence@gmail.com). The 'BDI Systems' account is highlighted with a red box. Below the accounts is a 'Use another account' option. At the bottom, there is a disclaimer: 'To continue, Google will share your name, email address, and profile picture with HubSpot. Before using this app, you can review HubSpot's [privacy policy](#) and [terms of service](#).'

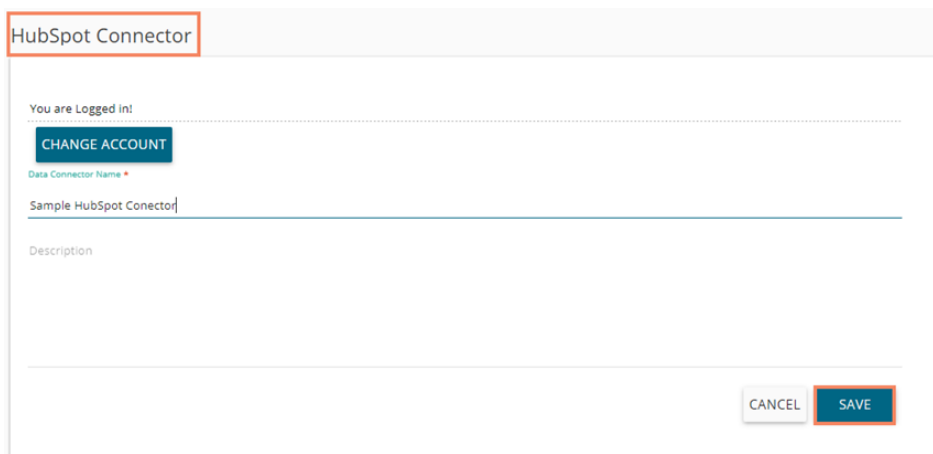
- vi) Enter the password for the selected account.
vii) Click the 'Next' option.



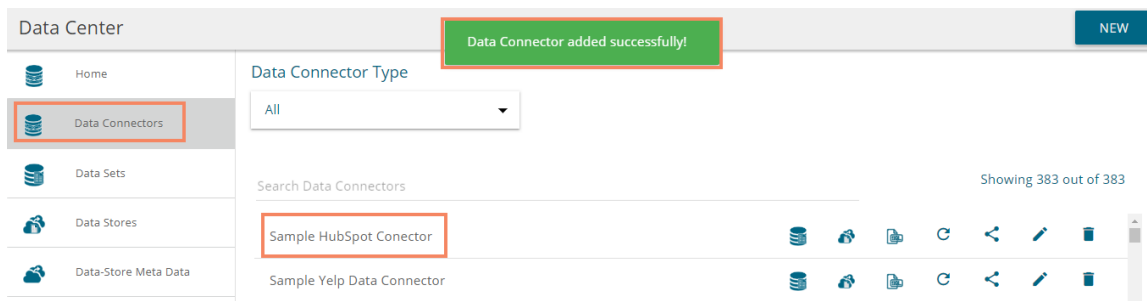
viii) Choose an option from the given choices under the PRODUCTS option.



- 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.



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

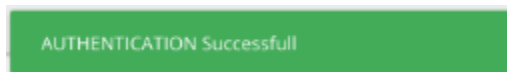


43. Yelp

- 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.

The screenshot shows the 'Yelp Data Connector' configuration form. The title 'Yelp Data Connector' is highlighted in a red box. The form contains three input fields: 'Data Connector Name *', 'Description', and 'Access Key *'. At the bottom right, there are three buttons: 'CANCEL', 'TEST' (highlighted in a red box), and 'SAVE'.

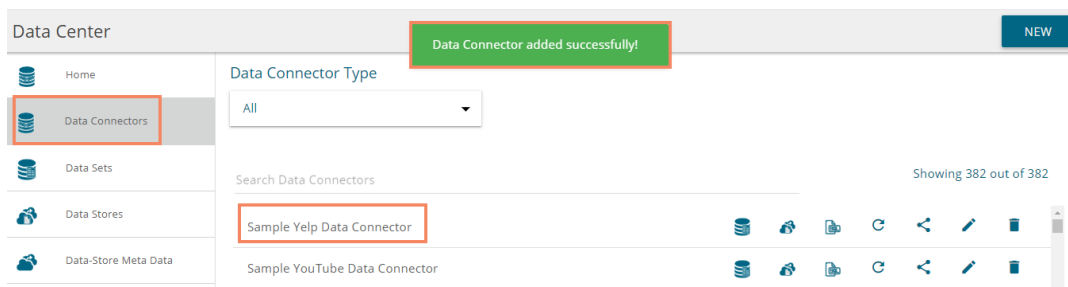
- e. A success message appears to inform the successful connection developed.



- f. The 'SAVE' option gets enabled.

The screenshot shows the 'Yelp Data Connector' configuration form after successful authentication. The title 'Yelp Data Connector' is at the top. The form fields are now populated: 'Data Connector Name *' is 'Sample Yelp Data Connector', 'Description' is empty, and 'Access Key *' is masked with dots. At the bottom right, the 'SAVE' button is now highlighted in a red box, indicating it is enabled.

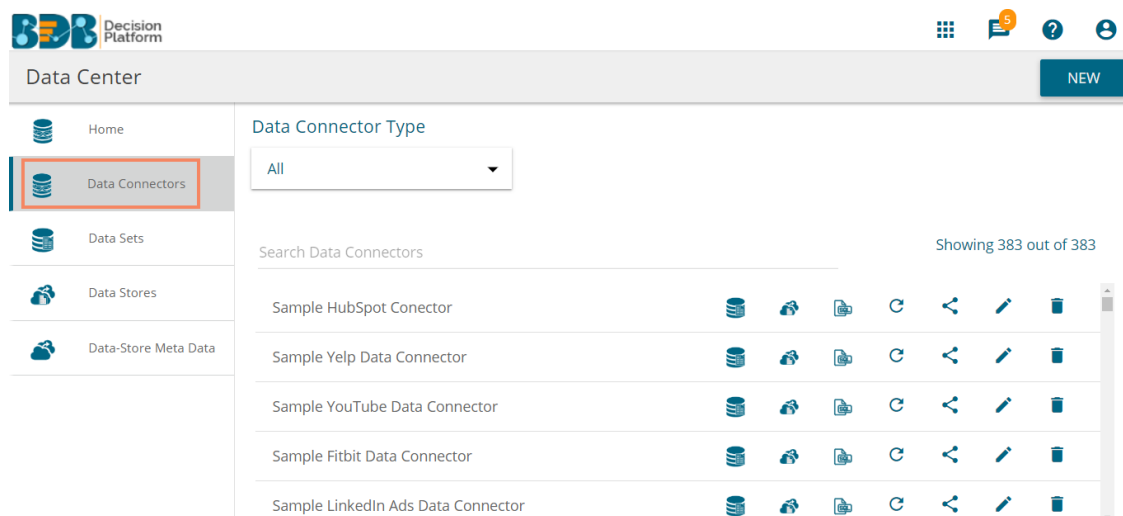
- g. Click the **'SAVE'** option to save the connector information.
- h. A success message appears, and the newly created Yelp Data Connector gets added to the Data Connectors List.



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 left side of the page.



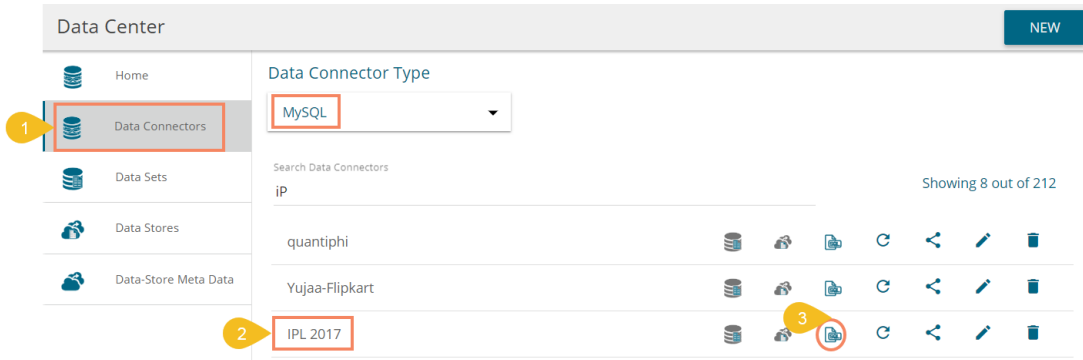
Option	Name	Task
	New Data Set	Redirects the user to create a new Data Set
	New Data Store	Redirects the user to create a new Data Store
	Reconnect	Reconnects to the server
	Share	Shares connector with the selected user(s) or group(s)
	Edit	Edits the connector fields
	Remove	Removes a connector from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

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

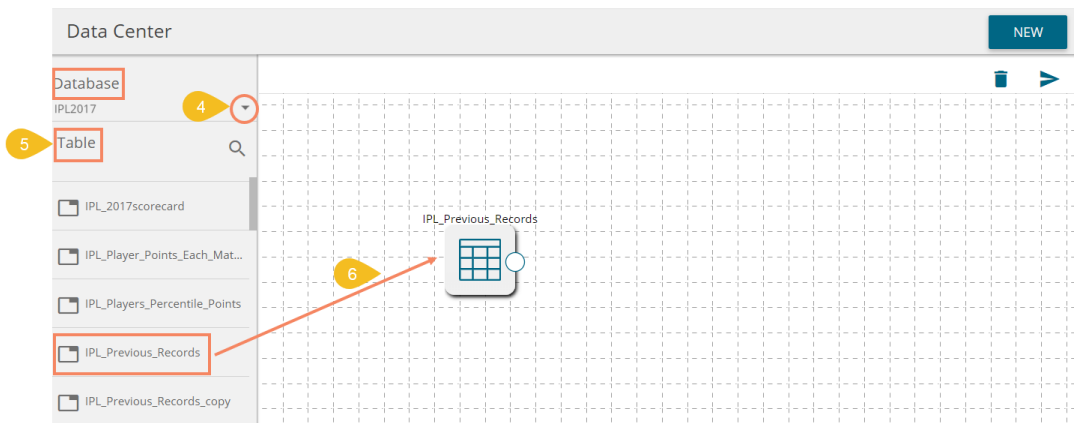
The query builder functionality is introduced to create database queries. It can be used to perform most database functions like count, max, min, average, and sum and write the Join statements (It supports all types of joins-left, right, inner, outer). The result can be the generated query, and the data 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.



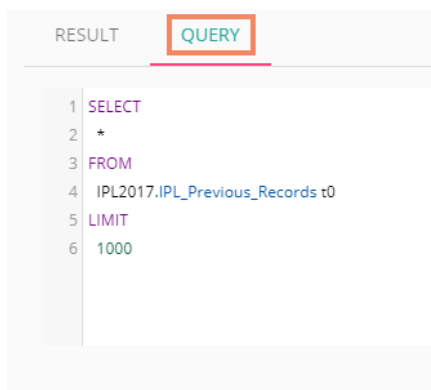
- iv) A new page opens redirecting the user to select a database.
- v) List of the existing tables appears from the selected database.
- vi) Drag-drop a database table to the workspace (The users can drag multiple tables to the workspace).



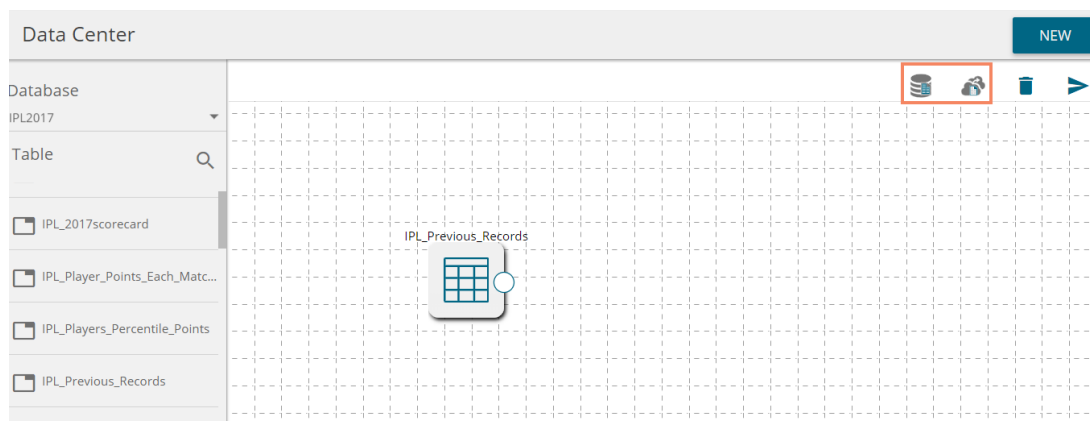
- vii) Click the 'Execute Query' icon.
- viii) The requested data gets sent to the server, and the result displays on the screen with two tabs - one for showing the query result and other displaying the generated query itself.
 1. The 'RESULT' tab opens by default with the preview of the data.

Team	Players	Runs	Balls	OutType	No_Four	No_Six	Strike_Rate	Over	Maidens	Wickets	RunBow	Economy	Venue
Kolkata Knight Riders	Morne Morkel	0	0	NIL	0	0	0	4	0	1	16	4	Sheikh Zayed Stadium, Abu Dhabi
Kolkata Knight Riders	Gautam Gambhir	0	8	b Malinga	0	0	0	0	0	0	0	0	Sheikh Zayed Stadium, Abu Dhabi
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 Dhabi
Kolkata Knight Riders	Plyush Chawla	0	0	NIL	0	0	0	3	0	1	15	5	Sheikh Zayed Stadium, Abu Dhabi
Kolkata Knight Riders	Sunil Narine	0	0	NIL	0	0	0	4	0	4	20	5	Sheikh Zayed Stadium, Abu Dhabi
Kolkata Knight Riders	Suryakumar Yadav	13	5	not out	3	0	260	0	0	0	0	0	Sheikh Zayed Stadium, Abu Dhabi

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



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

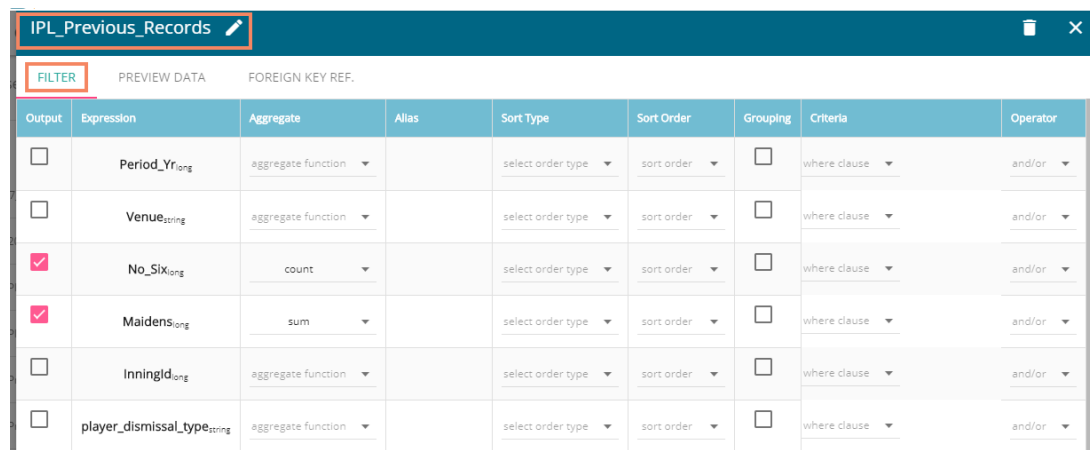


x) The users can click the dragged table component.

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.

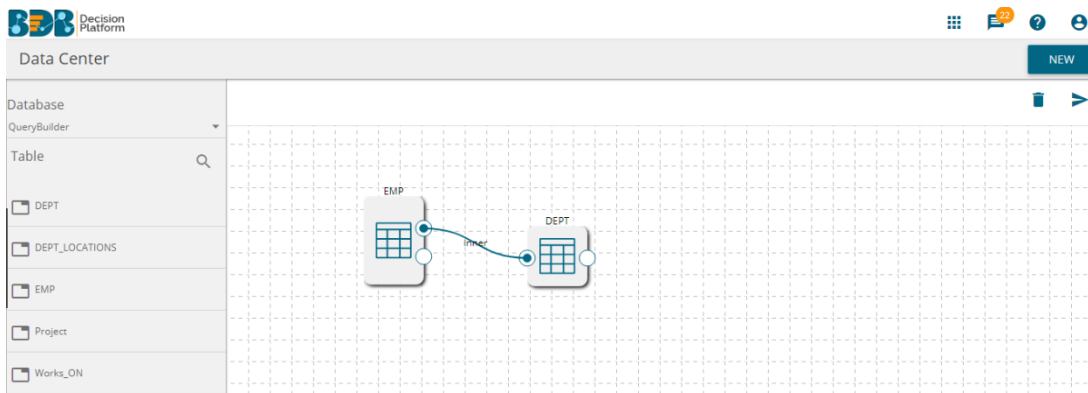
The user can get filtered data by selecting the columns using the checkboxes provided next to the columns.



- 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.

Team	Players	Runs	Balls	OutType	No_Four	No_Stk	Strike_Rate	Over	Maidens	Wickets	RunBowl	Economy	Venue
Kolkata Knight Riders	Morne Morkel	0	0	NIL	0	0	0	4	0	1	16	4	Sheikh Zayed Stadiu
Kolkata Knight Riders	Gautam Gambhir	0	8	b Malinga	0	0	0	0	0	0	0	0	Sheikh Zayed Stadiu
Kolkata Knight Riders	Jacques Kallis	72	46	c Anderson b Malinga	5	3	156.52	3	0	0	23	7.66	Sheikh Zayed Stadiu
Kolkata Knight Riders	Piyush Chawla	0	0	NIL	0	0	0	3	0	1	15	5	Sheikh Zayed Stadiu
Kolkata Knight Riders	Sunil Narine	0	0	NIL	0	0	0	4	0	4	20	5	Sheikh Zayed Stadiu
Kolkata Knight Riders	Suryakumar Yadav	13	5	not out	3	0	260	0	0	0	0	0	Sheikh Zayed Stadiu

- 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.'

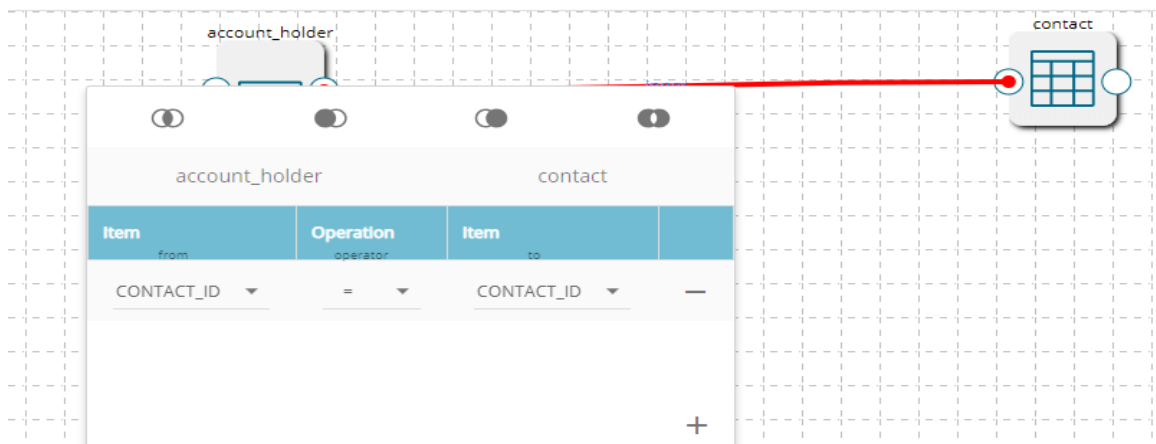


This column appears as 'FOREIGN KEY REF.' for the EMP table.

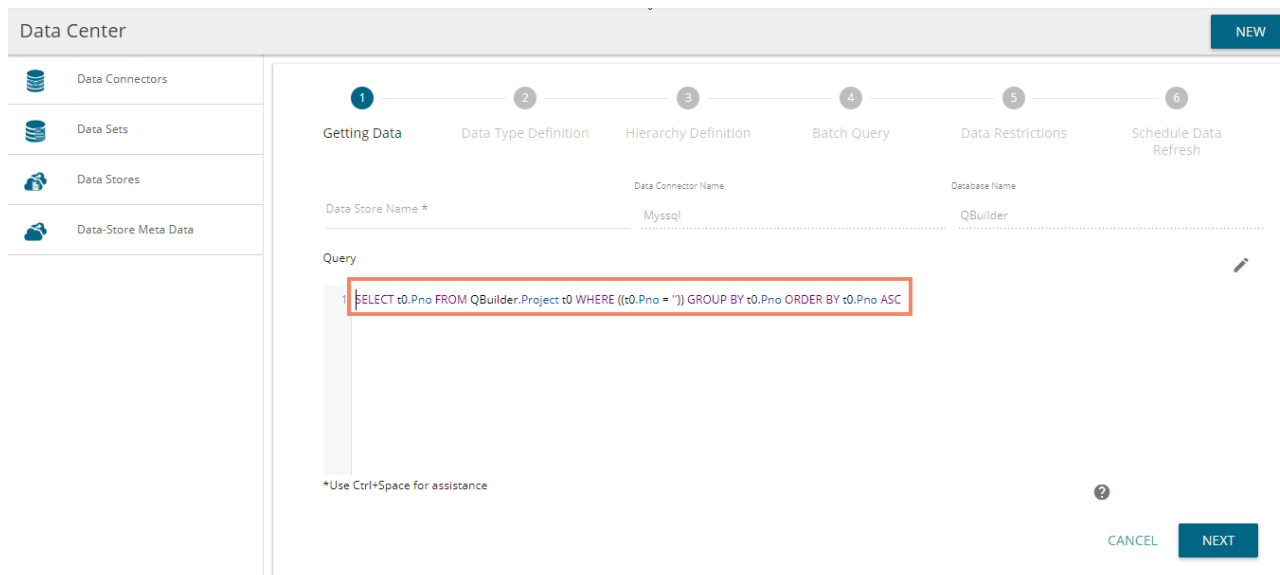
Column Name	Reference Column	Reference Table
Dno	Dno	DEPT

Note:

- The Alias Name of the table and the **'Delete'** option appear for the selected table while clicking on it.
- 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.



- 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.

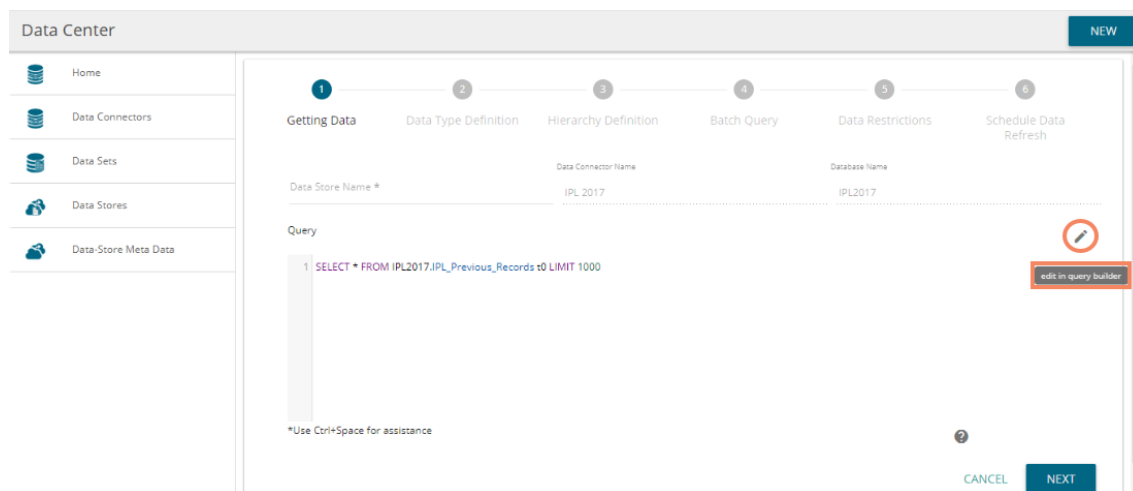


- Users can use the Query Builder functionality to create basic queries and perform various joins, but it is not possible to create in-depth BI queries using the current Query Builder option.

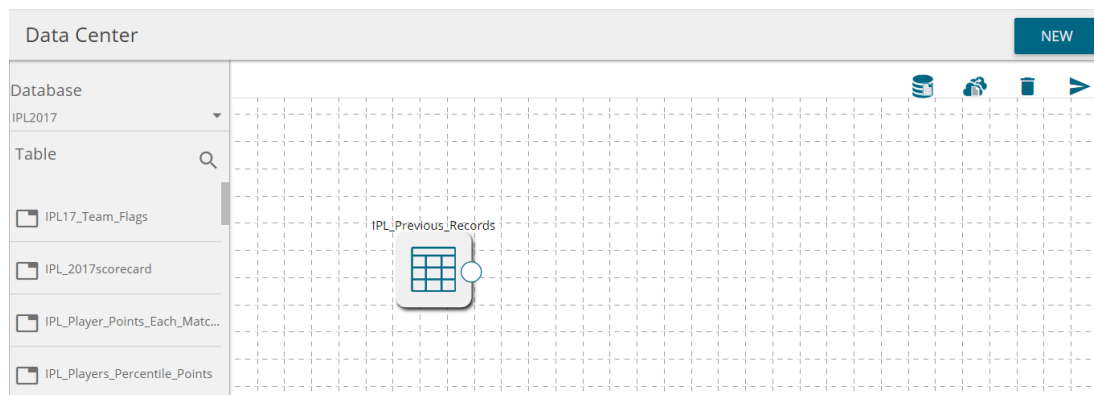
6.1.3.1. Editing Data Store/Data Set by using Query Builder

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'** icon in the Data Store page.




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.




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.

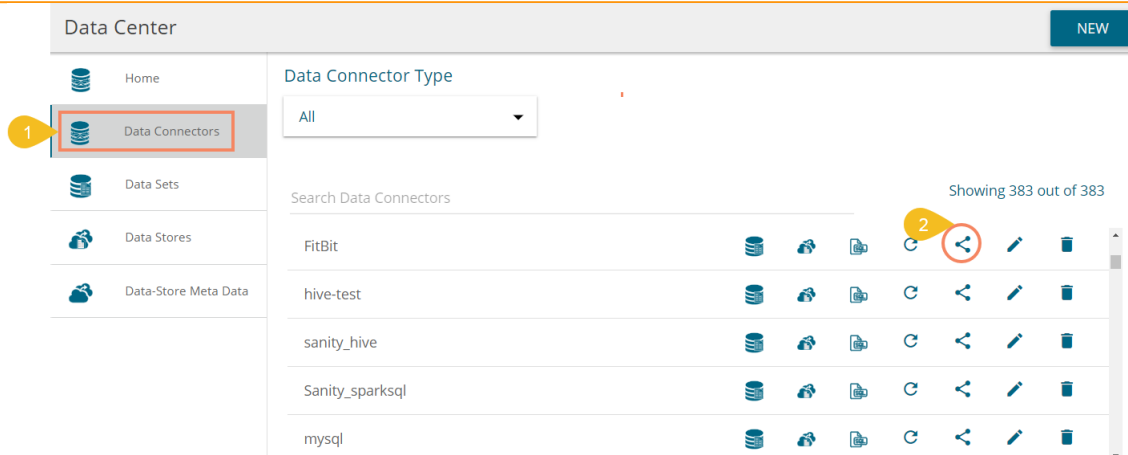
6.1.4. Reconnecting a Data Connector

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

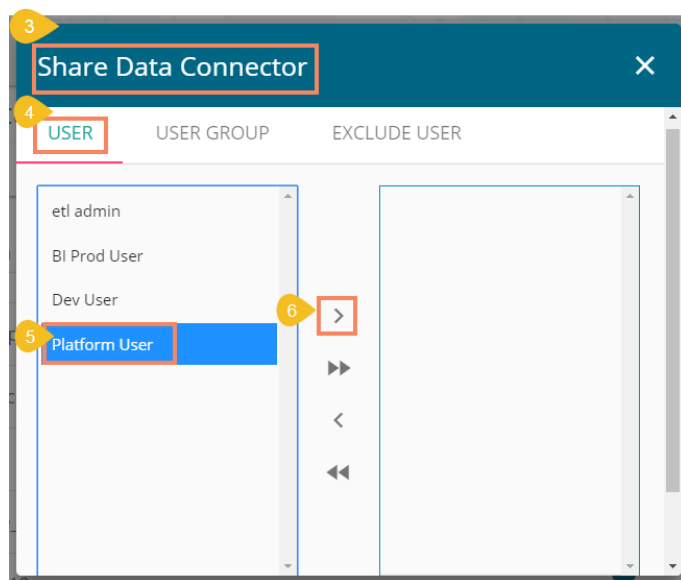
- iv) The selected data connector gets reconnected.

6.1.5. Sharing a Data Connector

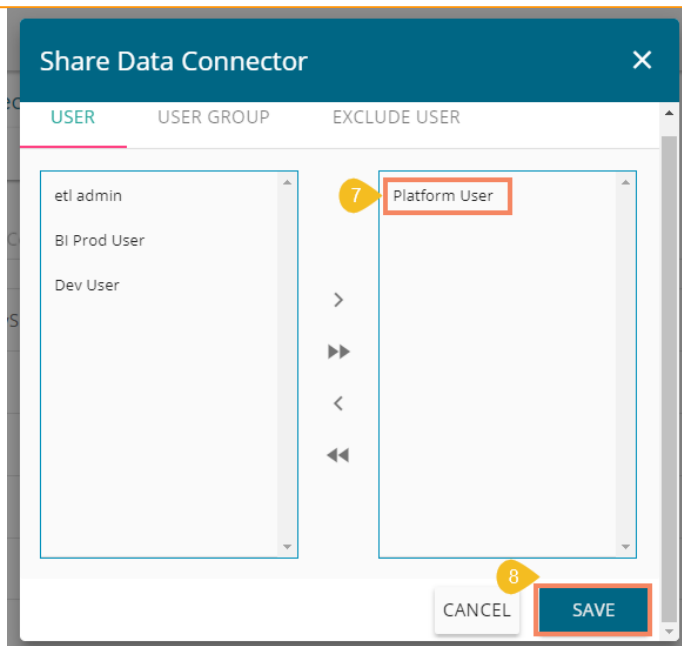
- i) Navigate to the Data Connector list.
- ii) Select a Data Connector and click the '**Share**'  icon.



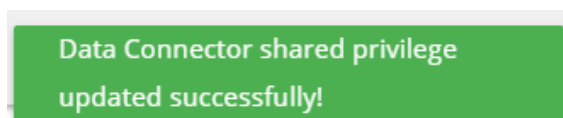
- iii) Users get directed to the **'Share Data Connector'** window.
- iv) Select an option out of the given choices: User and User Group/ Exclude User ('Exclude User' option can be chosen, if the document is already shared with a user/user group and you wish to exclude them from the privilege).
- v)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



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



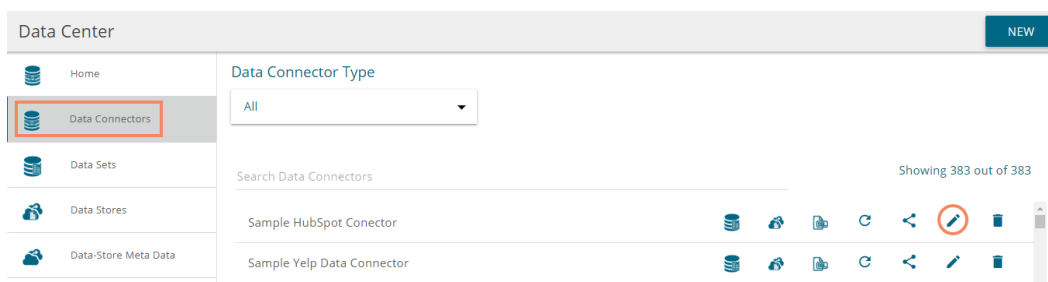
- ix) A message appears to communicate the same (as displayed below).



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.



- 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

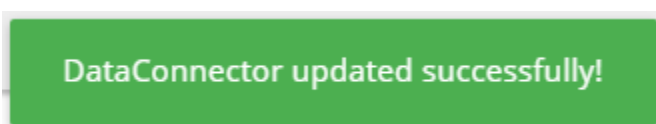
Data Connector Name *

Sample HubSpot Connector

Description


CANCEL SAVE

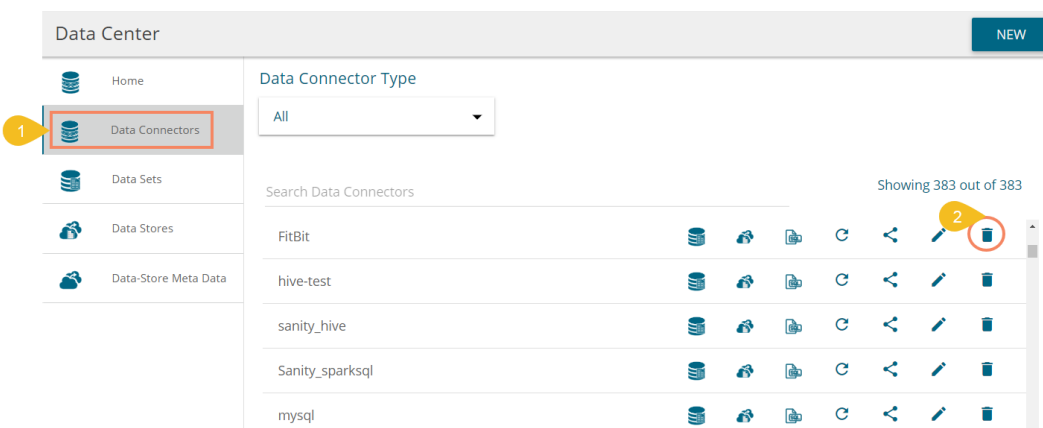
vi) A success message appears to inform the user that the data connector has been updated.



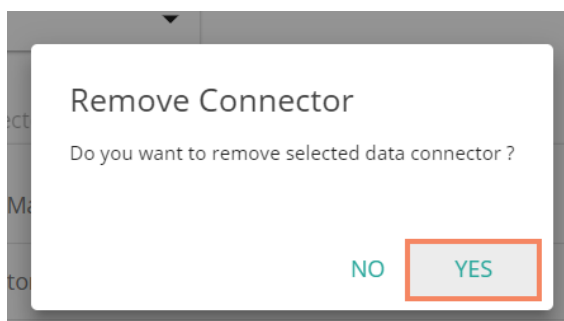
vii) The updated details get saved for the selected data connector.

6.1.7. Removing a Data Connector

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



- 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.

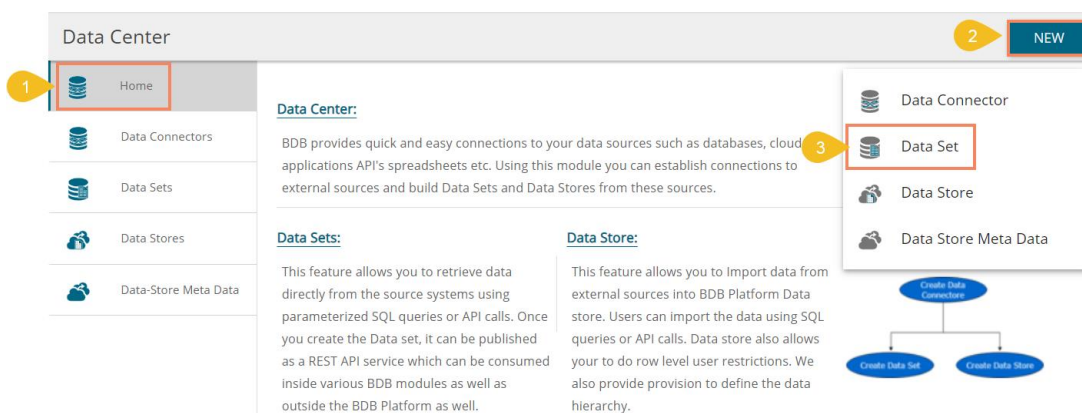
6.2. Data Set

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.

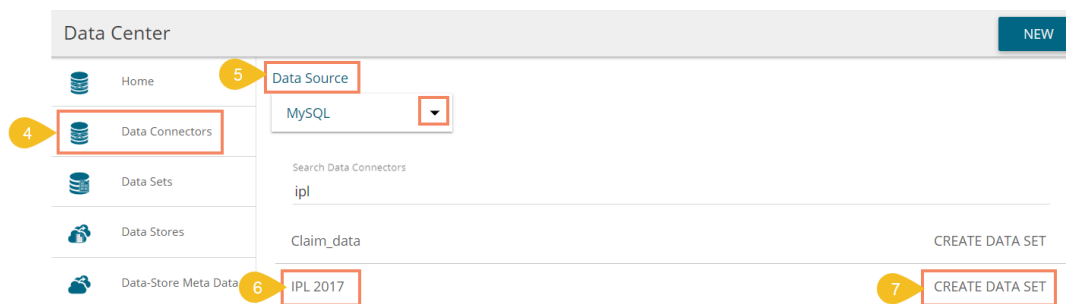
6.2.1. Creating a New Data Set using RDBMS or Big Data Connector

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.



- 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**

11 **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 `BowInn`,
10 ifnull(( `IPL_Previous_Records`. `RunBowI` / `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** **SAVE** **CANCEL**

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

15 **Successfully Executed...!** **NEW**

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 `BowInn`,
10 ifnull(( `IPL_Previous_Records`. `RunBowI` / `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**

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

17

Period_Yr	Team	Players	Runs	Balls	Wickets	SR	Batinn	BowlInn	ER
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

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

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

Data Center NEW

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

Data Connector Type: All | Data Connector: All | Publish Status: All

Search Data Sets Showing 2463 out of 2463

Sample Data Set	Download	View Link	Publish	Share	Edit	Remove
goals	Download	View Link	Publish	Share	Edit	Remove

18

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

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

6.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

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

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

Query

```

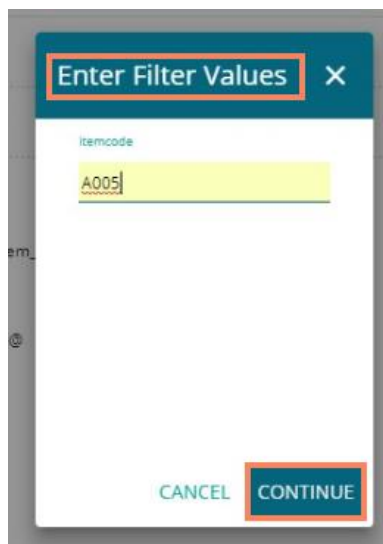
1 select date(tran_date) as dt, item_code , item_name,
2 itemamt as sm
3 from ccddb.bill
4 Where item_code=@itemcode@
5 limit 100
6

```

*Use Ctrl+Space for assistance

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
NEW

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

Data Connector Type
Data Connector
Publish Status

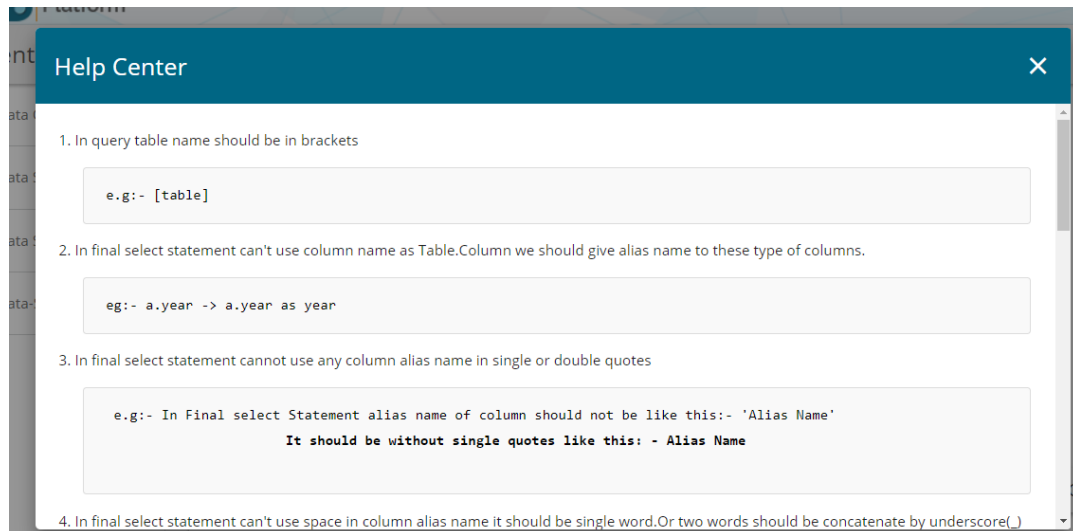
All
All
All

Showing 2463 out of 2463

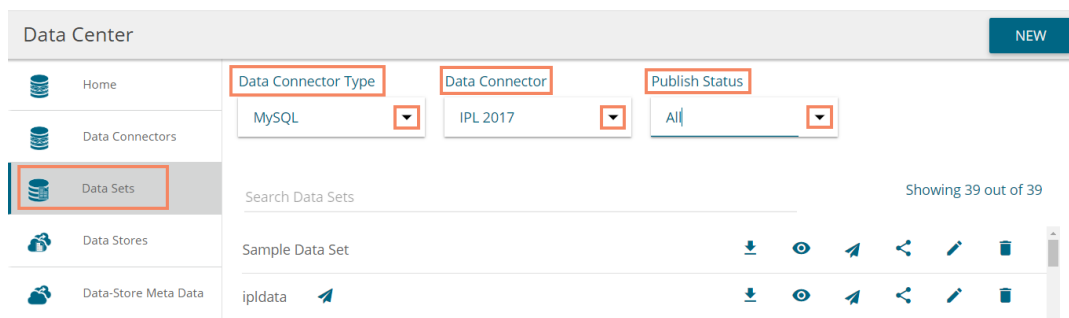
Sample Data Set	
goals	

Note:

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



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

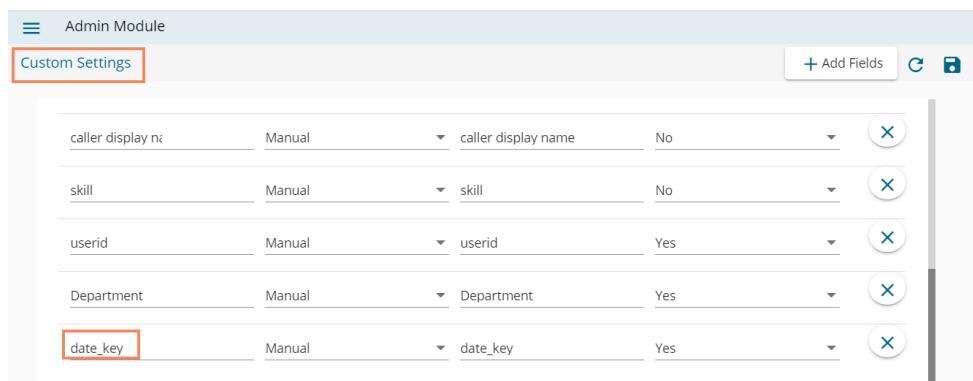


6.2.1.2. Restricting Displayed Data for End Users via Data Set

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.



- 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

VALIDATE SAVE 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

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

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

Update User

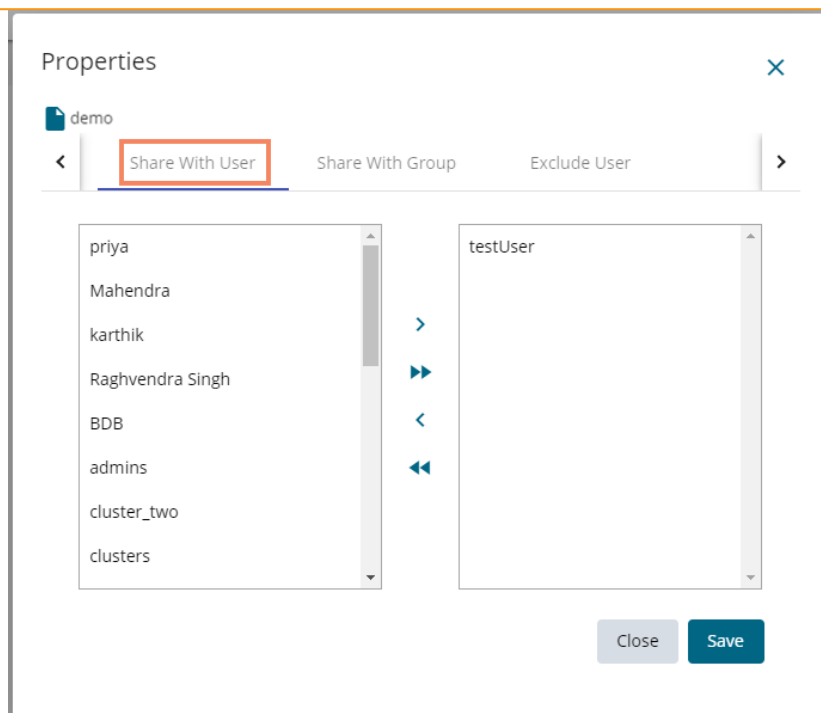
CANCEL SAVE

Keil

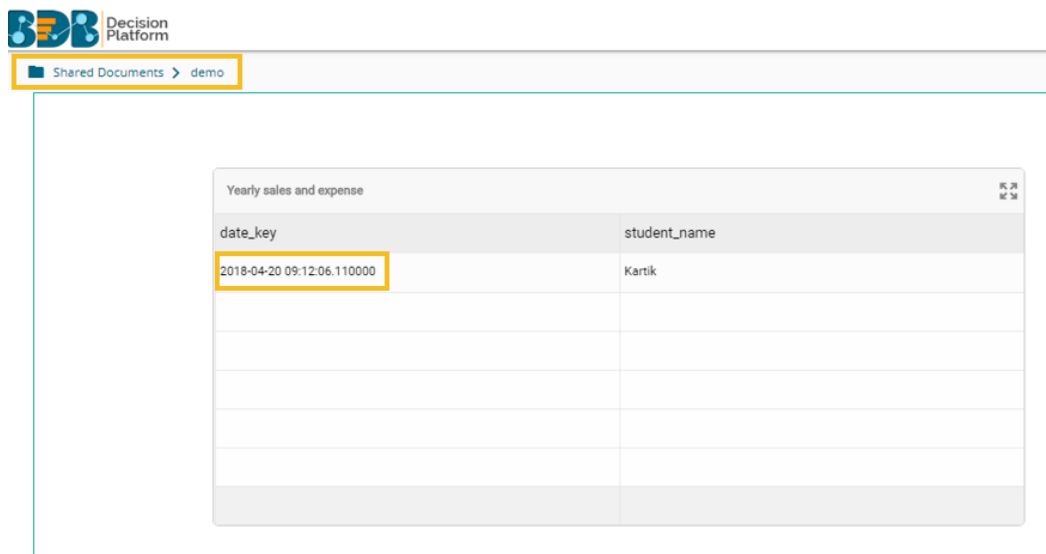
DATE_KEY

20-APR-18 09.12.06.110000000 AM

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

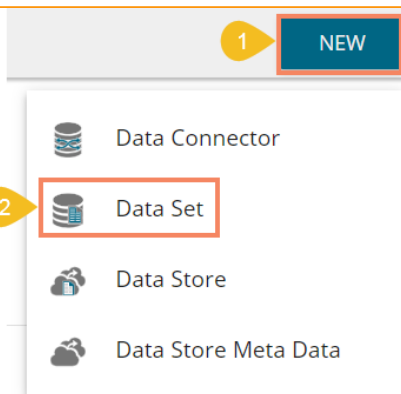


- viii) Access the dashboard from the updated user’s account to whom it was shared.
- ix) Open the shared dashboard; the dashboard displays only permitted data by the admin.

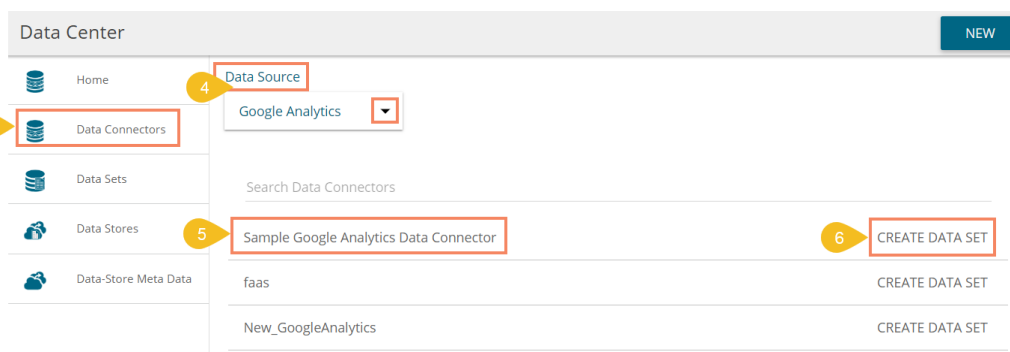


6.2.2. Creating a New Data Set Using API Connectors

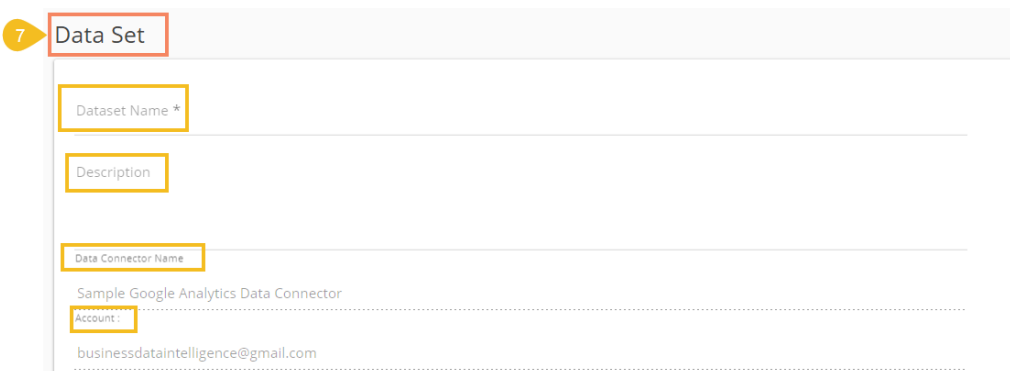
- i) Click the **'NEW'** menu from the Data Center page.
- ii) Select the **'Data Set'** option from the context menu.



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



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



- 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 Selection

Web Property *

BdBizViz UA-22551973-4

View *

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

- 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.

9 Apply Filters:

filter query *

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

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

CANCEL PREVIEW DATA SAVE

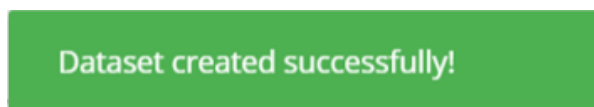
- ix) After getting the data preview in the tabular format, click the '**SAVE**' option.

CANCEL PREVIEW DATA SAVE

Preview of 10 rows are shown below

ga: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.



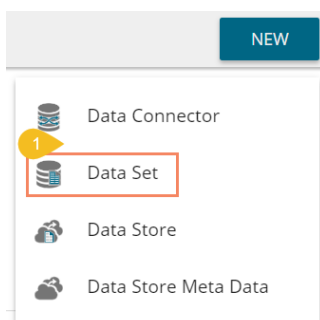
xi) The newly created Google Analytics dataset gets added to the 'Data Sets' list.

Data Center NEW

	Data Connector Type	Data Connector	Publish Status
Home	All	All	All
Data Connectors			
Data Sets	Search Data Sets		Showing 600 out of 600
Data Stores	Sample Google Analytics Data Set		Download View Refresh Share Edit Delete
Data-Store Meta Data	oracle_apr19		Download View Refresh Share Edit Delete

6.2.3. Creating a New FTP Data Set

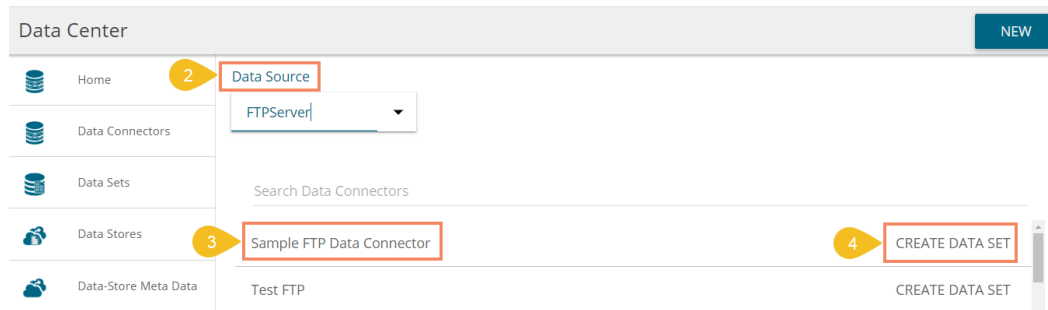
i) Select 'Data Sets' from the 'NEW' context menu



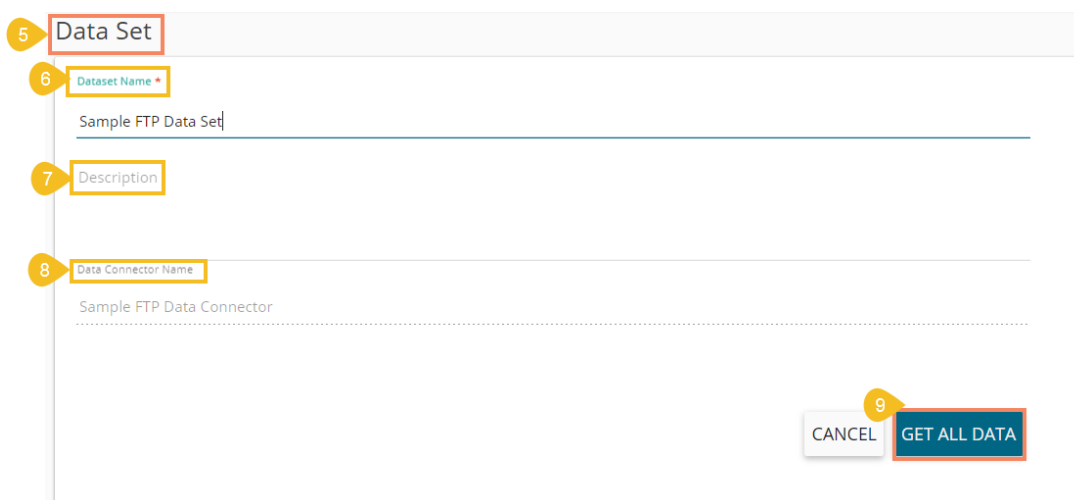
ii) The Data Connectors list appears

- a. Select an FTP Server using the data source filter
- b. Select an FTP Data Connector from the list

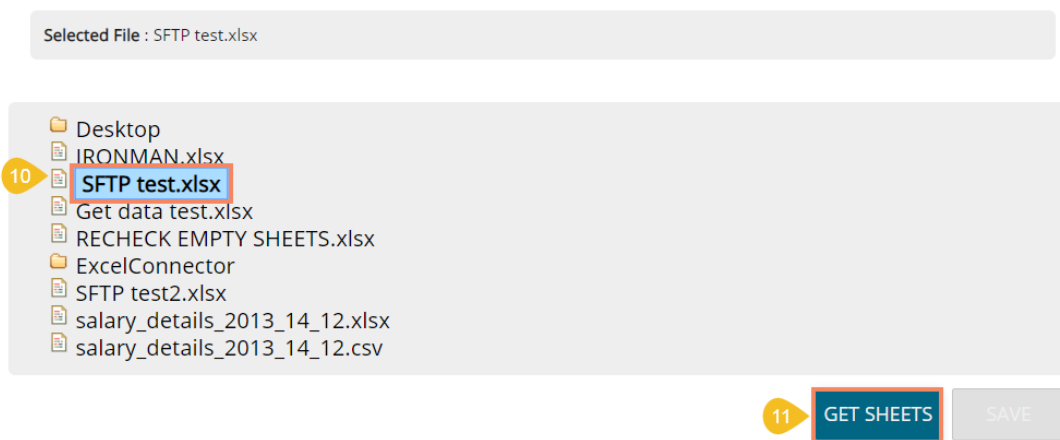
c. Click the **'CREATE DATA SET'** option



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

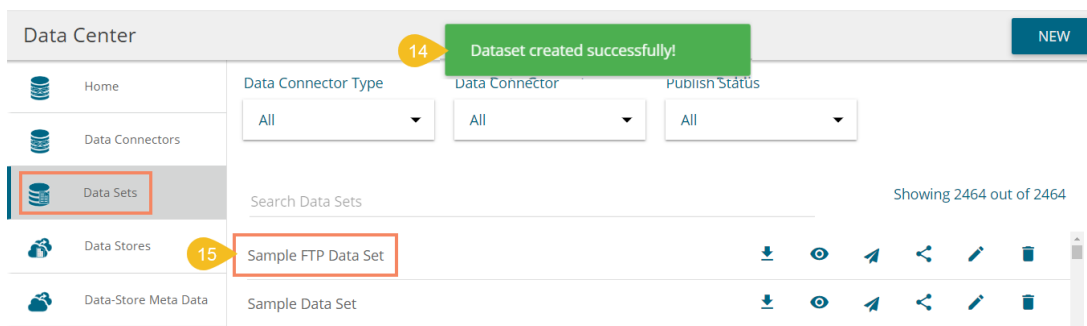


- iv) Select a file from the displayed list (Use double-click on a file to select it.)
- v) After selecting a specific file, click the **'GET SHEETS'** option.



- vi) Choose a sheet using the drop-down menu.
- 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.



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.



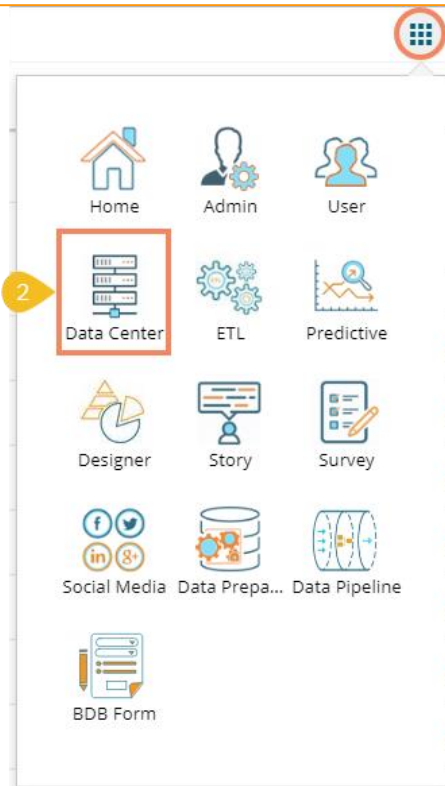
Email *

Password *

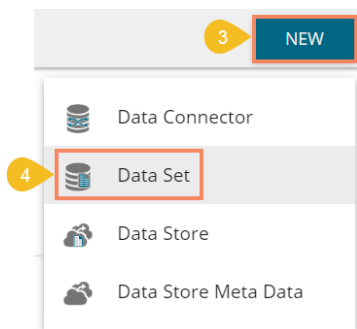
1 Auth Type
CA PPM

Continue

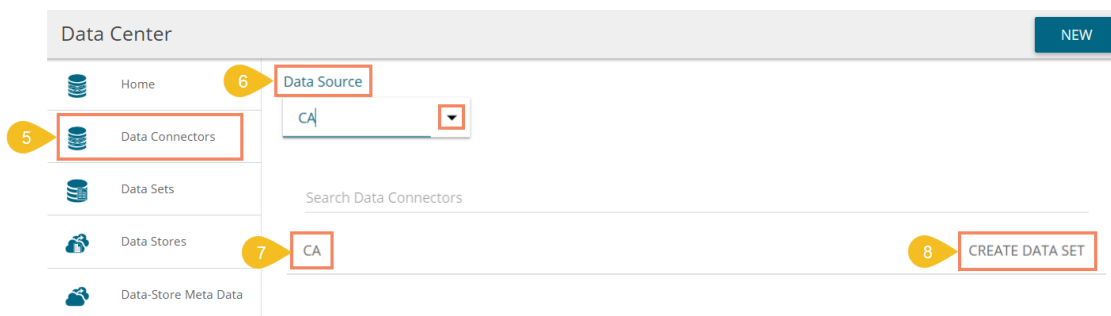
- ii) Select the 'Data Center' module from the Apps menu.



- 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.



- 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

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

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.

quer:reportid

quer:reportid_from

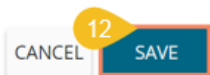
quer:reportid_to

quer:reportid_in

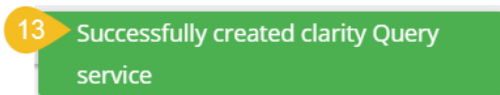
quer:report_name

quer:report_name_from

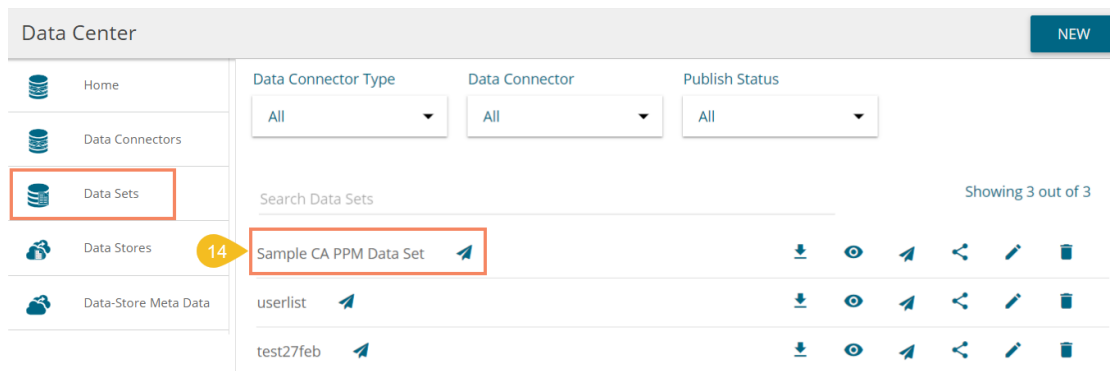
- e. Click the 'SAVE' option.



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.



Note:

- 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.
- 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.
- Users get only partial data downloaded if the Data Set contains records more than 5000. The downloaded document carries a notification in this regard.

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

6.3. Data Store

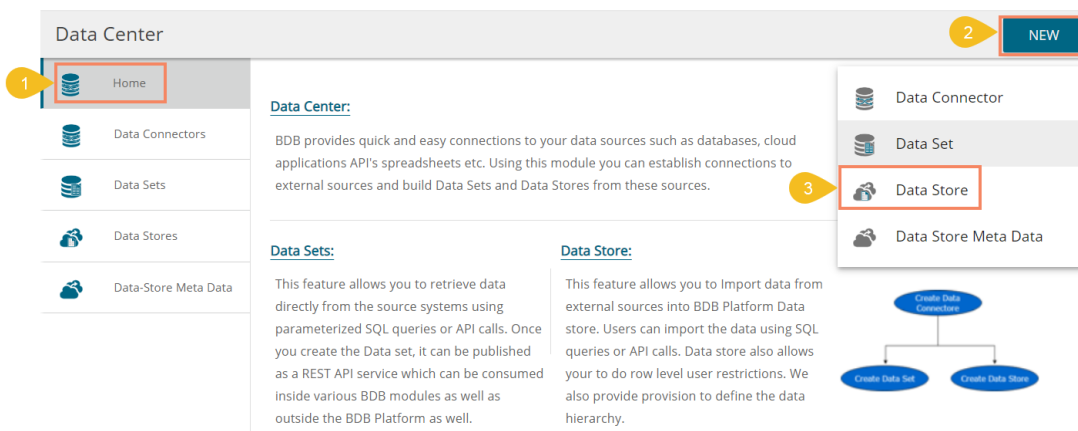
Data store is a data source for persistently storing and managing collections of data which include not just repositories like databases, but also more straightforward data store types such as simple files, emails. BDB Data Stores use Elastic Search for data interaction to use in the visualization layer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

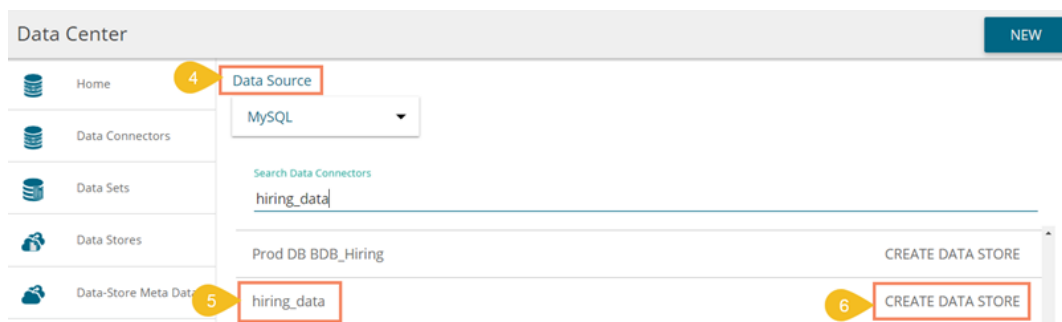
6.3.1. Creating a New Data Store

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.



- 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.



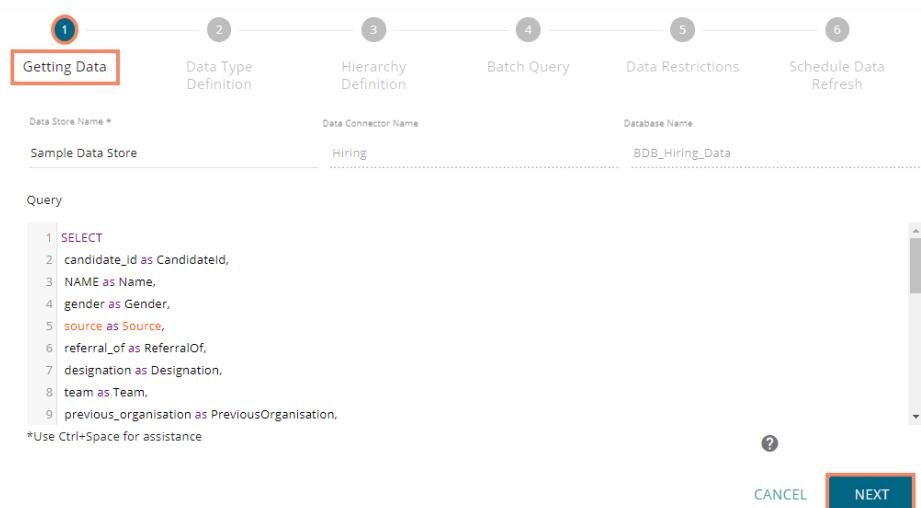
- v) The **'Getting Data'** option opens to create a new Data Store.

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:** The field displays a pre-selected database name based on the selected data connector.

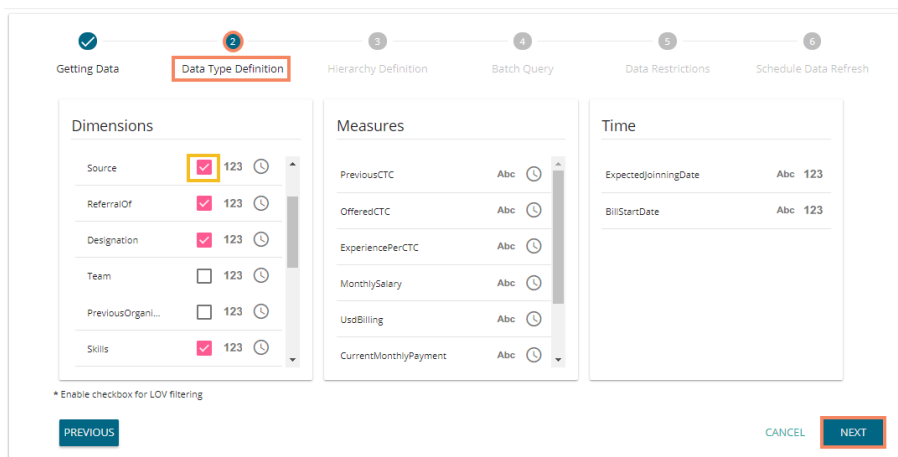
- iv) **Query:** Write the query service in the given space (Use 'Ctrl+Space' for assistance in writing a query).
- v) Proceed on the next tab by clicking the 'NEXT' option.



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.



Note:

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

Options	Description
Abc	Move to Dimensions

123	Move to Measures
	Move to Time

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

6.3.1.3. Hierarchy Definition

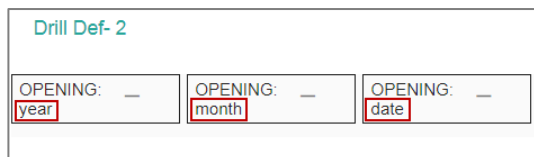
Define hierarchy using various dimensions and time options.

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



Note:

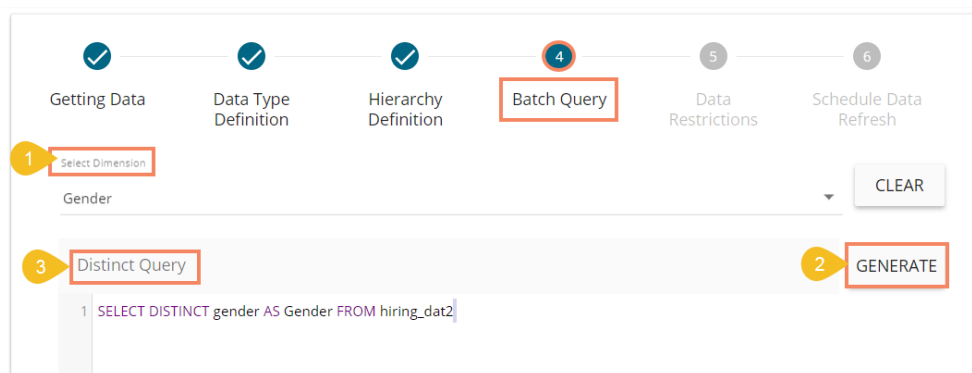
- Click the **'PREVIOUS'** option to go back to the previous tab.
- Click the **'Remove'** option (in the Drill Def box) to remove the defined hierarchy using the selected option.
- The **'Date Drill'** functionality is available for the Time dimensions. By default, the Time dimensions can be split into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



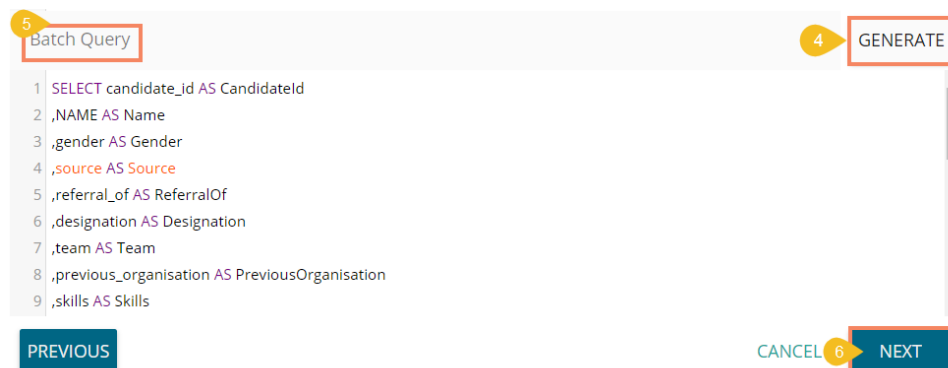
6.3.1.4. Batch Query

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

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



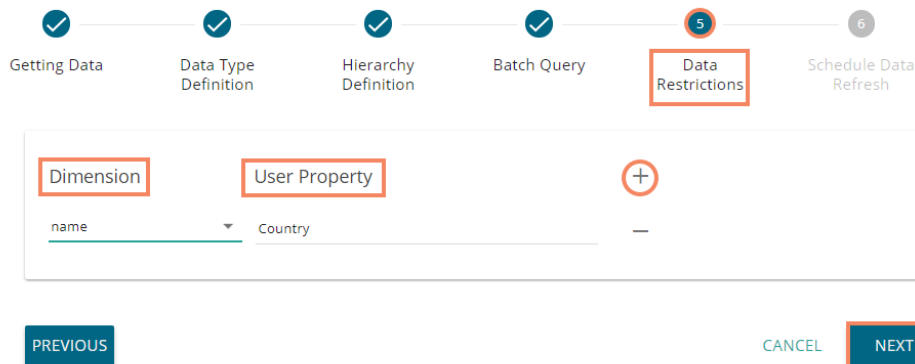
- iv) Click the **'Generate'** option provided for the **'Batch Query'** option.
- v) The original query generates with the distinct query specifications to fetch data.
- vi) Proceed to the next tab by clicking the **'NEXT'** tab.



6.3.1.5. Data Restriction

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

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

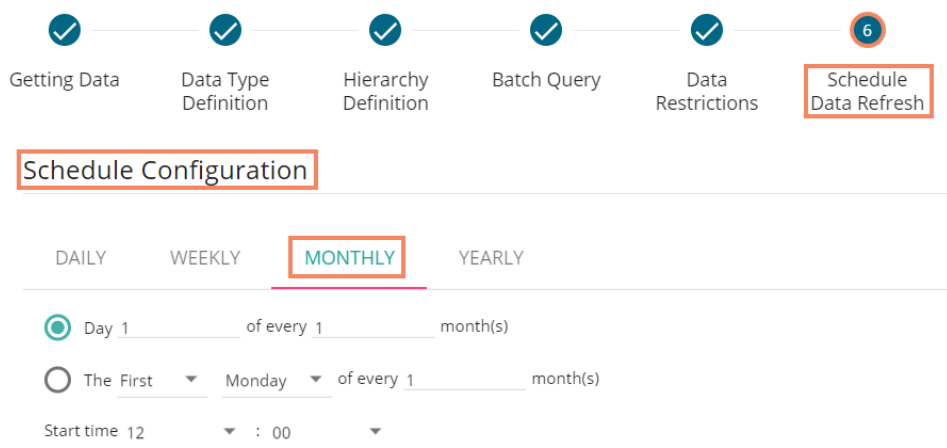


Note: The Administrator can restrict access to data for a specific user by configuring the User Property via the ‘Data Restriction’ tab. E.g., If for a user/user group ‘Country’ custom field is provided value ‘India,’ and the administrator passes ‘Country’ as User Property while creating a data store.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

6.3.1.6. Schedule Data Refresh

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

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

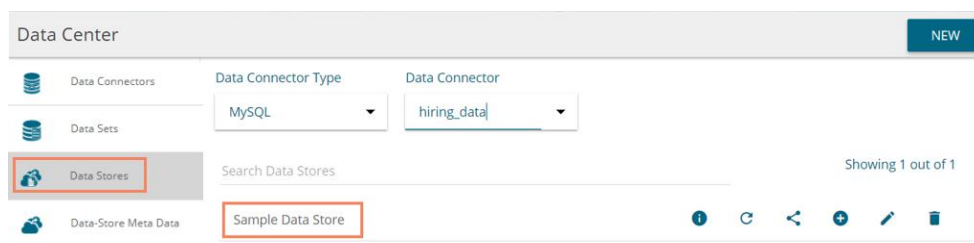


- iii) Select the ‘Refresh Now’ option by enabling the box to refresh the data store immediately after it gets created.
- iv) Enable Email Notification by enabling the option
- v) Provide the Email Address to receive the notification email regarding the Data Store.

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

Refresh Now
 Enable Email Notification
 Email Address *

- vii) A message will pop-up to confirm that the data store configuration has been saved.
- viii) The Data Store List opens.
- ix) A new data store gets created and added to the displayed list.

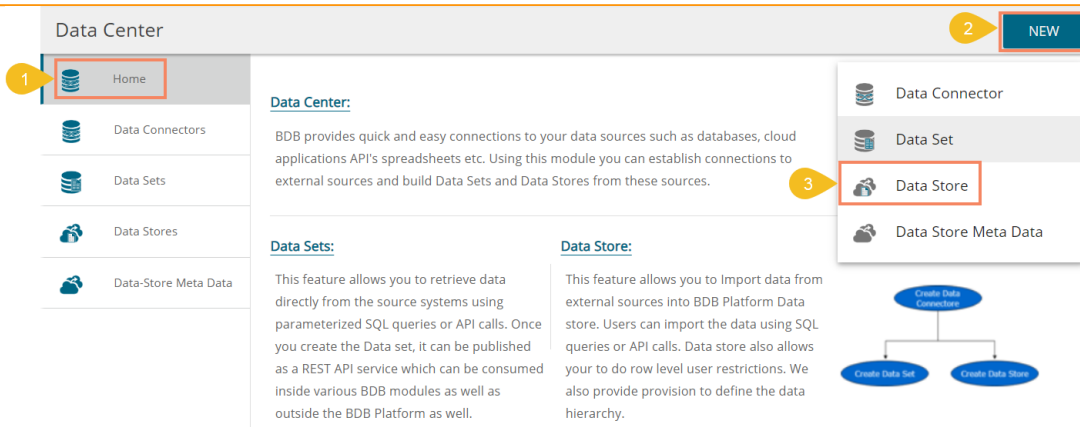


Option	Name	Task
	Latest Scheduler Status	Displays the latest scheduler status via a pop-up window
	Refresh Data	Refreshes data for a datastore
	Share Data Store	Shares a datastore to/for the selected user(s) or group(s)
	Add Synonyms to Data Store	Adds more synonyms to a datastore
	Edit	Edit the datastore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

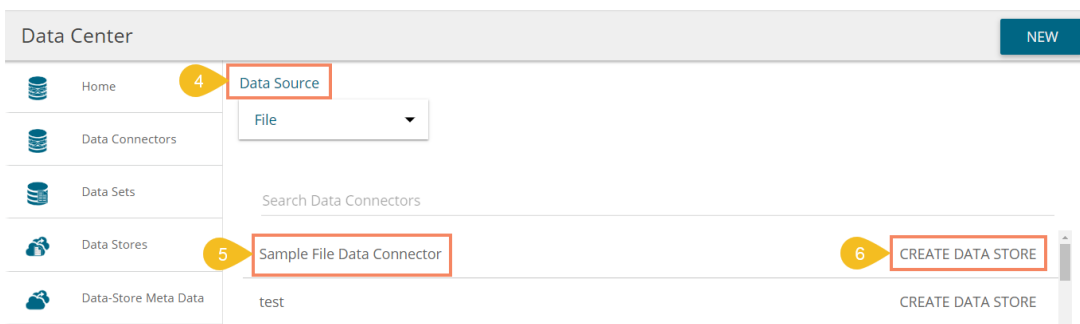
6.3.2. Creating a New Data Store Using a Flat File Data Connector

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.



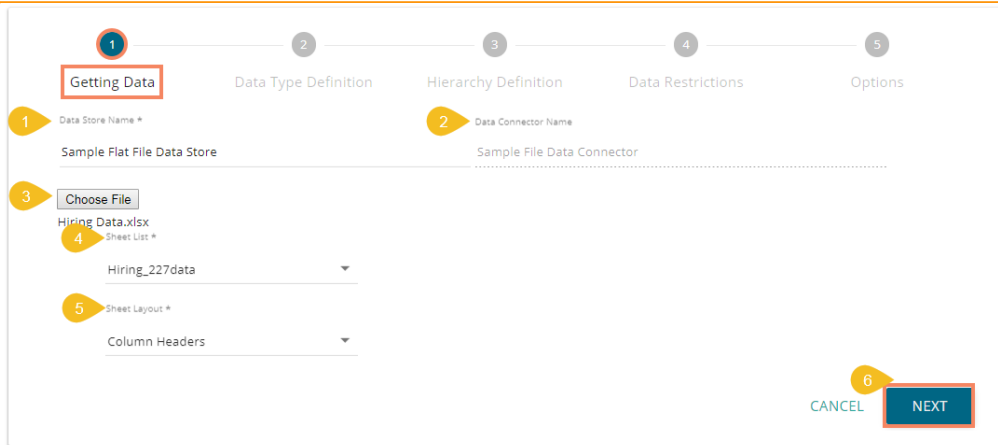
- iv) A new page opens.
 - a. Select a Connector Type from the 'Data Source' filter (E.g., MySQL data source is selected in the following image).
 - b. Select a data connector from the Data Connector list.
 - c. Click the 'CREATE DATA STORE' option provided next to the selected data connector.



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

Step 1- Getting Data

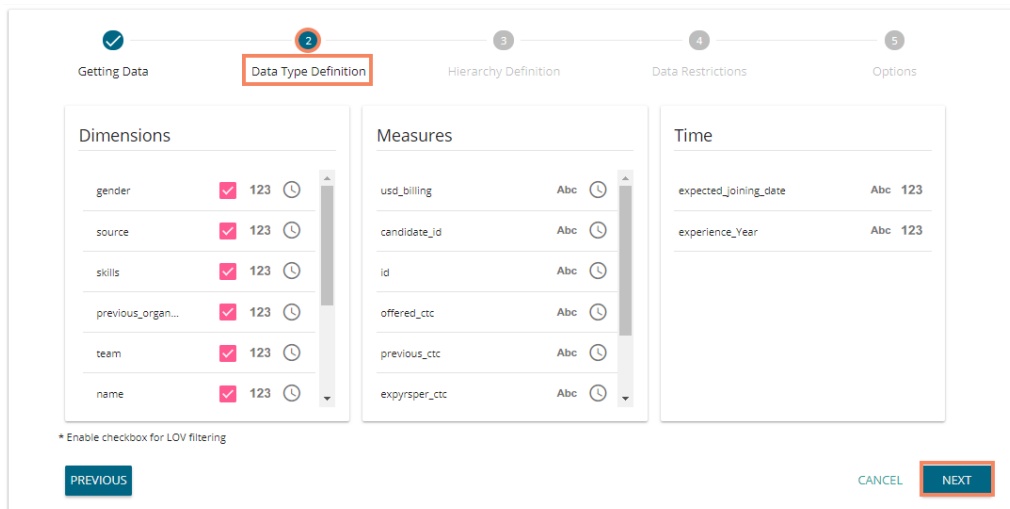
- i) Fill in the following information:
 - a. **Data Store Name:** Enter a data store name.
 - b. **Data Connector Name:** Displays the preselected name of the selected data connector in this field.
- ii) Click 'Choose File' to browse a file from the system.
- iii) Configure the following information 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.



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


Step 2- Data Type Definition

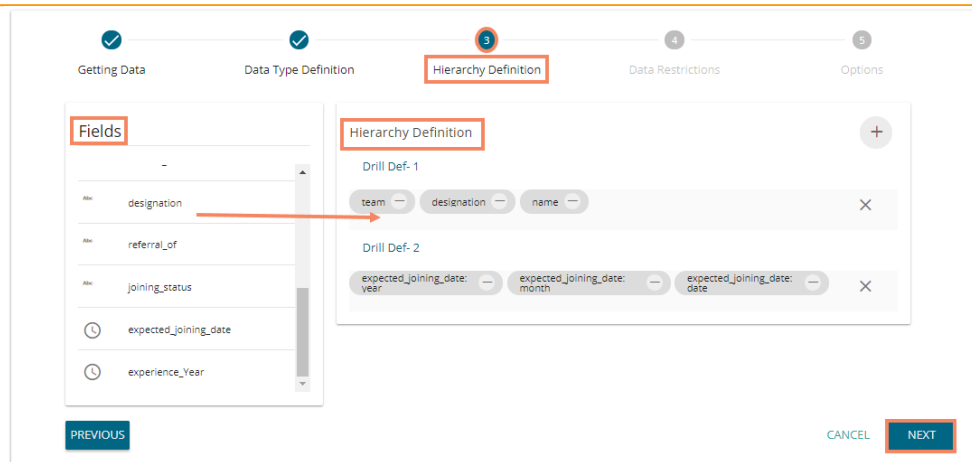
- i) Users can define data by interchanging available Dimensions, Measures, and Time fields from the selected data store.
- ii) Proceed to the next tab by clicking the **'NEXT'** option.



Step 3- Hierarchy Definition

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

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

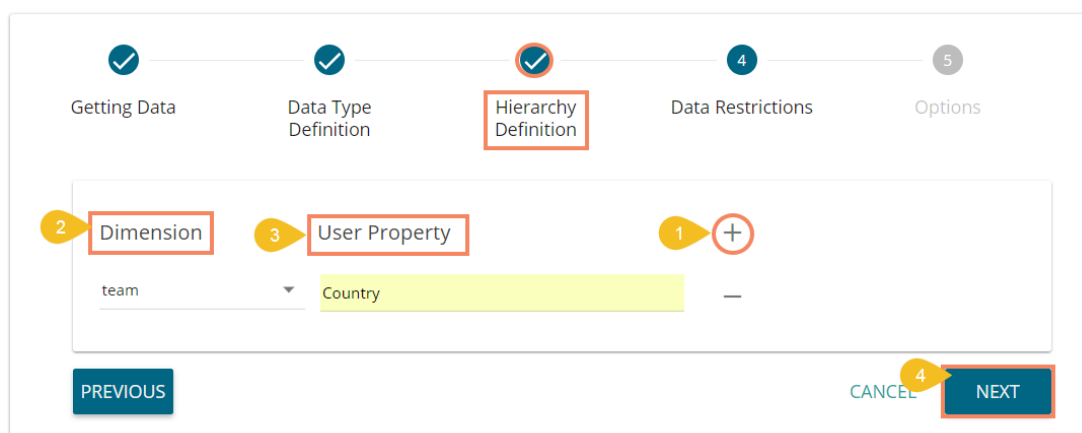


Step 4- Data Restriction

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

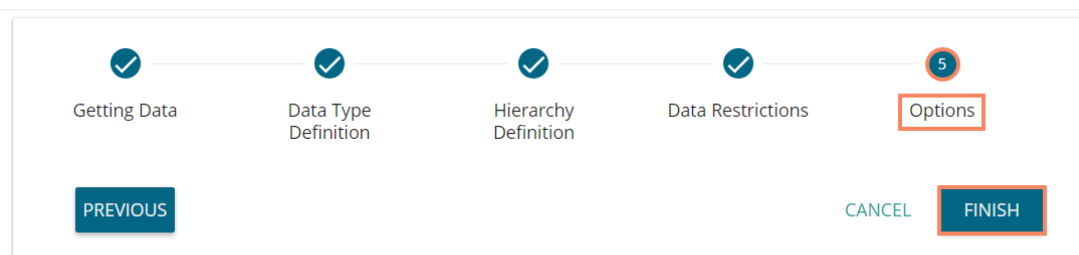
E.g., If for a user/user group 'Country' custom field value is 'USA' and the administrator passes 'Country' as a User Property while creating a data store. Users for whom 'USA' was selected as value for the 'Country' custom field can access data related only to the USA from the data store.

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

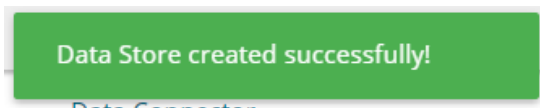


Step 5 – Options

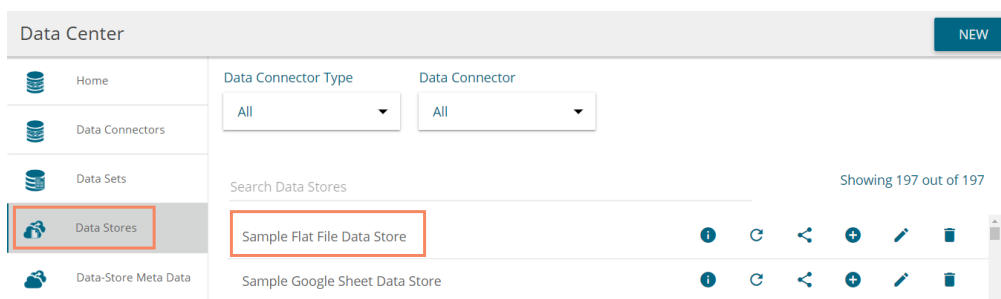
- i) The 'Options' tab opens.
- ii) Click the 'FINISH' option to complete the Data Store creation process.



iii) A success message appears.

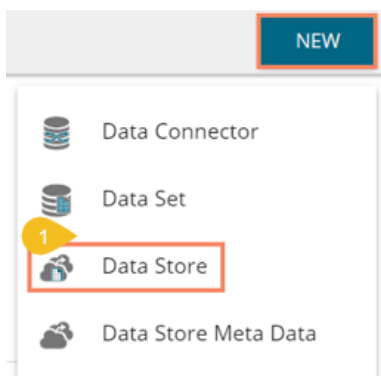


iv) The newly created data store gets added to the Data Store list.



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

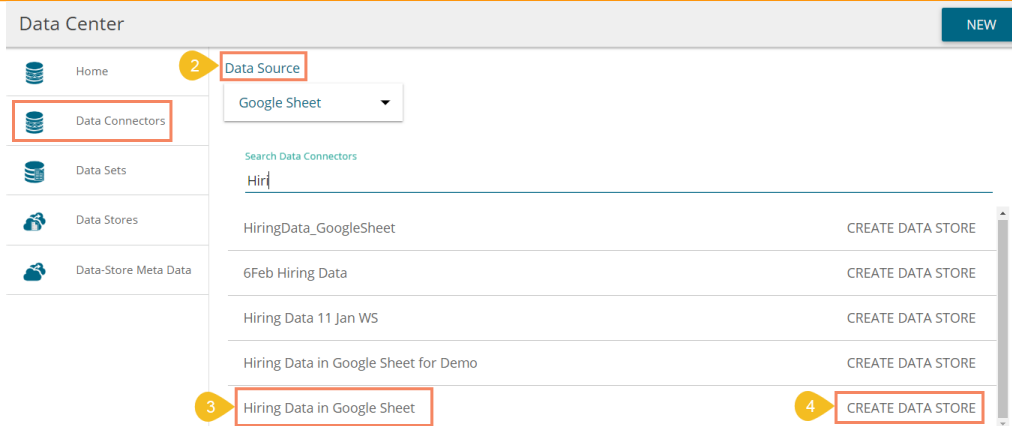
i) Select the 'Data Store' option from the 'NEW' context menu.



ii) Choose an API connector type from the filter panel.

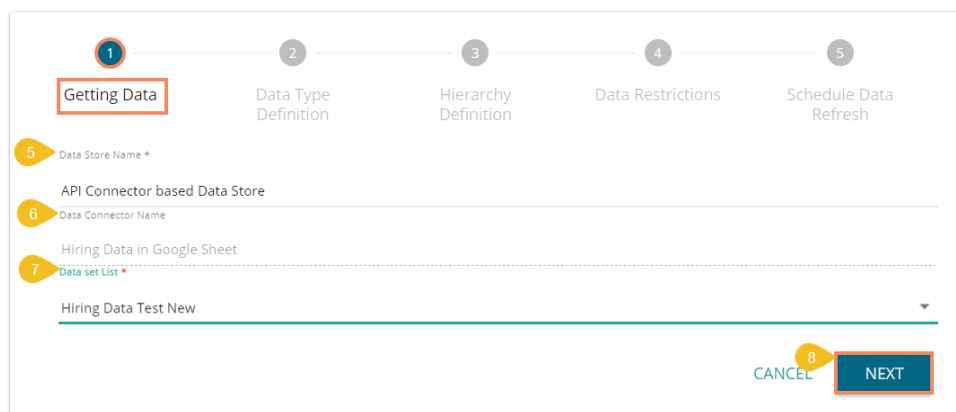
iii) Select a data connector from the displayed list.

iv) Click the 'CREATE DATA STORE' option.



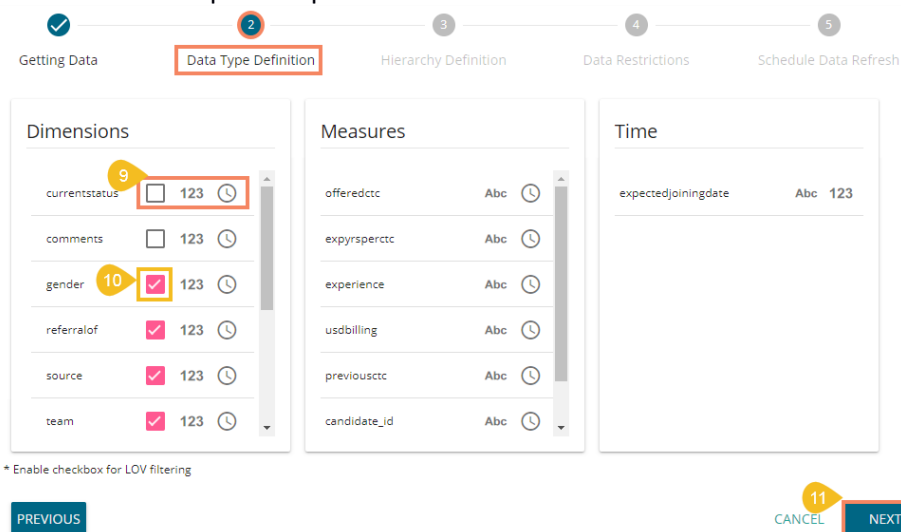
v) The **'Getting Data'** tab opens.

1. Provide a name for the Data Store.
2. The name of the selected Data Connector gets displayed 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.

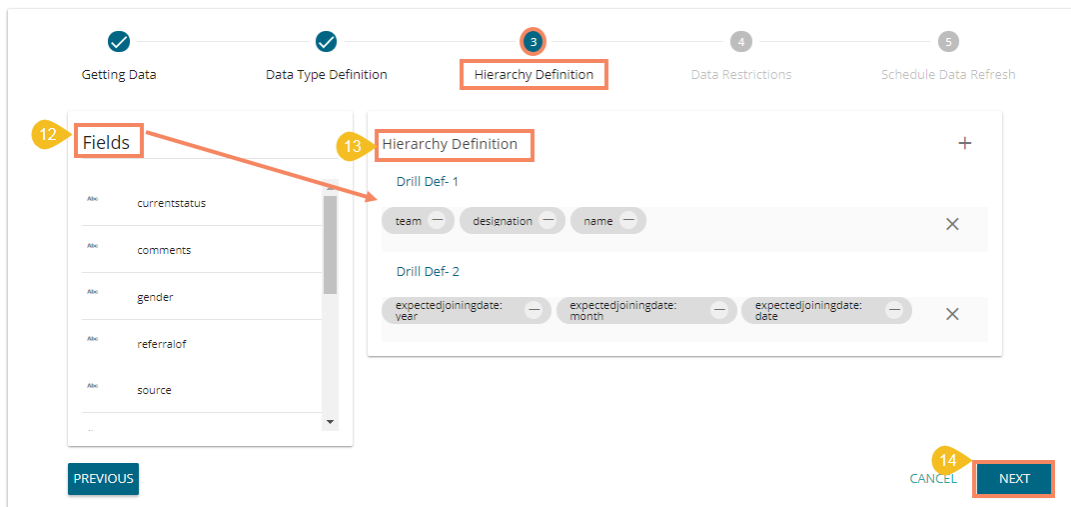


vi) The **'Data Type Definition'** tab opens.

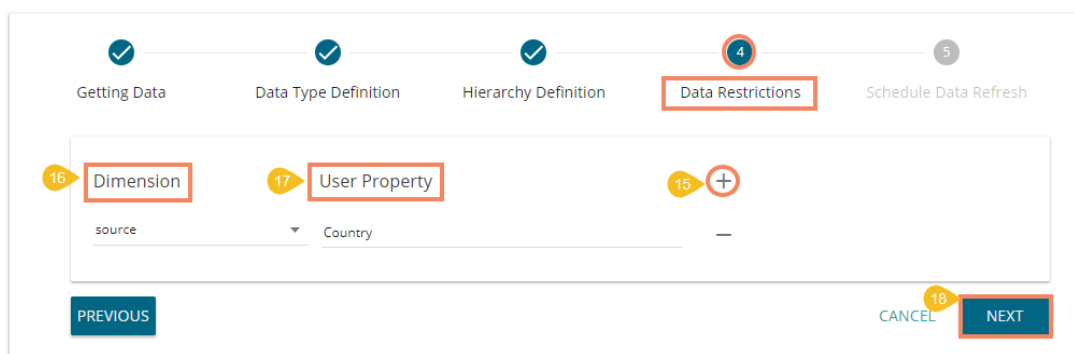
1. The user can interchange the available Dimensions, Measures, and Time fields to define data.
2. Enable dimension fields with a checkmark to get in the LOV of the Filter pane of the Self-service BI Report.
3. Click the **'NEXT'** option to proceed.



- vii) The **'Hierarchy Definition'** tab opens.
1. Add a new Drill Def. box by clicking the **'Add'** icon.
 2. Drag and drop Dimension fields or Time field to create 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.



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

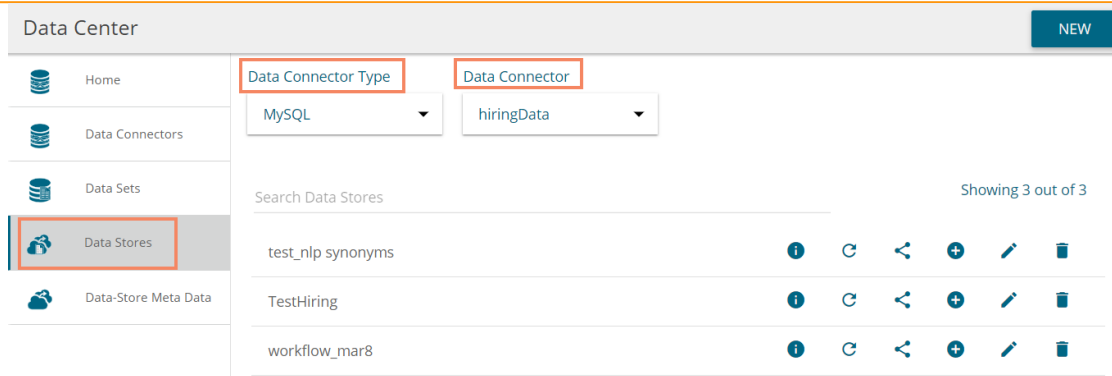


- ix) The **'Schedule Data Refresh'** tab opens.
1. The following options are provided to refresh the data:
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Yearly
 2. Select any one option from the above-given list and configure the required information to set the data refresh interval.
 3. Select the **'Refresh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

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

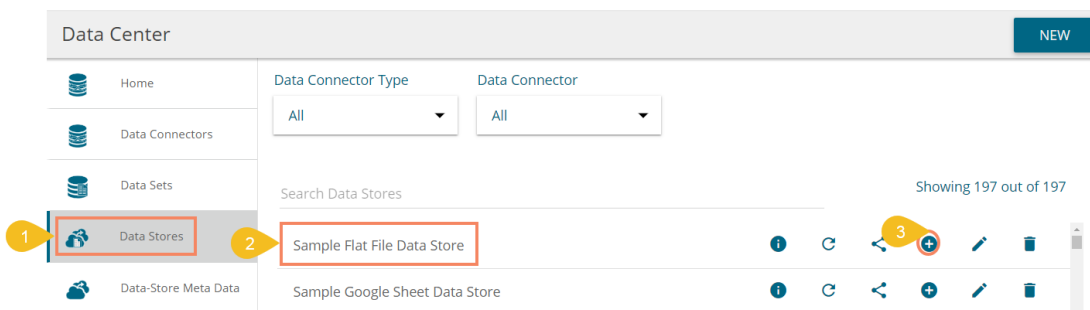
Note:

- a. 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'** drop-down menus.

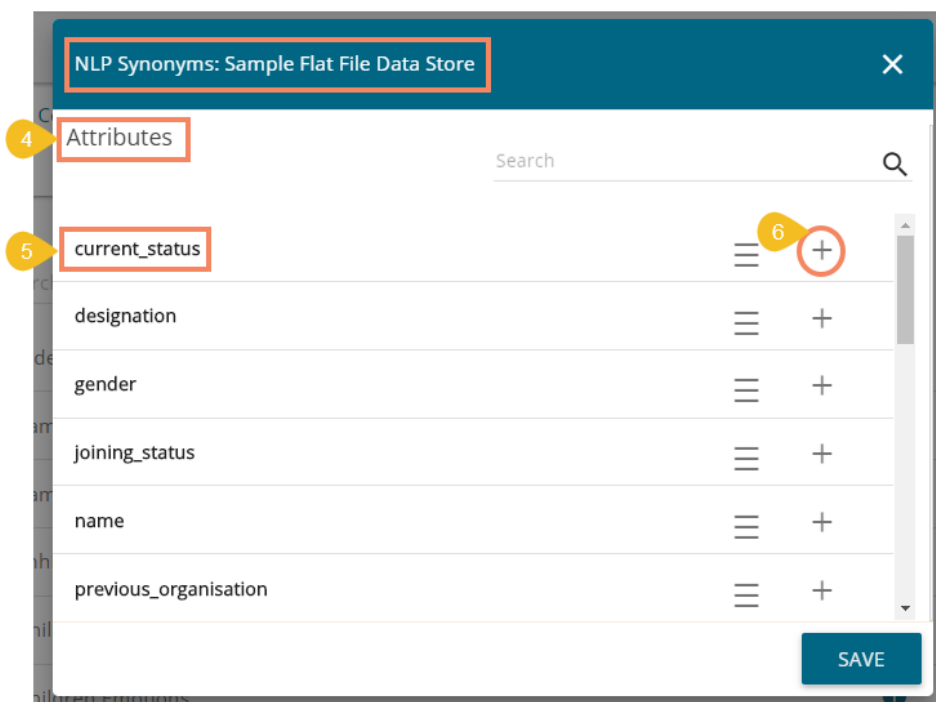


6.3.4. Adding Synonyms to a Datasore

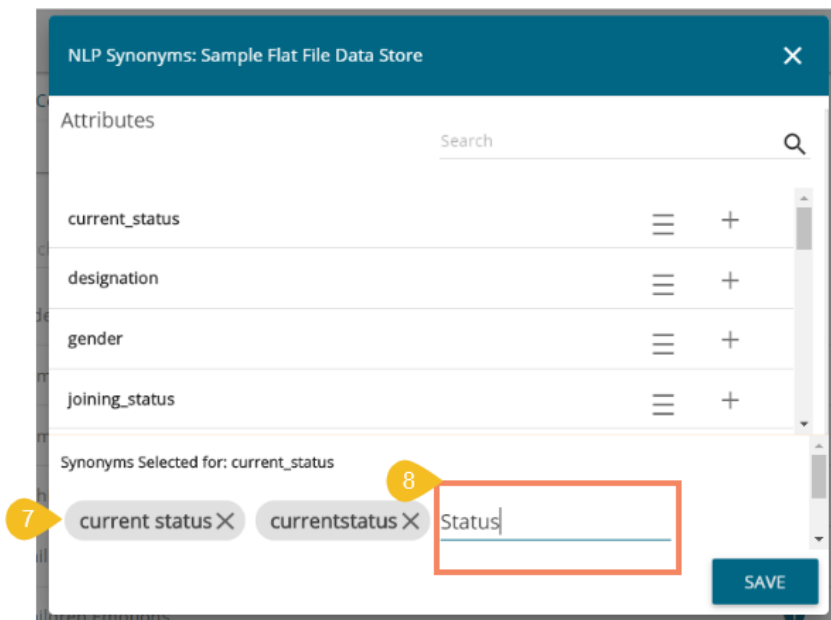
- i) Navigate to the Datasore list.
- ii) Select a datasore.
- iii) Click the 'Add Synonym to Datasore' option.



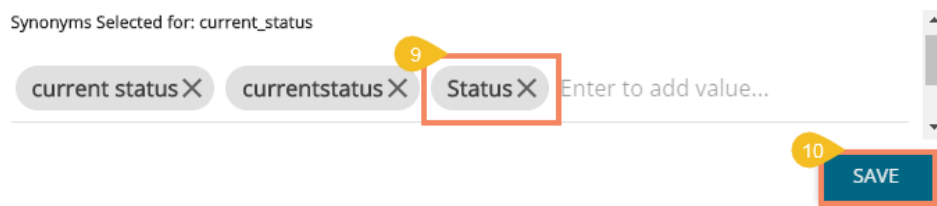
- iv) All the Attributes (fields names) option display in a list form.
- v) Select a field.
- vi) Click the 'Add Synonyms' + icon.



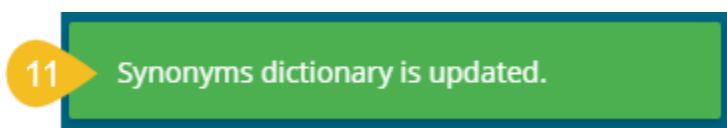
- vii) A new window opens with the default synonyms get displayed at the bottom.
- viii) Use the space given next to the default synonyms to add new synonyms.




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

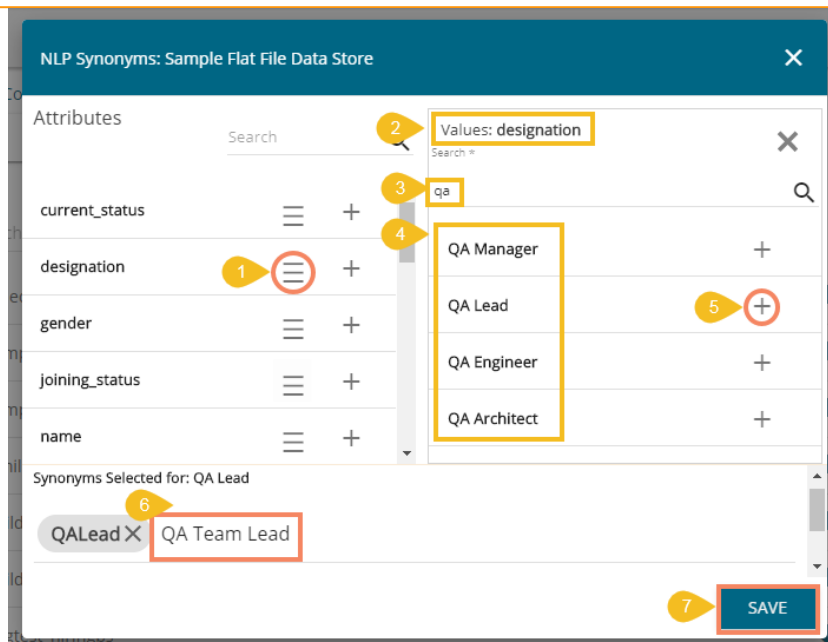


- xi) A success message appears to confirm that the synonym dictionary is updated with the newly added synonym.



Note: Steps to Add Synonyms for a Dimension Value.

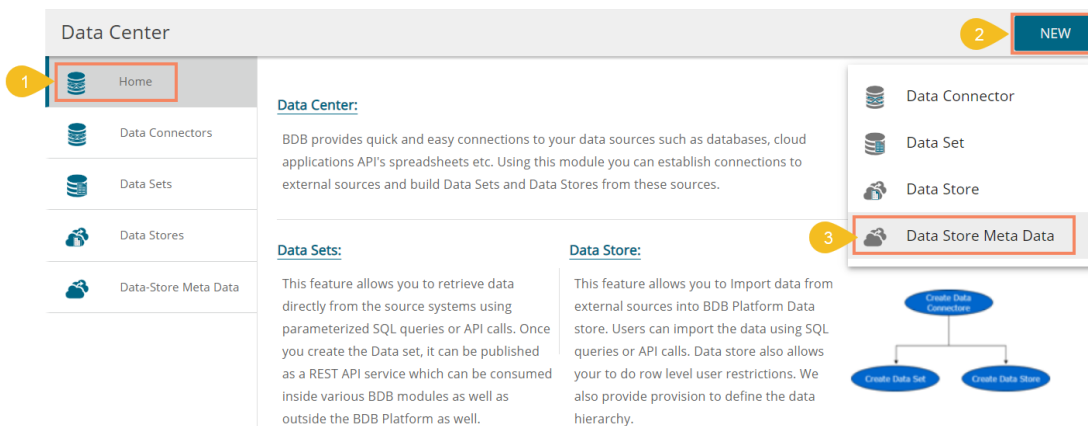
1. Click the **'Add Values'** as an option from the list of the displayed fields.
2. A new box opens with the selected Dimension.
3. Use the search bar to find specific dimensions.
4. All the available values for the selected dimension get displayed.
5. Select a Value from the displayed choices and click 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.



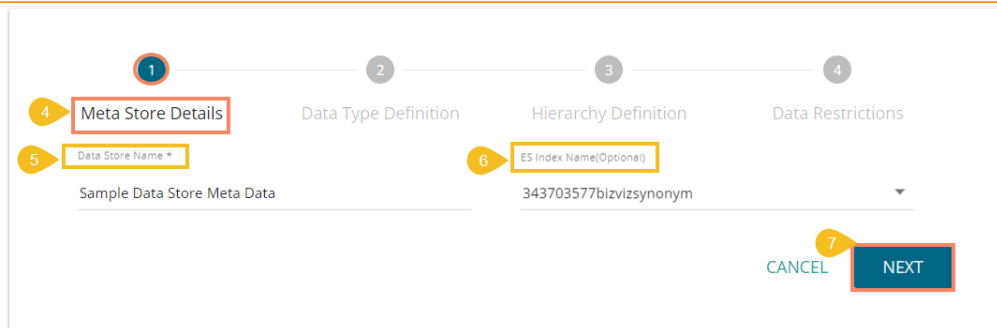
6.4. Data Store Meta Data

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.

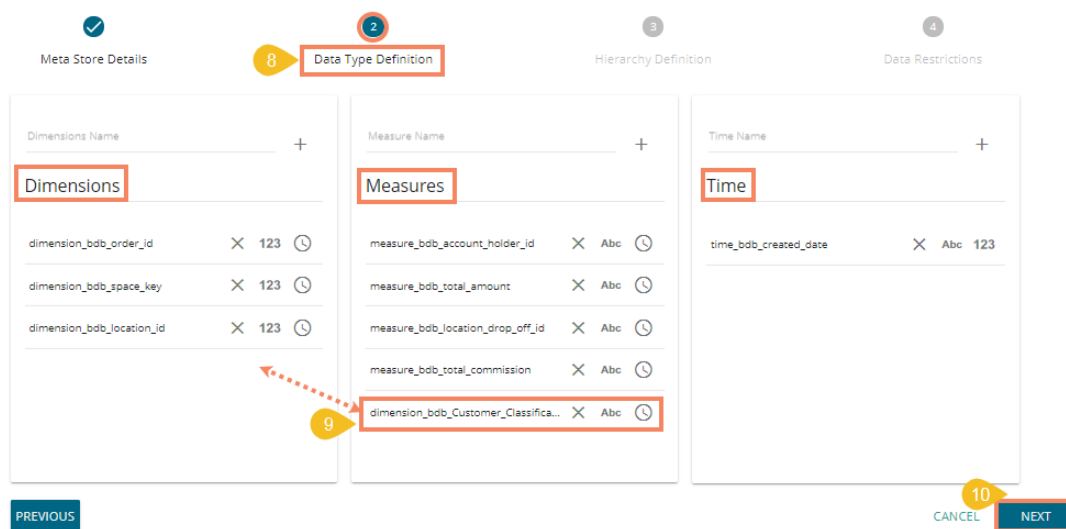
- i) Navigate to the Data Center homepage.
- ii) Click the 'NEW' menu.
- iii) Select the 'Data Store Meta Data' option from the 'NEW' context menu.



- 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.



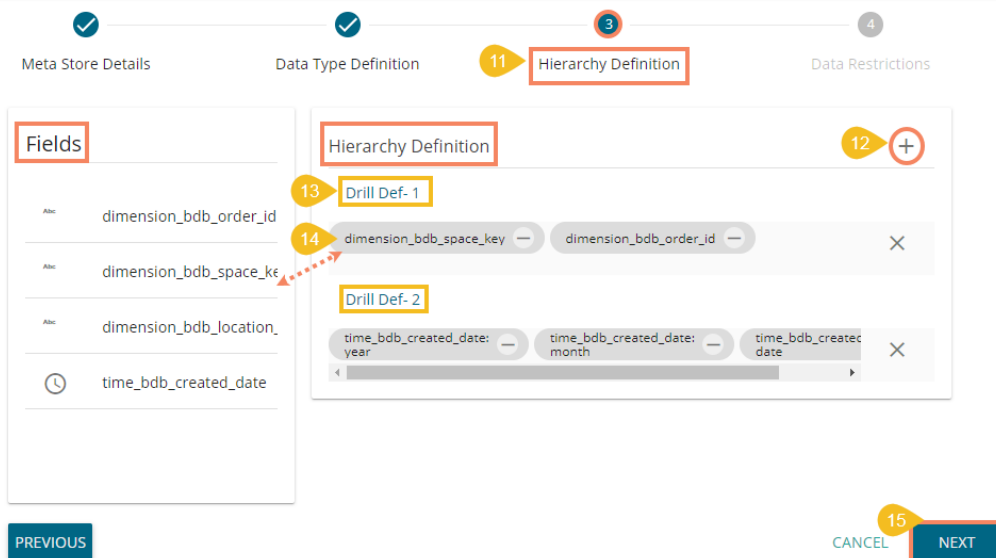
- viii) Define the data type (if users have not chosen the ES index then they need to insert the fields name manually, else the names of the fields get selected from the chosen ES index).
- ix) Users can interchange the Dimensions, Measures, and Time fields.
- x) Click the '**NEXT**' option.



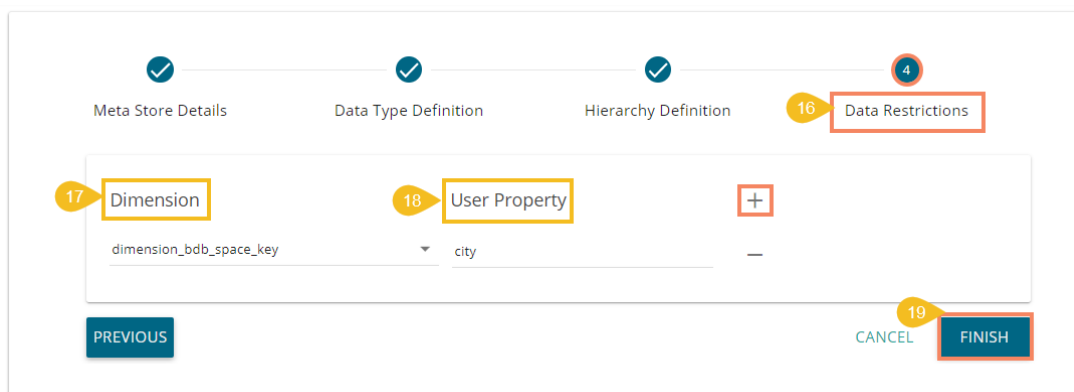
Note: Users can change the categories of a dimension, measure, and time value by clicking the following options:

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

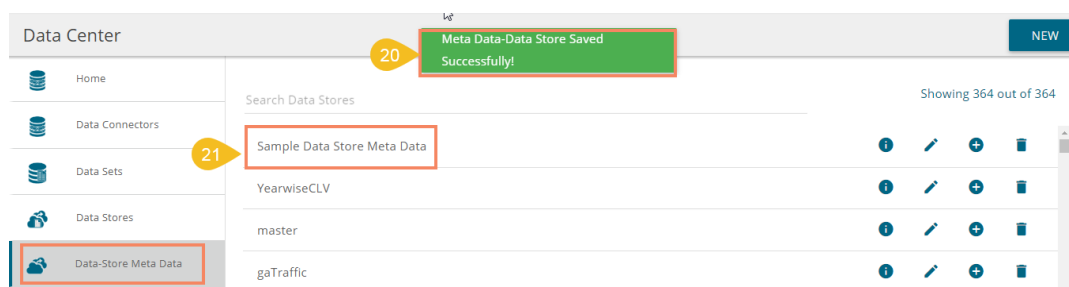
- xi) The Hierarchy Definition tab options.
- xii) Click the '**Add**' option **+** provided in the Hierarchy Definition window.
- xiii) A new '**Drill Def**' box gets added to the page.
- xiv) Drag and drop the dimensions or time options to define a hierarchy.
 - a. Dimensions have to be manually pulled to create a hierarchy.
 - b. Time dimension creates a 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.






- 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.



- 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.



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

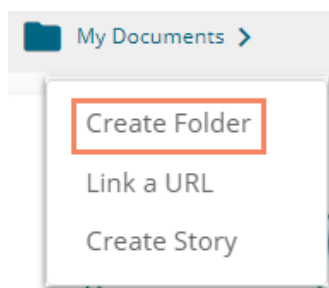
	Edit	Edits the data store metadata fields
	Add Synonyms to Metadata Store	Redirects the user to add synonyms to the selected Metadata store.
	Remove	Removes the data store metadata from the list

7. Option

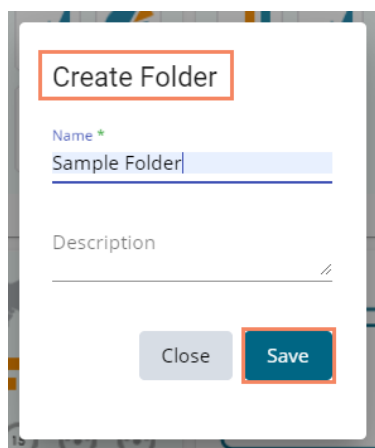
Users can access various options by using right-click anywhere on **My Documents** or **Public Documents**.

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

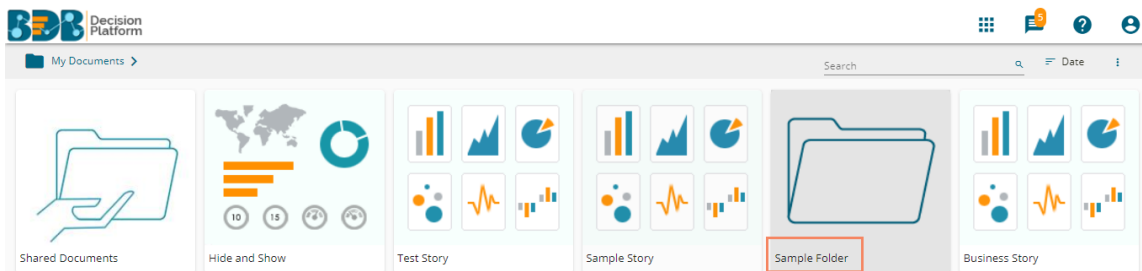


- vi) A pop-up window appears.
- vii) Fill in the following information:
 - a. **Name:** Enter a folder name
 - b. **Description:** Describe the folder (optional)
- viii) Click the **'Save'** option.



- ix) A success message appears.

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

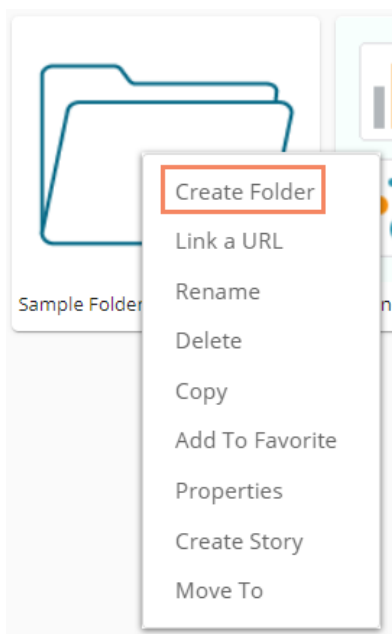


- **Options Assigned to a Folder**

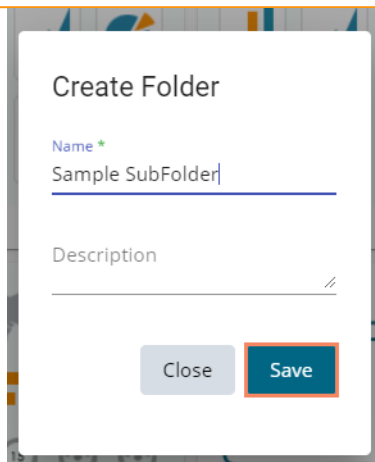
A single folder is credited with various operations in a context menu as displayed below:

7.1.1. Creating a Folder (Sub-Folder)

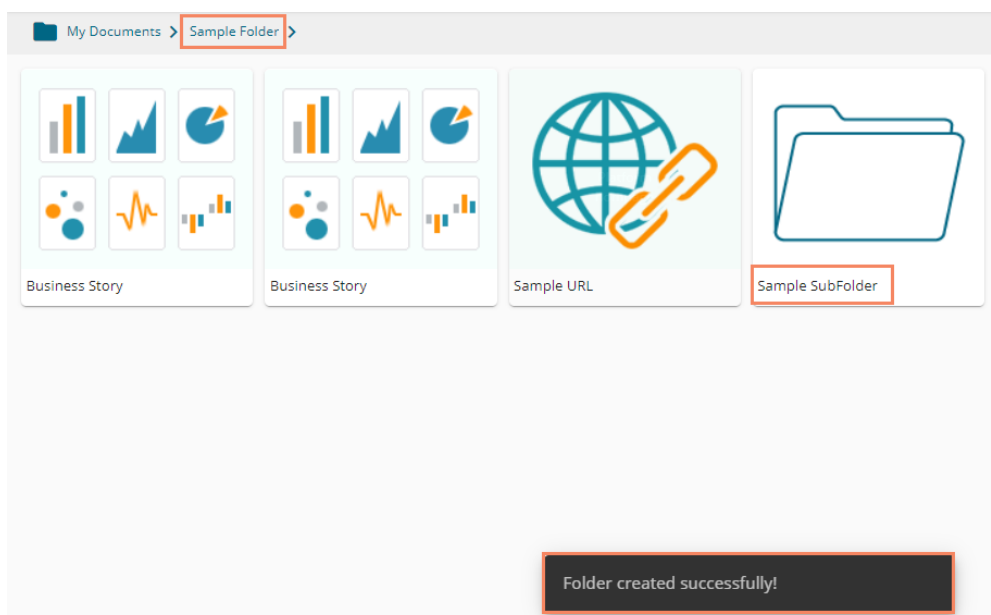
- i) Select a folder.
- ii) Use right-click on an existing folder to display the various options.
- iii) Select the **'Create Folder'** option.



- 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.



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



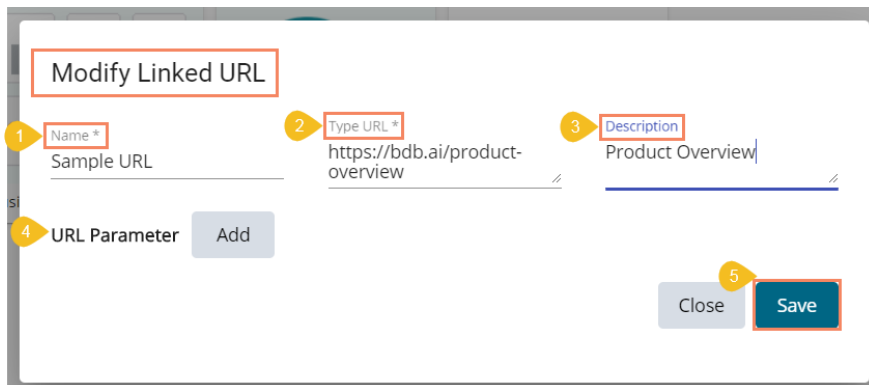
Note: Users can create multiple folders under a folder.

7.1.2. Linking a URL

Users can connect a URL to the required platform documents.

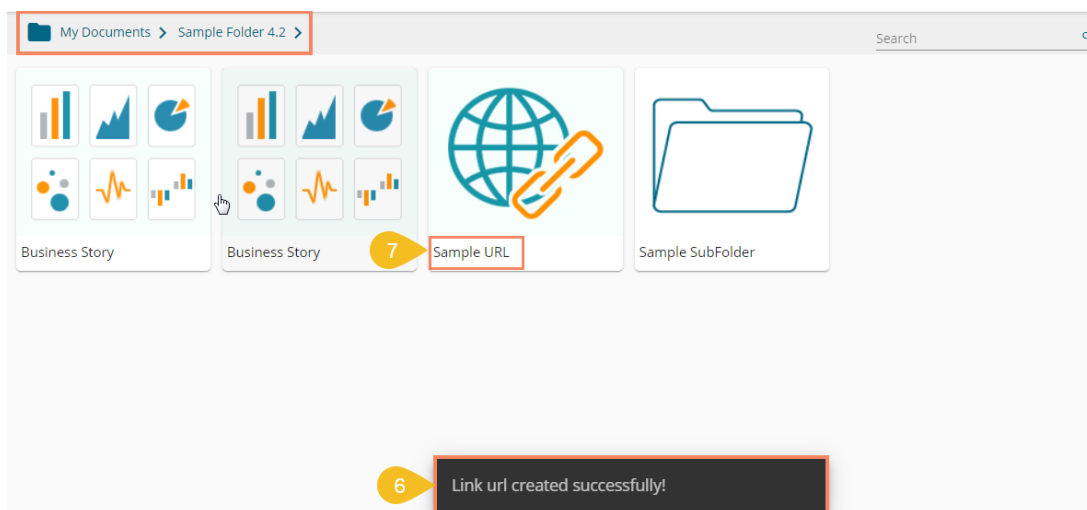
- i) Select a folder.
- ii) Use the right-click on it to display various options.
- iii) Select the 'Link a URL' option.
- iv) A new window pops-up.
- v) Fill in the required information:
 - a. **URL Name:** Enter a name for the URL
 - b. **Type URL:** Type the URL link that you wish to add
 - c. **Description:**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

vi) Click the 'Save' option.

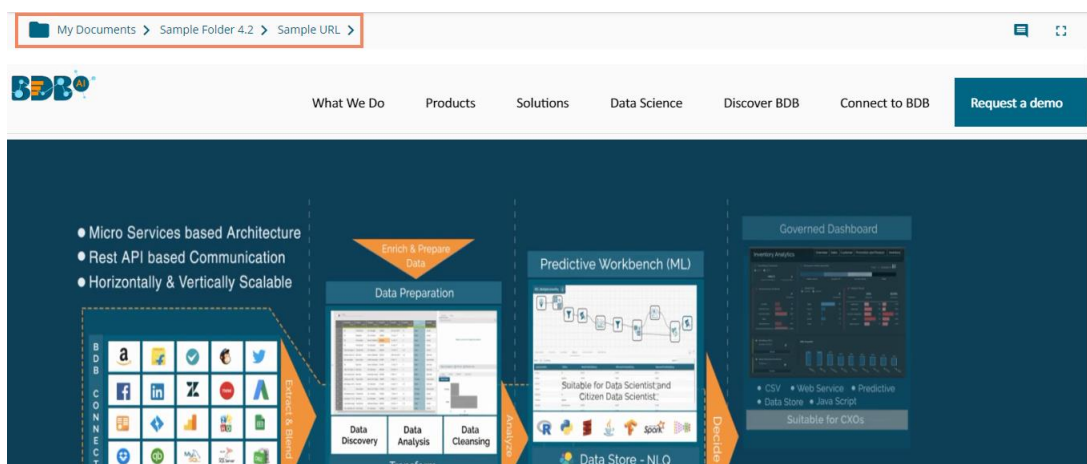


vii) A success message appears.

viii) The URL gets created in the selected folder.




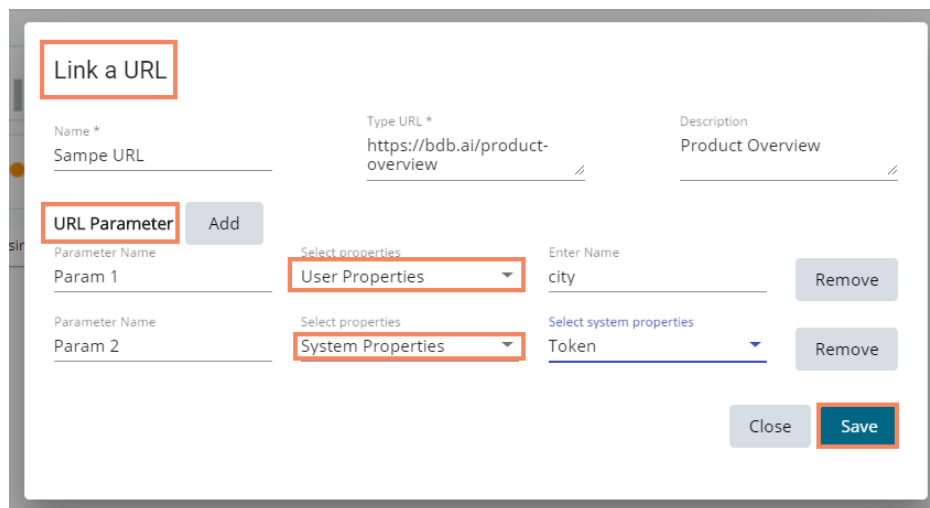
ix) The user can see the linked URL link by opening the URL link.



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.



The screenshot shows a form titled "Link a URL" with the following fields and options:

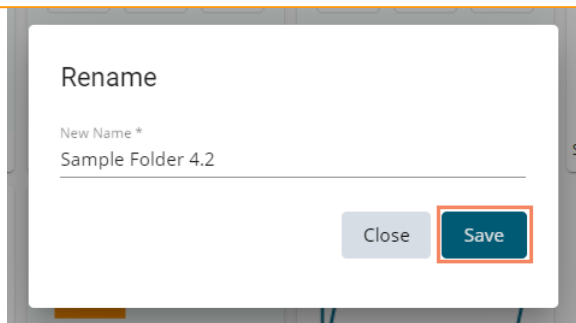
- Name ***: Sampe URL
- Type URL ***: https://bdb.ai/product-overview
- Description**: Product Overview
- URL Parameter** section:
 - Parameter Name**: Param 1, **Select properties**: User Properties, **Enter Name**: city, **Remove** button.
 - Parameter Name**: Param 2, **Select properties**: System Properties, **Select system properties**: Token, **Remove** button.
- Buttons**: Close, Save.

Note:

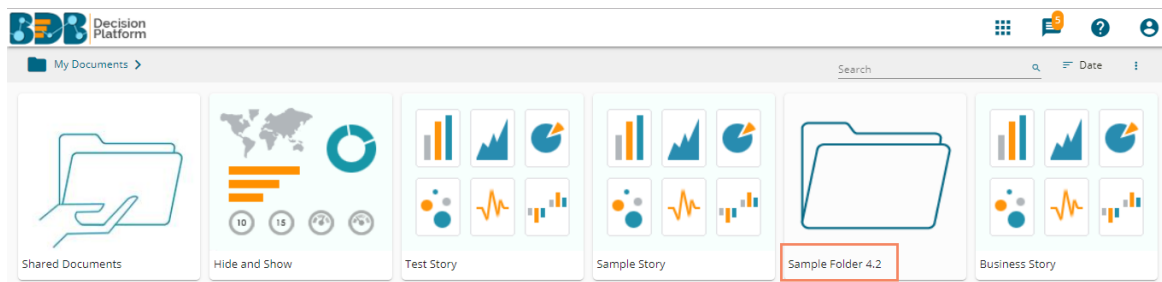
- a. Users can easily connect internal URL links by using the parameters, while the external URLs requires security permission to link.
- b. Users can click the **'Remove'** option provided next to an added parameter to remove the parameter.

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.

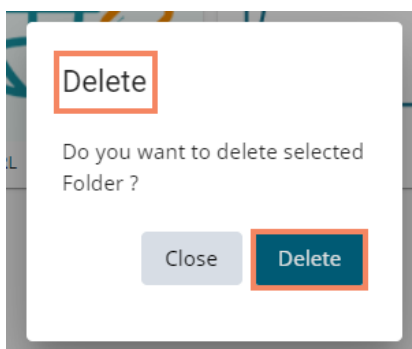


iv) The folder gets renamed.

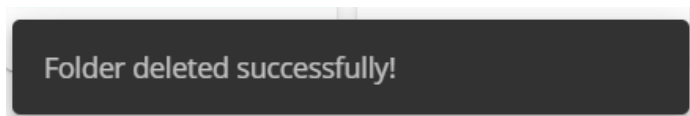


7.1.4. Deleting a Folder

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



v) A success message appears to confirm the action.



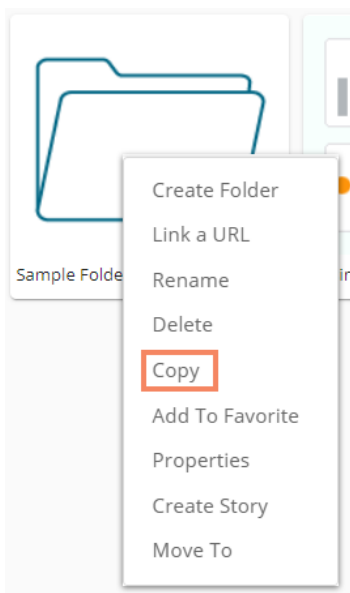
vi) The selected folder gets removed from the platform.

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

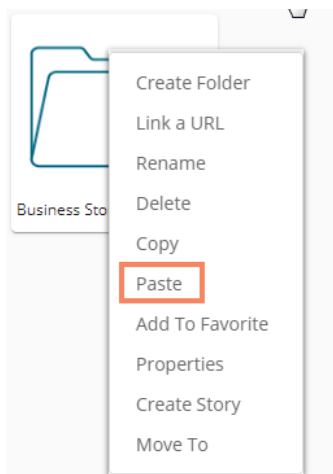
7.1.5. Copying a Folder

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.

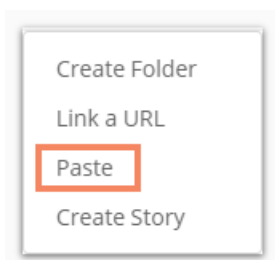


- iii) Select another folder and use the right-click to get the **'Paste'** option.

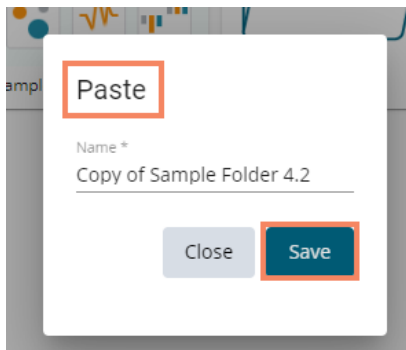


Or

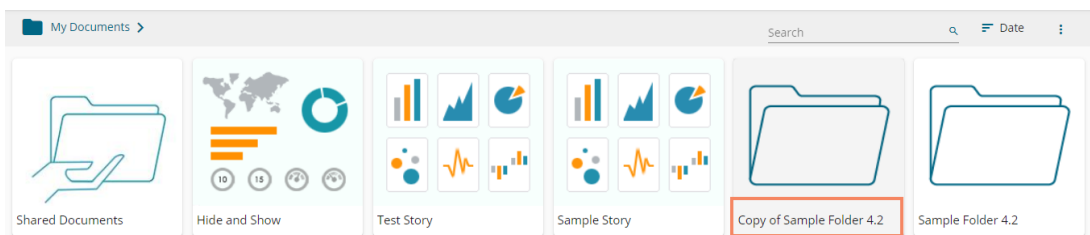
Navigate to **'My Documents'** or **'Public Documents'** and right-click anywhere on the blank space to get the **'Paste'** option.



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



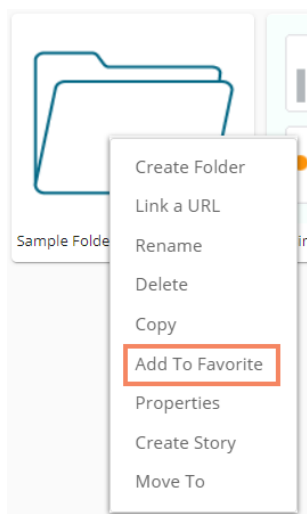
- vii) A success message appears.
- viii) The copied folder gets pasted successfully with a different name.
E.g., The following image shows that a folder '**conjoint**' from '**My Documents**' is named *Copy of conjoint* and has been posted next to the original one in the same document space.



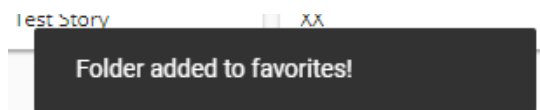
7.1.6. Adding/Removing a Folder to/from Favourites

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

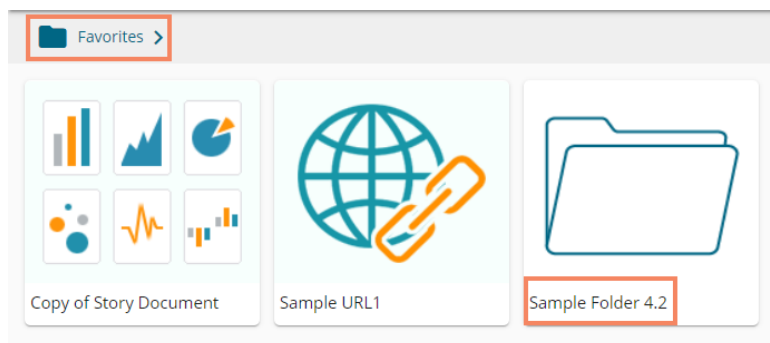
- i) Select a folder.
- ii) Select the '**Add to Favorite**' option from the context menu.



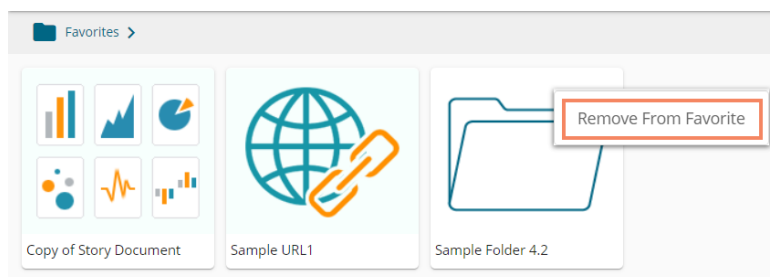
- iii) A message appears, “**Folder added to favorites!**”



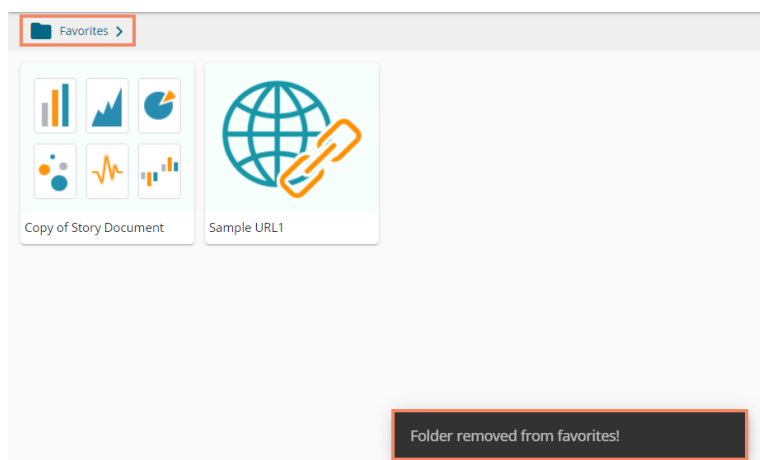
- iv) The selected folder gets added to the ‘**Favorites**’ document space.



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

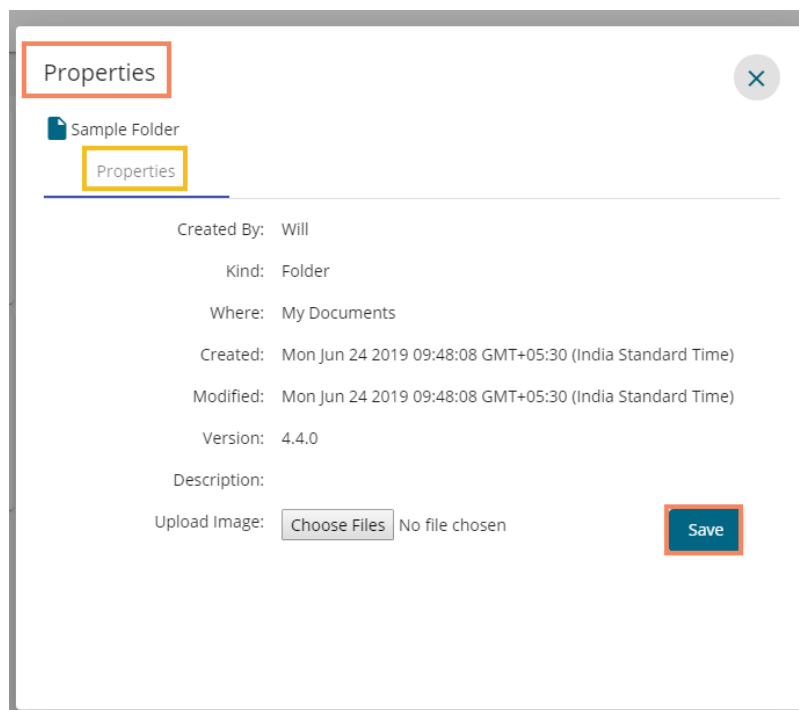


- ix) A message, “**Folder removed from favorites!**” appears on the screen and the selected folder gets removed from the ‘**Favorites**’ document space.

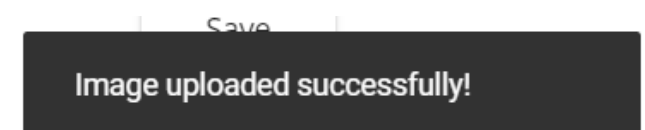


7.1.7. Properties

- i) Select a folder.
- ii) Use the right-click to display the operations credited to a folder.
- iii) Select the '**Properties**' option.
- iv) The folder properties open.
 - a. Click the '**Choose Files**' option to update the image.
 - b. Click the '**Save**' option to save the update.



- v) A success message appears, "Image updated successfully!"

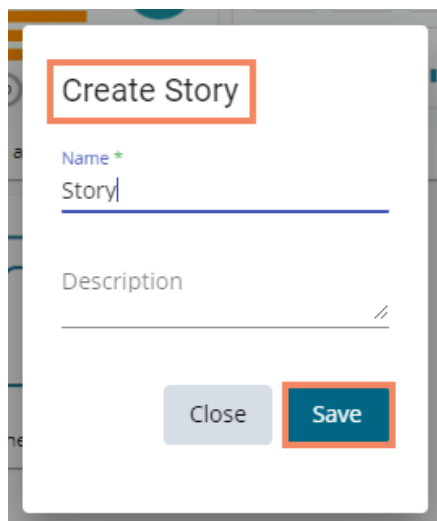


Note: Click '**Close**' option to close the folder properties.

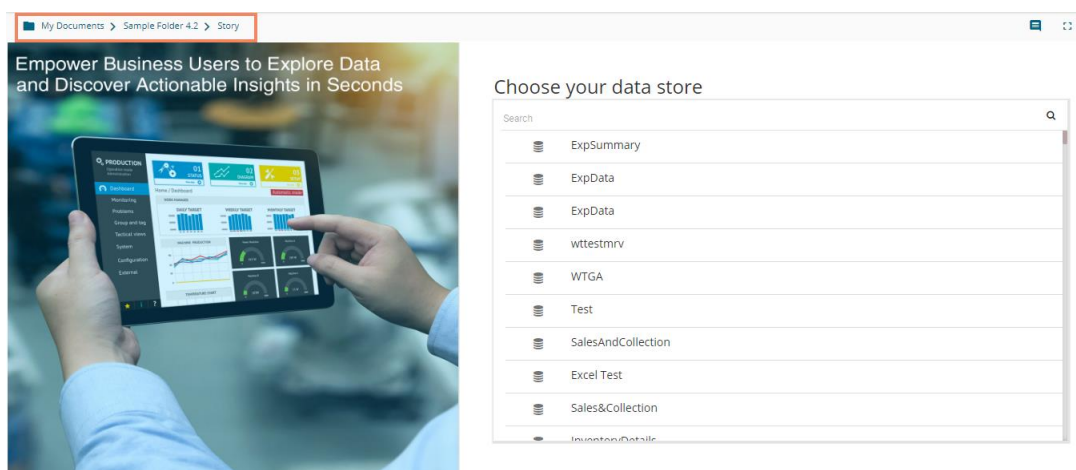
7.1.8. Creating a Story

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

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

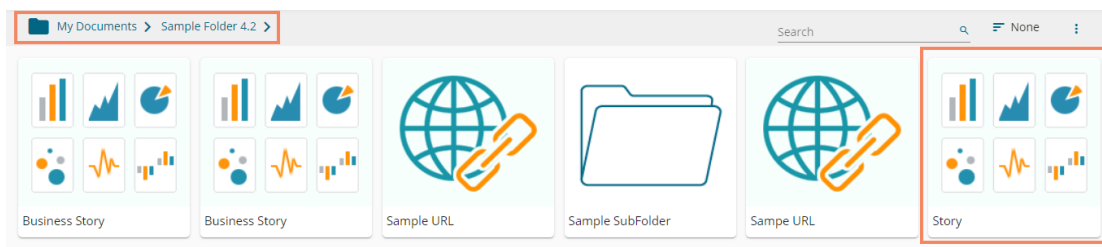


vii) The user gets a new page to select a data store for the story.



viii) Navigate to the folder.

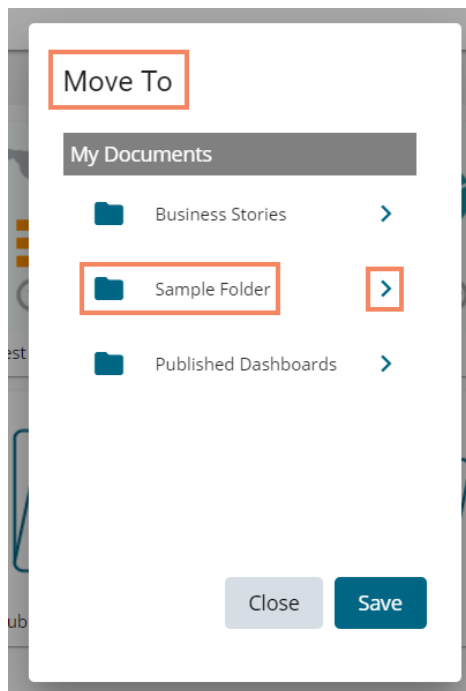
ix) The Story document gets added to the selected folder.



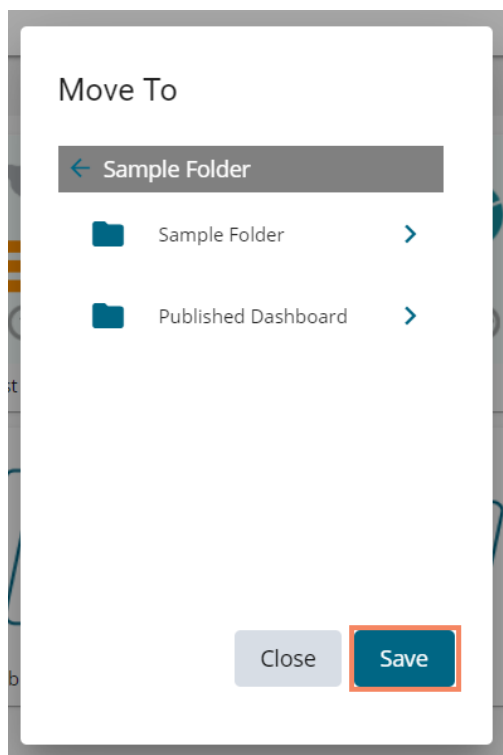
7.1.9. Moving a Folder

- 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.



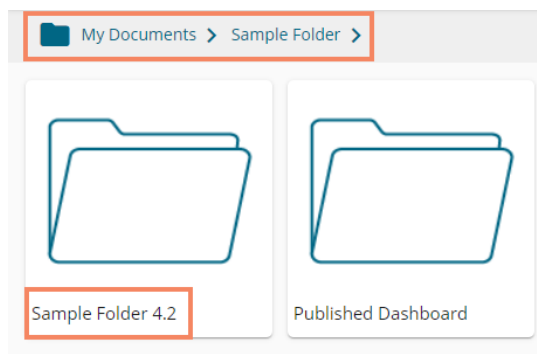
- vi) A new window opens displaying the available folders inside the selected folder
- vii) Click the **'Save'** option.



- viii) A success message appears.

Folder moved successfully!

- ix) The folder gets moved to the targeted folder.

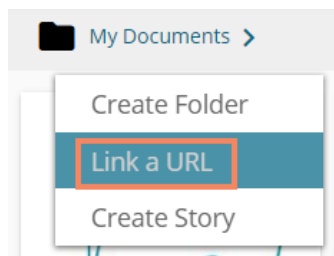


Note: The 'Move To' option is not available to the folders shared as the Public Documents.

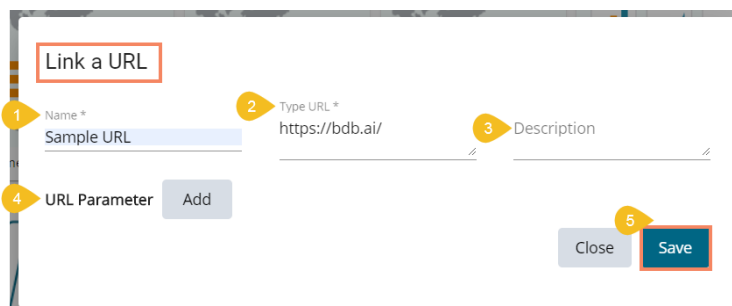
7.2. Linking a URL

The users can connect to the URLs with the chosen folders or to the selected Document space.

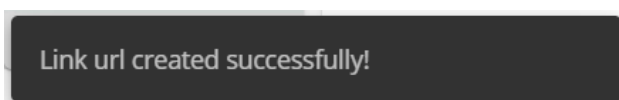
- i) Use the right-click anywhere at the blank space on the 'My Documents' or 'Public Documents.'
- ii) Select the 'Link a URL' option.



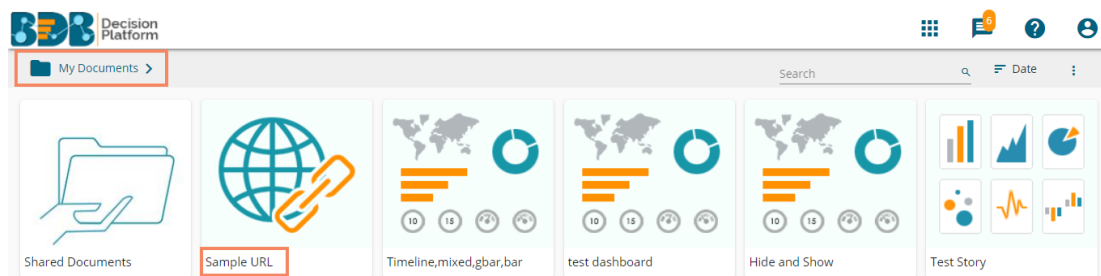
- iii) A new window appears.
- iv) Fill in the required information:
 - a. **URL Name:** Enter a name for the URL
 - b. **Type URL:** Type the URL link that you wish to add
 - c. **Description:** Describe the URL (optional)
 - d. **URL Parameter (Optional)**
- v) Click the 'Save' option.



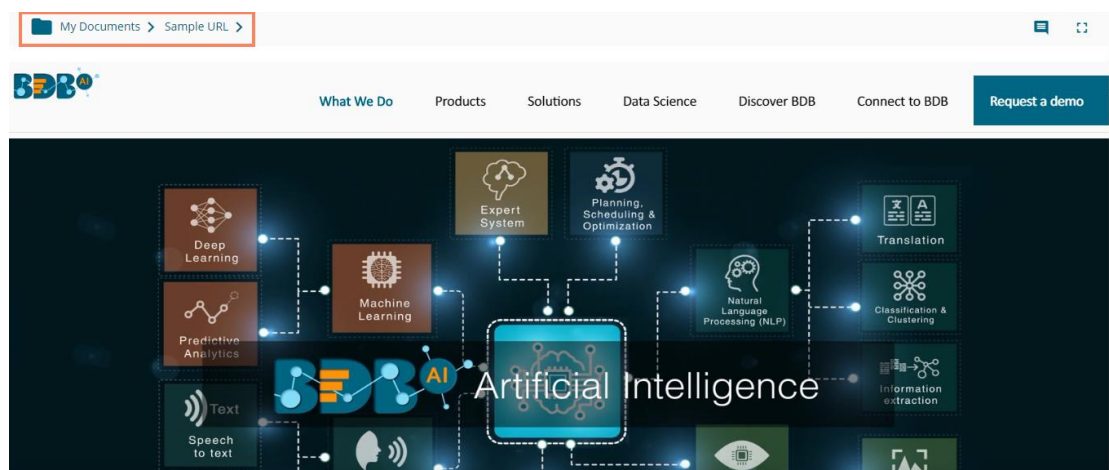
vi) A success message appears.



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



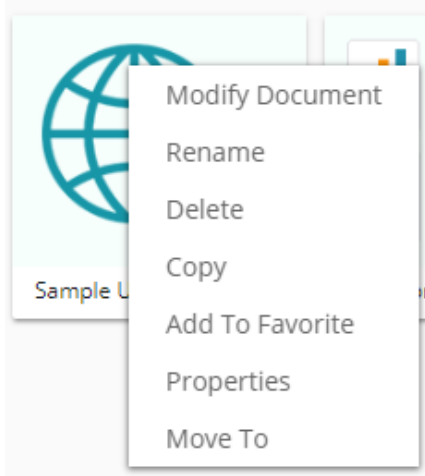
viii) Users can open the linked URL document by clicking on it.





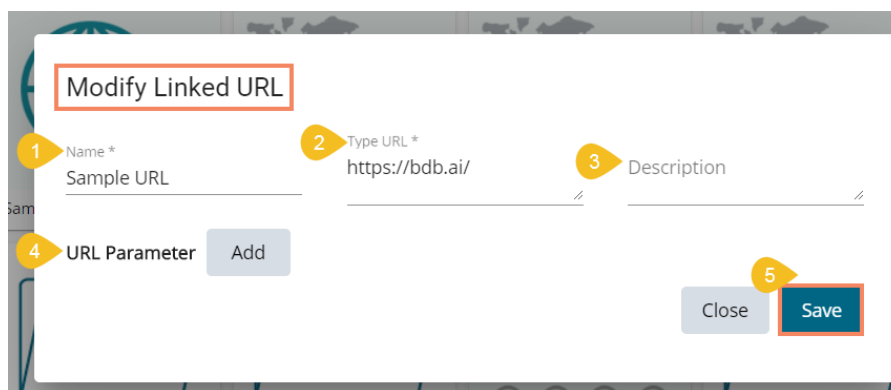
• Operations Assigned to a URL

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 credited operations.



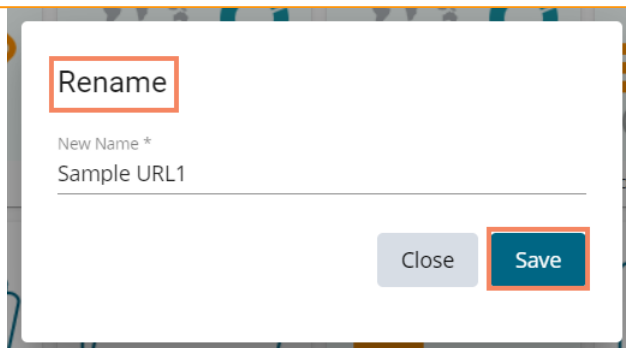
- iv) Select the **'Modify Document'** option.
- v) A pop-up window appears.
- vi) Modify the following information:
 - a. URL Name
 - b. URL Link
 - c. Description
 - d. URL Parameter
 - i. Click the **'Add'** button  to add the URL Parameter.
 - ii. Click the **'Remove'** button  to remove the inserted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



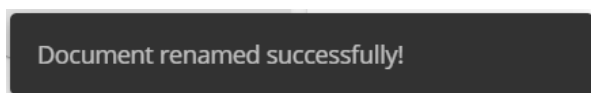
- viii) The modified URL Link gets saved.

7.2.2. Renaming a URL Document

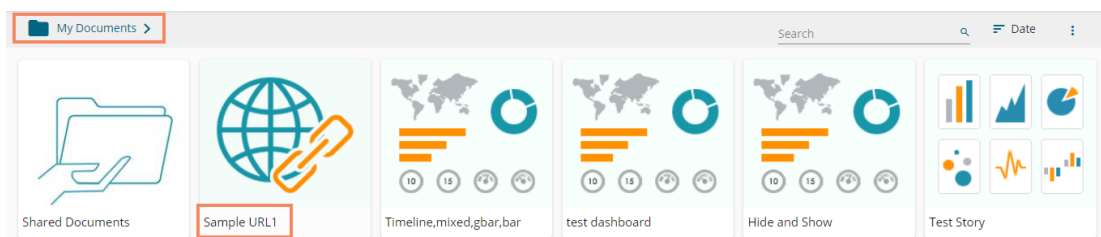
- i) Select a linked URL document.
- ii) Select the **'Rename'** option from the URL Operations menu.
- iii) A new window appears.
- iv) Enter a New Name for the URL document.
- v) Click the **'Save'** option.



vi) A success message appears.

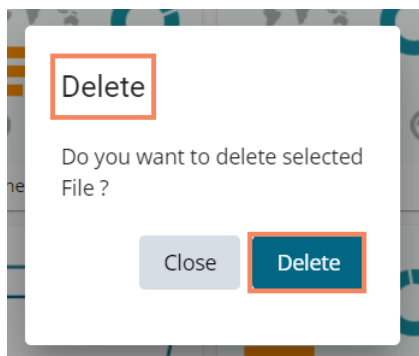


vii) The linked URL document gets renamed.



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.



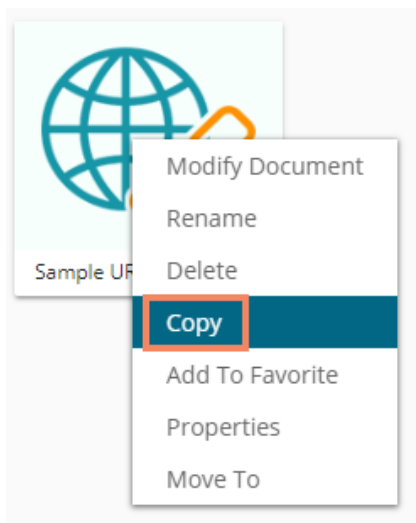
v) The selected URL file gets removed.

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

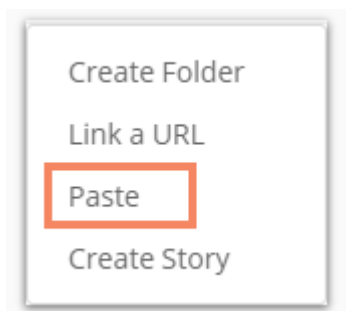
7.2.4. Copying a URL Document

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

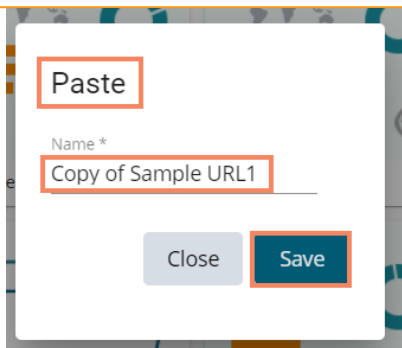
- i) Select a linked URL document.
- ii) Select the **'Copy'** option from the context menu.



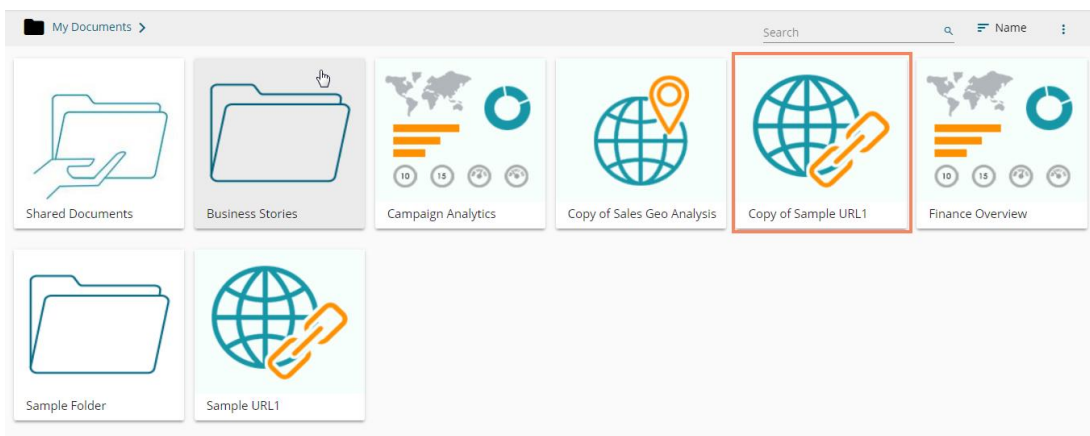
- iii) Select a folder and use the right-click.
Or
- iv) Navigate to **'My Documents'** or **'Public Documents'** and use right-click on the blank space.
- v) A context menu appears with the **'Paste'** option.
- vi) Select the **'Paste'** option.



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



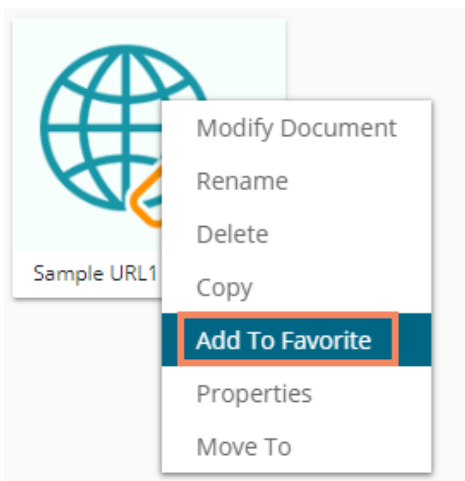
- x) A success message appears.
- xi) The copied link URL gets replicated with a different name.



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

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

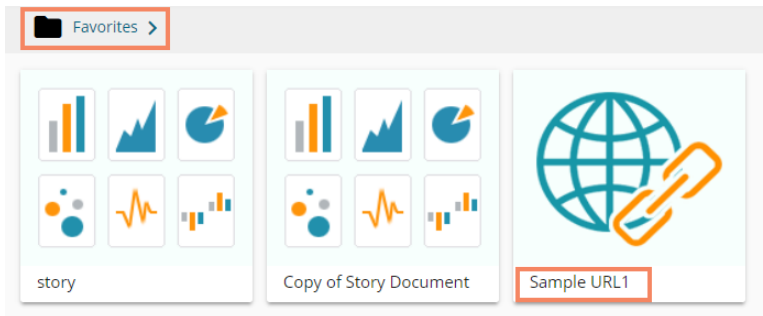
- i) Select a linked URL document.
- ii) Select the 'Add to Favorites' option from the context menu.



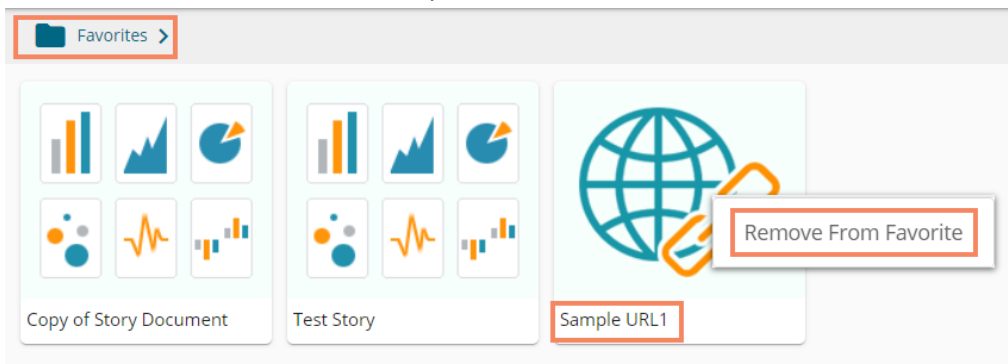
- iii) A message, "Document added to favorite!" appears.

Document added to favorites!

- 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.



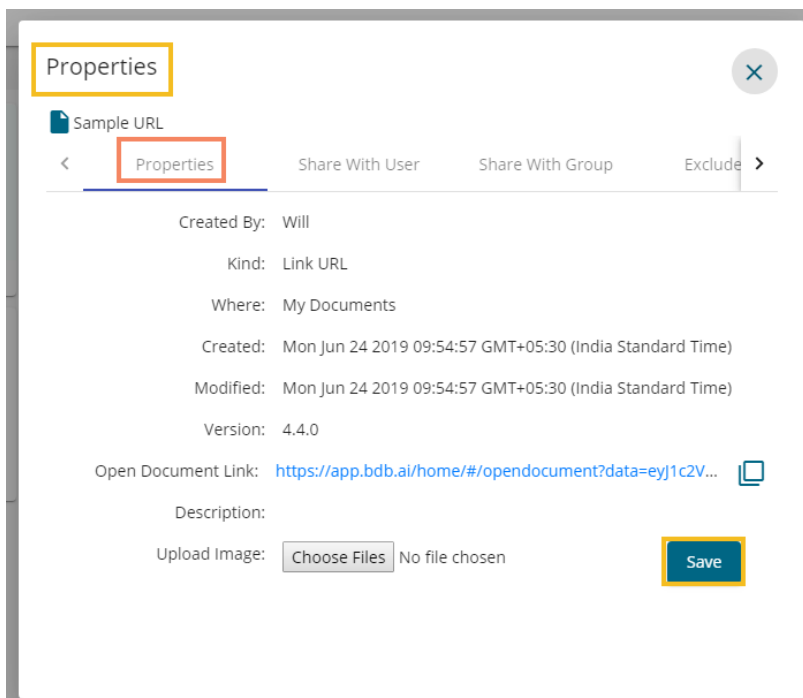
- ix) A pop-up window appears with a message, **"Document removed successfully!"**

Document removed from favorites!

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

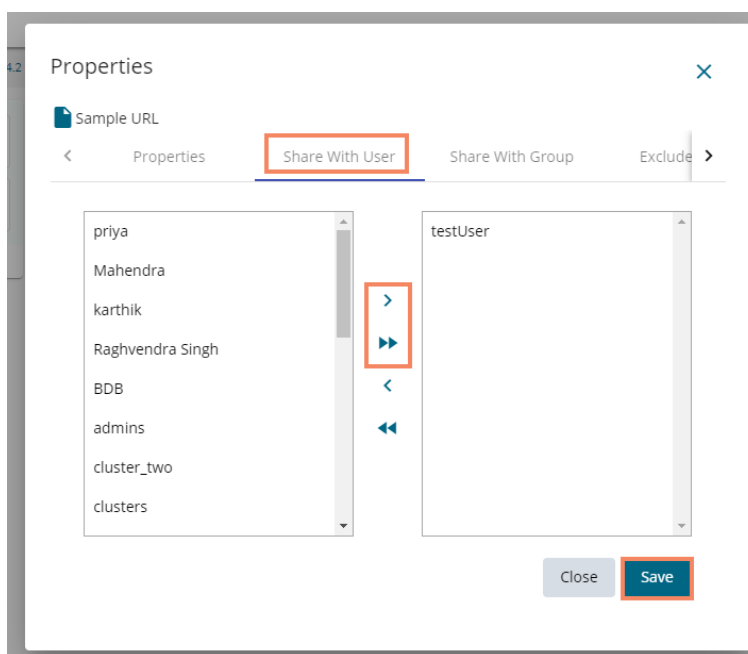
7.2.6. Properties

- 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.



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

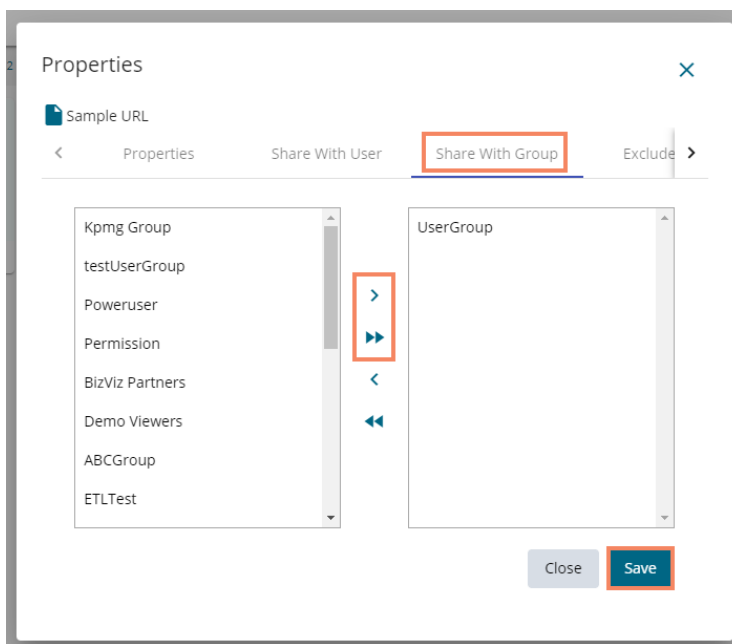


4. A success message appears stating that the document privilege is updated.

Document privilege updated successfully!

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

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



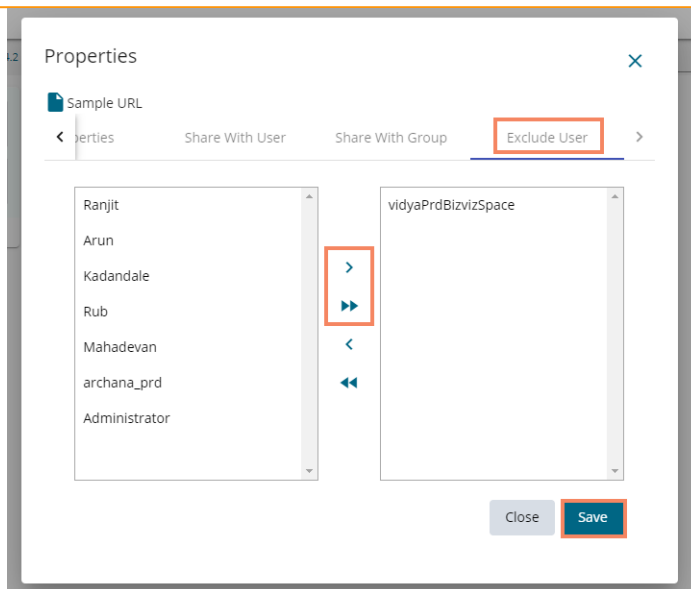
4. A success message appears stating that the document privilege is updated.

Document privilege updated successfully!

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

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

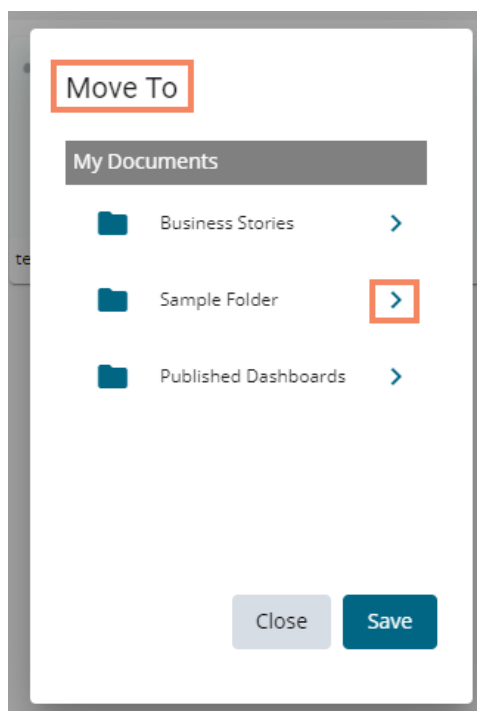
- d. **Exclude User:** The selected user cannot access the linked URL file.
 1. Select the **'Exclude User'** on the Properties pop-up screen.
 2. Select and move a user or all the users to the space given on the right side using the arrows.
 3. Click the **'Save'** option.



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

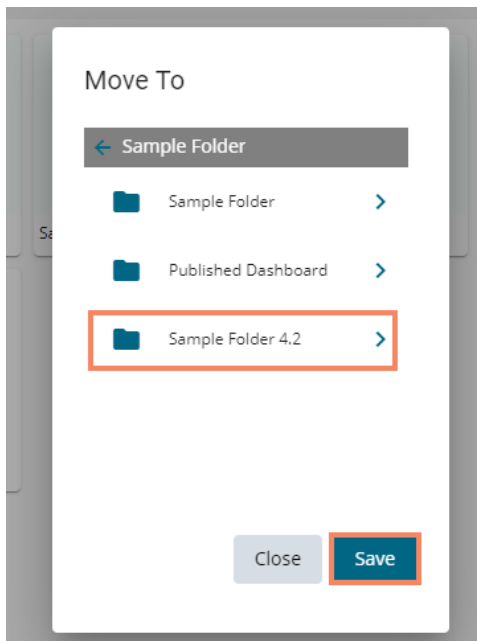
7.2.7. Moving a URL File

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

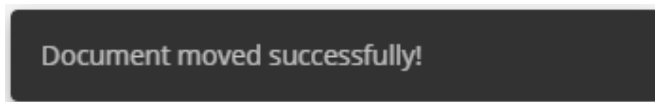


- vi) Users get redirected to the next screen.

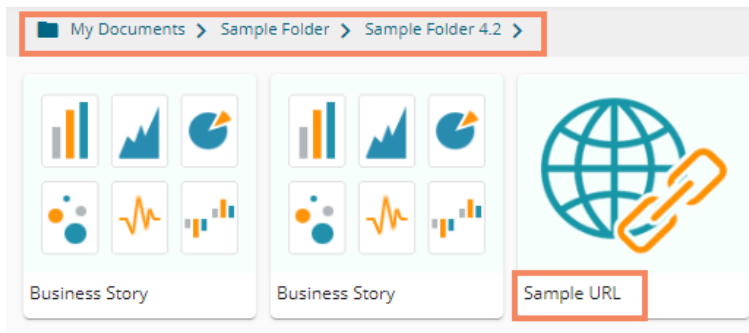
vii) Click the **'Save'** option.



viii) A success message appears.

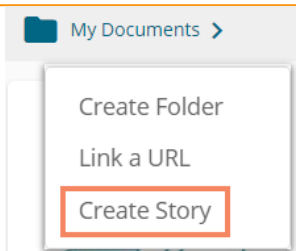


ix) The URL gets moved to the selected space.

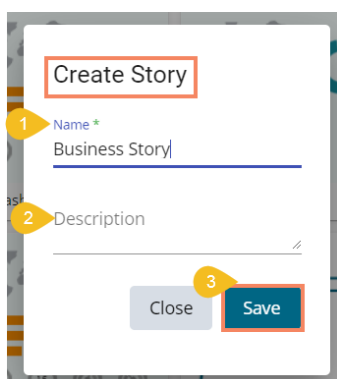


7.3. Creating a Story

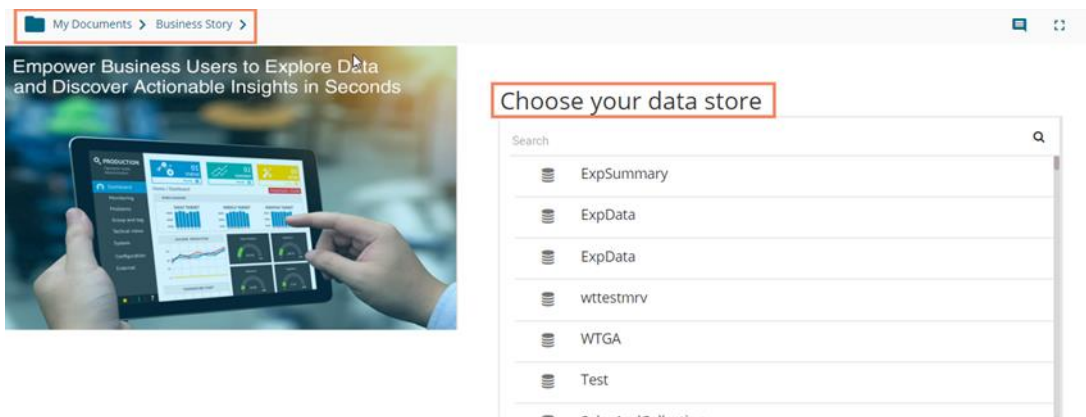
- i) Navigate to **'My Documents'** or **'Public Documents'**
- ii) Right-click anywhere on the My Documents or Public Documents blank space
- iii) Select the **'Create Story'** option from the context menu



- 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.

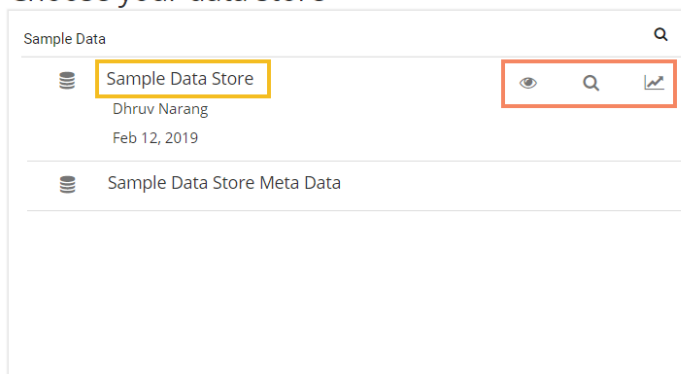


- vii) The story document gets created, and the following page opens by default.

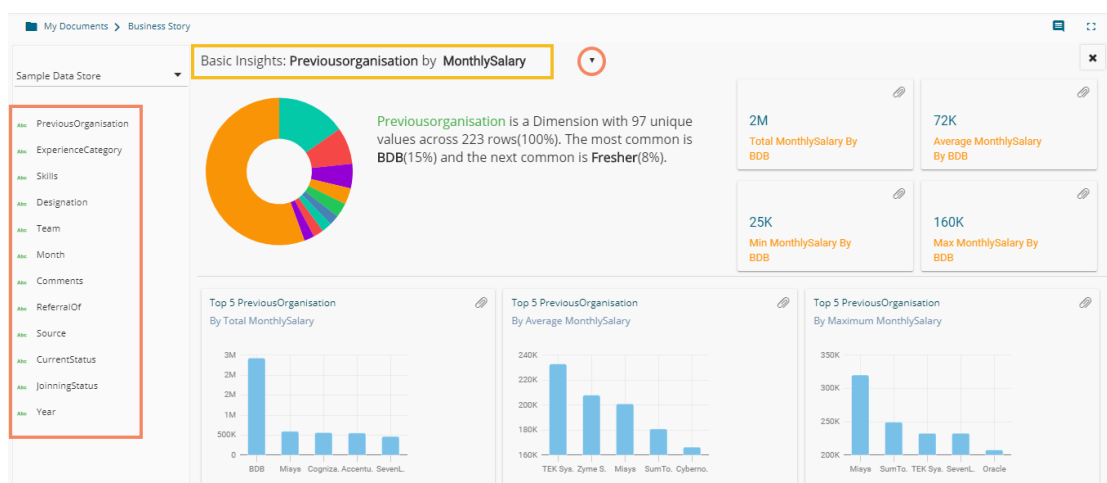


- viii) After selecting a data store, the user gets three options to begin working with their newly created story:
 1. Data Insights
 2. BDB Search
 3. View Design

Choose your data store

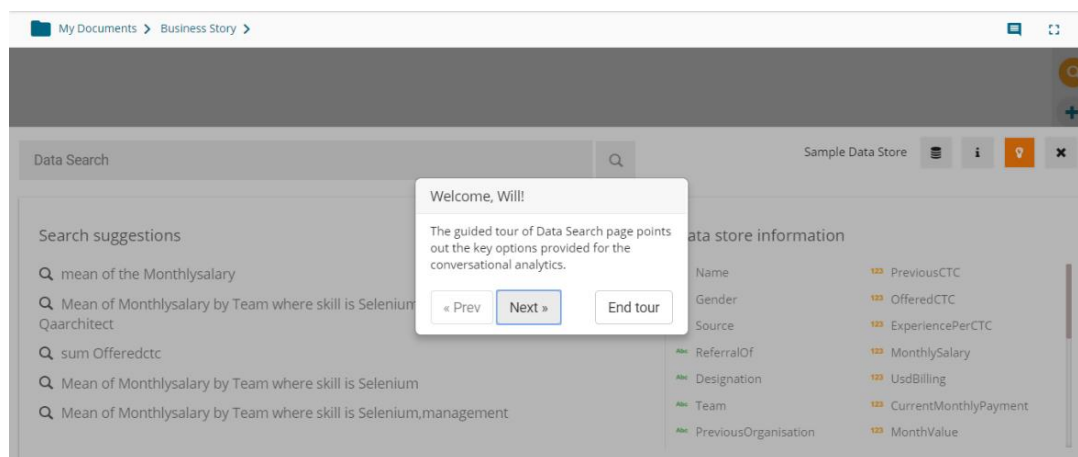


1. **Data Insights:** It redirects the user on a new page displaying the basic data insights which can be edited by selecting different dimension or measure.



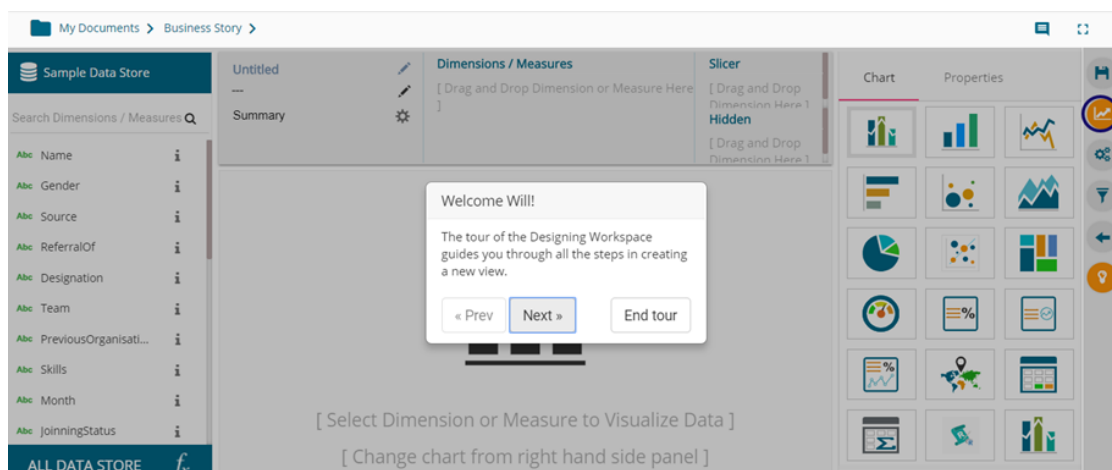
Note: By clicking the 'Close Insights' icon, the user gets the Storyboard screen.

2. **BDB Search:** It redirects the users to approach the newly created business story using the 'BDB Search' functionality.

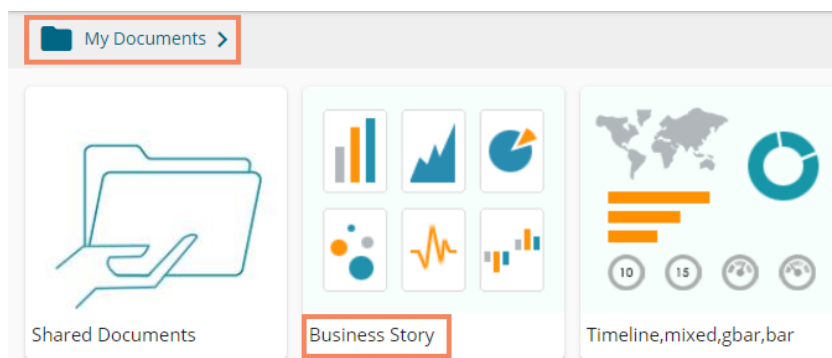


Note: By clicking the 'Close BDB Search Dialog' the user gets Storyboard screen.

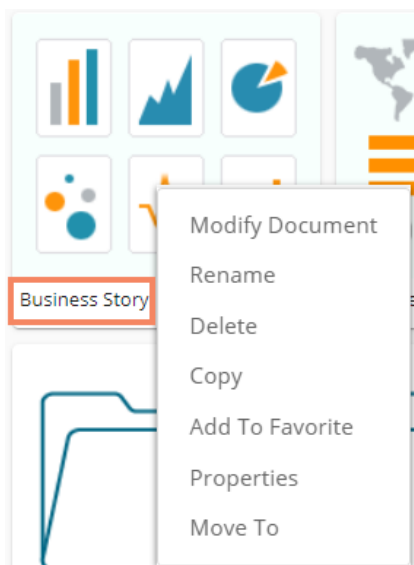
3. **View Design:** It redirects the user to drag and drop the required dimensions and measures to create a new view for the newly created story.



- ix) Navigate back to the 'My Documents' space.
- x) The newly created Story document gets added to the My Documents space.

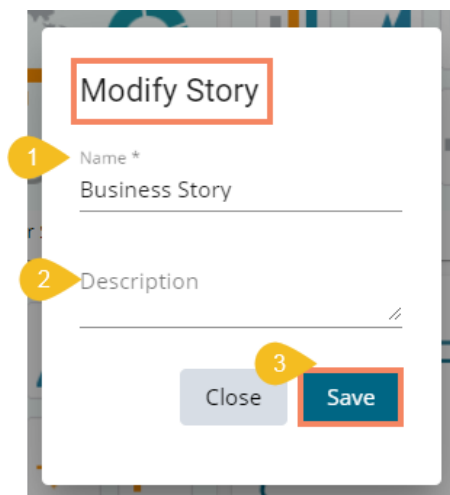


- xi) Select a story document from the My Documents or Public Documents space.
- xii) Use the right-click on it to display the credited operations for a story in a context menu.



7.3.1. Modifying a Document

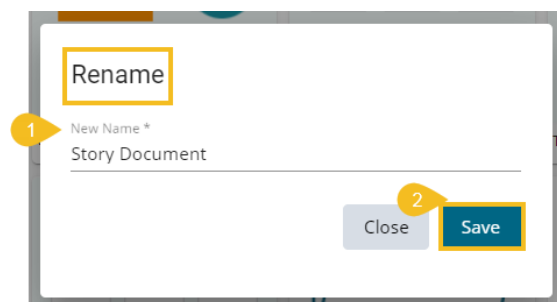
- i) Select '**Modify Document**' option from the Operations context menu.
- ii) A new window to modify the story details appears.
- iii) Modify the following information:
 - a. Title: Enter a title for the Business Story.
 - b. Description: Describe the story (Optional)
 - c. Click the '**Save**' option.



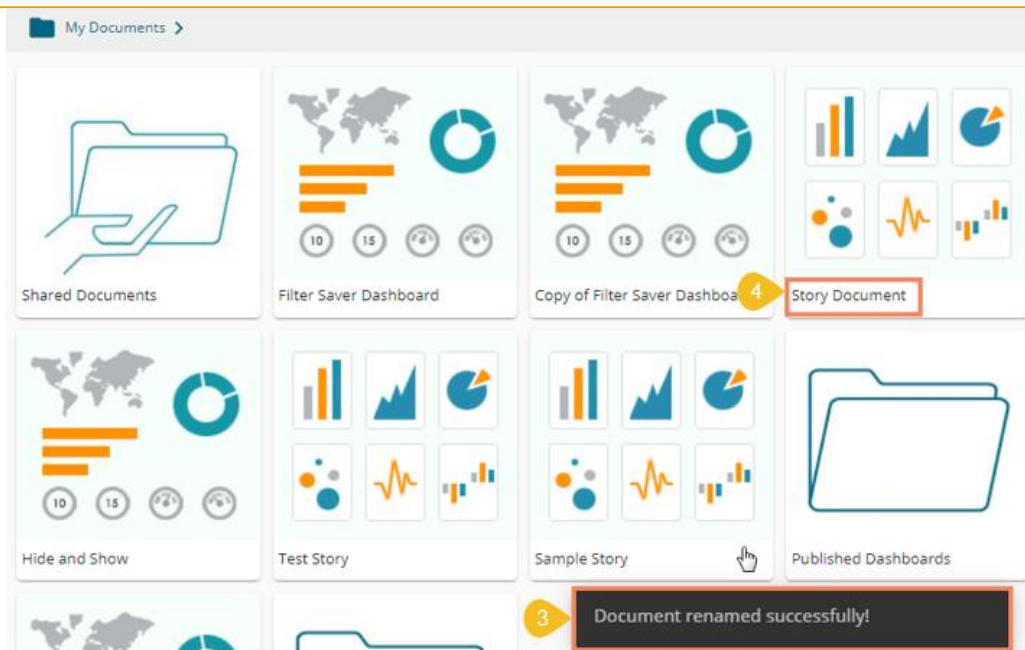
- iv) The chosen information for the story document gets modified.

7.3.2. Renaming a Story Document

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

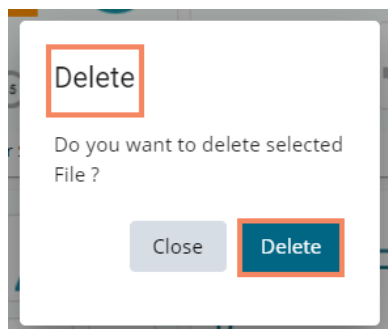


- iii) A success message appears.
- iv) The story document gets renamed successfully.



7.3.3. Deleting a Business Story

- i) Select the '**Delete**' option from the context menu.
- ii) A new window will pop-up to assure the deletion.
- iii) Click the '**Delete**' option.



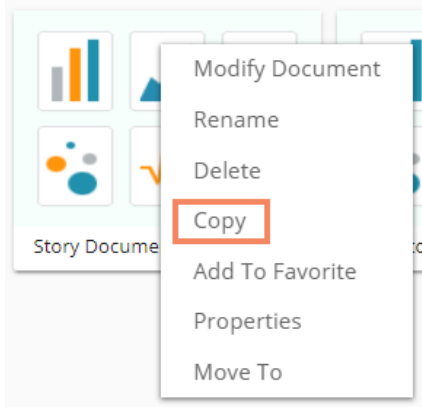
- iv) The selected story document gets removed.

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

7.3.4. Copying and Moving a Business Story

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

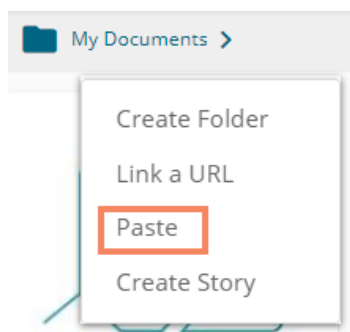
- i) Select '**Copy**' option from the context menu.



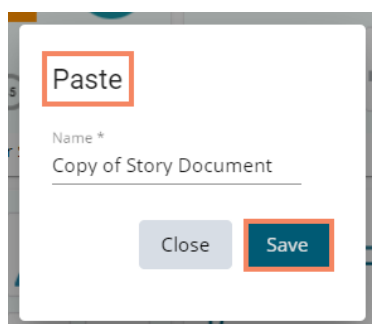
- ii) Select another folder and use a right click to get story option menu with the **'Paste'** option
Or

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

- iii) A context menu appears with the **'Paste'** option.
- iv) Select the **'Paste'** option.

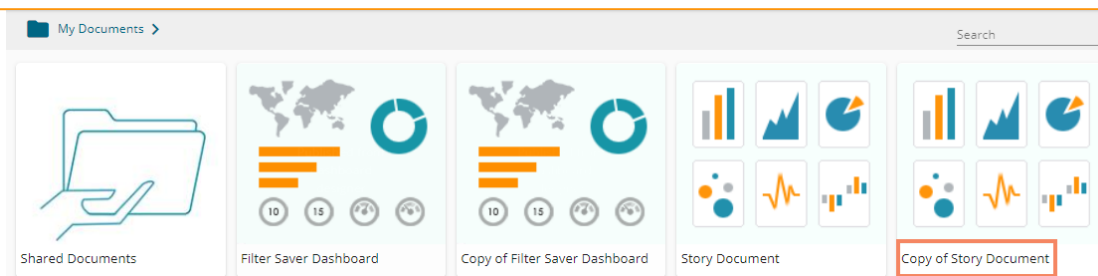


- v) A new window appears
- vi) The **Name** mentioned in the pop-up window shows prefix **'Copy of-'** before the original name of the story document (E.g., *Story Document* gets a new name *Copy of Story Document*).
- vii) Click **'Save.'**



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

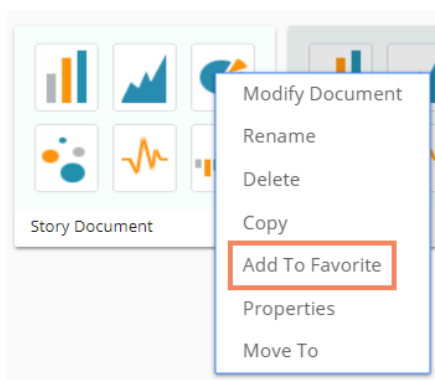
E.g., The following image shows that *Story Document* is named *Copy of Story Document* and has been pasted to the **'My Documents'** space.



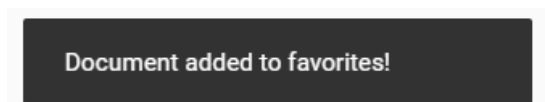
7.3.5. Adding/Removing a Story Document to/from Favorites

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

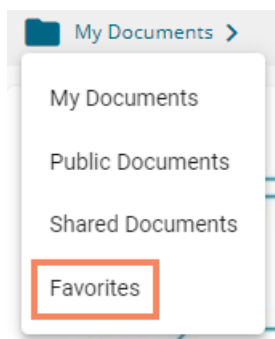
- i) Select the **'Add to Favorite'** option from the context menu.



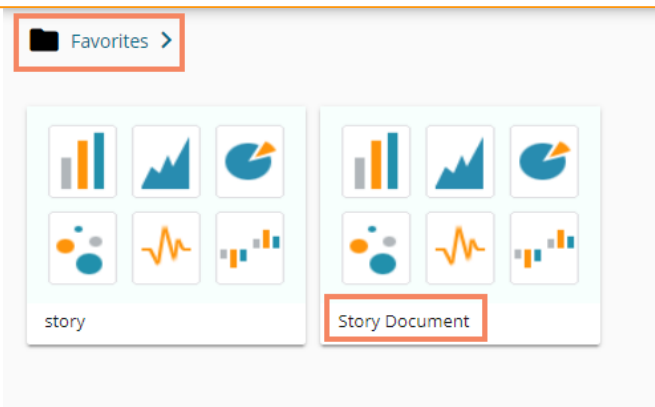
- ii) A new message pops-up, "Document added to Favorites!"



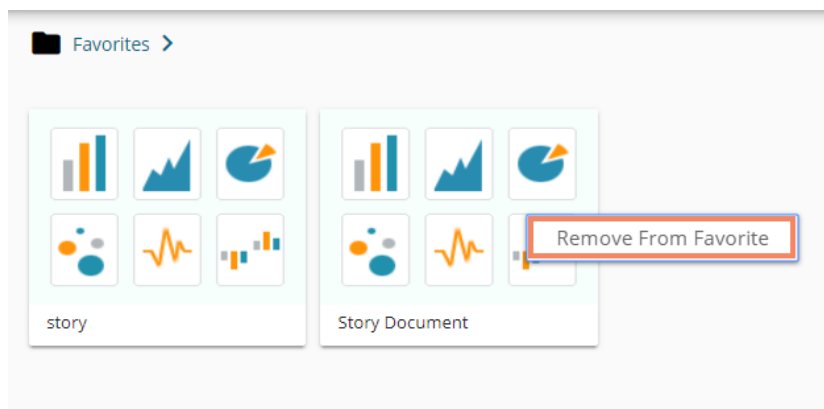
- iii) Open **'Favorites'** using the **'My Document'** drop-down menu.



- iv) The selected story document gets added to the **'Favorites'** space.

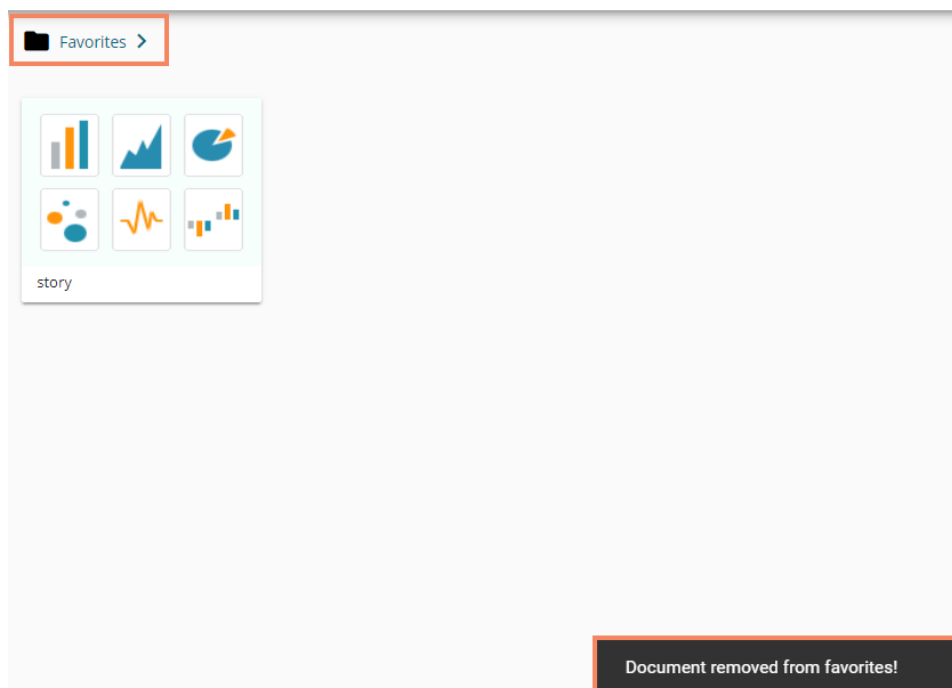


v) Click the **'Remove from Favorite'** option that appears by using a right-click on the story document.



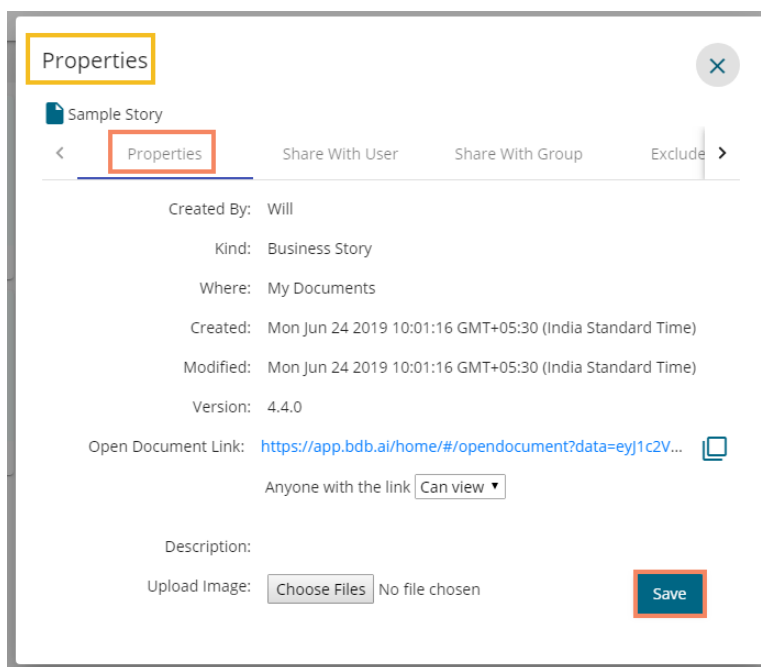
vi) A new message pops-up, **"Document removed from Favorites!"**

vii) The selected story document gets removed from **'Favorites.'**

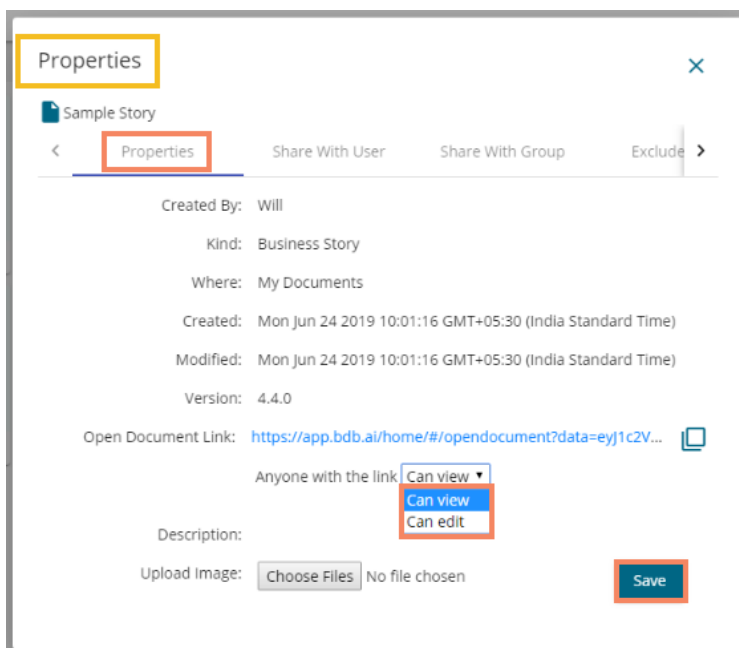


7.3.6. Properties

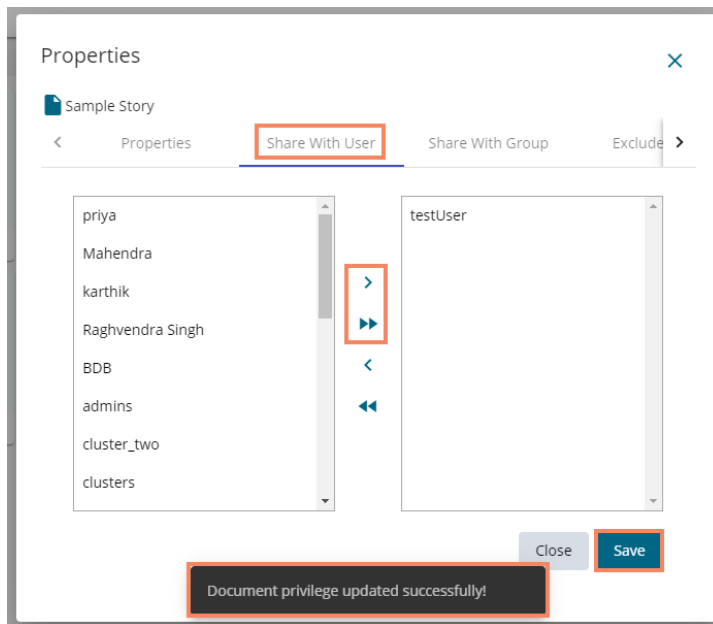
- i) Select the **'Properties'** option from the context menu.
- ii) A new screen pops-up with four tabs:
 - a. **Properties:** Displays the basic properties of the selected Business Story.



- i. The users can select via the Properties screen whether the other users to whom the story doc has been shared receive a **view only rights** or they can **edit the shared copy**. Select an option using the drop-down menu:
 1. Can view
 2. Can edit
- ii. Click the **'Choose Files'** option to update an image.
- iii. Click the **'Save'** option after the required settings are selected from the drop-down.

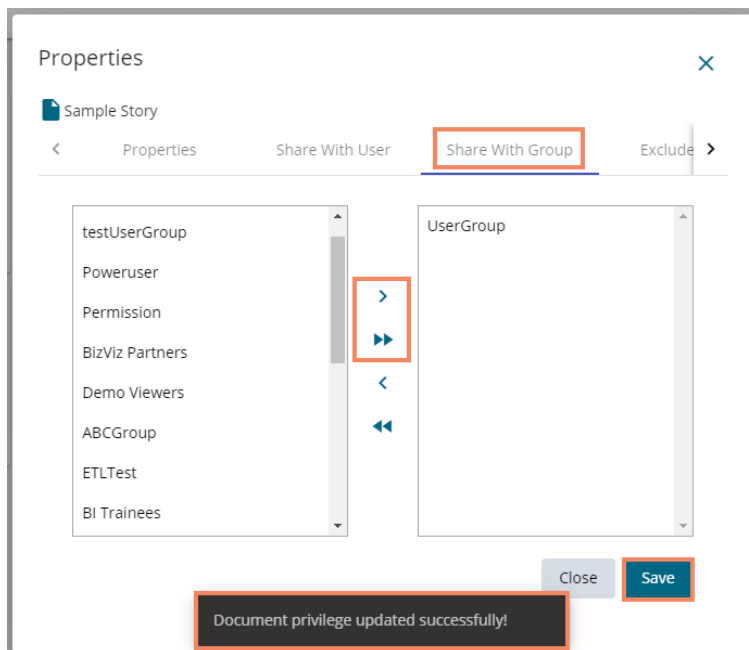


- b. Share With User:** The story document gets shared with the selected user or users.
1. Select 'Share With' tab on the Properties pop-up screen.
 2. Select a user or multiple users from the User List that appears on the left side
 3. Move the selected user or users to the right-side box using the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



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

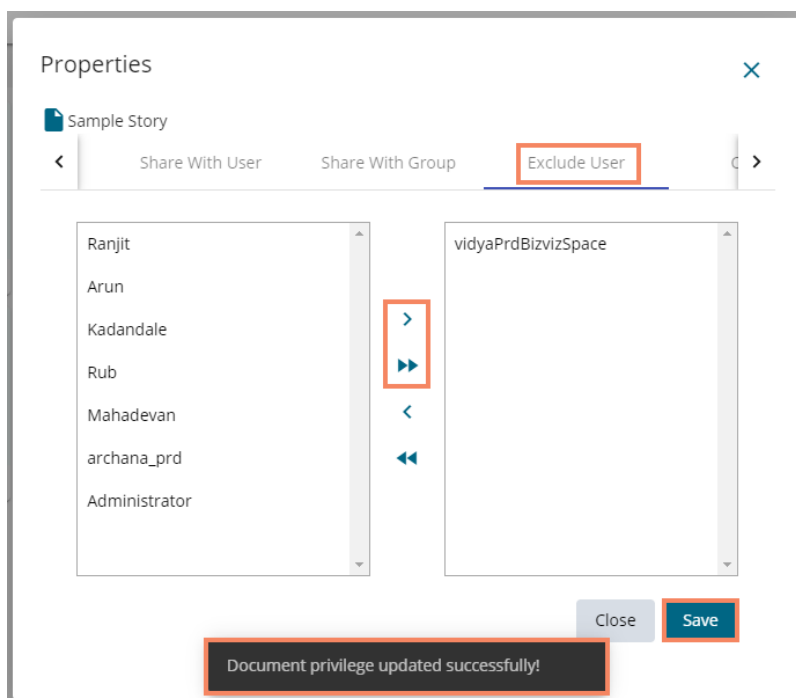
- c. Share With Group:** The story document gets shared with the selected user group or user groups.
1. Open the 'Share With Group' tab on the Properties pop-up screen.
 2. Select a user group or multiple user groups from the list that appears on the left side.
 3. Move the selected user group or user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



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

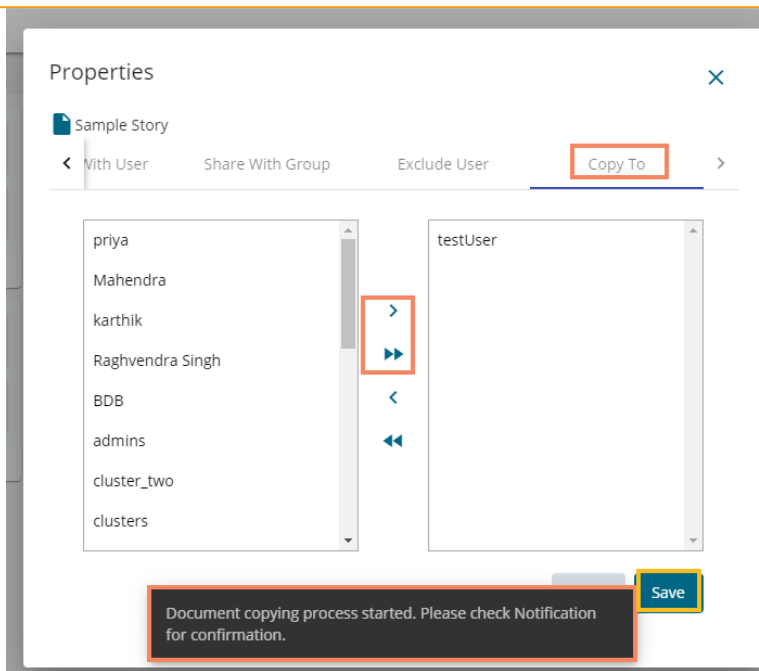
Note: If a story document is shared using this option, then the selected users or user groups receive a view only copy. The shared story document gets added to the **'Shared Documents'** space.

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

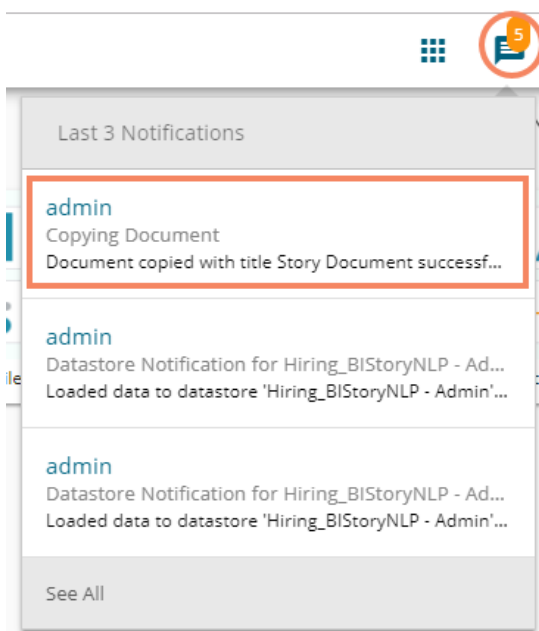


5. The selected user or users are unable to access the story document.

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



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

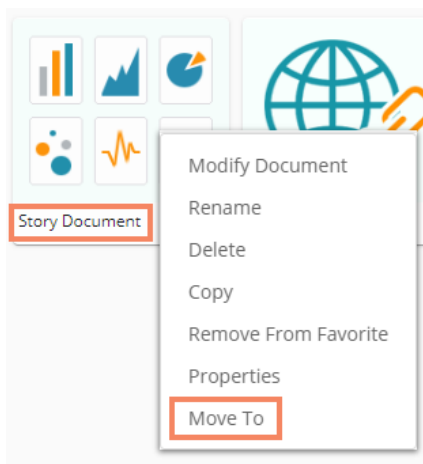


6. A copy of the story document gets shared with the selected user or users.

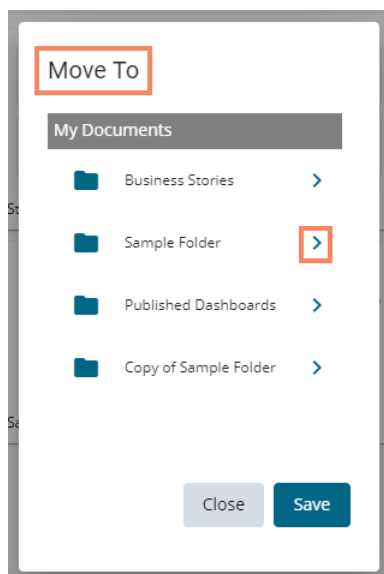
Note: If a story document is shared using this option, then the selected users have the right to modify the received story. The copied story document can be accessed from the **'Shared Documents'** space.

7.3.7. Move To

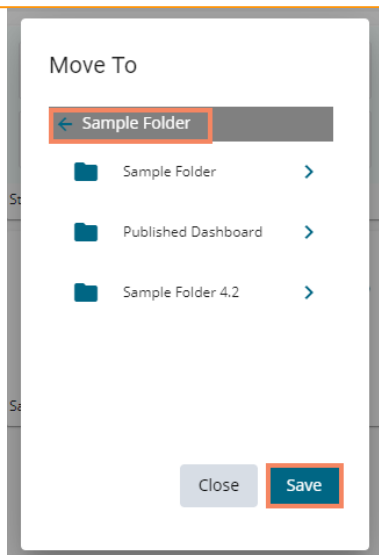
- i) Select the **'Move To'** option from the Operations context menu.



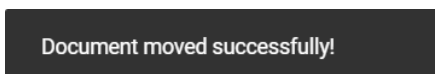
- ii) A new screen opens with the available folder options.
- iii) Select a folder or subfolder.
- iv) Click on the **'Move'** ➤ option to open a list of available sub-folders.



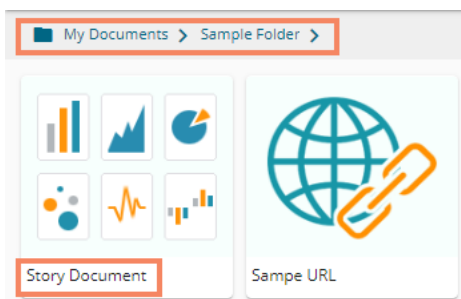
- v) Users get redirected to the next screen.
- vi) Click the **'Save'** option.



vii) A success message appears at the bottom of the screen.



viii) The story is moved to the selected folder or subfolder.



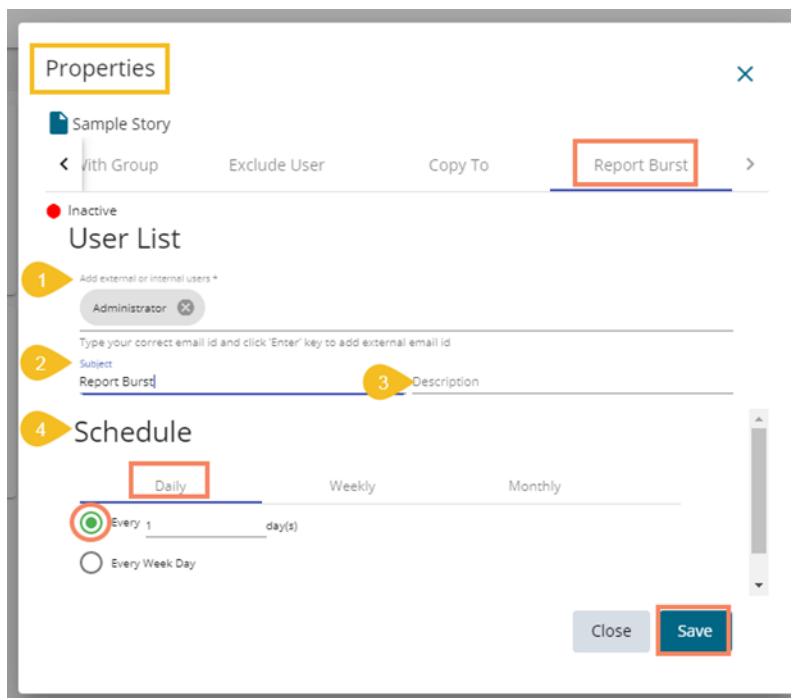
7.3.8. Report Burst

The Report Burst operation allows the user to share the open document link of a Business Story or Dashboard to another user(s). The feature appears under the Properties option provided for a story created or shared under the **'Public Documents'** space.

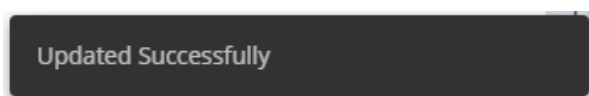
- i) Navigate to the **'Public Documents'** documents space.
- ii) Open the context menu with available operations.
- iii) Click the **'Properties'** option.



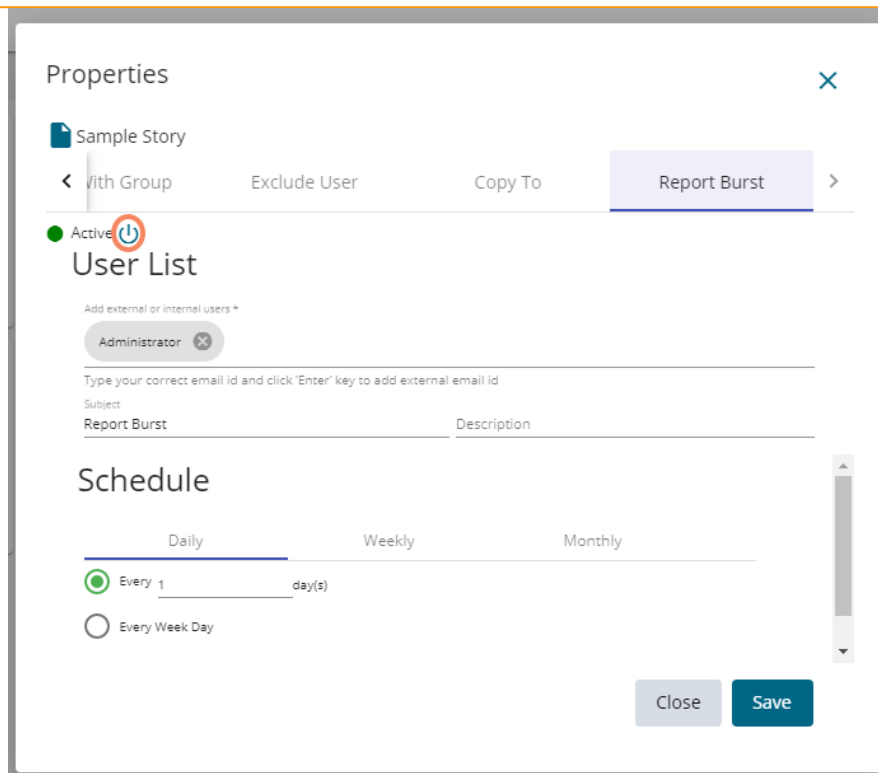
- iv) A new window opens with multiple tabs.
- v) Select the **'Report Burst'** tab.
 1. Add an external or internal user(s).
 2. Provide Subject.
 3. Provide Description.
 4. Schedule the selected story document by configuring the time range.
 5. Click the **'Save'** option.



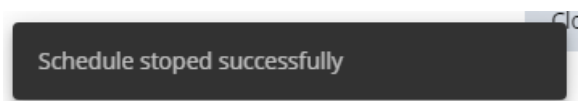
- vi) A success message appears.



- vii) The Scheduler status becomes active.
- viii) Click the **'Stop Schedule'** button to stop the scheduler.



- ix) A notification message appears to inform the same.



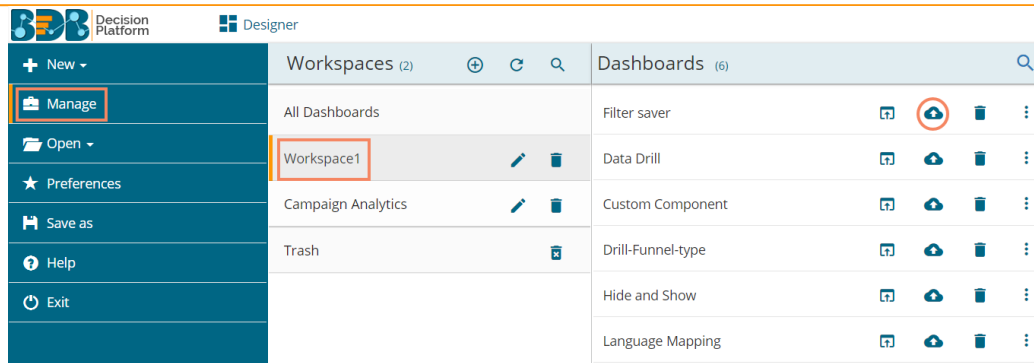
- x) The open doc link of the selected story or dashboard gets shared to the selected user at the scheduled time through the mail.

Note: The documents which are created in the ‘Public Documents’ space get the ‘Delete’ and ‘Move To’ operations, the shared documents do not get these two operations.

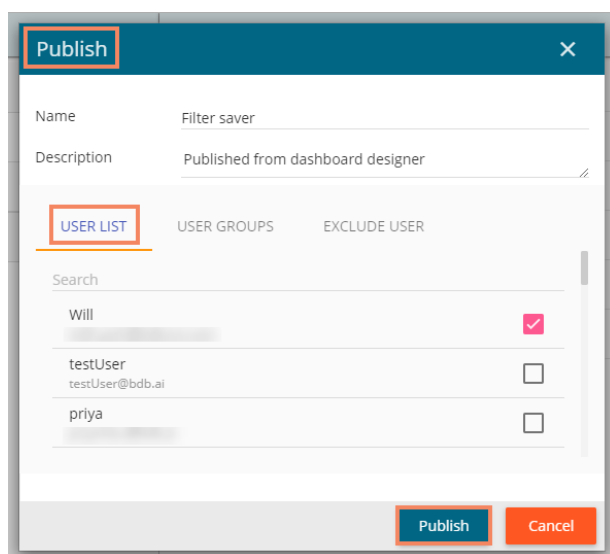
7.4. Published Dashboard on the BDB Platform

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

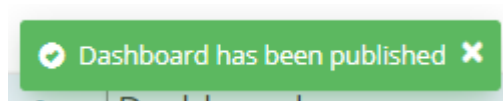
- i) Users need to navigate to the dashboard list provided in a workspace.
- ii) Access the ‘Publish to Portal’ option from the list of Dashboards.



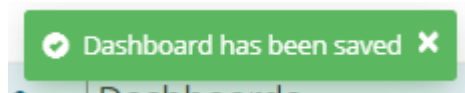
- iii) The user gets redirected to a new wizard to choose a user or user group or exclude the user.
- iv) Use a check mark to choose the desired action.
- v) Click the **'Publish'** option.



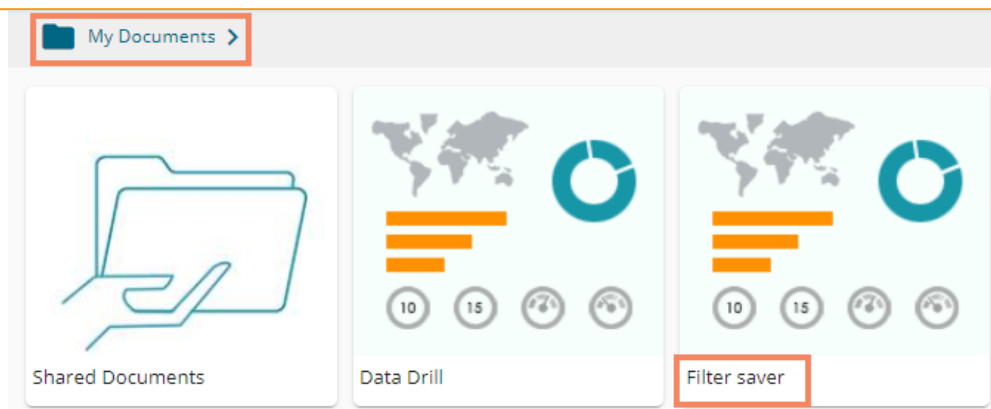
- vi) A success message appears to confirm that the Dashboard is published.



- vii) Another success message appears to inform the user that the dashboard has been saved.

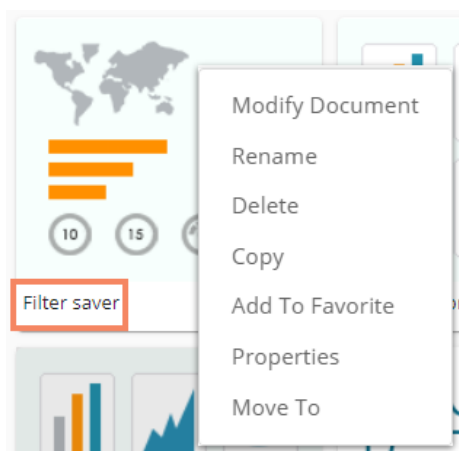


- viii) Users can access the published dashboard from the given location. E.g., location for the following dashboard is **'My Documents.'**



• **Operations Assigned to a Published Dashboard**

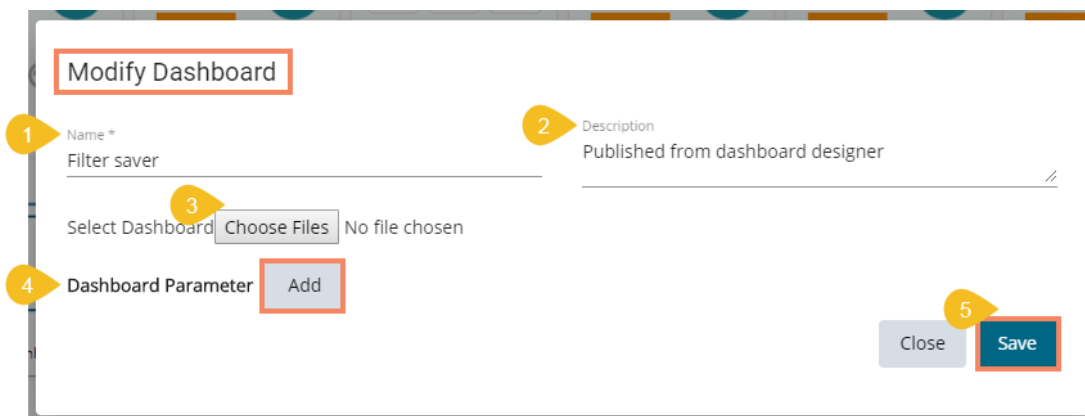
- i) Navigate to the platform homepage.
- ii) Select a published dashboard on My Documents or Public Documents.
- iii) Use a right-click on the published dashboard to open various credited operations in a context menu.



7.4.1. Modifying a Dashboard

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

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

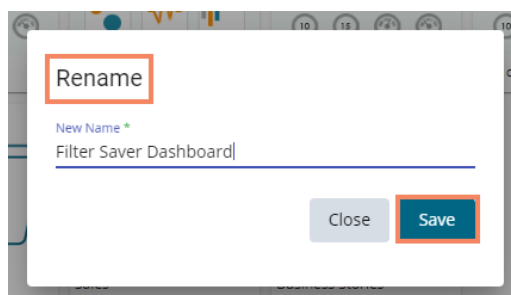


vii) A message appears to assure that the required data got updated.

7.4.2. Renaming a Dashboard

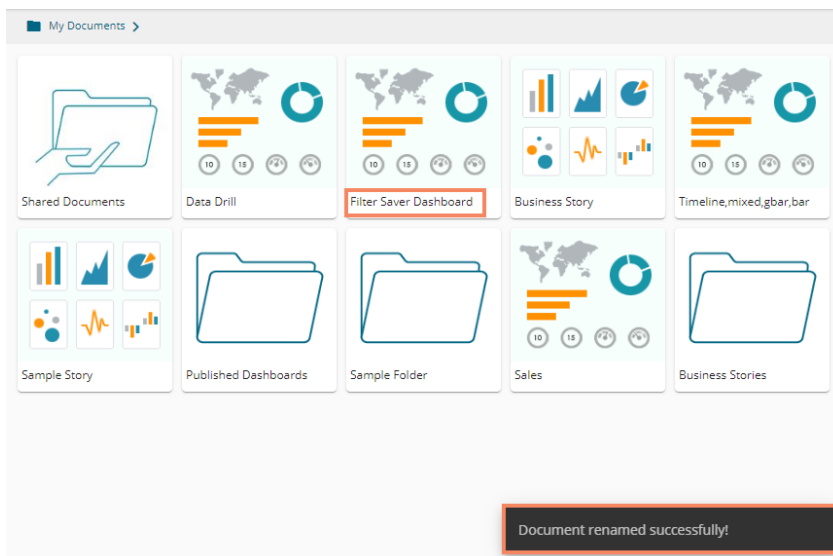
Administrators can change the name of an existing dashboard.

- i) Select a dashboard.
- ii) Select the **'Rename'** option from the Dashboard Operations 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.

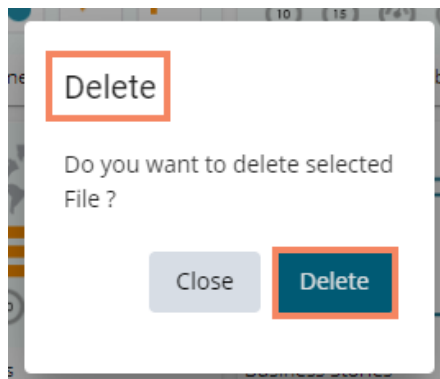
vii) The selected dashboard gets renamed.



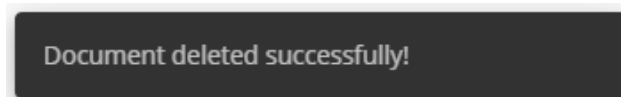
7.4.3. Deleting a Dashboard

Administrators can remove a dashboard by following the given steps:

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



- v) A success message appears.

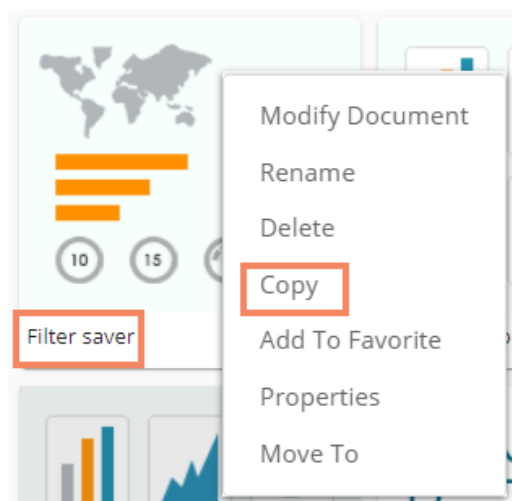


- vi) The selected dashboard gets deleted.

7.4.4. Copying and Moving a Dashboard

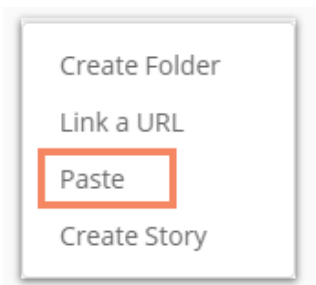
Administrators can copy an existing dashboard and paste it at any chosen place within My Documents or Public Documents of the platform.

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



- iii) Select another folder and open the menu with the credited options.
Or

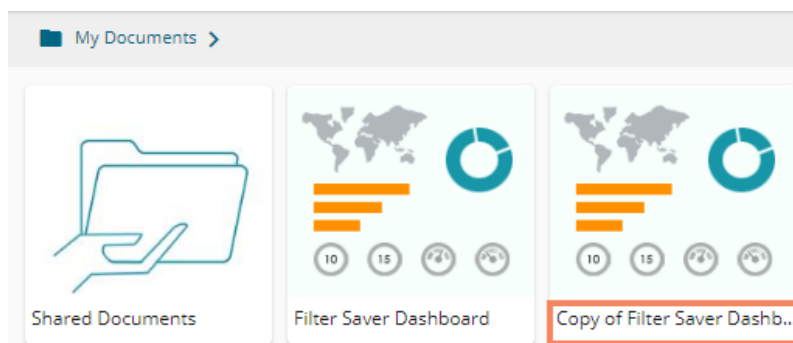
- iv) Navigate to **'My Documents'** or **'Public Documents'** and right-click anywhere on the blank space.
- v) A context menu appears with the **'Paste'** option.
- vi) Click the **'Paste'** option.



- 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.



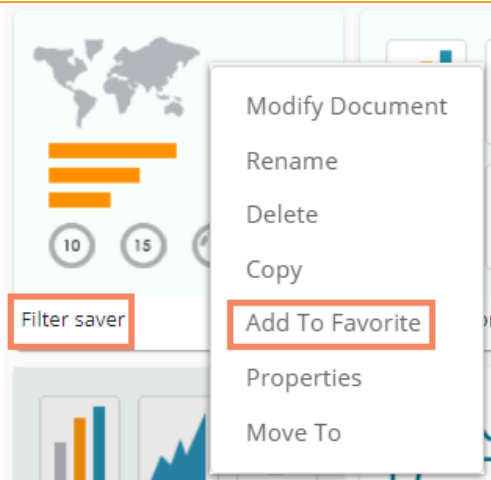
- x) The selected dashboard gets copied with a different name.



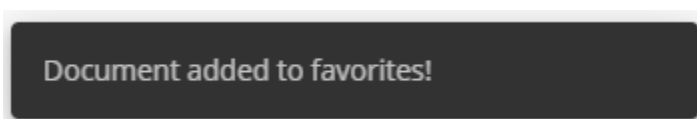
7.4.5. Adding/Removing a Dashboard to/from Favorites)

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

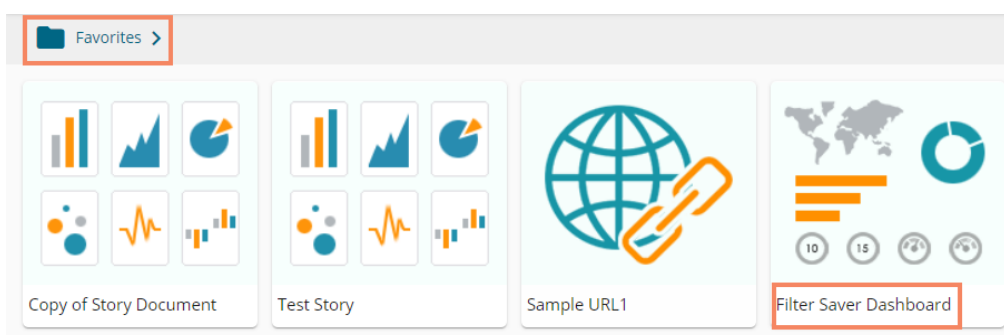
- i) Select a dashboard.
- ii) Select the **'Add to Favorites'** operation from the context menu.



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



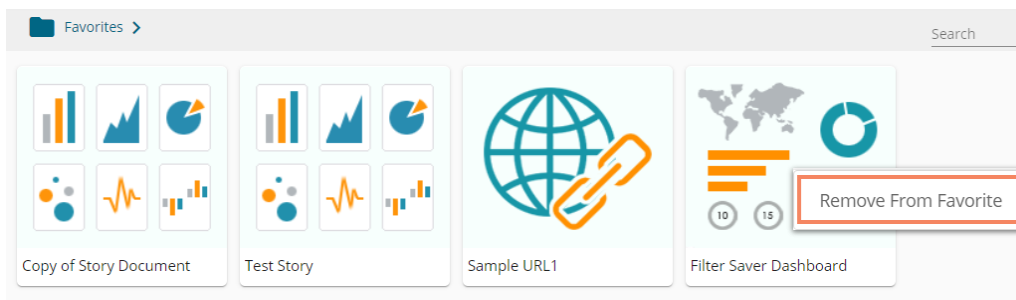
iv) The selected dashboard gets added to the **‘Favorites’** section.



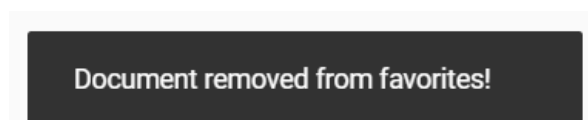
v) Open the **‘Favorites’** section.

vi) Use right-click on the dashboard to get the remove option.

vii) Click the **‘Remove From Favorite’** option.




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

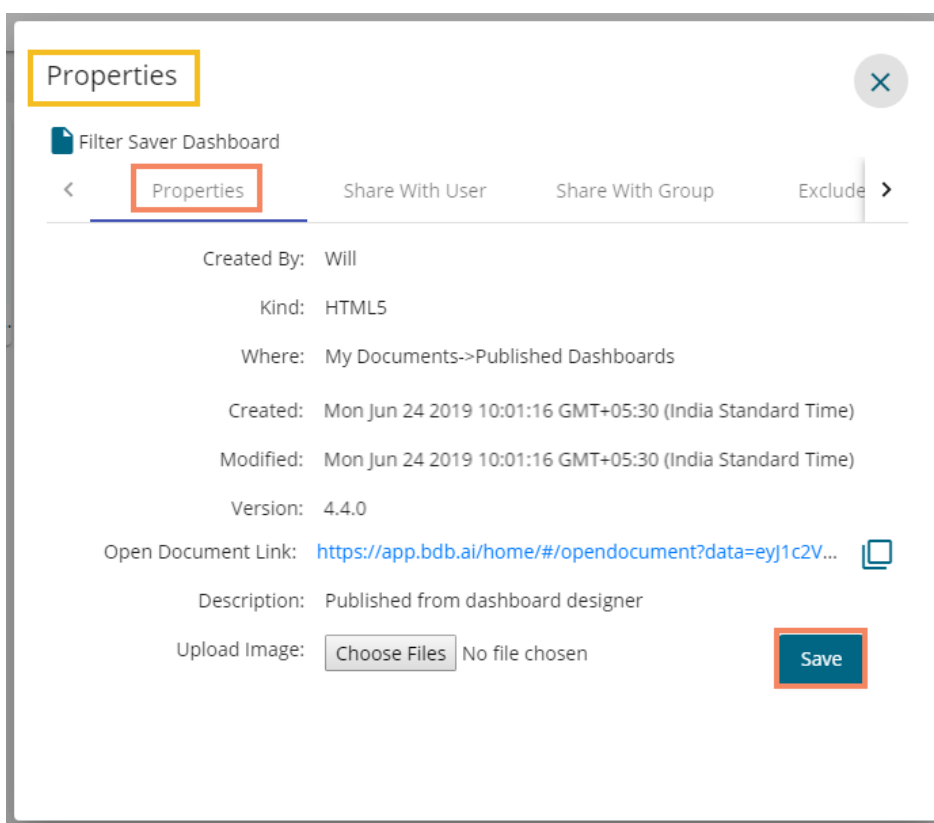


ix) The dashboard gets removed from the **Favorites**.

7.4.6. Properties

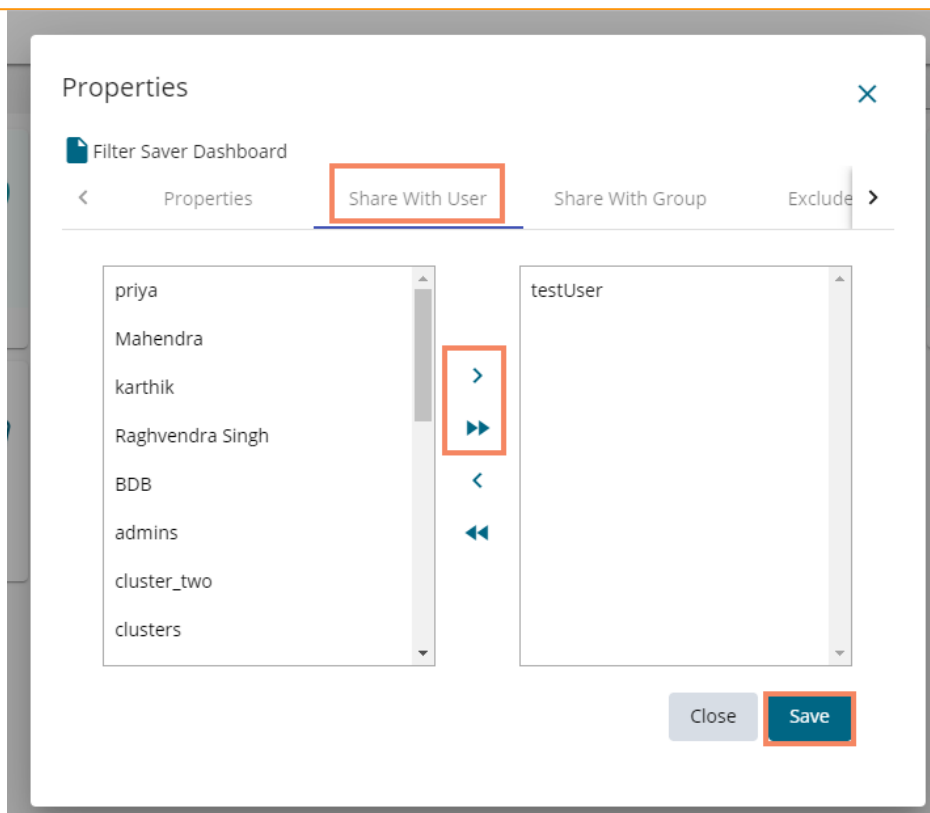
Users can access the properties details of a selected dashboard by using this option.

- i) Select a dashboard.
- ii) Select the '**Properties**' operation from the context menu.
- iii) The Properties window appears with four options.
 - a. **Properties:** The basic dashboard properties get displayed.
 1. Click the '**Copy Link**'  icon to copy the open document link of the published Dashboard.
 2. Click the '**Choose Files**' option to upload an image.
 3. Click the '**Save**' option to save the update.

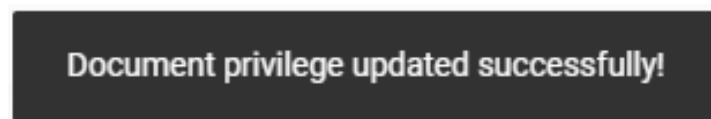


b. **Share With User:** The dashboard gets shared with the selected user(s).

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

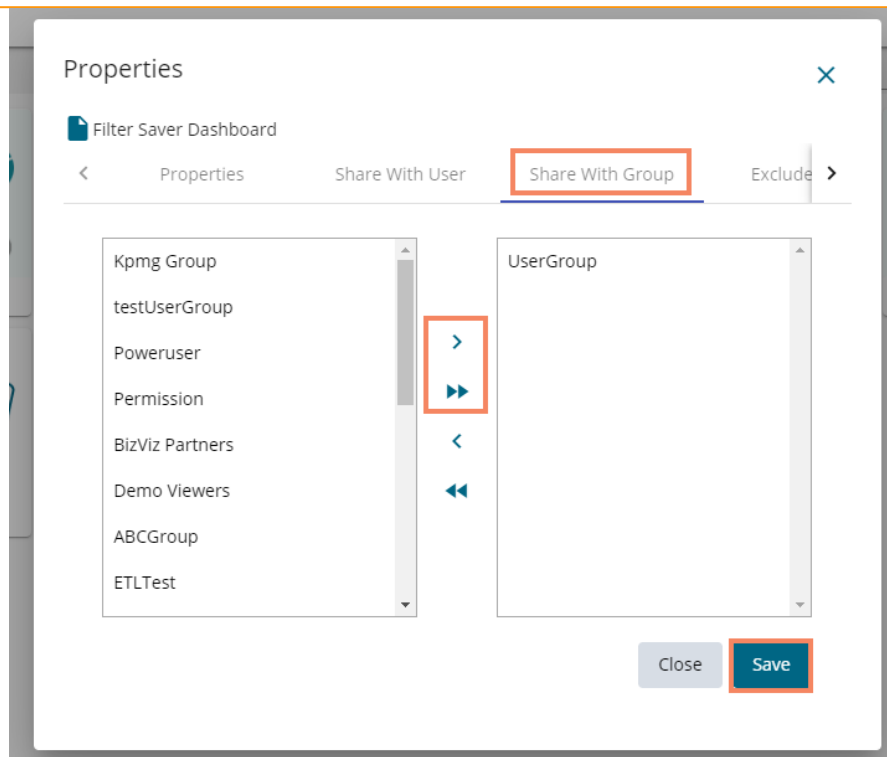


4. A success message appears stating that the document privilege is updated.

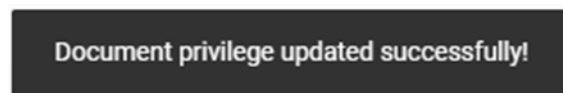


5. The dashboard gets shared with the selected user(s).

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



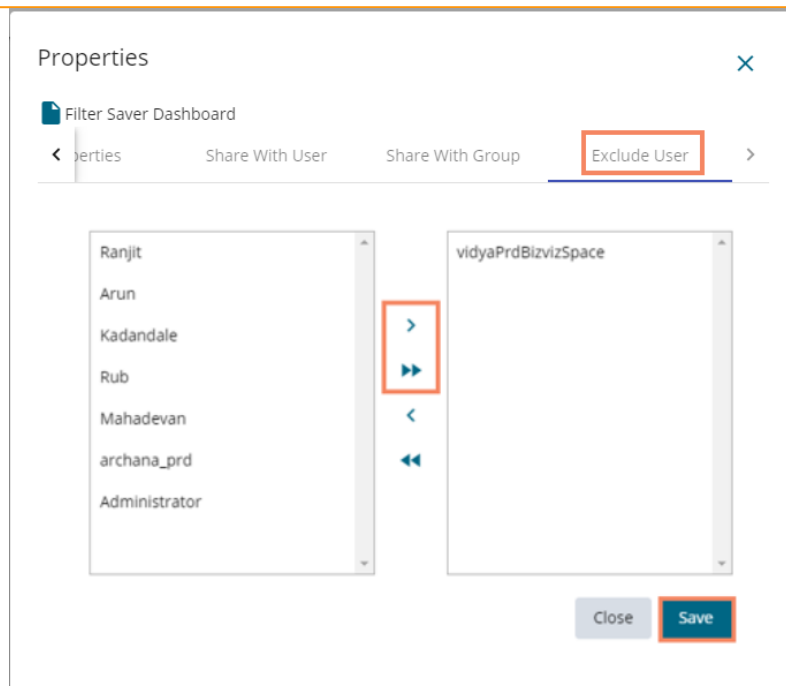
4. A success message appears stating that the document privilege is updated.



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

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

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

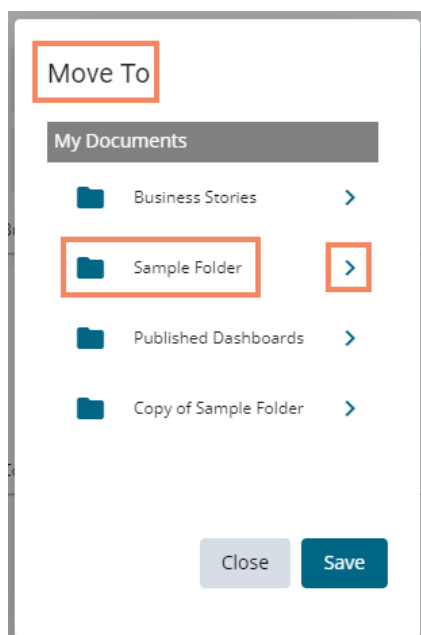


4. A success message appears, and the document privilege gets updated to exclude the selected user(s).

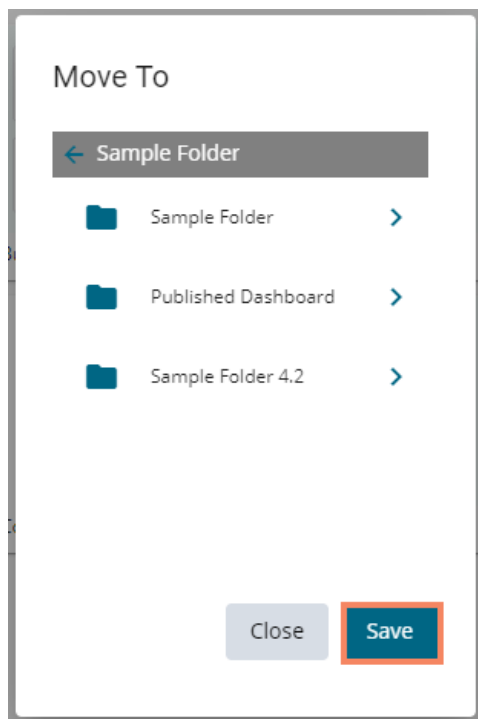
7.4.7. Moving a Dashboard

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

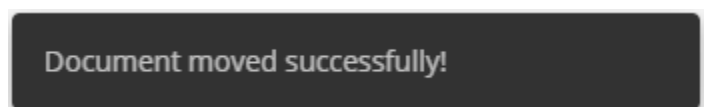
- i) Select a dashboard.
- ii) Select the '**Move To**' option from the operation context menu.
- iii) The '**Move To**' window appears displaying the available folders.
- iv) Select a folder.
- v) Click the '**Move**' > icon.



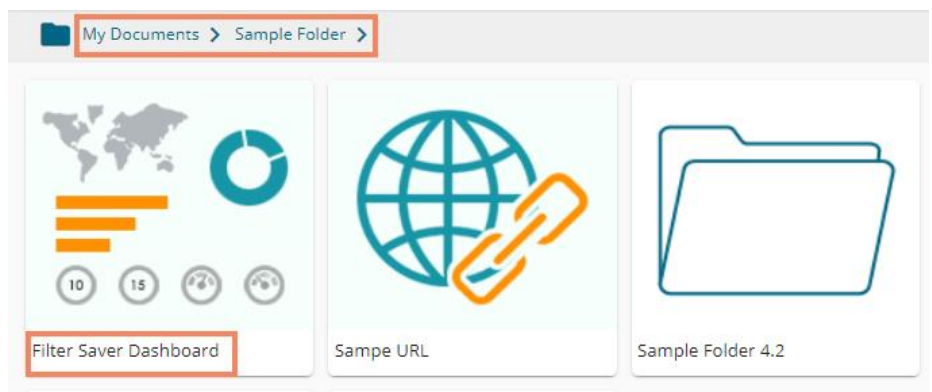
- vi) Users get redirected to the next screen.
- vii) Click the **'Save'** option.



- viii) A success message appears.



- ix) The dashboard gets moved to the selected space.

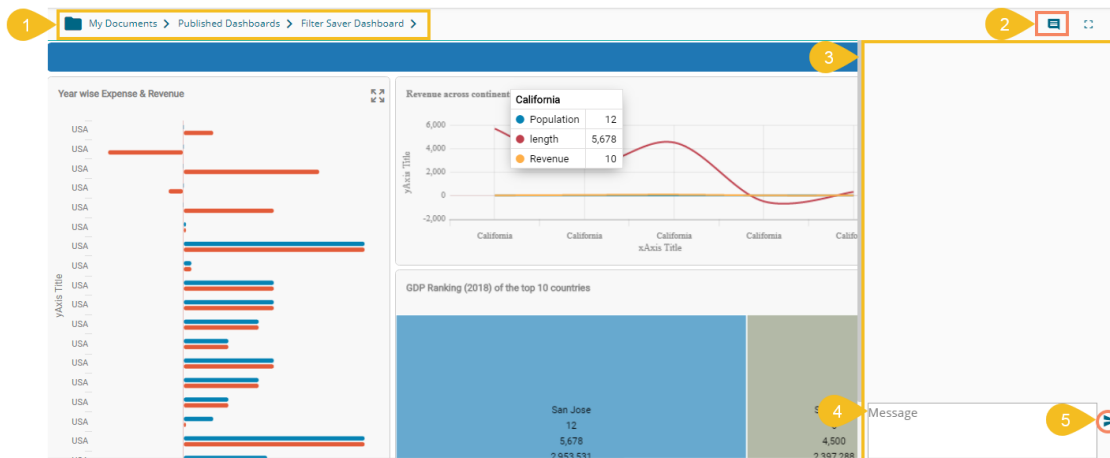


Note: To view a dashboard, use a click on the selected dashboard.

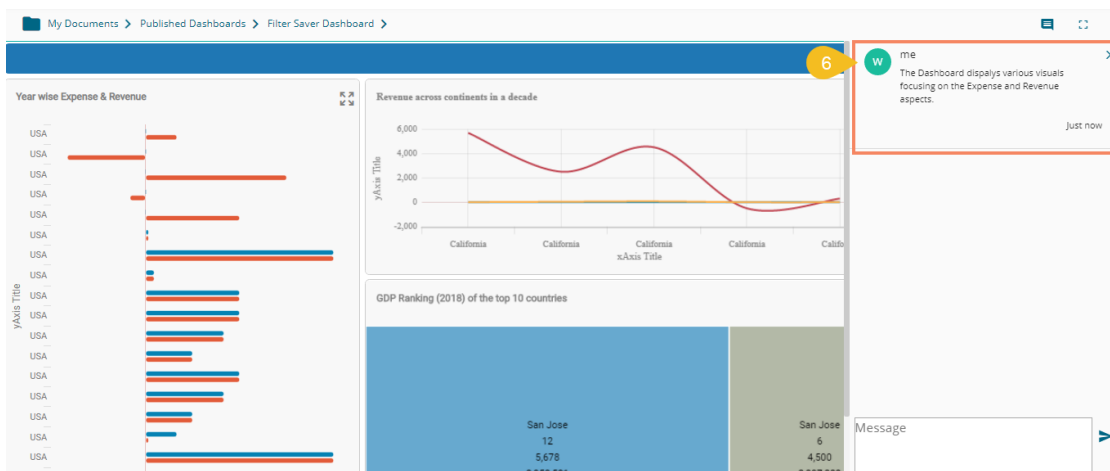
7.4.8. Insert Comments

The comment option is provided for the published Forms to explain or insert feedback for the form.

- i) Open a published Dashboard from the BDB Platform.
- ii) Click the **'Comments'** icon from the header.
- iii) A new window opens below with space to insert a message at the end of the window.
- iv) Type a comment in the given **'Message'** space.
- v) Click the **'Send'** icon.



- vi) The message gets added to the **'Comments'** window.



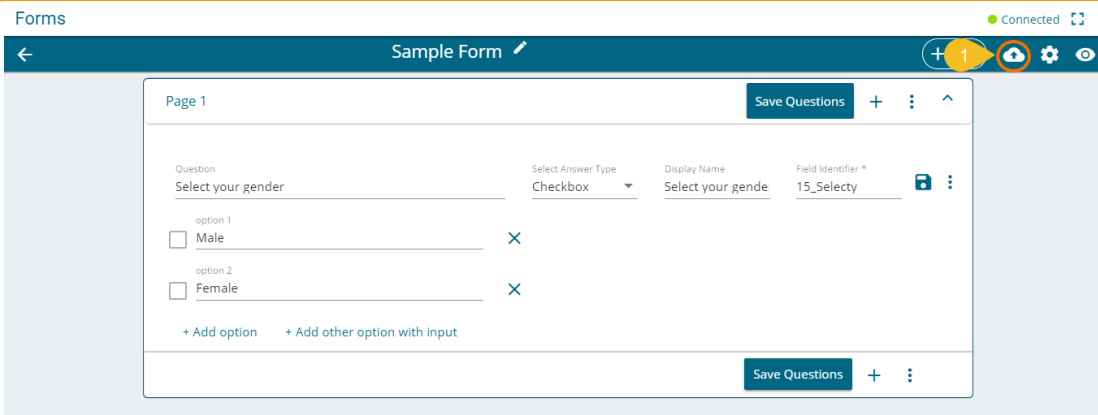
Note:

- a. The **'Comments'** feature is enabled for all the users who can access the dashboard document.
- b. The inserted comments display user initials and record of time.
- c. **Full Screen** / **Reduce Size** icon is provided to view the form in full screen or reduce the form screen size.

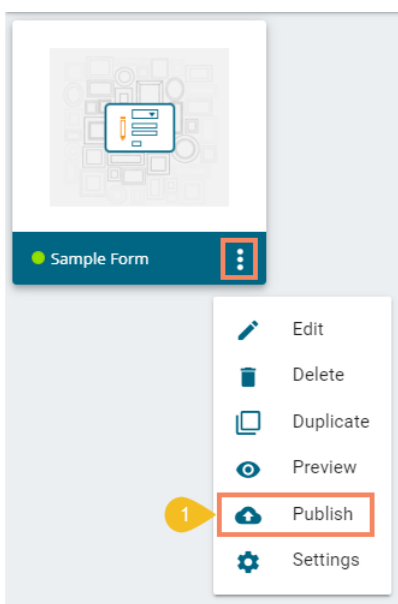
7.5. Published Forms on the BDB Platform

The users can publish the forms created by them to the BDB Platform. The published forms can be accessed on the BDB Platform homepage under the **'My Documents'** section.

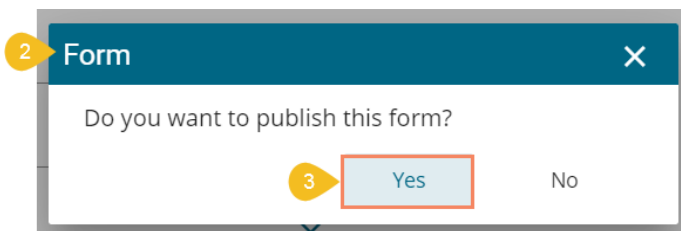
- i) Click the **'Publish'** icon from the header panel of the selected Form.



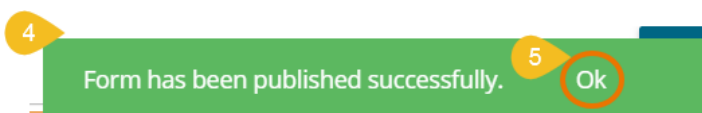
Or
Click the Publish option using the Form Options menu.



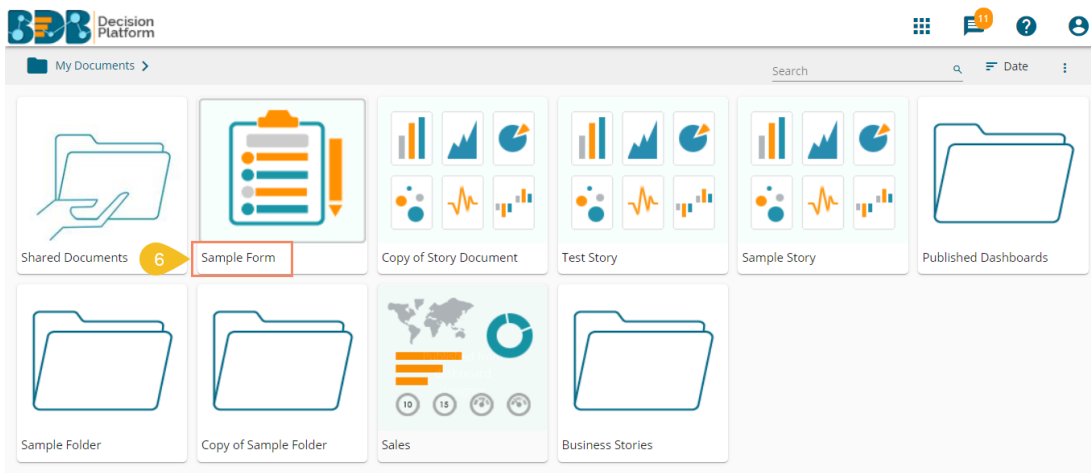
- ii) A pop-up window opens to confirm the action.
- iii) Click the 'Yes' option to publish the form.



- iv) A success message appears to confirm the action of the publish.
- v) Click the 'OK' option to remove the message window.

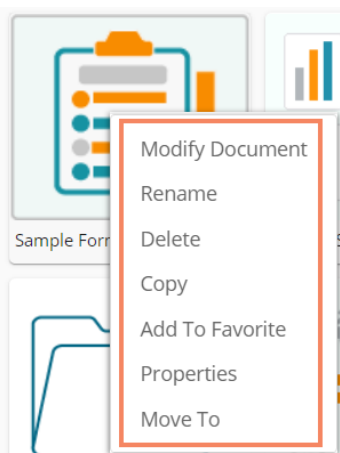


vi) The Published form appears under the 'My Documents' place of the same BDB Platform account.



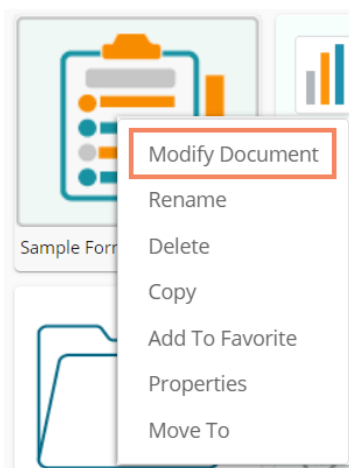
vii) Each published Form is credited with some operations on the BDB Platform.

viii) The users can use right-click to access the available Form operations in a context menu.

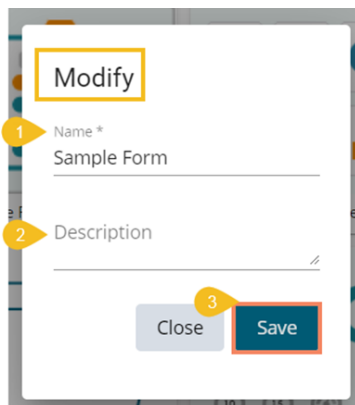


7.5.1. Modifying a Form

i) Select the 'Modify Document' option using the Form operations menu.



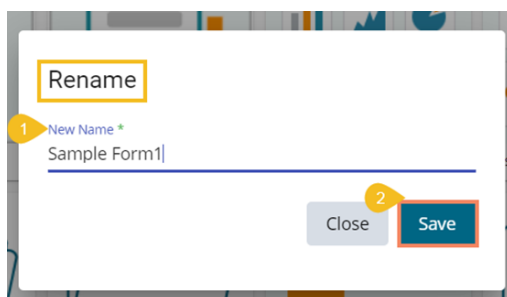
- ii) The **'Modify'** window opens for the selected form.
- iii) Modify the required information:
 - a. Name of the Form
 - b. Description of the Form
 - c. Click the **'Save'** option.



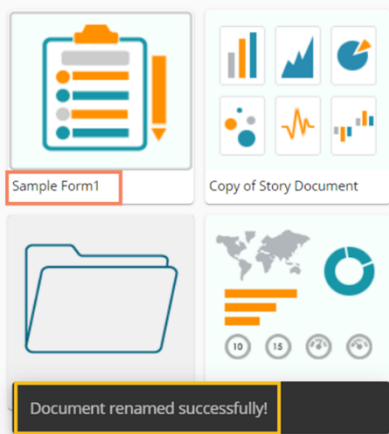
- iv) The selected information gets modified.

7.5.2. Renaming a Form

- i) Select the **'Rename'** option from the Form Operation menu.
- ii) A new window opens prompting to rename the Form.
- iii) Provide a New Name for the selected form.
- iv) Click the **'Save'** option.

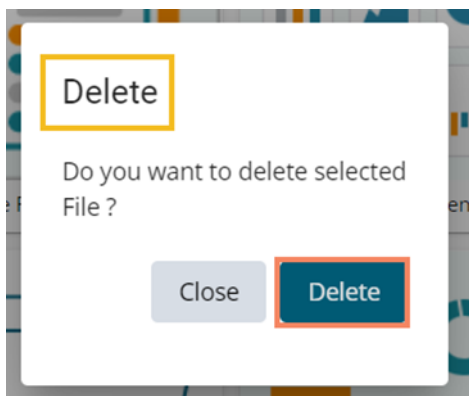


- v) The selected form gets renamed.



7.5.3. Deleting a Form

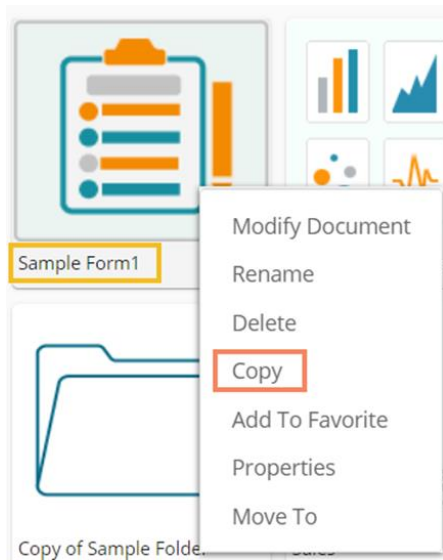
- i) Select the '**Delete**' option from the Operations menu.
- ii) A message window opens to confirm the action.
- iii) Select the '**Delete**' option to delete the selected form.



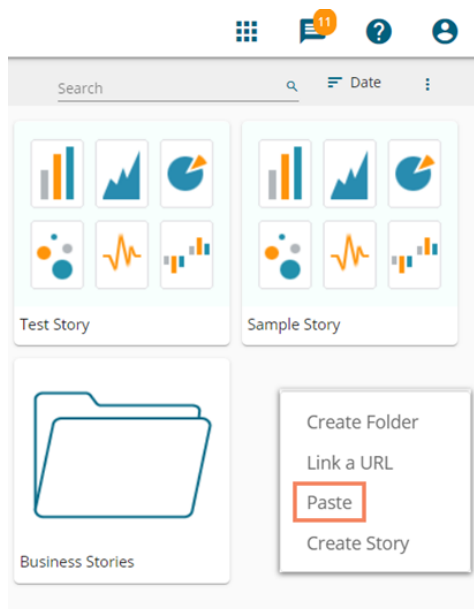
- iv) The selected form gets deleted.

7.5.4. Copying a Form

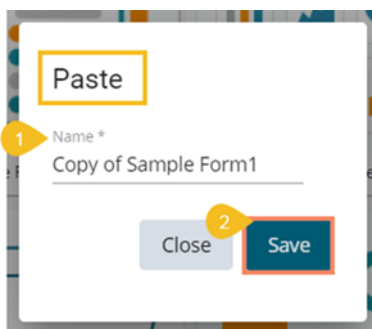
- i) Select the '**Copy**' option from the Operations menu.



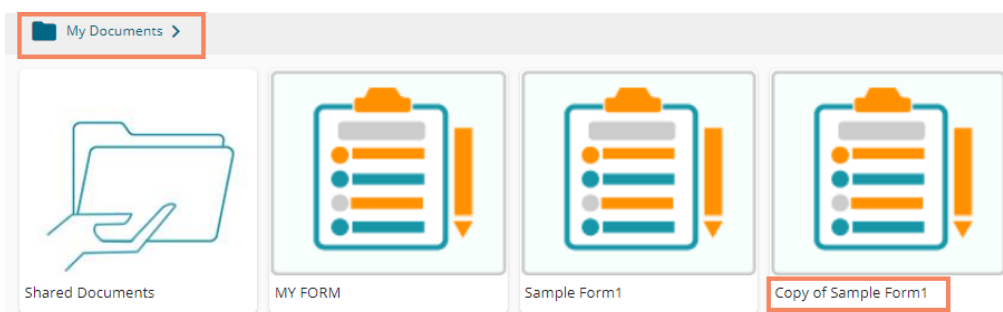
- ii) Use the right click on another folder or on the blank space to get the 'Paste' option.
- iii) Click the 'Paste' option.



- iv) The 'Paste' window opens displaying the selected form name with the 'Copy of' prefix. E.g., A form named Sample Form 1 gets a new name, 'Copy of Sample Form 1' as shown in the following image:
- v) Click the 'Save' option.

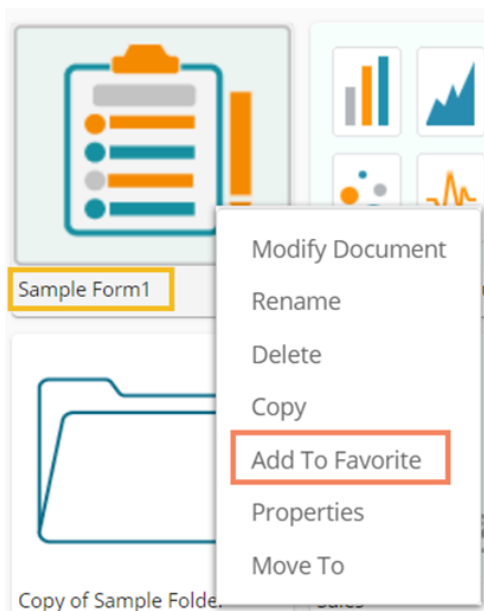


- vi) The pasted form gets saved with the new name.

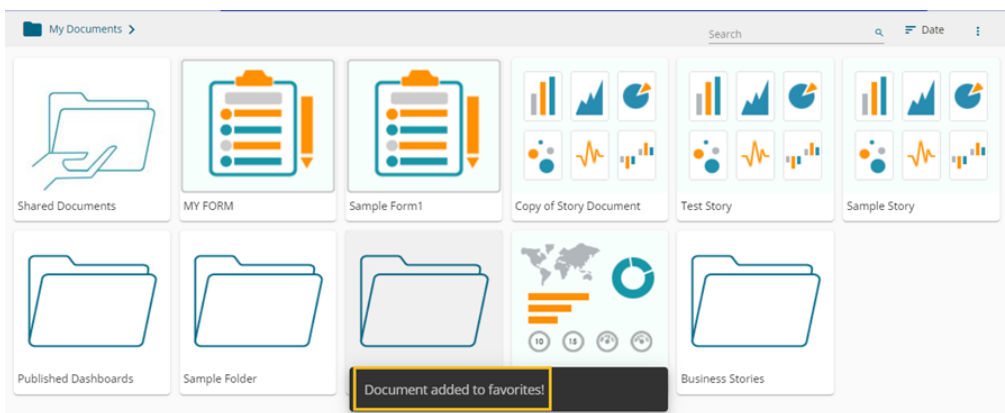


7.5.5. Adding a Form to Favorite

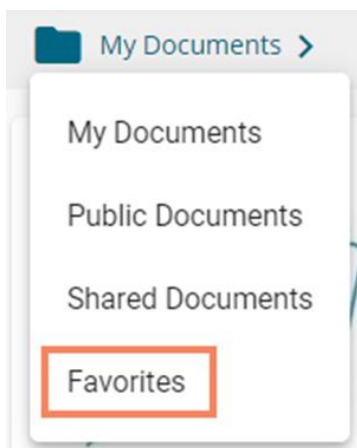
- i) Select the 'Add to Favorite' option from the operations menu.



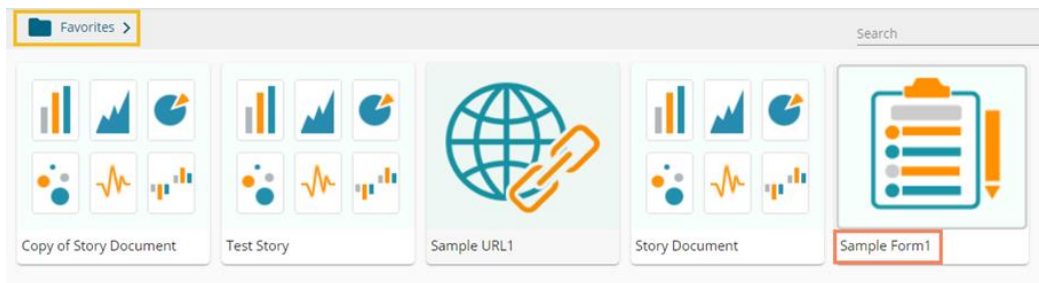
- ii) A message appears to assure the success of the action.



- iii) Open the Favorites section.

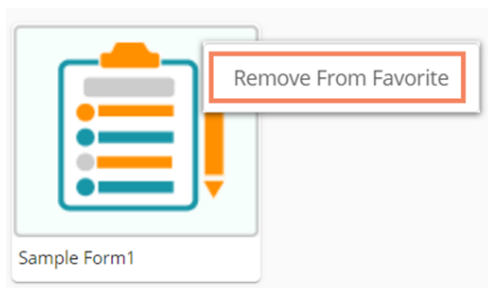


iv) The selected Form gets added to the Favorites.

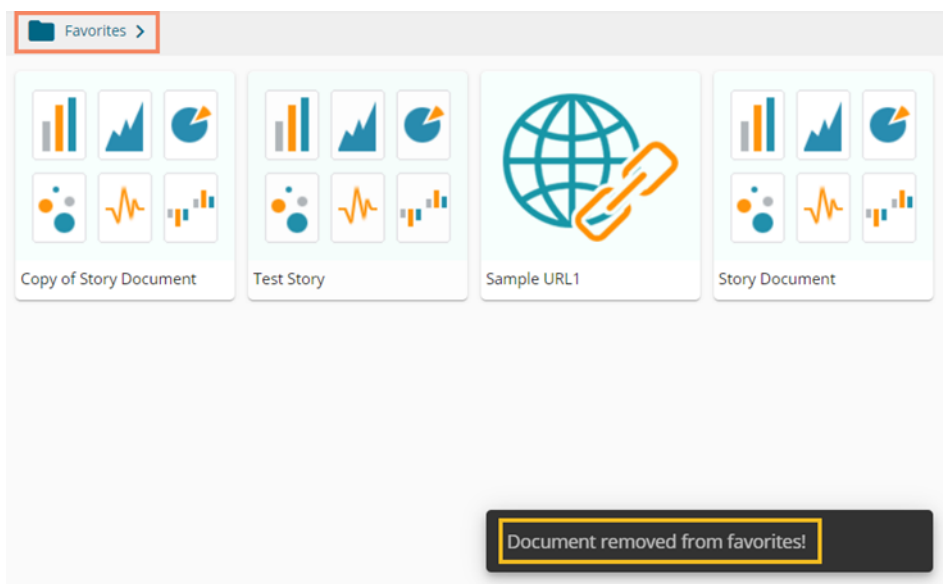


v) Use the right-click on the Form which has been added to the Favorites.

vi) The **'Remove From Favorite'** option appears.

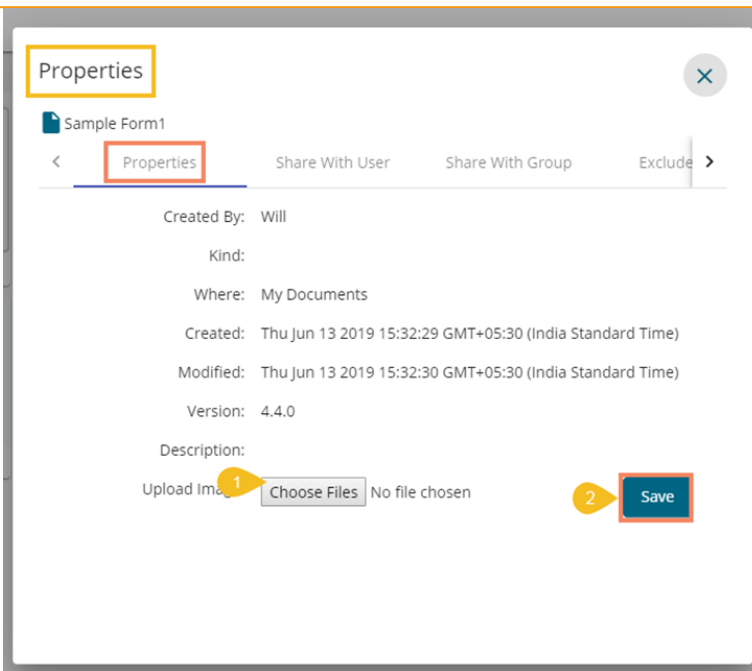


vii) The Form gets removed from the Favorites, and a notification message appears stating the same.

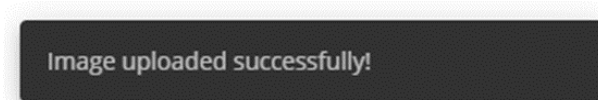


7.5.6. Properties

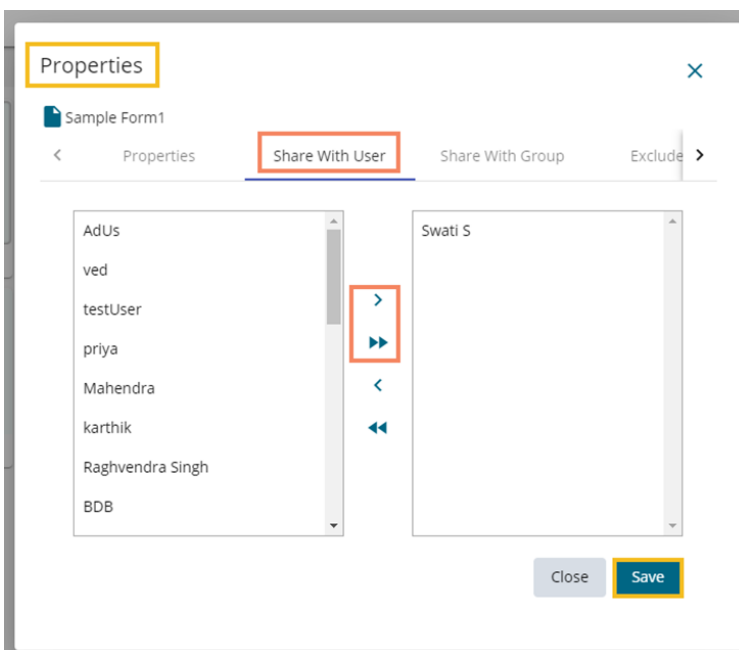
- i) Select the **'Properties'** option from the operations menu.
- ii) The **'Properties'** window appears with four options:
 - a. **Properties:** Displays basic details about the Form creation.
 - i. Click the **'Choose Files'** option to upload an image.
 - ii. Click the **'Save'** option to save the update.



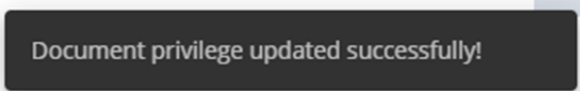
iii. A message appears to assure about the update.



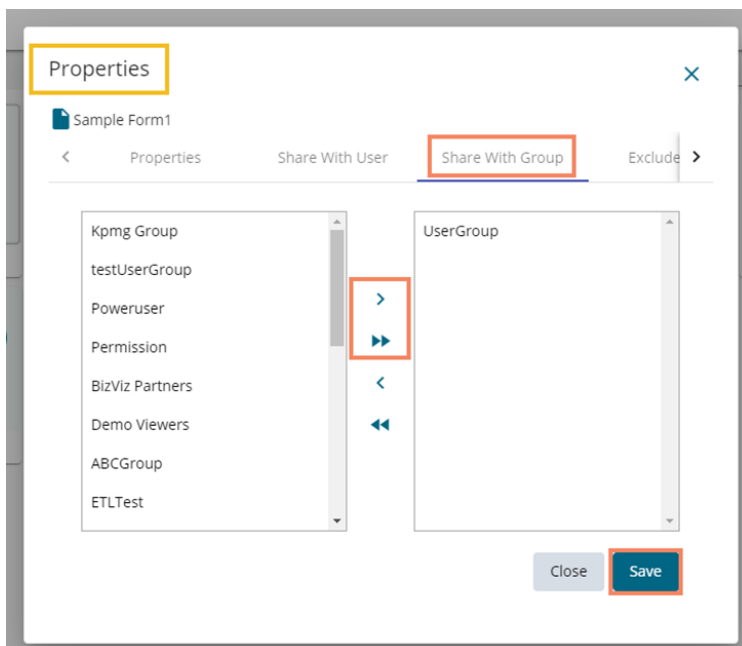
- b. **Share With User:** The Form gets shared with the selected User
 - i. Select the '**Share With User**' option using the Properties window.
 - ii. Select a user or multiple users and move to the space given on the right side.
(Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)
 - iii. Click the '**Save**' option.



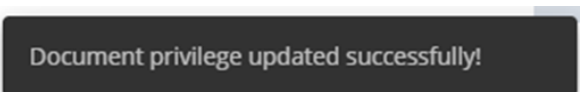
- iv. A success message appears stating that the document privilege is updated.



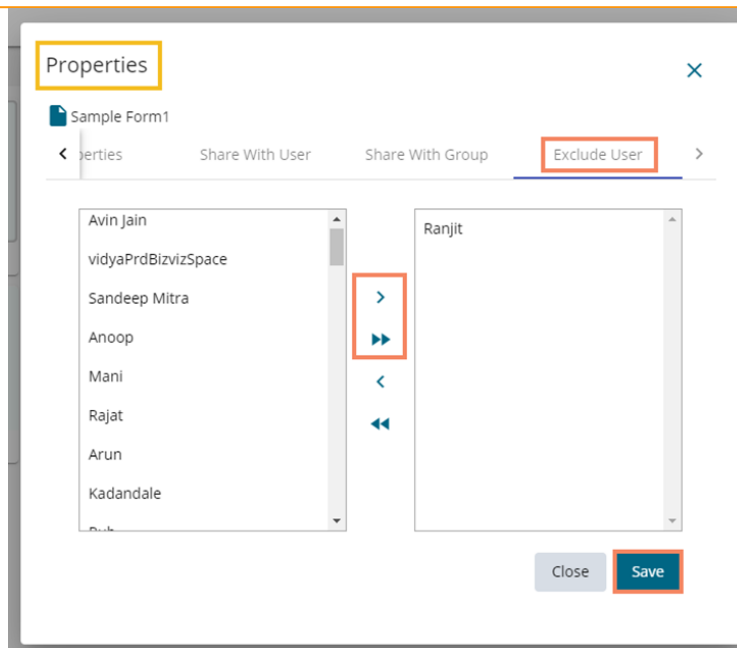
- v. The Form gets shared with the selected user(s).
- c. Share with Group:** The Form gets shared with the selected User Group
- i. Select the '**Share With Group**' option using the Properties window.
 - ii. Select a user group or multiple user groups and move to the space given on the right side.
(Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)
 - iii. Click the '**Save**' option.



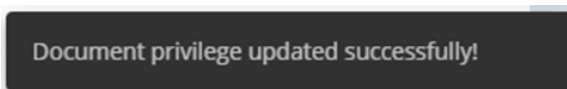
- iv. A success message appears stating that the document privilege is updated.



- v. The Form gets shared with the selected user group(s).
- d. Exclude the User:** The Selected User gets excluded from the rights to access the Form
- i. Select the '**Exclude User**' option using the Properties window.
 - ii. Select a user or multiple 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.)
 - iii. Click the '**Save**' option.



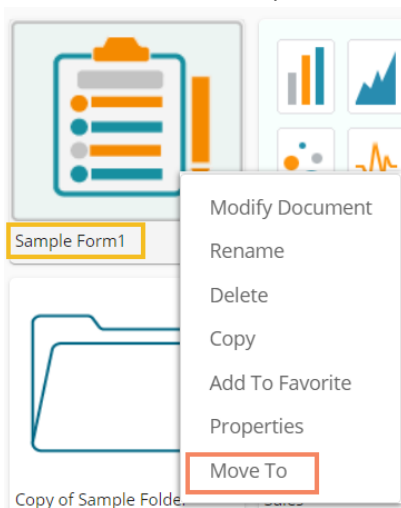
- iv. A success message appears, and the document privilege gets updated to exclude the selected users.



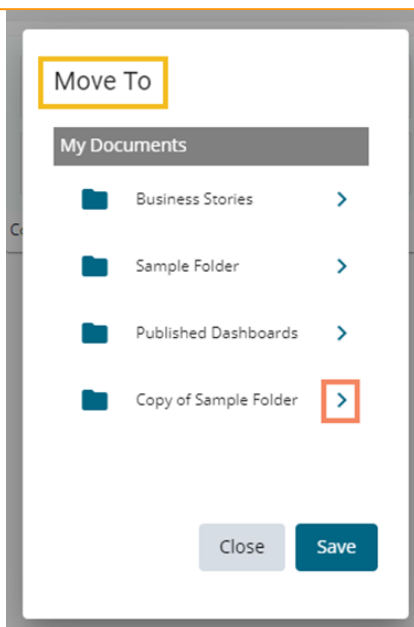
7.5.7. Moving a Form

This option allows the user to move the Form from one folder or space to another folder.

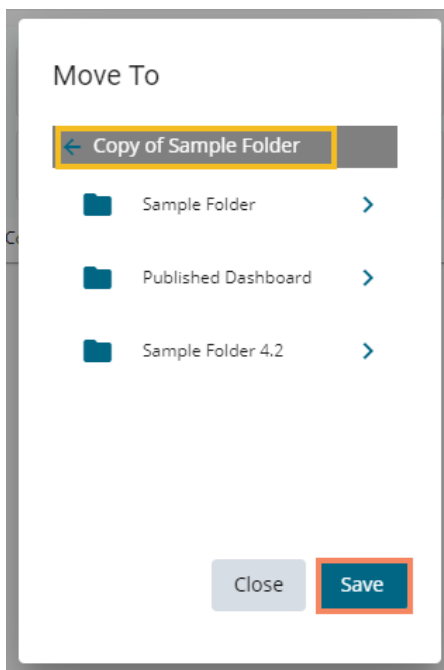
- i) Select a Form.
- ii) Select the **'Move To'** option from the Operations menu.



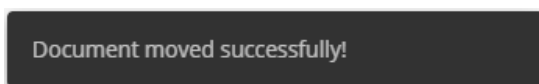
- iii) The **'Move To'** window appears displaying the available folders.
- iv) Select a folder.
- v) Click the **'Move'** > icon.



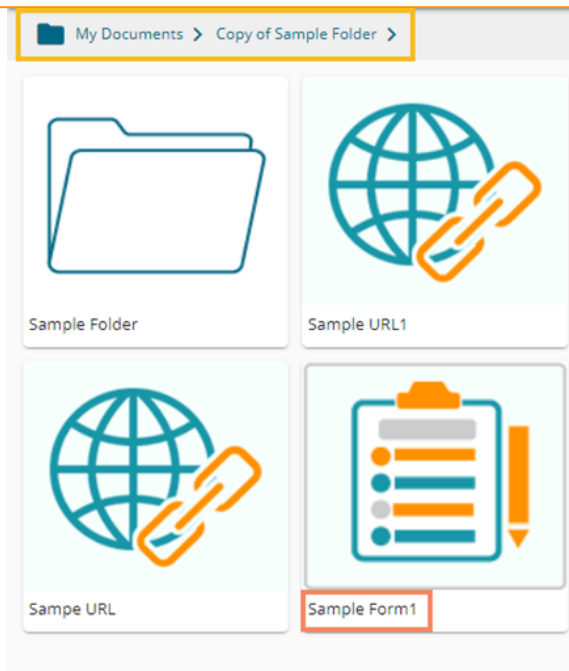
- vi) Users get redirected to the next screen.
- vii) Click the **'Save'** option.



- viii) A success message appears.



- ix) The Form gets moved to the selected space.

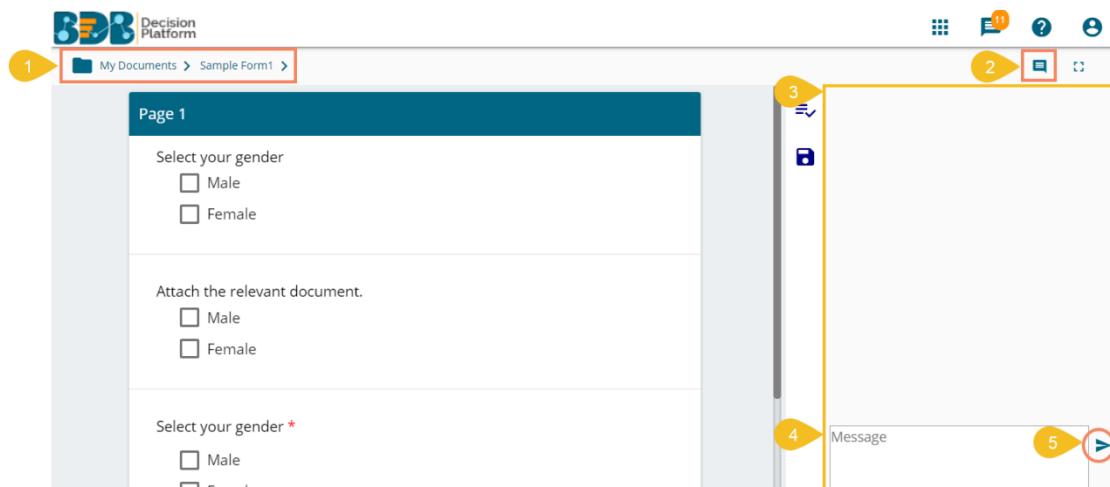


Note: To view a Form, use a click on the selected Form.

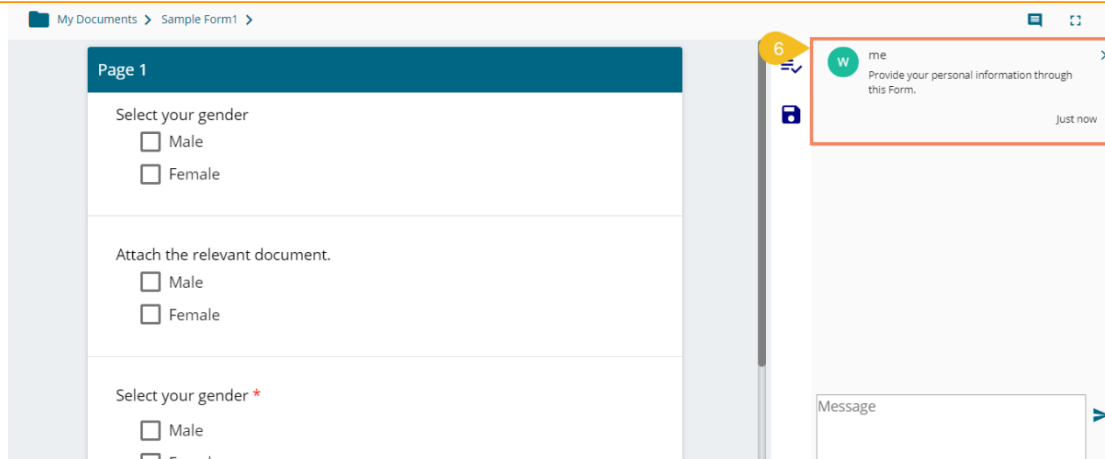
7.5.8. Insert Comments

The comment option is provided for the published Forms to explain or insert feedback for the form.

- i) Open a published Form from the BDB Platform.
- ii) Click the **'Comments'** icon from the header.
- iii) A new window opens below with space to insert a message at the end of the window.
- iv) Type a comment in the given **'Message'** space.
- v) Click the **'Send'** ➤ icon.



- vi) The message gets added to the **'Comments'** window.

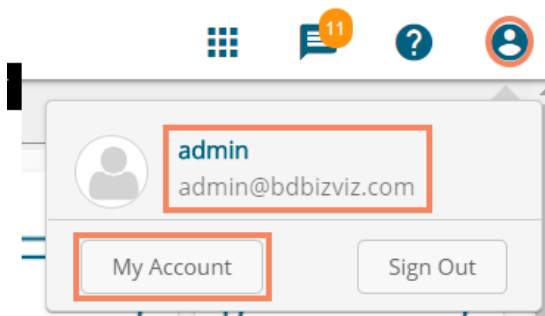


Note: **Full Screen** / **Reduce Size** icon is provided to view the form in full screen or reduce the form screen size.

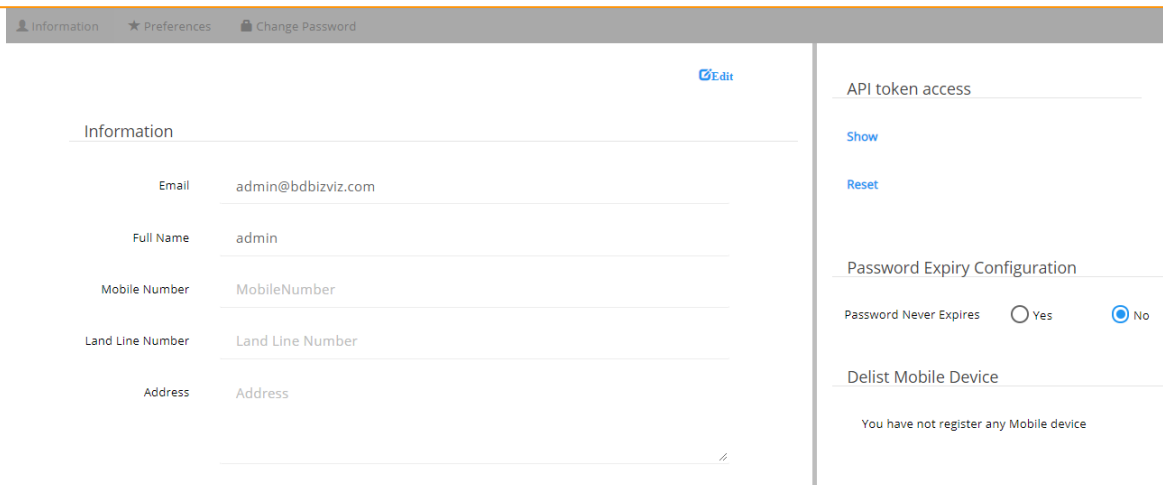
8. My Account

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:

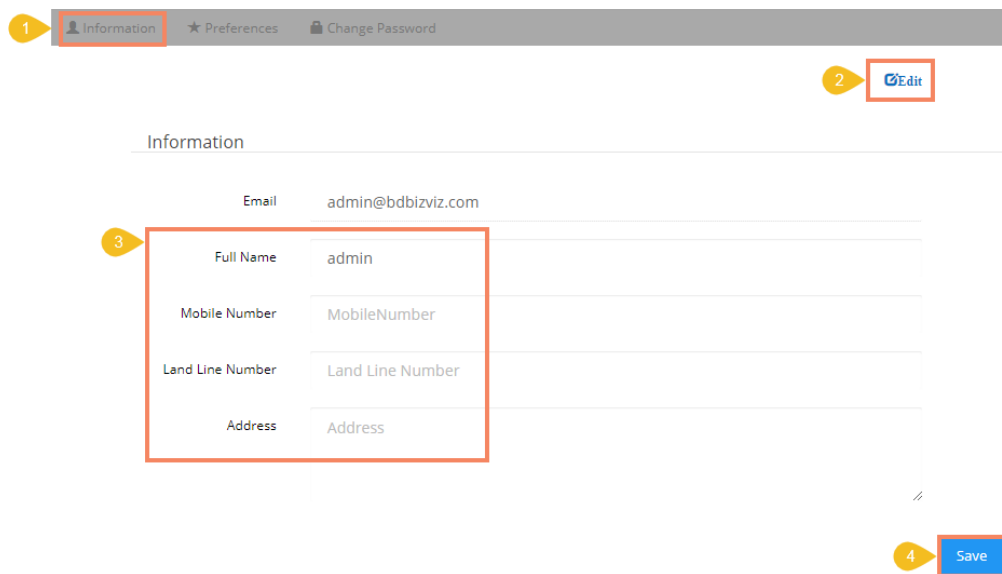


Note: By clicking the user icon, the ‘**Information**’ tab opens by default.

8.1. Information

This module displays personal information about the user.

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



- v) The user information gets saved.

Note:

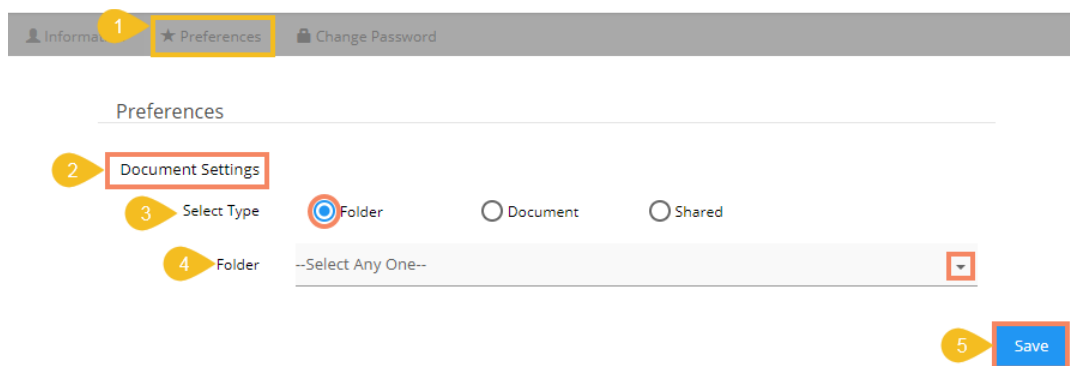
- a. It is mandatory to click the **'Edit'** option to enter/modify the user information.
Steps to edit the Information:
Click **'Edit'** -> Modify/ Change the details -> Click **'Save'**
- b. Users can modify the other profile information except for the Email by using the **'Information'** tab.

8.2. Preferences

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

Follow the below given steps to change preference settings

- i) Click **'Preferences'** 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 is selected from the Select Type).
- v) Select a folder (or document) from the respective drop-down menu.
- vi) Click the **'Save'** option.



- vii) A pop-up message appears to assure that the preferences have been updated.



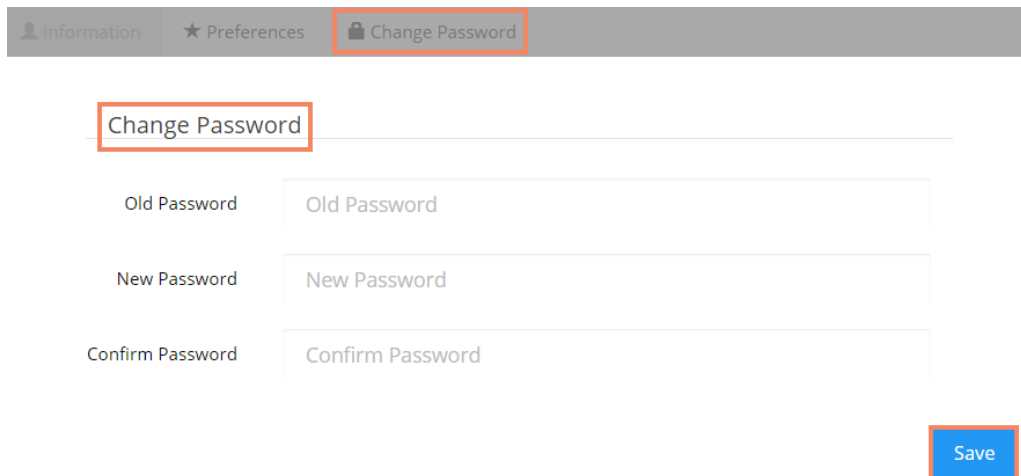
Note: Folders and documents get displayed to the users as per the set preferences by the Administrator.

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.



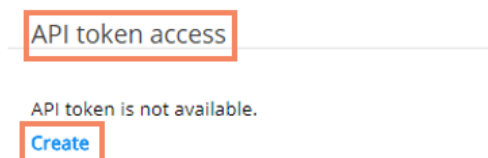
v) The password gets changed.

8.4. Other Related Options

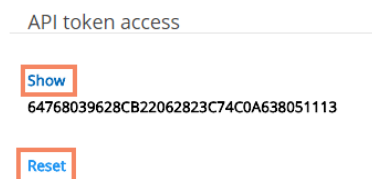
The API Token and Mobile Device access codes are displayed in the right pane of the **'My Account'** page. The Password Configuration can be accessed via the same page.

a. API Token

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



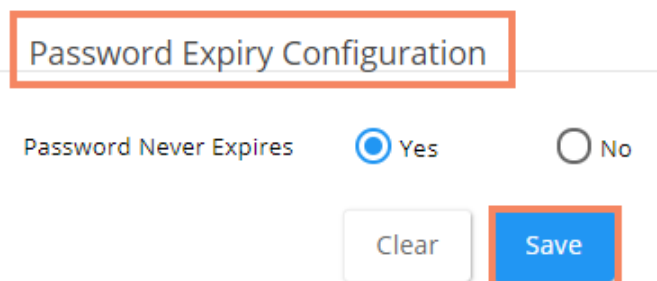
- b) A new API token gets created.
- c) The following details appear after creating an API token
 - a. Show: By clicking this option the API token is displayed
 - b. Reset: By clicking this option the API token gets reset



b. Password Expiry Configuration

- 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.

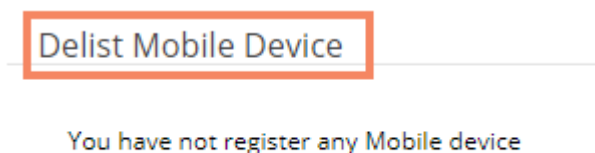


The screenshot shows a form titled "Password Expiry Configuration" with a red border. Below the title, there are two radio button options: "Yes" (selected) and "No". At the bottom of the form, there are two buttons: "Clear" and "Save" (highlighted with a red border).

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.



The screenshot shows a form titled "Delist Mobile Device" with a red border. Below the title, there is a message: "You have not register any 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.

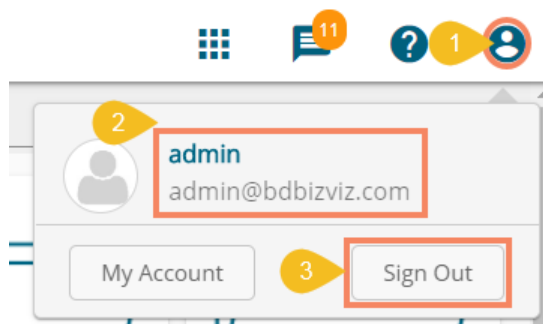
b. Securing the Application Data: It verifies that resources have access only to the assigned data. **E.g.,** everybody should be able to see the platform page, but with their assigned projects and functionalities.

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 'Login' page of the BDB platform.