

# **Admin Guide**

# Platform R-4.6



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# **1. About this Guide**

#### 1.1. Document History

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

Product Version	Date (Release Date)	Description
Platform 1.0	June 9 <sup>th</sup> , 2015	First Release of the document
Platform 2.0	February 18 <sup>th</sup> , 2016	Updated document
Platform 2.1	May 11 <sup>th</sup> , 2016	Updated document
Platform 2.5	November 9 <sup>th</sup> , 2016	Updated document
Platform 2.5.1	January 3 <sup>rd</sup> , 2017	Updated document
Platform 2.5.3	March 16 <sup>th</sup> , 2017	Updated document
Platform 3.0	August 31 <sup>st</sup> , 2017	Updated document
Platform 3.0	October 31 <sup>st</sup> , 2017	Modified document
Platform 3.2	February 2 <sup>nd</sup> , 2018	Updated document
Platform 3.5	April 15 <sup>th</sup> , 2018	Updated document
Platform 3.6	August 20 <sup>th</sup> , 2018	Updated document
Platform 3.7	October 10 <sup>th</sup> , 2018	Updated document
Platform 3.8	December 1 <sup>st</sup> , 2018	Updated document
Platform 4.0	December 31 <sup>st</sup> , 2018	Updated document
Platform 4.2	March 25 <sup>th</sup> , 2019	Updated document
Platform 4.3	April 24 <sup>th</sup> , 2019	Updated document
Platform 4.4	June 7 <sup>th</sup> , 2019	Updated document
Platform 4.5	August 5 <sup>th</sup> , 2019	Updated document
Platform 4.6	November 15 <sup>th</sup> , 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 BDB Business Intelligence Platform (popularly known as BDB Decision platform).

# **2. Introduction**

#### 2.1. Introducing the BDB Platform



BDB offers a unique BI platform to gain better knowledge and actionable insights from your business data to make mindful decisions. BDB Decision Platform contains a wide range of data connectors that make it both an exclusive and interesting tool. It allows the user to create web services based on a verity of database connections. The integrated dashboard designer plugin can then utilize the generated web service. The user gets descriptive, diagnostic, predictive, and prescriptive analytics on-premise and in the cloud even on mobile devices.

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 Data Science modules to prepare and organize their existing data to gain actionable insight into their business.

#### 2.2. Supported Web Browsers

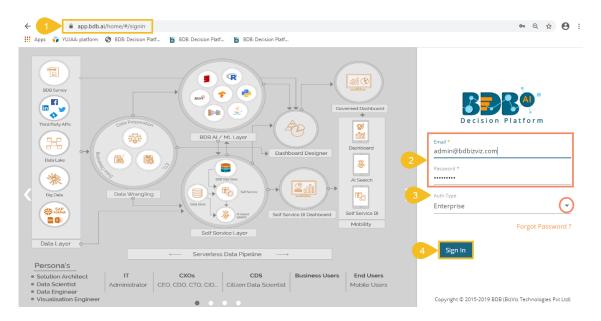
The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

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**

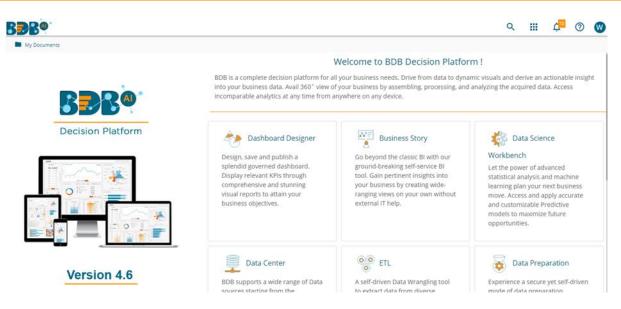
This section explains how to access the BDB Platform and a variety of plugins that it offers:

- 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 'Sign In' option.



v) BDB Platform homepage opens.



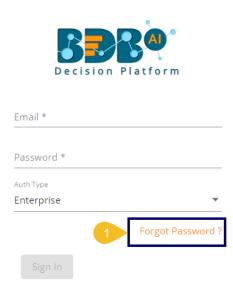


Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

#### **3.1.1. Forgot Password Option**

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

i) Click the 'Forgot Password?' option from the Sign In page.



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- ii) The 'Forgot Password?' page opens.
- iii) Provide the email id that is registered with BDB to send the reset password link.
- iv) Click the '**Continue**' option.



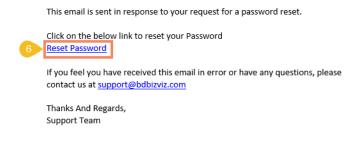
Decisio	n Plat	form
Forgot Passw	ord?	
Please enter the registe your password.	red emai	address to reset
<sup>Email *</sup> admin@bdbizviz.com		
		Sign in
Continue		
	Forgot Passw Please enter the registe your password. Email * admin@bdbizviz.com	Email • admin@bdbizviz.com

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



vi) Click the link from your registered email.



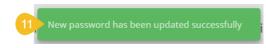
- vii) The user gets redirected to the 'Reset Password' page to set a new password.
- viii) Set a new password.
- ix) Confirm the newly set password.
- x) Click the '**Continue**' option.

	Decision Platform
7	Reset Password
	You have confirmed ownership of the BDB account. Please reset your password to get access.
8	New Password *
9	Reset Password You have confirmed ownership of the BDB account. Please reset your password to get access.
10	Continue

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xi) The password for the selected BDB account gets reset and a message appears to inform the user.



Note: The user gets redirected back to the Sign In page after successfully resetting the password.

#### 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 the 4<sup>th</sup> 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 'Sign In' option.



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



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- vi) A warning message appears the currently active sessions get killed, and the user gets redirected to the BDB Platform Login page.
- vii) The user needs to provide valid credentials once again and click the '**Continue**' option to access the platform.

#### 3.2. Platform Homepage

The BDB Platform homepage redirects the user 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. AI Search

The AI Search feature facilitates the user to search specific data queries across the data stores by using text or voice. The user can drill into any granularity of the data using this interactive AI Search option.

#### **3.2.1.1.** Text-Based Search

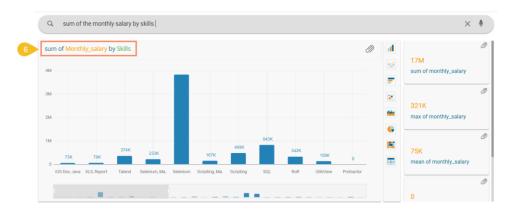
- i) Click the '**Search**' icon provided on the Platform homepage.
- ii) The following Search Space appears.



- iii) Type a specific data query in the given search space.
- iv) Click the 'Search' icon provided on the Search space or click the 'Enter' key.
- v) The searched data query result appears in the form of a View on the screen.

			۹		¢ <u>n</u>	0	W
4	C sum of the monthly salary					$\times$	•
	sum of Monthly_salary	2					Ø
5	Measure T	otal		7M um of mor	nthly_sala	iry	
	sum( monthly_salary ) 16.	ом	_				0
				21K hax of mor	nthly_sala	iry	07

vi) The user can search for data up to any granularity level.E.g., The following images display data up to the dipper granularity level.Query 1: Sum of the monthly salary by skills'





Query 2: Sum of the monthly salary by skills for QA Engineer

vii) Click the 'Add to Story' icon from the Searched view.

sum of Monthly_salar	ry by Skills Where Designation is QA Engineer		
900K		~	905K sum of monthly_salary
800K	Selenium	=	sum of monuny_salary
700K	Sum(monthly_salary) 856,666		
600K			63K
500K		<u>**</u>	max of monthly_salary
400K		6	
300К —		R.	48K
200K			mean of monthly_salary

viii) Either create a new Story to add the Searched view or select an existing Story document from the list to add the Searched view.

8 +	Create new story and add search re	sult	
Q :	Select a story to add search result	Showing 44 out of 44	
8 BI	usiness Story 4.5	Copy of Business Story	Copy of Business Story
Co	opy of Story Document 3.6.0	Copy of Story Document 4.3.0	Mobile App Story 3.5.1
Sa	ample Business Story (3.5.0)	Sample Business Story 3.5	Sample Story
Sa	ample Story 3.5.0	Sample Story 4.2.0	Sample Story 4.3.0

ix) A success message appears to confirm that the searched view is added to the story.



#### Note:

a. The user can access a voice-based search by clicking the 'Search by voice' icon.



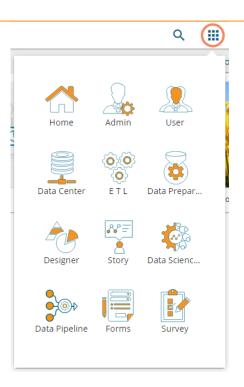
b. If the user does not add the searched View to any Story, then it does not get saved for future use. The user needs to search the query again when required.

#### 3.2.2. Apps Menu

The Apps Menu button displays all the available applications.

- i) Navigate to the Platform homepage.
- ii) Click the 'Apps' III icon.
- iii) All the available plugin applications get displayed.



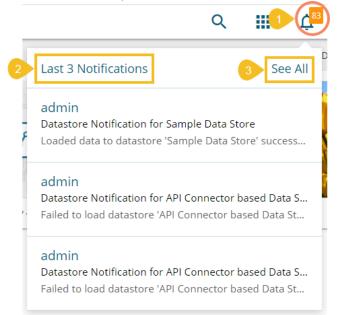


Note: The user can select and open various applications by using the specific App icon provided under the '**Apps**' menu window.

#### 3.2.3. Notification Option

The Notification feature is a way to send and receive messages from processes to people. By default, it has Inbox and Trash folders. The data store refresh and copy of a story document get communicated through this feature.

- i) Click the '**Notification**'  $\overset{\textcircled{}}{\overset{\textcircled{}}}$  option using the Platform homepage header.
- ii) A window opens with the latest 3 notifications.
- iii) Click the 'See All' option.





iv) The notification 'Inbox' page opens (by default).
 (Unread Notifications are indicated using numbers on the Platform homepage on the Notification icon.)

BBB®		Q	 <mark>83</mark> Ļ	?	
Inbox	Select All C 🖬 🖬				
Trash	admin 12:01 PM 21/12/2019 Datastore Notification for Sample Data Store				
	admin 12:00 PM 21/12/2019 Datastore Notification for API Connector based Data Store				
	admin 12:00 PM 20/12/2019 Datastore Notification for API Connector based Data Store				

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

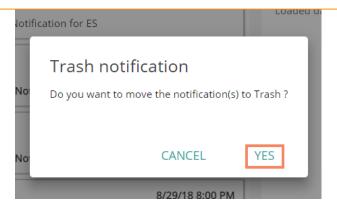
BBB®				Q		4 <mark>81</mark> Ļ	?	W
Inbox	Select All C		Subject: Datastore A	lert for	'Sampl	e Data i	Store'	
👕 Trash	admin	5:00 AM 15/11/2019	Sent: 5:00 AM 11/15/201	9				_
	Datastore Alert for 'Sample Data Store' admin		Current count( Designation Current count( Designation			han or eo	Jual to 0	9.
	Datastore Alert for 'Sample Data Store'	5:00 AM 15/11/2019						_

Icons provided on the inbox window:

Icons	Name	Task Assigned
Î	Trash	Displays messages in a list of all the deleted messages
C	Refresh	Receives the latest messages
Î	Move to Trash	Moves the selected messages to the Trash folder
$\sim$	Unread	Marks messages status as 'unread'
	Read	Marks messages status as ' <b>read</b> '

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

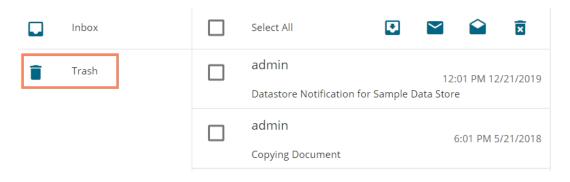




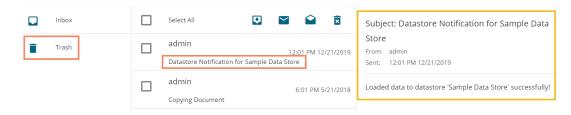
ix) A message appears to confirm that the selected message has been moved to the Trash folder.

Text has been moved to Trash!!!

x) Click the '**Trash**' folder to open the list of messages moved to 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
$\mathbf{>}$	Unread	Marks messages status as 'unread'
	Read	Marks messages status as ' <b>read</b> '

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

#### 3.2.4. Help Menu

The users can access the Documentation section using the Help documents via this menu.

- i) Navigate to the Platform homepage.
- ii) Click the '**Help'** ? icon from the header panel.

BBB®	Q	 <mark>گ<sup>81</sup></mark>	0	W

iii) The user gets directed to the 'BDB Documentation and Help' page of the BDB website.

	BDB Documentatio	on and Help
Version 4.6	Rele	ease 4.6
		8
	HOW TO GUIDES	USER GUIDES
	Data Pipeline	• ETL
	Platform	Dashboard Designer     Data Science Workbench
		Business Story
		Platform Administrator Guide

#### 3.2.5. User Profile

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

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

BBB@					Q		Ļ <sup>14</sup>	2 A
My Documents > A	ll Data 🗲		Search	A	adm			
			3	8	My Ad		z.com	
BS BDB Recruitment	Dashboard BDB Recruitm	Dashboard BDB Dark The		0	Sign (	Jut	1	



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

#### **3.2.6. 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

BBR <sup>®®®</sup>				Q		<mark>,81</mark>	?	W
My Documents >				Search	م	📻 Da	te	:
My Documents						CA1	<u>a</u>	
Public Documents								~
Shared Documents			<b>▲</b> ~~®			1 A	I.	T
Favorites					atom.	They	T	
Shared Documents	Filter Saver Dashboard	Copy of Filter Saver Dash	Business Story 4.5	Folders	Sample	Form	1.4.11	

- My Documents
  - o 'My Documents' lists all the documents created by the user or assigned to the user
  - o The documents are displayed as thumbnails
- Public Documents
  - o The 'Public Documents' folder is available to all users
  - o 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.

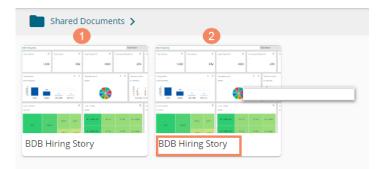


The Dashboard shared using the '**Copy To**' option gets all the permissions to modify it.



Shared Docur		
Territoria a la construir de l		
BDB Hiring Story	Modify Document Rename Delete Copy Add To Favorite Properties Move To	

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



- Favorites
  - The documents marked as a favorite by a user are saved under 'Favorites.'
  - The documents in frequent use by the users are a part of Favorites
  - Users can remove a document from 'Favorites' (if desired)
  - $\circ$   $\;$  The documents added to Favorites do not get any permission to modify them.

Note:

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

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

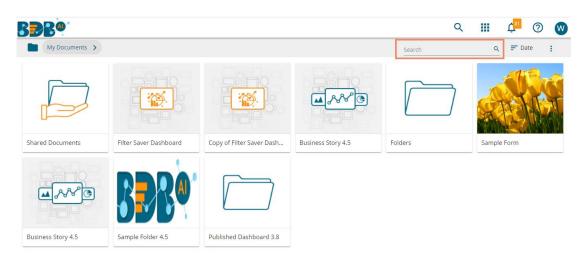
#### 3.2.7. Navigation Bar

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



bar.

i) The User gets 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**' **Q** 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:

BPR@				Q	III 🗘 🕅 🕐 💓
Back Search Result			2	sample Folder	3 Q = None :
<b>BBR</b> <sup>®</sup>					
Sample Folder 4.5	Sample Folder 3.5 (2)	Copy of Sample Folder 3.7	Sample Folder 4.2 (2)	Sample Folder 3.5	Sample Folder 3.7
Sample Folder 4.2	Sample Folder 4.4				

#### 3.2.8. Ordering Documents

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

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

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

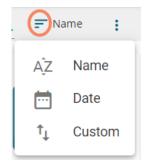
3. Custom

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

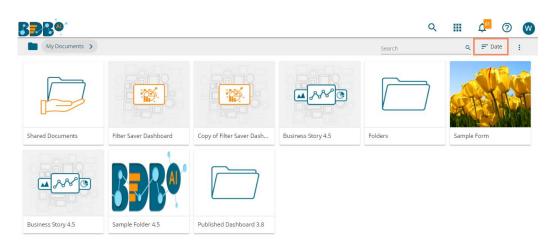


My Documents >				Search	Q 📻 Name 🚦
	<b></b>	<b>س</b> هره			
Shared Documents	Business Story 4.5	Business Story 4.5	Copy of Filter Saver Dash	Filter Saver Dashboard	Folders
	BBR				
Published Dashboard 3.8	Sample Folder 4.5	Sample Form			

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



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



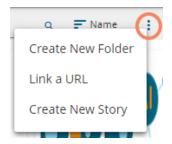
- v) Users can set a customized order of the document by choosing the '**Custom**' order option.
- vi) By selecting the 'Custom' option, the user gets directed to a new window.
- vii) Set a customized order of displaying the available documents or folders by using the given arrows.
- viii) Click the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



	Custon	n Order				×
5		Business Story 4.5	^	~	$\uparrow$	$\checkmark$
		Folders	^	~	$\uparrow$	$\checkmark$
		Business Story 4.5	^	~	$\uparrow$	4
		Copy of Filter Saver Dashboard	^	~	↑	$\checkmark$
	*	Filter Saver Dashboard	^	~	$\uparrow$	$\checkmark$
.5	Close	Save				

#### Note:

- **a.** The 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 userspecific configuration settings for various plugin applications provided on the platform.

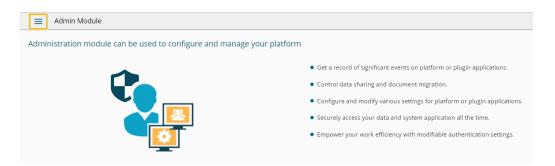
#### 4.1. Accessing the Administration Module

- 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) The user gets 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  $\checkmark$  provided next to the concerned admin option to display the subcategories for the same. By clicking the drop-down sign, it gets changed into the upward sign  $\land$  as displayed in the below given image:



BBB®				Q		Ļ <sup>55</sup>	?	W
🝵 Document Management								
🎯 Configurations	~	ed to configure and manage your pla	tform					
e음 Authentication	~		• Get a record of significant events	on platform or plug	in applic	ations.		
💾 Audit Trail	~		• Control data sharing and docume	ent migration.				
🛃 Language Mapping	~		<ul> <li>Configure and modify various set</li> </ul>	ttings for platform o	r plugin a	applicatio	ns.	
m Migration	~		Securely access your data and sy					
Session Manager			<ul> <li>Empower your work efficiency with the second second</li></ul>	ith modifiable authe				
Schedule Monitor								
Server Monitor								
License								

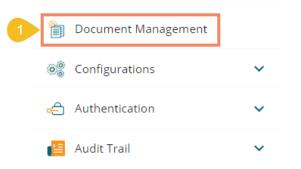
#### 4.2. Administration Options

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

Document Managen	hent		Enterprise
Search	۹	Selected user : Will	Showing 19 out of 19
Showing	42 out of 42	Search documents	٩
💄 Avin Jain			
		alesforce story created on 14 nov	<b>■ &lt; </b> □
L Prakash		Copy of Business Story 4.5	■ < □
L Will	4	Finance Overview	■ <
Will     Karthikps	4	Finance Overview     Business Story 4.5	



lcon	Name	Description			
Î	Delete	emoves 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			
D	Сору	Redirects to Copy the selected document to another user(s)			

Note:

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

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

Share Documents		×
ct Users Search User		
ct krish 🔕		
Group Search Group		
testUserGroup 😵		
Excluded Search Exclude Users		
Chetan 😣		
	Cancel	Save

d. Steps to Copy a document:

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

ie <sup>lo</sup>	Copy Documents	_	×	Å
	Search User Prakash ⊗ priya 😒			
L	BDB Hiring Story	Cancel	Save	

#### 4.2.2. Configurations

This section covers configuration details for various platform plugins.

#### 4.2.2.1. Geo-Spatial

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



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

Configurations	^
🧟 Geo Spatial	^
Geo Settings	
Geo Shapes	
🔊 Data Science Servers	~

#### • Settings

- a. Click the 'Geo 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.

Geo Settings	
Google Setting	^
Google map key *	
AlzaSyADrD2CvOhA9YetSyskKOtmwpV2000iXBU	
	Clear Save
Leaflet Setting	^
Map URL *	
http://(s).tile.osm.org/(z)/(x)/(y).png	
Attribution * ©: <a href="http://osm.org/copyright">OpenStreetMap</a> contributors	
«copy, <a copyngm="" mer-="" mup.rosm.org="">opensureetwap</a> contributors	
	Clear Save

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



Geo Settings		
	Google Setting	^
	Google map key *	
		Clear Save
	Leaflet Setting	^
	Map URL *	
	Attribution *	
		Clear Save

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

■ Admin Module				
Geo Shapes			+ Polygon	•
Search				Q
Id	UserName		Actions	
10059776	USA Country		Î	
10059777	USA State Level		Ĩ	
10059778	USA States FM		Î	
293470208	USA Geo Shape		Î	
		ltems per page: 10 💌	1-4 of 4   < < >	×I

- 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 the 'Save' 🗟 icon to save the inserted details.

Create Ne	ew Geo Shapes		→ 5 <b>(5</b> )	
	Create Geo Shapes		^	
	Shape Name *			
	Geometry Type *	Area Type *	•	
	Choose File No file chosen			

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

#### Note:

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

i.	Polygon			
ii.	Line			
≡	Admin Module			
Geo	Shapes			- Polygon
	Search			Line
	Id	UserName	Actions	
	10059776	USA Country	i i	
	10059777	USA State Level	Î	
	10059778	USA States FM	Î	
	293470208	USA Geo Shape	Î	
		ł	tems per page: 10 💌 1 - 4 of 4	$ \langle \rangle \rangle >  \rangle$

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

Admin Module		
o Shapes		+ Polygon
29		<u> </u>
Id	UserName	Actions
293470208	USA Geo Shape	
		ltems per page: 10 ▼ 1 - 1 of 1  < < > >

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



eo Shapes		+ Polygon	
Search			Q
Id	UserName	Actions	
10059776	USA Country		
10059777	USA State Level	Î	
10059778	USA States FM	Î	
293470208	USA Geo Shape	Î	
	Items pe	er page: 10 💌 1 - 4 of 4 🛛 🕹 🕹 🕹	>1

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

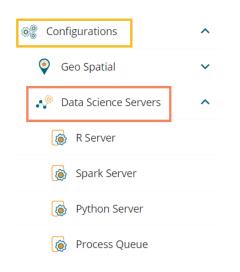
Delete shape file				
Do you want to delete selected shape file ?				
CANCEL	DELETE			

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

#### 4.2.2.2. Data Science Servers

This section explains server settings for various data science workspaces. for the Predictive Analysis plugin of the BizViz Platform.

- a. Click the 'Data Science Servers' option from the list of 'Configurations' admin options.
- b. Various Data Science Servers get listed.



- Steps to Create a New R-Server
  - a. Navigate to the 'Data Science Servers' admin option.
  - b. Click the '**R Server**' option.



Search Configurations	^
🥥 Geo Spatial	~
🧬 Data Science Servers	^
🛞 R Server	
Spark Server	
🛞 Python Server	
Process Queue	

- c. The R Server page opens.
- d. Click the 'Add new server' icon.

≡	Admin Module							
R Serv	ver					+	Test	
	Server name	Cores	Workflow	Scheduler	Actions			
	rserve	1	۲	۲	/ =			

- e. Click the 'Create New Server' 🕂 icon
- f. A scrollable window opens asking Basic Information for new R Server
- g. 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. Username: 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 checkmark in the box
- h. Click the '**Test**' option to verify the R-Server connection.



ever Information address * Port * Port * Passwor server name * Server na	Test Save
address * Port * Passwor server name * Serve	^
address * Port * Passwor server name * Serve	Â
ser name * Passwor Eustic sear server name * 9200 TP UR, for 8.8keh * tps://	
ser name * Passwor Eustic sear server name * 9200 TP UR, for 8.8keh * tps://	
Elastic sear TP UR, for & Bokeh * tps:// <li> <li>Enable parallel processing</li> </li>	
Elastic sear TP UR, for & Bokeh * tps:// <li> <li>Enable parallel processing</li> </li>	Can contain only numbers. Maximum 0/51
server name *         9200           TP UR, for /R Bakeh *            tps:// <lp>:port/domainName/RViz/&gt;            Enable parallel processing</lp>	
179 LBL for & Roken * tps:// <lp:port domainname="" rviz=""></lp:port> Enable parallel processing	
tps:// <lp></lp>	
tps:// <lp></lp>	
imber of cores *	
TIDEL OF COLES	
Set as default	

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

		Ļ <sup>55</sup>	?	W
Successfully connected to R Server				
	Te	st S	ave	←

I. A message appears to ensure the successful updates in Data Science Settings.



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

Admin Module				
erver				+ Test
Server Name	Cores	Workflow	Scheduler	Action
34.209.28.33	1	Θ	0	2 <b>1</b>
R server	1	۲	۲	2 I

Note:

- a. The user can click 'Edit' icon from the R Servers window to modify the R Server settings.
- b. The user 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**'<sup>**I**</sup> 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 'Data Science Servers' admin option.
- b. Click the 'Spark Server' option.

😻 Configurations	^
Geo Spatial	~
🤣 Data Science Servers	^
🛞 R Server	
Spark Server	
Bython Server	
Process Queue	

- c. The Spark Server page opens.
- d. Click the 'Add New Server' + icon.

≡	Admin Module			
Spark	Server			+ Test Save
	Server name	Default	Actions	
	172.31.41.103	0	× •	

- 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. Username: 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.

	Test Save
	^
Port *	
Password *	
Application *	

i. A message appears to assure the connection.

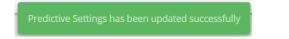
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- ii. The 'Save' option gets enabled.
- iii. Click the 'Save' option to save the verified Spark server configuration details.



iv. A confirmation message appears to ensure successful updates in the data science server settings.



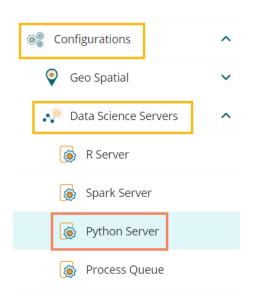
v. The newly configured Spark server gets added to the 'Spark Server' page.

Admin Module			
Spark Server			+ Test Save
Server name	Default	Actions	
172.31.41.103	0	2.1	
Spark Server	۲	/ 1	

#### • Python Server

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

- a. Navigate to the 'Data Science Servers' admin option.
- b. Click the 'Python Server' option.



- c. The Python Server page opens.
- d. Click the 'Add new server ' <sup>+</sup> icon to add a new Spark server confirmation.



≡	Admin Module			
Pytho	n Server			+ Test Save
	Server name	Default	Actions	
	pythonServer	۲	× 1	

- 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. Username: 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.

← Test	
^	
Port *	
Password *	
Elastic search port *	
9200	
TensorBoard visualization URL*	
	Port * Password * Elastic search port * 9200

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

		Ļ <sup>55</sup>	?	W
Python Server is Successfully Connected.				
	←	Test	Sav	/e

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

Predictive Settings has been updated successfully



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

≡	Admin Module				
Pytho	n Server			+ Test S	
	Server Name	Default	Action		
	pythonServer	۲	2 <b>1</b>		
	Python Server	0	× 1		

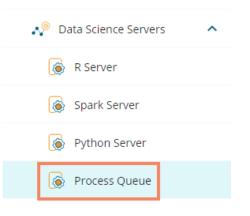
#### Note:

- a. Click 'Edit' 🖍 icon to modify an existing python server configuration
- b. Click the '**Delete**'<sup>1</sup> 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 Data Science servers.



- ii) The Process Queue page opens.
- iii) Click the 'Reset Queue' option.

Admin Module Process Queue		
C	•	Click the 'Reset Queue' option to set the count of currently running processes to zero.
Java	R	
		Reset Queue



- iv) A warning message appears, asking whether the user wants to flush the queue.
- v) Click the '**YES**' to set the count of currently running processes to Zero for the Data Science Workbench.

A Warning
Do you want to flush the queue ?
Note: Flushing of Queue will set the count of currently running Processes to Zero.
CANCEL YES

#### 4.2.2.3. 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.

min Module Field Settings				+
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	• ×

- 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.

# Bulk User Creation Download Template Click the 'Download' icon to download a standard excel template for Bulk User Creation. Enter information for multiple users in the required format, Such as: Email Id, User Name, Full Name, CP\_spacekey (CP : Custom Properties).



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

lulk User Creation	
Download Template           • Click the 'Download' icon to download a standard excel template for Bulk User Creation.           • Enter information for multiple users in the required format, Such as: Email Id, User Name, Full Name, CP_spacekey (CP : Custom Properties).	Upload Template <ul> <li>Click on 'Choose File' icon to select the excel template, and choose the updated sheet with details of multiple users.</li> <li>Click the 'Upload' icon.</li> <li>A success message appears to confirm the user creation.</li> </ul>
All the users created through Bulk User Creation get added to the user list provided under the l dule.	Choose Files No file chosen Select sheet - Select s
UserTemplateLubsc	Stor

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

4	Α	В	С	D	E
1	Email Id	User Name	Full Name	CP spacekey	
2	user1@gmail.com	user1	User 1	1112	
5	user2@gmail.com	user2	User 2		
4	user3@gmail.com	user3	User 3		
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
-21	< → User]	emplate	+		
		-	-		

Steps-2 Upload a file with multiple usernames

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

Upload Template	
<ul> <li>Use the 'Choose File' option to select a file with multiple usernames in the proper format.</li> <li>Click the 'Upload' option.</li> <li>A success message appears to confirm the user creation.</li> </ul>	
Choose Files UserTemplate.xlsx UserTemplate	3



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



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

User Groups		Users	Type Enterprise	<ul> <li>Status</li> <li>Active</li> </ul>		
Search Group	م	Search User			†⊥	a
Showing 44 out of 44		Showing 42 out of 42			*	
All Groups	5	User 3		1	09	
UserGroupgrpfed	∕⊘ 🗈	User 2		1	00	Î
GroupshareTestywqspj	/ 🖉 🗎	Vidya		1	09	Î
UserGroupgrpeiz	/ 0 🔒	krish			09	Î

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



•	🏽 🛞 Configurations	^
	Geo Spatial	~
	Nata Science Servers	~
	🛓 Bulk User Creation	
	[] Custom Field Settings	
	👼 Data Connectors	
	😪 Encryption	
	loc Form Settings	
	Version Control	
2	Email Server	
	Password	

- 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.

≡ Adr	min Module	
Email Ser	ver Settings	
4	Email Server Information	^ .
	inal host * secure.emailsrvr.com	
	imail port *	Encryption type *
4	465	SSL v
	inai from * projectadmin@bdb.ai	
	imail password *	
	imal user name * projectadmin@bdb.al	
0	Disable email sending	
0	Send test email	
	Send email for publish/share/copyto documents	
	main selection	
(	All      Selected Domains	

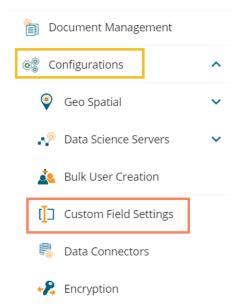
v) Click the '**Refresh**'  $\subset$  icon to erase the entered configuration details.

### 4.2.2.4. Custom Field Settings

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



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



- b. The Custom Field Settings window opens.
- c. Provide the following information for each custom field:
  - i. Key: Provide the key value of the custom field
  - ii. Input Type: Select an input option from the drop-down menu
    - 1. Manual: By selecting this option, users need to fill the field manually
    - 2. User Lookup: By selecting this option, users need to choose from a drop-down menu
  - iii. Description: Describe the inserted key
  - iv. Mandatory: Use checkmark in the given box to make the inserted custom field mandatory
- d. Click the 'Save Component' **c** icon to save the inserted custom fields.

dmin Module				
Field Settings				+
Custom Field Informatio	n			/
Key	Input Type	Description	Mandatory	Delete
State	Manual	▼ state of user	No	<b>.</b> ×
country	User LookUp	<ul> <li>country of user</li> </ul>	No	• ×
component	Manual	▼ component	No	• ×
				• ×

Note:

- a. Click 'Add Fields' option to add a new custom field.
- b. Click the '**Refresh**'  ${f C}$  icon to erase the inserted custom fields information.

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c. Click the 'Delete'  $\times$  icon to remove a custom field.

### 4.2.2.5. Data Connectors

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

i) Click the 'Data Connectors' option from the list of Configuration and Settings.

Configurations	^
Geo Spatial	~
🄊 Data Science Servers	~
🐴 Bulk User Creation	
Custom Field Settings	
👼 Data Connectors	
+ Encryption	

- 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.

Admin Module		
Management Settings		C
Data Connector Information		^
MySQL (Max fetch limit) *	MsSQL (Max fetch limit) *	
5000	5000	
Oracle (Max fetch limit) *	Hive (Max fetch limit) *	
5000	5000	
Hana (Max fetch limit) *	OData (Max fetch limit) *	
5000	5000	
Spark SQL (Max fetch limit) *	Cassandra (Max fetch limit) *	
5000	5000	
Red Shift (Max fetch limit) *		
5000		

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

Admin Module		
Aanagement Settings		C
Data Connector Information		^
MySQL (Max fetch limit) *	MsSQL (Max fetch limit) *	
Oracle (Max fetch limit) *	Hive (Max fetch limit) *	
Hana (Max fetch limit) *	OData (Max fetch limit) *	
Spark SQL (Max fetch limit) *	Cassandra (Max fetch limit) *	
Red Shift (Max fetch limit) *		
Note : Please enter the fetch limit between 5000 to 9223372036854775800.		

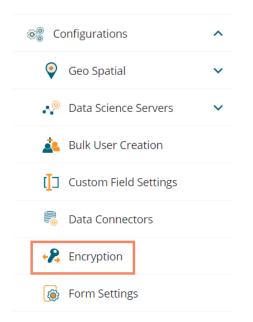


# 4.2.2.6. Encryption

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

Admin Module     Encryption Settings	Active Users :17
	<ul> <li>Encrypt a data object, file, network packet or an application to access data securely for your analytics processes.</li> <li>Encryption protects user data and flow data securely across the devices.</li> </ul>

# 4.2.2.7. 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.



Ô	Configurations	^
	Geo Spatial	~
	🥠 Data Science Servers	~
	🛓 Bulk User Creation	
	Custom Field Settings	
	👼 Data Connectors	
	+2 Encryption	
1	🔞 Form Settings	
	Version Control	

- 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.

Form Settings			Clear
6	Enter the database details for saving the data of forms	^	
	User Name *		
	form_user		
	*Use Read only credential Password *		
	Host *		
	Port *		
	Database Name *		

Note:

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

#### 4.2.2.8. Version Control

This section helps the user to get a private token to access multiple versions of the Data Science workflows, scripts, and models.

- i) Click the 'Version Control' option from the Configurations options.
- ii) The Version Control page opens.
- iii) Provide the Host address of the GitLab link.

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- iv) Select the 'User Credential' as Token type (if the user can select the 'Private Token' option if the user has access to the Private Token from Git Lab).
- v) Provide an email address of the GIT Lab account.
- vi) Provide a valid password.
- vii) Put a checkmark in the given box to generate and store a new Private Token.
- viii) Click the '**Test**' option.

Admin Module Version Control	Clear 6 Te	est Save
		_
Version Control Information	^	
1 https://gitlab.com 2 Token type	_	
User Credential O Private Token		
anagha.kn@bdb.ai		
5 I understand that, this will auto generate a new Private Token that will be stored and will be used furt	her to proce	

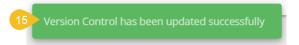
ix) A success message appears.



- x) The Private Token option gets selected.
- xi) Token Key from the Git Lab account gets entered by default.
- xii) Select a Project from the drop-down menu.
- xiii) Select a branch from the drop-down menu.
- xiv) The 'Save' option gets enabled. Click the 'Save' option.

Version Control	Clear	Test Save
Version Control Information	^	
Host * https://gitlab.com		
Token type O User Credentration Private Token		
11 Token Key*		
12     Select a Project *       VCS_BDB     VCS_branch	•	

xv) A success message appears to inform the version control update.

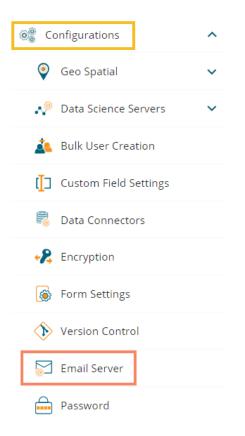




# 4.2.2.9. Email Server

The administrator can configure the email server information using this admin option to get email alerts for new Forms and Business Story alert.

i) Click the 'Email Server' option from the Configurations list.



- ii) The Email Server Settings page opens.
- iii) Provide the required information to configure the Email Server Settings.
  - a. Email Host: SMTP host address
  - b. **Email Port**: Port number of SMTP
  - c. **Encryption Type**: Select an encryption type from the drop-down menu.
  - d. Email From: Enter authenticated credentials of the sender.
  - e. Email Password: Provide the password
  - f. Email Username: Name that gets displayed to the receivers

Email Server Information		^
Email host *		
Email port *	Encryption type *	•
Email from *		
Email password *		



- iv) Configure the following alert options for email by putting checkmarks:
  - i. Disable email sending: By selecting this option, email alert gets disabled
  - ii. Send test email by selecting this message a test mail is sent.
  - iii. Send email for publish/share/copy to documents: By enabling this option email alert gets shared for publishing, share and copy to actions of the documents.
- v) Select a Domain from the given options (All/Selected Domains)

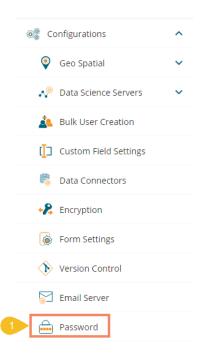
Disable email sending
Send test email
Send email for publish/share/copyto documents
Domain selection
O All O Selected Domains

- vi) Click the '**Update settings**' **l** icon to save the email server information.
- vii) Click the 'Clear all Setting'  $^{\circ}$  icon to erase the entered configuration details.

### 4.2.2.10. 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**' **b** icon to save the entered password information.

Admin Module Password Settings	C B
3 Password Information	^
Password Expiry * O	
Password Strength * 6	
Password Reuse * 3	
Login Failures(before account is locked) *	

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

sword Settings	0
Password Information	^
Password Expiry *	
Password Strength *	
Password Reuse *	
Login Failures(before account is locked) *	

#### Note:

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

### 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

The user can authenticate the Windows AD accounts through this admin option.

- 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.



Document Management	
Configurations	~
🚖 Authentication	^
AD Configuration	
🔞 CA PPM Configuration	
📒 Audit Trail	~
Tanguage Mapping	~
1 Migration	~
<li>Session Manager</li>	
😥 Schedule Monitor	
Server Monitor	
👼 License	

- iv) The Active Directory Settings page opens.
- v) The 'Configuration ' tab for the Active Directory Configuration opens by default.
- vi) Provide the **Username** of the Windows AD service account.
- vii) Enter the secured **Password**.
- viii) Provide IP address/Host of the Windows AD server.
- ix) Provide the **Port** number of Windows AD.
- x) Enter the **Domain name.**
- xi) Click the **'Next'** option to proceed.

≡	Admin Module			
Active	Directory Settings			
1 Cor	nfiguration	2 Parameters	3 Sync Configuration	4 Group Configuration
	Configuration			G v
	Server Protocol * LDAP	Host *	Port *	
	User name *			
	Password *			
	Domain name *			
				Next

xii) A message appears to confirm the action and leads to the 'Parameters' tab.



	Ad Configuration :	Lattings Saved	۹		Ċ <sup>∞</sup>	0	V
Admin Module							
Active Directory Settings							
Configuration	2 Parameters	3 Sync Configuration		- 4 Gr	oup Cor	figurat	ion
Parameters					^		
First name							
Last name							
Description							
Custom Fields					~		
			Back	Next			

- xiii) Set the user parameters by using this tab.
- xiv) Provide the first name of the user.
- xv) Provide the last name of the user.
- xvi) Add description.

Active Directory Settings			
Configuration	2 Parameters	3 Sync Configuration	4 Group Configuration
Parameters			^
first name Last name last name			
Description			

- xvii) Open the Custom fields from the drop-down menu.
- xviii) Select an option from the available context menu.
- xix) Enter Active Directory Property.
- xx) Add a new custom field by clicking the 'Add row' icon.
- xxi) Click the 'Next' option.

Admin Module				
Active Directory Settings				
Configuration	2 Parameters	3 Sync Configuration	Group Confi	iguration
Parameters			~	
Custom Fields			^	
User property		Active directory property	Delete	
User property		Active directory property	×	
+ Add row				
			Back Next	

xxii) A success message appears to confirm the action and leads to the 'Sync Configuration' tab.



- xxiii) Select a user group using the displayed AD Group list.
- xxiv) Select users from the AD User list by putting the checkmarks in the boxes given next to the usernames.
- xxv) Click the 'Next' option to proceed.

Admin Module					
Active Directory Settings					
Onfiguration	•	Parameters	3 Sync Co	onfiguration	Group Configuration
	AD Group list		AD User list		
	empl		Search		
	employee		Select All	3/6	
			✓ bijeesh.op		
			🗸 shyam		
			🖌 kalanidhi.m		
			archana.ms		
			🔲 georjo.johan		
			vidhyashree.bhosale		
					Back Next

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

<ul> <li>xxvii) The Group Configuration tab opens.</li> <li>xxviii) The selected AD user list appears.</li> <li>xxix) Select any user group from the BDB Group list.</li> <li>xxx) Click the 'Save' option.</li> </ul>	User list updated successfully.
	xxviii) The selected AD user list appears. xxix) Select any user group from the BDB Group list.

Admin Module					
Active Directory Settings					
O Configuration	•	Parameters		Sync Configuration	Group Configuration
	BDB Group list  Per  Group Permissions Permission Check S permissions PAPermissions		Selected AD User list Search Select All Dijeesh.op shyam kalanidhi.m	1/3	
					Back Save

xxxi) A success message appears confirming that the user group has updated successfully.





User	User Management					
	Consume				Add Users to Group	
User	Groups	_	Update User		Search	
Searc	h Group	۹				
Showing	g 23 out of 23				<ul> <li>Select all</li> </ul>	
All Gr	oups				User_Perm	
User_	_Perm 🧪	0 🛢	Short Name * Shyam	Full Name * shyam	Admin Role	
Admi	n Role	8			□ bl_group	

# 4.2.3.2. CAPPM Configuration

This section explains how to configure Clarity.

i) Select the 'CAPPM Configuration' using the 'Authentication' Admin option.



- ii) A new page opens with 3 steps mentioned on it.
- iii) The fields for CA PPM Settings get displayed by default.
- iv) Provide a Username of a CAPPM account.
- v) Enter the valid **Password** for the selected CAPPM account.
- vi) Enter the CAPPM server URL.
- vii) Provide the name of the query that fetches a list of the Clarity users in the 'User access NQuery' field.
- viii) Click the 'Next' option to proceed.

Admin Module     CA PPM Settings		
3 (CA PPM Information	2 CA PPM - Sync Configuration	3 Group Configuration
		G v
4 User name *		
6 CA PPM server URL *		
7 User access NQuery*		
		8 Next

ix) A success message appears, and the administrator gets directed to the CA PPM Sync Configuration tab.



CA PPM Settings Saved	ш џ
ity user list Search	
ity user list Search	
ity user list Search	3 Group Config
Search	3 Group Config
Select All 0/0	
Back	Next

- x) The CAPPM Sync Configuration tab opens, displaying the Clarity User list.
- xi) Select a user by using a checkmark in the given box.
- xii) Click the 'Next' option to proceed.

Admin Module		
CA PPM Settings		
CA PPM Information	CA PPM - Sync Configuration	3 Group Configuration
	Clarity user list	
	Search	
	Select All 7/141	
	☑ dashboard ☑ test ☑ ematkovitch@pcyc.com	
	✓ iarangohisijara@pcyc.com	
	smascotto@pcyc.com	
	✓ tgraef@pcyc.com	
	✓ gecole@pcyc.com	
	□ siavasimba@ocvc.com	
		Back Next

- xiii) A success message appears to confirm the user list update and the administrator gets directed to the Group Configuration tab.
- xiv) Select a clarity user from the Selected Clarity User list using a checkmark.
- xv) Select a group from the BDB Group List.
- xvi) Click the 'Save' option.



Admin Module		
CA PPM Settings		
CA PPM Information BDB Group list Search UserfestGrouphdz	CA PPM - Sync Configuration Selected Clarity User list Search Search Select All 1/7	S Group Configuration
UserTestGrouppic UserTestGrouppid UserTestGrouppixo UserTestGrouppixo UserTestGrouppitm UserTestGrouppitf UserTestGrouppid UserTestGrouppid UserTestGrouppid UserTestGrouppid UserTestGrouppid	dashboard  test  matkovitch@pcyc.com  iarangohisijara@pcyc.com  smascotto@pcyc.com  tgraef@pcyc.com  gecole@pcyc.com	
		Back Save

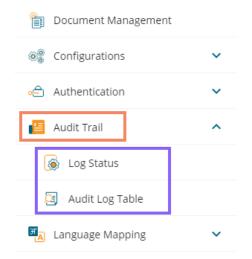
Note:

- a. Click the 'Clear all setting' <sup>C</sup> icon to erase the entered CA PPM Information.
- b. Click the 'Back' option to go back on the CA PPM Settings page.

### 4.2.4. 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 appear under the Audit Trail.
  - 1. Log Status
  - 2. Audit Log Table



- iii) Click the 'Log Status' option.
- iv) The 'Audit Trail' page opens.
- v) The administrator can enable or disable audit trail settings by sliding the given button.
- vi) Click the 'Save' icon to save the selected audit trail setting.

🗮 Admin Module	
Audit Trail	
Slide to enable/ disable audit log	



- vii) Click the 'Audit Trail List' option
- viii) The Audit Trail List page opens, displaying the audit log details.
- ix) Select a User: Select a user from the drop-down list
- x) Enter a Start Date: Select a Start Date using the calendar
- xi) Enter an End Date: Select an End Date using the calendar
- xii) Click the 'Apply Filter' icon.

it Trail List	verr	na 🔻 11/11/2	2019 💼 11/18/2019	Search	
Message Id	Request	Response	Audit log	Details	
ddcefd474a7aed4671c	31fb8 [Request]=[pluginSe	rvice]= spac null	null	6	
cb5101a8ea165b29b4c	b4c7c [Request]=[getalluse	rs]= spaceke[response]=UserNar	me:null,Statu null	0	
e2caf7d7acee0fb261a7	3b9b [Request]=[getAudit	TrailSettings][response]=UserNar	me:null,Statu null	0	
5a676bf2aeb37fd42497	78724 [Request]=[getMoni	erData]= sp null	null	6	
309fdd22932d685fd8co	ee50 [Request]=[getMonit	terData]= sp null	null	0	
ebd16cae898aca51060	2fbb8 [Request]=[getMoni	erData]= sp null	null	6	
			Items per page: 10		> >

xiii) Enter a term in the search bar and click the '**Search**' icon to display specific log entries in the Audit Trail List.

Audit Trail List	verma	✓ 11/11/2019	11/18/2019	Ē	~	getlist		(	<u>}</u>
Message Id	Request	Response	Audit log			Details			
ad41ac317d52e5ct	f10d88 [Request]=[getlis	stview]= spac[response]=Use	rName:null,S null			6			
1bc0b1ff00c2cb15	a475e [Request]=[getlis	stview]= spac[response]=Use	rName:null,S null			1			
			ltems per page: 10	• •	1 - 2 of 2	<	<	> >	

# 4.2.5. Language Mapping

The Language Mapping 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 Mapping gets completed in two steps which are as mentioned below: Step-1: Languages Step-2: Mapping Table



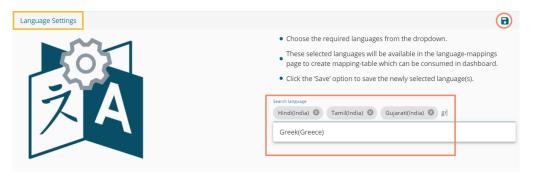
3	Language Mapping	^
	👩 Languages	
	🗐 Mapping Table	

# 4.2.5.1. Languages: Adding more Languages

- i) Click the 'Language Mapping' option from the list of Admin options.
- ii) Choose Languages option to add languages.
- iii) The Language Settings page opens displaying the selected language(s).

Admin Module	
Language Settings	8
	Choose the required languages from the dropdown.
502	These selected languages will be available in the language-mappings page to create mapping-table which can be consumed in dashboard.
	Click the 'Save' option to save the newly selected language(s).
	Search language
	Hindi(India)

- iv) The administrator can search and add more languages by using the same 'Search Language' bar.
- v) Click the 'Save' icon to save the recently added languages on the Language Settings page.



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



# 4.2.5.2. Mapping Table: Language Mapping Part

i) Click the 'Mapping Table' option using the Language Mapping admin option.



8	🔥 La	^	
	٢	Languages	
0	€ A	Mapping Table	

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

2 Language Text M	lapping	3 + Search Q		
	Name	Created date	Actions	
	restlangzzt	12/10/19, 11:53 AM	Z 1	
	restlangohv	12/10/19, 10:42 AM	/ 1	
	arabic	9/24/19, 11:56 AM	/ 1	

- iv) The 'New Language Mapping' window opens.
- v) Provide a name for the new Language Mapping.
- vi) Select a language or multiple languages using the drop-down menu.
- vii) Click the 'Save' option.



- viii) A success message appears to assure that the newly added language mapping is saved.
- ix) The Language Text Mapping page opens, from where the administrator can add various key terms and their synonyms to the newly created language.

<b>58°</b>	8 Language setting has been saved		९ III 🖞 🕐
Admin Module     Language Text Mapping	can googe secong nos occh sarea		← Search
Language Name * Gujarati	Key Gujarati(India)	Edit	Delete
Key*			
Selected Languages			
Gujarati(India)			

x) The newly added Language Name appears.



- xi) Insert a key from the selected dashboard. (A dashboard must be selected from the Designer to get the key terms)
- xii) Provide the translated synonym of the key in the selected language(s).
- xiii) Click the 'Save' option.

🗮 Admin Module
Language Text Mapping
10 Language Name * Gujarati 11 Key * Year wise Expense and Rev
Selected Languages
13 Save

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

Admin Module	Language setting content has been saved			
guage Text Mapping			←	Search
Language Name * Gujarati	Key	Gujarati(India)	Edit	Delete
Key *	15 Year wise Expense and Revenue	વર્ષવાર ખર્ચ અને આવક	1	
Year wise Expense and Rev	-			
Selected Languages				
Gujarati(India) વર્ષવાર ખંચે અને આવક				
Save				

xvi) Save more terms to the newly created language settings using the same set of steps:



ey	Gujarati(India)	Edit	Delete
xpense	ખર્ચ	1	i i
levenue	મહેસૂલ	1	i i
Axis Title	એક્સ અક્ષનું શીર્ષક	1	
Axis Title	વાય અક્ષનું શીર્ષક	1	
ear	વર્ષ	1	
ear wise Expense and Revenue	વર્ષવાર ખર્ચ અને આવક		Ĩ

# 4.2.5.3. Configuring the Dashboard Settings

i) Select a saved dashboard using the Designer plugin.

- New -	Workspaces (3)	⊕ C	Q	Dashboards (14)				Q
- Manage						-	-	•
- Open -	All Dashboards			Map chart	(†	0	Î	:
Preferences	Finance	1	Î	filter_saver	(f)	0	Î	:
Save as	Workspace1	1	Î	Filter saver	F	0		:
? Help	Campaign Analytics	1	Î	Data Drill		•	-	:
b Exit	Trash		×			_	-	
				Custom Component	<b>F</b>	0		:
				Drill-Funnel-type	ET.	٥	Î	:
				Hide and Show	.↑	0	Î	:
				Language Mapping	(F)	•		:

ii) 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)

Title	
Title Box Color :	
Show Title Box :	
Show Title :	
Title Bar Height :	40
Description :	{Year wise Expense & Revenu
Font Color :	
Font Size :	11
Font Style :	Normal 🔻
Font Weight :	Bold 🔻
Font Family :	Roboto 🔻
Align :	Left 🔹
Text Decoration :	None 🔻



#### Note:

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

Column1		4	fx	×
Connections Con	nectior	1-1	•	G
Search	С	ategory	/	
Expense	R	evenue	ł	
Revenue	S	eries		
Year	E	xpense	:	
	Y	ear		
Properties		ndicato	or	
Field Name :	Rever	nue		
Display Name :	{Reve	nue}		
Visible :	<ul> <li>Image: A second s</li></ul>			
Color :				

- iii) Open the Dashboard Properties Panel and configure the Language Properties, as shown below:
  - a. Enable the Language Mapping by using a checkmark in the given box
  - b. Use a checkmark in the given box to Hide the Curly Braces
  - c. Click on the C icon to select a mapping option.

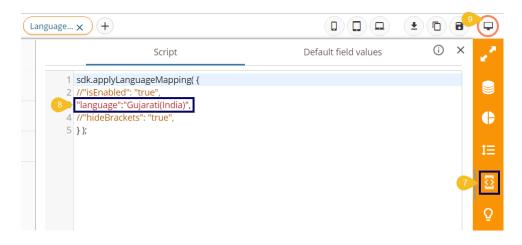
	Dashboard	×			
	Border				
	Cache				
- 1	Global Font And Themes				
	Gradient				
	Language Mapping				
1 2	Enable : Hide Curly Braces : Select a Mapping:				
	Size				

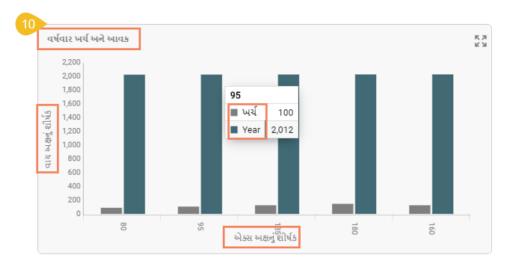
- iv) The 'Language Mapping Selection' window opens.
- v) Select a language using the Mapping List drop-down menu.
- vi) Click the 'Save' option.



4 Language Map	ping Selection		×
5 Mapping List	Gujarati		<b>T</b>
		6 Save	Cancel

- vii) Open the Script window for Component
- viii) Make sure that the desired language's name is mentioned in the script.
- ix) Click the '**Preview**' 🖵 icon.





x) The dashboard title and other descriptions get translated into 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

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- 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

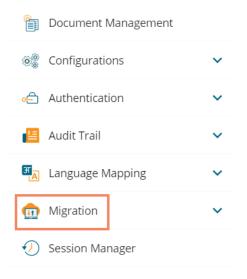
### 4.2.6. Migration

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:

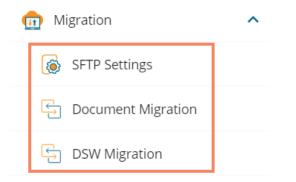
- 1. Document Migration,
- 2. DSW Migration.

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. DSW Migration



This section explains the step by step process of Migration.



# 4.2.6.1. Migration SFTP Settings

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

Migration SF	TP Settings	(	C Test	Save
	Migration Information	^		
	Host *	_		
	Port *	_		
	User name *	_		
	Password *	_		
	Start path *	_		

- v) A success message appears to confirm the verification of the connection.
- vi) The 'Save' option gets enabled.
- vii) Click the 'Save' option to save the SFTP details.

	۹ 🏢	С <sup>67</sup>	0 W
Connected Successfully			
	C	, Test	Save

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

_	
	Saved Successfully

# 4.2.6.2. Document Migration

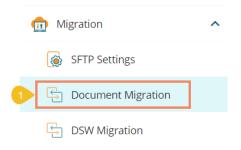
Users can migrate a business story or dashboard using the Document Migration option from the Admin module. The entire migration task has three phases:

- 1) Configuring an SFTP Server: the SFTP server location should be similar for import and export accounts.
- 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 next page that opens in the sequence.

Export Document 2 Export	Import Document
Click on the export button.     Select the document which needs to be migrated and click     on download.	Login to the destination Server or Space where the baf content has to be imported. Configure the SFTP location.
Selected document will be downloaded on configured SFTP location.	Click on import button to see all the available baf files on the configured SFTP server.
	Select the baf file and click on "Migrate" button to proceed for migration.

- 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:

- a. If you the folders list, then the user needs to select a specific file from a folder, then only the 'Download' icon gets displayed.
- b. 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.

	III 4 <sup>0</sup> 🧿 (
Admin Module	TP server
Migration - Document Export	My Documents 👻 😋 🔶
My Documents	
Search in documents	م
Search in documents	
	4

- vi) Sign 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 the same to use the document migration functionality)

BBB®	III 4 <sup>10</sup> 🔿 🔇
Admin Module     Migration SFTP Settings	William Martin
	6 My Account
8 Migration Information	i About
Host * 192.168.71.252	ن Sign Out
Port* 22	
User name * ftpuser	
Password *	
Start path * /Nome/ftpuser	

- ix) By clicking the 'Import' button from the Document Migration page.
- x) The Import Section lists all the baf files from the configured SFTP server. 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.

	≡	Admin Module		
	Migra	ation - Document Import		
9	fin	۵	Document Name: Finance Overview	
		Finance Cockpit3306140902428934150.baf	Query services Names Data Store Names Document Version	• 3.2.1
		Finance Dashboard Template3306140902432	Workspace Present	• true
		Finance Overview33061409024309362694.baf	<ul> <li>Migrate your Dashboard in Designer worl</li> <li>Migrate</li> </ul>	kspace
		ODC Finance Dashboard33061409024340983		
		PR_ODC_Finance_Dashboard3306140902434		
10		Finance Overview3306688128614483467.baf		
	-		1	

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

<b>B</b> ₽1 ≡	Admin Module	12 Migrated Successfully		III 🗘 🕅 🛞 🐼
	Export Document	Export	Import Document	Import

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



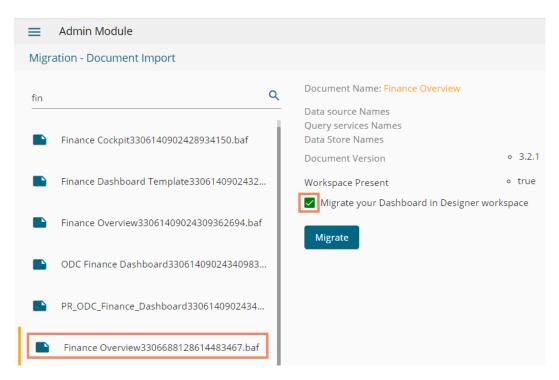
BBB®						¢ <mark>11</mark> (?	) w
My Documents >				Search W W	/illiam Martii	n	
Shared Documents 13	Finance Overview	Business Story 4.5	Sample Folder 4.5	B My	Account out n Out Sample F	Folder 4.2	
Published Dashboard 3.8	Sample Folder 3.7	Sample Folder 3.5	Business Stories 3.2.1 to				

#### 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 the 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 checkmark in the given box (as shown in the following image):





BBB@	Designer +								
+ New -	Workspaces (3)	$\oplus$	C	۹	Dashboards (1)				Q
🖆 Manage	All Dashboards				Finance Overview	.⊤	•	Î	:
🗁 Open 👻	Finance			Î					
★ Preferences	Workspace1			-					
🗎 Save as				•					
<ul> <li>Help</li> </ul>	Campaign Analytics		/	Î					
🖒 Exit	Trash			×					

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

Data Connector Details	>
ngData DB ser Name *	
bdbizviz.com	
assword *	
Villent *	
IP/Host * Database Name Note: If database name is not provided, it will be taken from the dataset internal	

- 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.

### 4.2.6.3. DSW Migration

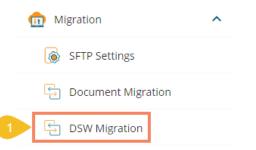
The DSW Migration option allows users to migrate Data Science Workflows, Script, and model.

The users can migrate multiple Workflows, scripts, and models to multiple users. However, the description is given below to migrate one Data Science workflow to another user.

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

www.bdb.ai





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

Export Section 2 Export	Import Section Import
<ul> <li>Click on the export button. write a suitable baf file name.</li> <li>Select the Workflows, Scripts and Models which needs to be migrated and click on download.</li> </ul>	Login to the destination Server or Space where the baf content has to be imported. Click on import button to see all the available baf files on
Selected Workflows, Scripts and Models will be downloaded on configured SFTP location.	the configured SFTP server. Select one or multiple baf file and click on "Migrate" button to proceed for migration.
	<ul> <li>Configure connector details for the selected content.</li> <li>Choose one or multiple users to import these files into their account.</li> </ul>

- iii) The Export Section for DSW Migration opens.
- iv) Select a Data Science Workspace to display the list of Workflows (By selecting 'All' option workflows from all the Data Science workspaces display)
- v) 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)
- vi) Click the 'Export' option after selecting the desired workflows, scripts, and models.

	≡ /	Admin M	Module						6	
3	DSW N	ligratio	n - Export					4 <u>All</u>	Export	←
			Workflows			Scripts		Models		
		WF_		۹	K-		۹	Search model	۹	
			Select all			Select all		Select all		
			model_wf_3.8		~	K-Means++_copy		HousePrice		
			model_wf_3.8_with model			K-Means++_copy_1554375646	б	Something		
			Performance WF_Binary Class	5				FIFA Model		
	5		WF_KmeanScript					NN_TestModel		
			WF_KmeanScript_1554375647	7				Vlccpdfmodel		

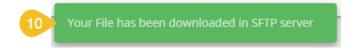
Note: The following example displays that by selecting a Workflow from the list the related script gets selected by default.

- vii) The 'Save As' window opens.
- viii) Provide the file name.
- ix) Click the '**Ok**' option.

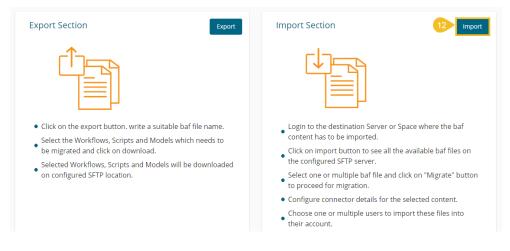


10		
0	Save As	
	Please enter	file name
8	Kmeans_Mig	ration
l	Cancel 9	Ok

x) A notification message appears to inform the user that the file has been successfully downloaded in the SFTP server.



- xi) The user needs to login to the destination user account.
- xii) Click the 'Import' option using the DSW Migration admin option.



- xiii) Search for the created BAF file.
- xiv) Select it by using the checkmark in the box.
- xv) Click the 'Next' option.



SW Migration - Import	←
Kmea 13 Q	
csv_kmeans111251445780.baf	
Kmeans_Migration967341779200.baf	
Kmeans_Migration330615073280.baf	
	œ

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

xvii) Configure the Data Connector details.

xviii)Click the 'Test' option.

Con	DSW Migration - Import figure data connector neans_Migration330615073280.baf		
	mysql_DB		
	Database type	Database name	
	mysql		
	Target IP	Target port	
	Target user name	Target password	

- xix) A success message appears, and the user gets informed that the configuration is done.
- xx) Click the 'Next' option after configuring the Data Connector details (The 'Next' option gets enabled after getting the success message).

BBB®	۹		¢24	0	V
Admin Module					
DSW Migration - Import					←
Configure data connector					
Kmeans_Migration330615073280.baf					
mysqLDB   Done   You are now done.   Back					
		Ba	20 ck	Next	

- xxi) The user gets redirected to select a destination user. Select a user/users by putting the checkmarks from the displayed list.
- xxii) Click the '**Next'** option to proceed.



	DSW Mig Search User Wi	gration - Import			← Q
		User Name	Email Id	Last Login Date	
21		Will		1554368717924	
				Back	22 Next

- xxiii) Select an option out of Overwrite and Replicate to treat the duplicate content (if in case it happens to be duplicate).
- xxiv) Click the '**Import**' option.

🗮 Admin Module	
DSW Migration - Import	←
What action you would like to take with duplicate content ?	24 Back Import

#### xxv) A confirmation message appears.

e content ?	
Confirm Duplicate	
	CANCEL CONFIRM

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



xxvii) Open the DS workspace to check the migrated Workflow and Script in the respective sections.



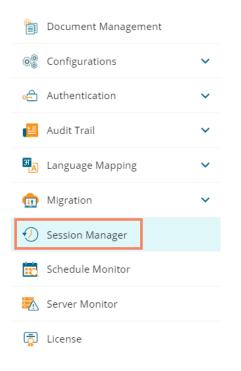
ata Science Workbench 😱	C +
С. 🗶 к 🔍 о	Create New Workflow William Martin
Saved Workflows	• • • • • • • • • • • • • • • • • • •
WF_KmeanScript_1554375647	• • • • • • • • • • • • • • • • • • •
	U Sign Out
WF_KmeanScript	
Test Workflow	
🗅 K means	
O Algorithms	
🕵 Custom Scripts	
🔺 📡 Saved Scripts	
🕵 K-Means++_copy_1554375646	(H)

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

# 4.2.7. Session Manager

The 'Session Manager' is an administrative module to display the various status of the platform users.

i) Click the 'Session Manager' option 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 username.
- iv) Click the 'Kill Session' icon.



Active Sessio	ons				Admin	-
Act	ive Admin Session				Search	٩
•	Name	Email Id		Active sessions		
	nik	nikhil.verma@bdb.ai		1		
	sadhana s	sadhana.s@bdb.ai		2		
	jubil	jubilant.vr@bdb.ai		4		
			Items per page: 5	▼ 1-3 of	f3   <b>&lt; &lt;</b>	> >1

- v) A window appears to confirm the action.
- vi) Click the 'YES' option.

	Kill Session
:"	Do you want to kill the selected sessions?
hi	CANCEL YES
aar	iana.s@pdp.ai

- vii) The selected user's session(s) gets killed, and a success message appears to inform the same.
- viii) The user gets removed from the Active Admin Session.

BBB@^				Q		¢	?	N
<b>⊒</b> Admin	Module	Successfully Session Killed						
Active Session	าร			Admir	ו		•	8
Activ	ve Admin Session			Search			٩	
	Name	Email Id	Active sessions					
	sadhana s	sadhana.s@bdb.ai	2					
	jubil	jubilant.vr@bdb.ai	5					
		1	tems per page: 5 🔹 1 - 2 c	of 2  ≮	<	> >	I	

#### Note:

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

Admin	3
User	



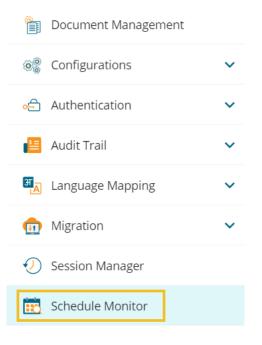
d. Use the 'Search' bar to search a specific user(s) from the displayed list of Active Sessions.

Activ	ve Sessions			Admin 👻 🛛
	Active A	Admin Session		<u>4</u>
		Name	Email Id	Active sessions
		sadhana s	sadhana.s@bdb.ai	2
				Items per page: 5 ▼ 1 - 1 of 1  < < > >

# 4.2.8. Schedule Monitor

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

i) Click the 'Schedule Monitor' option from the list of admin options.



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

Schedule Me	onitoring	12/10/20	19 🖻 1	2/10/2019	•	✓ <u>S</u> €	earch	٩
	Name	Status		Action				
	nlp hiring	•		• Act	ivate			
	testSchedule	•		• Dec	ctivate			
	jira store newly	•		• Act	ivate			
	nlp_hiring_data	•		• Act	ivate			
	6dec	•		• Act	ivate			
			Items per page: 8	▼ 1 - 8 of 9	966  <	< >	> >	



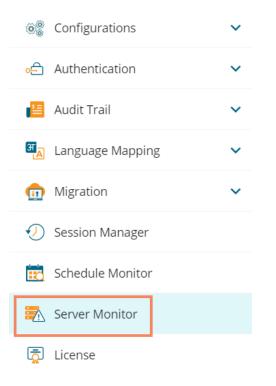
#### iii) Search and display specific scheduled data store(s) using the 'Search' space.

Schedule Mo	nitoring	12/10/2019			~	store r	۹
- 1	Name	Status	Action				
	Store Refresh	•	• Acti	ivate			
	Store Refresh	•	• Acti	ivate			
	Mssql Store Refresh check	•	• Dec	tivate			
		ltems	per page: 8 💌 1 - 3	of 3	<	< > >	

## 4.2.9. Server Monitor

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

i) Click 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 Data Science Servers node is selected in the below given details:

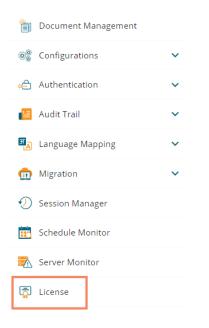


Gateway	Core	Data Science Servers	Data Service	Scheduler	F	ython	Pipeline & Data Prep	Consur
							OS Memory	
	-0-	Current Heap Size	110 MB	Committed Virtua	l Memory	3 GB	35%	
	110	Committed Heap Size	1920 MB	Free Physical Mer	nory	20 GB		
		Max Heap Size	1920 MB	Total Physical Me	mory	31 GB		
Search Bund	le							م
Search Bund			Start Id	Version			Storus	م

# 4.2.10. 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 the 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 'Show License Options' using the radio button to update the License Users.

Admin Module	
License Settings	
Show license options	
Active sessions	25
Customer name	BDB-Prod
License type	Cloud



Note: After enabling the 'License Settings' radio button, the following options appear on the page:

- a. Generate private key
- b. Update License Key

Follow the below given steps to configure the displayed License options

- a. Generate Private Key
  - i. Navigate to the License Settings page.
  - ii. Enable the 'Show license options' by using the radio button.
  - iii. Click the 'Generate private key' option.
  - iv. A private key gets generated.
  - v. Share the generated Private Key with our support team at <u>support@bdb.ai</u> to get the updated license key. Use the '**Copy**' icon to copy the Private Key.

1 License Settings
2 Show license options
3 Generate private key
4 Key: efaa82e919f2bd1947a56e1d2e8859e9 🔲 🗙
5 Note : Please copy this private key and share with BDB support team [ <i>support@bdb.al</i> ] to get updated license key.

Note: Click the '**Cancel**' option to remove the generated private key.

#### b. Update License

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

- i. The user needs to enter the license key in the '**Update License**' space.
- ii. Click the '**Update**' option to update the existing licenses.



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

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



Decision Platform	
License key is invalid or expired. To continue using your account update new license key.	
Cancel Generate	
Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)	

# 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 landing page opens.

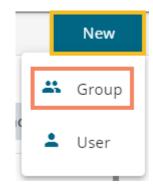


BBB®					Q		Ļ <sup>81</sup>	?	W
User Management								Nev	v
User Groups		Users	<sub>Type</sub> Enterprise	<ul> <li>Status</li> <li>Active</li> </ul>		•	t↓		
Search Group	۹	Search User							Q
Showing 75 out of 75		Showing 22 out of 22							
All Groups		Testinguser				1	$\oslash$	J	
UserGroupgrpbsp	/ 🖉 🗎	sujee				1	$\oslash$	9 T	
UserGroupgrpsas	/ 🖉 🔒	killsession				1	$\oslash$	9 T	
UserGroupgrpbta	/ 🖉 🗎	migTestUserDestn				1	$\oslash$	3	
GroupshareTestukbsml	/ 🖉 🗎	migTestUserSource				1	$\oslash$	J	
UserGroupgrpqsy	/ 🖉 🗎	Chetan				1	$\oslash$	3	
UserGroupgrpfpkwaf	/ 🖉 🗎	jubilant				1	0	J	

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

# 5.2. Creating a New User Group

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



iv) A new window opens asking for information about a new group.

New Group	Cancel Sa
Name *	
Description	
Add Users to Group Allows to add users from user list	Assign
App Permissions Allows to assign app permissions	Assign
Folder Permissions Allows to assign folder permissions	Assign
File Permissions Allows to assign file permissions	Assign



- v) Provide the following information to create 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)

New Group		
Name * Sample Group		
Description		

#### c. Add User to Group:

i. Click the 'Assign' option provided for adding the existing users to the newly created group.

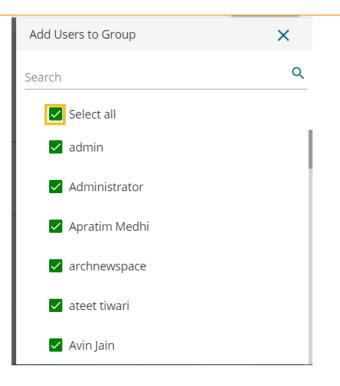


- ii. A new window opens with a list of all the existing users to that space.
- iii. Select User(s) by using a checkmark in the box from the displayed list of users.

Add Users to Group	×
Search	Q
Select all	
🖌 admin	
Administrator	
Apratim Medhi	
archnewspace	
ateet tiwari	
Avin Jain	

Note: Use checkmark in the box provided for the 'Select all' option to select all the existing users.



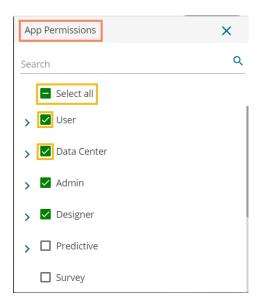


#### d. App Permission:

i. Click the 'Assign' option provided to add various app permissions to the newly created group.



- ii. A new window opens with the list of the available apps to select the App Permissions.
- iii. Either choose 'Select all' options to add all the permission or Assign various plugin/app rights by choosing a specific plugin option to the newly created User Group via the '**Group Permissions**' menu list (It is mandatory).

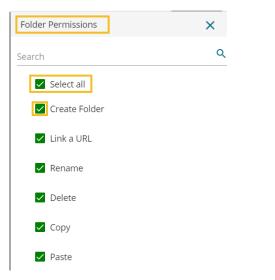


e. Folder Permission:



i. Click the 'Assign' option provided next to the Folder Permission option.

ii. A new window opens with the list of the Folder Permissions to be selected for the group.

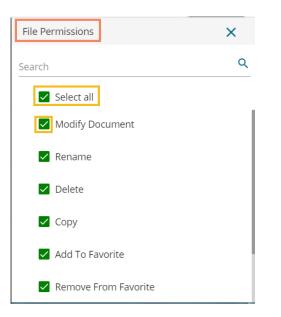


#### a. File Permissions:

i. Click the 'Assign' option provided for the File Permissions.



ii. A new window opens with the list of the File Permissions to be selected for the group.





New Group	Cancel	Save
Allows to add users from user list	Assign	
App Permissions		
Allows to assign app permissions	Assign	
Folder Permissions		1
Allows to assign folder permissions	Assign	
File Permissions		
Allows to assign file permissions	Assign	
		I

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

User Management	
User Groups	
Search Group	Q
Showing 26 out of 26	
All Groups	
Sample Group	/ 🖉 🗎
Sample Group only DD permimssion	<ul><li> Ø</li><li> Ø</li><li> Ø</li></ul>
only DD permimssion	1 🖉

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

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



# 5.2.1. Assigning Group Custom Fields

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

- i) Click the 'Assign Custom Field' option 🗐 provided next to a user group.
- ii) The 'Assign Custom Field to Group Users' page opens.
- iii) Select a Custom Field using the drop-down list.
- iv) The 'Manual' field appears to insert the Keywords for the selected custom field.
- v) Click the '**Add**' icon to select the user.
- vi) Click the 'Save' option.

User Groups		2 Assign custom	fields to group users	
Search Group Showing 26 out of 26	c	3 Group Name	Sample Group	
All Groups		4 Select Custom Fields	country	V
Sample Group		5 Manual	Keywords	
only DD permimssion	1 🖉 🖉		India 🛛 USA 🛇	
nan	1 0 🗎	6 Users		
test1security	1 0 🗎	Allows to assign cust 0 Custom Field Assigned		Assign
Designer	1 0 🗎			
TestUserGrp	1 0 🗎			Cancel Save

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



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

# 5.3. Creating a New User

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

		New
	*	Group
	+	User
10		

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



- e. **Password: Set** password for the new user
- f. Confirm Password: Confirm the above password

New User		Cancel Save
<sub>Email *</sub> bdbuser@bdb.ai		
Short Name * user	Full Name * BDB User	
Description		
Password *	Confirm Password *	

vi) Click the 'Assign' option provided for Adding the new User to Group(s).

Add to Groups		
Allows to assign user to groups from group list 0 Group Assigned	Assign	

- vii) A window opens, listing all the groups.
- viii) Either choose 'Select all' option or select the specific group(s) by using the checkmarks.

Add Users to Group	×
Search	۹
Select all	
Sample Group	
only DD permimssion	
🗌 nan	
test1security	

ix) The selected group(s) will be assigned, and the number of the selected groups gets mentioned.

Add to Groups		
Allows to assign user to groups from group list	Assign	
1 Group Assigned		

x) 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 of user		
country of user		
component		
gender		
user language		
caller display name		
skill		
userid *		

xi) Click the 'Save' option

New User	Cancel	Save
		1

- xii) A success message appears.
- xiii) The newly created user gets added to the user list.

				Ċ.	(?)	(\)
User has been created	l successfully				New	,
Jsers	<sub>Type</sub> Enterprise	Status • Active	-	t↓		
Search User						Q
howing 37 out of 37						. 1
BDB User			1	0 (	9 🔳	
ateet tiwari			1	0 (	D 🔳	

Options	Name	Description
1	Edit	Update/Edit the user-specific details for a selected user
$\oslash$	Block	Block the selected user
Î	Remove	Remove the selected user from the user list
Ð	Reset Password	A Reset password gets sent to the registered user email

Note:



- c. All the user-specific details other than email id can be updated/edited by the Update User option.
- d. If the new user gets added to the Admin Group, the new user becomes an admin.
- e. 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
<sub>Email</sub> * defaultuser@bdb.ai		
Short Name * duser	Full Name * Default User	
Description		
Password *	Confirm Password *	

- iv) Do not add the user to any group.
- v) Provide the '**Custom Fields**' details for the new user (If marked as mandatory).
- vi) A success message appears.
- vii) The user gets created and added to the list of users (By default the newly created user is added to the Viewer Role User Group).

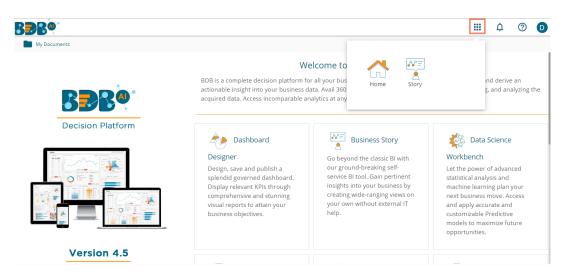
User Management											New
User Groups					Users	<sub>Type</sub> Enterprise	Status Active	<b>~</b>		t,	
Search Group				۹	Search User						Q
Showing 26 out of 26 BizViz Partners	1	~	Ê		Showing 38 out of 38				_		
Permission	1	~	Ê		Default User			i		Ð	- 1
Poweruser	1	~	Ê		BDB User			1	0	Ð	•
testUserGroup		~	Ê		ateet tiwari				0	Ð	1
Kpmg Group		~	Ê		Harsha Balan			1	0	Ð	Î
			_		Georjo.johan			1	0	Ð	Î
UserGroup		~	_	d	manohar			1	0	Ð	1
Viewer Role		_	Ê		Parnal Dudul			1	0	Ð	Î
Admin Role			Ê	. 1							

viii) Navigate to the 'Sign In' page of BDB platform and use new user's credentials to access the Platform.



<sup>Email *</sup> defaultuser@bdb.ai	
Password *	
Auth Type Enterprise	-
For	got Password
Sign In	

ix) Click the '**Apps**' option. 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 the 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. Sta	<b>tus</b> : It includes the	following user stat	tus as drop-dov	n options	
i.	Active				
ii.	Blocked				
iii.	Expired				
iv.	Deleted				
Use	ers	Type Enterprise	Status • Active	*	t↓
Sea	rch User				
Show	ving 36 out of 36				
a	teet tiwari			/ 0	• • •
F	larsha Balan			/ 0	• • •
C	ieorjo.johan			/ 0	•••

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 'Expired' as the status option.
- ii) A list of all expired user accounts/ groups appears.
- iii) Click the 'Activate'  $\checkmark$  icon to activate a specific user/user group.
- iv) Click the '**Reset Password**' option  $^{\mathbf{C}}$  to set a new password for an activated user.

Users	Type Enterprise	1 Status Expired		•
Search User			tĻ	Q
Showing 48 out of 48 UserPA			~ D	
2 AdminBDB		3		

**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

Before you create a visualization and start analyzing the data, it is needed that you first connect BDB to your data. BDB Decision Platform supports connecting to a wide variety of Data. Your data might be stored in



spreadsheets in your system, in relational databases, or stored to a cloud database source such as Google Analytics, Amazon Redshift, or Salesforce. The BDB users can establish connections to these Data Sources and build Data Sets and Data Stores that enable rich business intelligence and robust analytics.

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 datastore metadata.

# 6.1. Data Connector

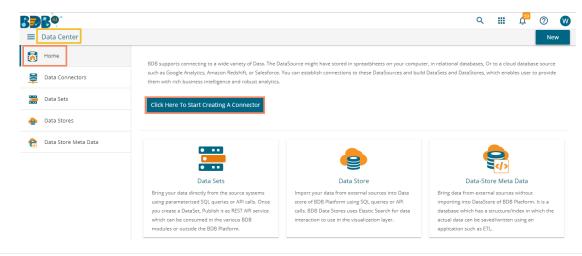
BDB provides native connectors that are built and optimized for those types of data. The BDB users can use these native connectors to connect to their data. The users may need to provide different information for each data connection as per each specific type.

# 6.1.1. Creating a Data Connector

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



- ii) The Data Center homepage opens.
- iii) An option appears stating, 'Click Here to Start Creating A Connector' on the Data Center homepage. The user can click the option, to begin with, the data connector creation.





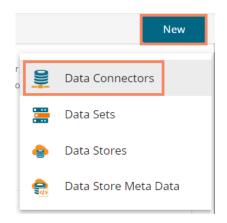


#### OR

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 Connectors' option from the context menu.



- v) A page opens with all the available data connector types.
- vi) The user can search a specific connector type using the 'Search' bar.

■ Data Center							New
Home	Search Data Connectors					Show	ving 44 out of 44 🗧
Data Connectors	D		0		GAD		ata
Data Sets	MysqL	SQL Server	ORACLE	Liave	SAP HANA		
😑 Data Stores	MySQL	MSSQL	Oracle	Hive	SAP Hana	MS Sql Olap	Data Store
😪 Data Store Meta Data	1	<b>=</b>	Sa a St		a	a	Z
		OData	Spark SQL	amazon REDSHIFT	đ		Å
	Cassandra	OData	Spark SQL	AWS Redshift	File	Amazon	App Store
	Ь	••					· <b>···</b> ·
	Bing ads	~		f	facebook Ads	Firebase	fitbit
	Bing Ads	Dropbox	FTPServer	Facebook	Facebook Ads	FireBase DB	Fitbit

- vii) Click the 'Filter by Category' icon  $\overline{=}$  to get various categories of data connectors.
- viii) Select a category from the displayed list.



Showing 44 out of 44 😇
All
Database
Other
File
API

ix) The Data Connectors get filtered based on the selected category (E.g., the following image displays all the available data connectors from the Database category).

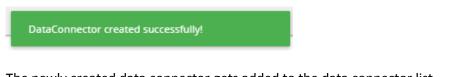
🗮 Data Center				New
Home	Search Data Connectors			Showing 3 out of 44
Data Connectors				
Data Sets	MySQL	SQL Server	ORACLE	
👌 Data Stores	MySQL	MSSQL	Oracle	
ea Data Store Meta Data				

- x) By selecting a connector type, the user needs to configure that connector.
- xi) Fill in the required details for the selected data connector. Note: The configuration fields may vary based on the selected category of the data connector.
- xii) 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.

User Name *		
*Use Read only credential		
Password *		
IP/Host *		
Port *		
Database Name		
		_
	Cancel	Save

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





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

🗮 Data Center							New
🔂 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	g 604 o	ut of 604
👌 Data Stores	Sample Mysql Data Connector	<b>=</b> 😑	b	C	<	1	Î
Data Store Meta Data	exi	<b>:::</b> 😔	۵	C	<	/	Î
	Mssql Test	<b>=</b> 😔	þ	C	<	1	Î
	dataconnlp	<b>=</b>	۵	C	<	1	Î
	restdbautomationMysql	<b>=</b> 🔶	۵	G	<	1	Î

# 6.1.2. Supported Data Connectors

Follow the description below for information on how to configure and connect to your specific type of data. All the available data connector types are described in this section. The connectors are listed in the order as they appear on the Data Connector pane.

# 6.1.2.1. MySQL

Provide the following information to create a MySQL Data Connector.

i) Data Connector Name: Provide a user-defined name to identify the data connector.

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



User Name *	
*Use Read only credential	
Password *	
IP/Host *	
Port *	
Database Name	
	Cancel Save

viii) A success message appears confirming the connection.



- ix) Another success message appears confirming the creation of the Data Connector.
- x) The newly created MySQL data connector gets added to the Data Connectors list.



## 6.1.2.2. MSSQL

Provide the following information to create an MSSQL Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data connector.
- ii) **Description**: Provide the connection details (Optional).

ISSQL 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:** Provide the server port number.
- vii) Database Name: Name of the database where you wish to store data.



#### viii) Click the 'Save' option.

User Name *		
*Use Read only credential		
Password *		
IP/Host *		
Port *		
Database Name *		
	Cancel	Save

ix) A success message appears to confirm the connection.



- x) Another success message appears to assure the creation of the new MSSQL Data Connector.
- xi) The newly created MSSQL data connector gets added to the Data Connectors list.

Data Center	Detector	nector created successfully!						New
Home	Data Connector Type	nector created successionly:						
Data Connectors	All							
Data Sets	Search Data Connectors					Sho	owing 2 (	out of 2
<ul><li>Data Sets</li><li>Data Stores</li></ul>	Search Data Connectors Sample MSSQL Data Connector		•	œ۵	C	Sho		out of 2

## 6.1.2.3. Oracle

Provide the following information to create an Oracle Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data connector.
- ii) **Description:** Provide the connection details (optional).

Oracle Data Connector	
Data Connector Name *	
Sample Oracle Data Connector	
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**: Provide the server port number.
- vii) SID Service Name: Provide the unique alias used for the database (when connecting).
- viii) Click the 'Save' option.

User Name *		
*Use Read only credential Password *		
IP/Host *		
Port *		
SID/ServiceName *		
BIZVIZ		
	Cancel	Save

- ix) The success messages appear to confirm the connection and creation of the new Oracle data connector.
- x) The newly created Oracle data connector gets added to the Data Connectors list.

🗮 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Shov	ving 18 (	out of 18
😑 🛛 Data Stores	Sample Oracle Data Connector	•	۵	G	<	/	Î
😝 🛛 Data Store Meta Data	Sample MySQL Data Connector	0	۵	G	<	-	Î

## 6.1.2.4. Hive

Provide the following information to create a Hive Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data connector.
- ii) **Description**: Provide the connection details (optional).

Hive Data Connector
Data Connector Name *
Sample Hive Data Connector
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:** Provide the server port number.
- vii) Click the 'Save' option.

User Name *		
Password *		
IP/Host *		
Port *		
	Cancel	Save

viii) The success messages appear to confirm the connection and data connector creation, and the newly created Hive data connector gets added to the Data Connectors list.

## 6.1.2.5. SAP Hana

Provide the following information to create an SAP Hana Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data connector.
- ii) **Description**: Provide the connection details (Optional).

SÆ	AP Hana Data Connector
Γ	Data Connector Name *
	Sample SAP Hana Data Connector
	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:** Provide the server port number.
- vii) Click the 'Save' option.

User Name *	
bizviz	
Password *	
IP/Host *	
192.168.1.54	
Port *	
3308	

Save

Cancel



viii) The newly created SAP Hana data connector gets added to the Data Connectors list.

## 6.1.2.6. MSSQL OLAP Data Connector

Provide the following information to create an MSSQL OLAP Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data connector.
- ii) **Description:** Provide the connection details (Optional).

N	IsOlap 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. The user needs to enter database server details (from where the user wants to fetch data).
- vi) **Port:** Provide the server port number.
- vii) Database Name: Name of the database where you wish to store data.
- viii) Click the 'Save' option.

Jser Name *	
lassword *	
Address Type IP 🔿 Host	
p +	
ort	
atabase Name *	
	Cancel Save
	Carreer

- ix) The success messages appear to confirm the connection and creation of a new connector.
- x) The newly created MSSQL OLAP data connector gets added to the Data Connectors page.

## 6.1.2.7. Data Store – Elastic SQL Data Connector

Provide the following information to create a Data Store- Elastic SQL Data Connector.

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



#### iii) Click the 'Save' option.

Elastic SQL Data Connector	
Data Connector Name *	
Sample Elastic SQL Data Connector	
Data Store Service *	
BB_ProductSalesData 🔻	
	Cancel Save

iv) A success message appears to assure the creation of the new data connector.



v) The newly created Elastic SQL data connector gets added to the Data Connectors list.

🗮 Data Center							New
🔂 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	ig 611 o	ut of 611
😑 Data Stores	Sample Elastic SQL Data Connector	<b>=</b> 😔	¢	C	<	/	Î
🤤 Data Store Meta Data	nov27_Cass	<b>:</b> 😣	۵	C	<	1	Î

## 6.1.2.8. Cassandra Native Data Connector

Provide the following information to create a Cassandra Native Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data connector.
- ii) **Description:** Provide the connection details (optional).

С	assandra Native Data Connector
	Data Connector Name *
	Sample Cassandra Native Data Connector

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

User Name *	
Password *	
P/Host *	
Multiple comma separated hosts can be given <sub>Port</sub> *	
Default Keyspace Name	
Consistency Level	Cancel Save
ONE 💌	

- x) The success messages appear to confirm the connection and creation of the new data connector.
- xi) The newly created Cassandra Native Data Connector gets added to the Data Connectors list.

## 6.1.2.9. O Data

Provide the following information to create an OData Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data source.
- ii) **Description:** Provide the connection details.

OData Data Connector	
Data Connector Name *	
Sample OData Data Connector	

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



Database Type	
OData V1-V2 🔻	
User Name	
test	
Password	
Base Uri *	
	Cancel Save

- viii) The success messages appear to assure the new OData connection.
- ix) The newly created OData Data Connector gets added to the Data Connectors list.

# 6.1.2.10. Spark SQL Data Connector

Provide the following information to create a Spark SQL Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data source.
- ii) **Description:** Provide the connection details (optional).

Spark SQ	L Data Connector
Data Connector	
Sample Spa	rk SQL Data Connector
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:** Provide the server port number.
- vii) Click the 'Save' option.

User Name *	
bizviz	
Password *	
IP/Host *	
Port *	
	Cancel Save

viii) The newly created Spark SQL Data Connector gets added to the Data Connectors list.



# 6.1.2.11. AWS Redshift

Provide the following information to create an AWS Redshift Data Connector.

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

AWS Redshift Data Connector	
Data Connector Name *	
Sample AWS Redshift Data Connector	

- 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:** Provide the server port number.
- vii) Database Name: Name of the database where you wish to store the data.
- viii) Click the 'Save' option.

User Name *		
bizviz_user		
*Use Read only credential		
Password *		
IP/Host *		
Port *		
Database Name *		
	Cancel	Save

ix) The success messages appear to assure the data connection, and the newly created AWS Redshift data connector gets added to the Data Connectors list.

#### 6.1.2.12. File

Provide the following information to create a File Data Connector.

- i) Data Connector Name: Provide a user-defined name to identify the data source.
- ii) **Description:** Describe the Connection details (optional).
- iii) Click the **'Save**' option.



File Data Connector	
Data Connector Name *	
Sample File Data Connector	
Description	
	Cancel Save

- iv) A success message appears to assure the connection.
- v) The newly created file connector gets added to the data connector list.

😑 Data Center	DataConnector created successfully!						New
🔂 Home	Data Connector						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	ig 612 o	ut of 612
😝 Data Stores	Sample File Data Connector		þ	G	<	/	Î
nata Store Meta Data	Sample Elastic SQL Data Connector	 •	۵	G	<	1	•

Note: The user needs to select a file from the system while creating a data store based on the file connector.

## 6.1.2.13. Amazon

Provide the following information to create an Amazon Data Connector.

- i) Select a link using the drop-down menu.
- ii) Provide the Seller id. The user can select the seller id from the drop-down list if already added before.
- iii) Provide the MWS Auth Token to authenticate the account.
- iv) Click the 'Verify Account' option.

IN - https://mws.amazonservices.in	
neme ne	
VWS Auth Token *	

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

Account Verified Successfully

- vi) The Amazon Marketplace connector page reopens with the 'ACCOUNT VERIFIED' notification.
- vii) Provide a title for the Data Connector.



### viii) Click the 'Save' option.

	ACCOUNT VERIFIED
Data Connector Name * Sample Amazon Marketplace Data Connector	
Description	
	CANCEL SAVE

ix) A success message appears, and the newly created Amazon Marketplace Connector gets added to the data connector list.

🗮 Data Center	Data Constants added successfully						New
📷 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showir	ig 605 oi	ut of 605
🚖 Data Stores	Sample Amazon Marketplace Data Connector	٩	þ	C	<	1	•
😝 Data Store Meta Data	file_connector	•	•	С	<	1	Î

# 6.1.2.14. App Store

Provide the following information to create an App Store Data Connector using the App Store Connector page.

- i) Provide a name for the App Store Data Connector.
- ii) Describe the connection details (optional).

App Store Connector	
Data Connector Name * Sample App Store Data Connector	
Description	

- iii) Provide the Following information to create an App Store Data Connector.
  - a. Email ID
  - b. Key ID
  - c. Issuer ID
  - d. Private Key
- iv) Click the 'Save' option.



Email ID *		
bizviz@apple.com		
Key ID +		
Issuer ID *		
Issuento =		
Private Key *		
	Cancel Save	

v) A success message appears, and the newly created App Store data connector gets added to the Data Connectors list.

📃 Data Center	Data Connector added successfu							New
🔂 Home	Data Connector Type	iy!						
Data Connectors	All							
Data Sets	Search Data Connectors					Showin	ig 605 o	ut of 605
🔷 Data Stores	Sample App Store Data Connector	0 0	•	<u>b</u>	C	<	1	<b>I</b>
Data Store Meta Data	file_connector		٠	۵	c	<	1	<b>I</b>

# 6.1.2.15. Bing Ads

Provide the following information to create a Bing Ads Data Connector.

i) Log in to a Bing Ads account by clicking on the 'SELECT ACCOUNT' option.

Bing Ads Connector	]		
Login to Bing Ads account			

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



Microsoft	
crictix.analytics@gmail.com	
Enter password	
Because you're accessing sensitive i verify your password.	nfo, you need to
••••••	
Forgot my password	
Sign in with a different Microsoft accoun	t
	Sign in

- iii) The Bing Ads connector page opens with a notification that the user has been logged in to the selected Microsoft account.
- iv) Provide a name for the Bing Ads Data Connector for the identification.
- v) Click the 'Save' option to save the inserted information.

Bing Ads Connector			
You are Logged in!			
Change Account			
Sample Bing Ads Data Connector			
Description			
		Cancel	Save

vi) A success message appears the newly created Bing Ads Data Connector gets added to the Data Connectors list.

# 6.1.2.16. Dropbox

Provide the following information to create a Dropbox Data Connector.

i) Click the 'Select Account' option to log in to a Dropbox account.

Dropbox Connector	
Login to Dropbox account Select Account	



- ii) The 'Sign in' page of the Dropbox opens.
- iii) Enter the credentials to Sign in.

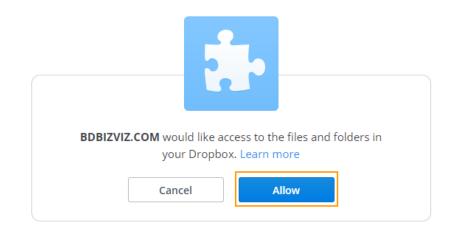
\*\*

		<b>*</b>	
Si	gn in to Dropb	oox to link with BD	BIZVIZ.COM
	G	Sign in with Google	
		or	
	Email		
	Password		
	Forgot your passw	ord?	Sign in

iv) A message appears asking to allow the selected Dropbox account access to BDB.

New to Dropbox? Create an account

v) Click the 'Allow' option to provide access to the selected Dropbox account.



- vi) The Dropbox connector page opens with the '**Change Account**' option indicating that the selected account is connected.
- vii) Enter a Data Connector Name.
- viii) Click the 'Save' option.



ropbox Connector	
Login to Dropbox account	
Change Account	
Sample Dropbox Data Connec	tor
Description	
	Cancel Save

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

Data Center		Data Connector added successfully	a.						New
Home	Data Connector Type	Data connector added succession	y:						
Data Connectors	All	•							
Data Sets	Search Data Connectors						Showin	ig 614 o	ut of 614
😝 Data Stores	Sample Dropbox Data Connec	ctor		٢	<b>@</b> 0	С	<	1	Ĩ
nata Store Meta Data	file		• ••	٠	<b>@</b>	C	<	1	Î

## 6.1.2.17. FTP Server

Provide the following information to create an FTP Data Connector.

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

F	P Server Data Connector
	Data Connector Name *
L	Sample FTP Server Data Connector
	Description

- iii) Host: Enter database server details (from where the user wants to fetch data).
- iv) Port: Provide the server port number.
- v) Username: Enter a Username (It should be the same as given in the connection server).
- vi) Password: Enter the Password (It should be the same as provided in the connection server).
- vii) Start Path: Give a defined path to start.
- viii) Click the 'Save' option.



Host *	
54.244.139.74	
Port *	
3304	
User Name *	
bizvizftp	
Password *	
Start Path *	
Startpath /home/ftpuser	
SFTP Server	*
	Cancel Save

ix) A success message appears, and the newly created FTP Server data connector gets added to the Data Connectors list.

# 6.1.2.18. Facebook

The following steps display how to create a new Facebook Data Connector.

i) Select the 'Add New Account' option from the Select Account drop-down menu to add a new Facebook account.

Facebook Cor	nnector		
Select Account			
Add New Accou	nt		
Data Connector Na	ime *		

ii) Enter the credentials of a Facebook account to log in.

facebook	Create New Account
	Log in to Facebook
	Email address or phone number
	Password
	Log In
	Forgotten account?
	or
	Create New Account Not now



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

<b>69</b> 🗆 5006				
Continue as ?				
-	Bizviz will receive your name and profile picture. This doesn't let Bizviz post to Facebook without your permission.			
Cancel	Continue as			
Not ? Log into another account.				

v) Select the '**OK**' option to link BizViz with the selected Facebook account (it may ask for a few additional steps if there is no page created from the selected Facebook account).

<b>()</b>	•
You've now linked Bizviz to Facebook You can update what Bizviz can do in your Business Integrations Settings. To finish setup, Bizviz may require additional steps.	*
ок	
Bizviz's Privacy Policy Help Center	

- vi) By selecting the continuation option, the user gets notified as logged in to the selected Facebook account and the Facebook Connector page reopens.
- vii) Provide a title for the Data Connector.
- viii) Describe the Data Connection (Optional).
- ix) Click the 'Save' option.



Facebook Connector	
You are Logged in!! Data Connector Name *	
Sample Facebook Data Connector	
Description	
	Cancel Save

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

😑 Data Center	Data Connector added successfully							New
Home	Data Connector Type	1						
Data Connectors	All							
Data Sets	Search Data Connectors					Showin	ig 615 o	ut of 615
😑 Data Stores	Sample Facebook Data Connector		0	<b>@</b>	C	<	/	Î
🧙 Data Store Meta Data	Sample Dropbox Data Connector		•	۵	G	<	1	Î

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

Facebook Connector	
NO_EMAIL	
Data Connector Name *	
Sample Facebook Data Connector	
Description	
	Cancel Save

## 6.1.2.19. Facebook Ads

The following set of steps displays how to create a new Facebook Ads data connector.

i) Select the 'Add New Account' option from the Select Account drop-down list add a new Facebook account.



Facebook Ads Connector	
Select Account	
Add New Account	
Data Connector Name *	
Description	

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

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

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

<b>()</b> 536	
Continue as Bizviz will receive your name let Bizviz post to Facebook w	and profile picture. This doesn't ithout your permission.
Cancel	Continue as
Not ? Lo	g into another account.
Bizviz's Privacy Policy	Help Center

- iv) A new window opens informing that BizViz would like to manage the ads, access your Facebook ads, and related states, and display a list of the pages you manage.
- v) Click the '**OK**' option to give permission. Note: The user may get a notification page in case of no Business page available in the



selected Facebook account.

<b>Bizviz</b> would like to manage your ads, access your Facebook ads and related stats and show a list of the Pages you manage.
Choose what you allow

- vi) The Facebook Ads Connector page reopens with the notification that the user has logged in to the selected Facebook account.
- vii) Provide a Data Connector name.
- viii) Describe the data connection (optional).
- ix) Click the 'Save' option.

Facebook Ads Connector	
You are Logged in!!	
Data Connector Name *	
Sample Facebook Ads Data Connector	
Description	
	Cancel Save

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

😑 Data Center							New
🔂 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	ig 615 oi	ut of 615
💩 Data Stores	Sample Facebook Ads Data Connector	0	۵	С	<	/	
🧙 🛛 Data Store Meta Data	Sample Dropbox Data Connector		٦	C	<		



## 6.1.2.20. Firebase DB

The following set of steps displays how to create a Firebase DB Data Connector.

- i) Click the 'Firebase' Data Connector icon from the Data Connector page.
- ii) The Firebase Data Connector page opens.
- iii) Click the 'Select Account' option.

FireBase DB Connector	
Login to FireBase DB account	

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

	Google	
On	ACCOUNT. All of GOOG Sign in with your Google Account	е
	Sign in with your Google Account	
	businessdataintelligence@gmail.cor	
	Next	
	Find my account	
	Create account	
	One Google Account for everything Google G M 🛃 😐 🛆 🚸 🕨 🔕	

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

Google			businessdataintelligence@gmail.com 👻
	- BIZVIZ would	like to:	
	8 Have offline access	0	
		Deny Allow	

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



reBase DB Connector	
You are Logged in!	
Change Account Data Connector Name *	
Sample FireBase Data Connector	
a can paran	
	Cancel

vii) A success message appears, and the newly created Firebase data connector gets added to the Data Connectors list.

📃 Data Center	Data Con	nector added successfully!						New
Home	Data Connector Type	lector added successfully:						
Data Connectors	All							
📑 Data Sets	Search Data Connectors					Showin	ng 616 o	ut of 616
😝 Data Stores	Sample FireBase Data Connector		9	۵	C	<	/	Î
🤮 Data Store Meta Data	Sample Facebook Ads Data Connect	or	 0	۵	C	<	1	Î

#### 6.1.2.21. Fitbit

The following set of steps displays how to create a new Fitbit Data Connector.

- 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 Connecto	or
Login to FitBit account	t

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



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

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

FireBase DB Connector		
You are Logged in! Change Account Data Connector Name *		
Sample FireBase Data Connector		
	Cancel Sa	ave

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

Data Center		Data Connector added successfully!							New
Home	Data Connector Type	Data Connector added successiony:							
Data Connectors	All	•							
Data Sets	Search Data Connectors						Sh	owing 2	out of 2
💩 Data Stores	Sample Fitbit Data Conne	ector	• • •	•	<u>م</u>	C	<	1	Î
🤤 🛛 Data Store Meta Data	FitBit			0	۵	С	<	1	

# 6.1.2.22. Flipkart

The following set of steps displays how to create Flipkart Data Connector.i) Click the 'Select Account' option from the Flipkart Connector page.



Flipkart Connec	tor
Login to Flipkart accou	unt

- ii) Enter the credentials to get Flipkart Permission Registration for the selected Flipkart account.
- iii) Click the 'Sign In' option.

Flipkart Permission Registration		
	Please sign in	
	Email address	
	Password	
	Sign in	

- iv) The Flipkart Connector page opens again with the connected Flipkart account.
- v) Provide a title for the Data Connector.
- vi) Click the 'Save' option.

lipkart Connector		
Login to Flipkart account		
Change Account		
Data Connector Name * Sample Flipkart Data Connector		
Description		
		Cancel Sav

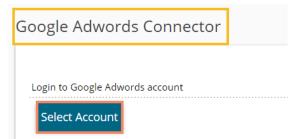
vii) A success message appears, and the newly created Flipkart Connector gets added to the data connector list.

### 6.1.2.23. Google AdWords

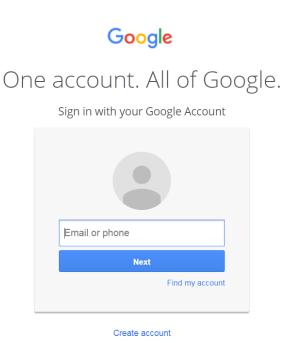
The following set of steps displays how to create a Google AdWords Data connector.



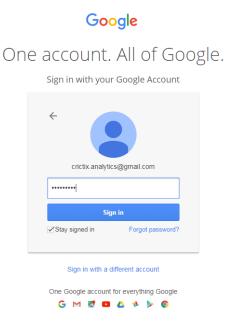
i) Click the 'Select Account' option from the Google AdWords Connector page.



ii) The user gets a Google page instructing them to enter a valid email id or contact number.



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





- iv) The user gets a page asking permission to allow BDB data access from their selected Google AdWords account.
- v) Click the 'Allow' option to permit data access.

Google			crictix.analytics@gmail.com +
	BD Biz∨iz would like	e to:	
	8 Have offline access	(j)	
		Deny Allow	

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

Google Adwords Co	nnector			
You are Logged in!				
Change Account				
Sample Google AdWords Dat	a Connector			
Description				
			Cancel	Save
			Cancel	Save

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

#### 6.1.2.24. Google Analytics

The following set of steps displays how to create a Google Analytics Data Connector.

i) Select the 'Add New Account' option to add a new Google account or select an added Google account from the Select Account drop-down menu.

Google Analytics Connector	
bdb.artificialintelligence@gmail.com	
bdbizviz@gmail.com	
businessdataintelligence@gmail.com	
Add New Account	

ii) The user gets redirected to log in to a Google account, if 'Add New Account' is selected.



Google Analytics Connector						
	Google					
	One account. All of Google.					
	Sign in with your Google Account					
	businessdataintelligence@gmail.cor Nex Find my account					

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

Google		bu	sinessdataintelligence@gmail.com 👻
	- BIZVIZ would	d like to:	
	8 Have offline access	<u>(</u> )	
		Deny Allow	

- iv) The user gets 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.
- v) Data Connector Name: Enter a user-defined name to identify the data connector.
- vi) **Description:** Describe the data connector (optional).
- vii) Click the **'Save'** option.

← →		r/data-center.html#/connector/googleanalytics/create code=4%2FtwHown6vRvhFh_DNoRAtg8a7F45Q68esOU1B7uthxk1oEDNZcUmp5nC4a8F_PsRkKoj	4	<b>₽</b> :
BÐ		Q III 🖉	⑦ Ne	w
<b>7</b>	Home	Google Analytics Connector		
	Data Connectors	You are Logged in!		
	Data Sets	Data Connector Name *		
0	Data Stores	Sample Google Analytics Data Connector		
e	Data Store Meta Data	Description		
		Cancel Sav	e	



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

viii) A success message appears, and the newly created Google Analytics data connector gets added to the Data Connectors list.

Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	ig 616 o	ut of 616
😑 🛛 Data Stores	Sample Google Analytics Data Connector	0	۵	С	<	/	Î
😪 🛛 Data Store Meta Data	Sample FireBase Data Connector	 0		C	<	/	Î

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

Google Analytics Connector			
bdb.artificialintelligence@gmail.com			Ţ
Data Connector Name * Model Google Analytics Connector			
Description			
		Cancel	Save

# 6.1.2.25. Google Forms

The following set of steps displays how to create a Google Form Data Connector.

Data Center					New
Nome Home					
Data Connectors	fitbit	4	Λ	~	
Data Sets	Fitbit	Flipkart	Google Adwords	Google Analytics	Google Forms
Data Stores					
Data Store Meta Data		Hub Spot	Ϋ́	lead squared	in
	Google Sheet	Hubspot	JIRA	Lead Squared	Linkedin

i) Click the 'Google Forms' connector type icon from the Data Connector page.

ii) The 'Google Form Connector' page opens.



iii) Click the 'Select Account' option from the Google Form Connector page.

Google Form Connector	
Login to Google Form account	Select Account
Data Connector Name *	
Description	

- iv) The user gets redirected to select a Google account.
- v) Provide valid credentials to select a Google Account.
- vi) A new page opens, asking the user to share the information from the selected Google account with BDB.
- vii) Click the 'Allow' option.

Google					i@gmail.com ↓
		BIZVIZ would like to:			
	4	See, edit, create, and delete all of your Google Dr files	rive	(j)	
	4	View metadata for files in your Google Drive		(j)	
	8	See, edit, create, and delete your spreadsheets in Google Drive	ı	i	
	accorda	ng Allow, you allow this app and Google to use your informati ce with their respective terms of service and privacy policies his and other Account Permissions at any time.	ion in 5. You ca	an	
		ſ	Deny	Allow	

- viii) The Google Forms Connector page opens again with the 'Change Account' option.
- ix) Provide a name for the Google Forms Connector.
- x) Click the 'Save' option.

u are Logged in! a Connector Name *	Change Account	
mple Google Form Data Connector		

xi) A success message appears to confirm the creation of the Google Form Connector. The newly created Google Form Connector gets added to the Data Connectors list.



Home	Data Connector Type	accessfully					
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	g 605 ou	ut of 605
Data Sets	Search Data Connectors Sample Google Form Data Connector		•	6		g 605 ol	ut of 605

# 6.1.2.26. Google Sheet

The following set of steps displays how to create a Google Sheet Data Connector.

i) Click on the 'Google Sheet' connector type from the Data Connector page.

🗮 Data Center					New
Home		-			
Data Connectors	fitbit	4	Λ	~	
Data Sets	Fitbit	Flipkart	Google Adwords	Google Analytics	Google Forms
😑 🛛 Data Stores					
🏫 🛛 Data Store Meta Data		Hub Spot	Ϋ́	lead squared	in
	Google Sheet	Hubspot	JIRA	Lead Squared	Linkedin

- ii) The Google Sheet Connector page opens.
- iii) Click the 'Select Account' option from the Google Sheet Connector page to login to a Google Sheet.



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





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

Google				@gmail.com 🗸
		- BIZVIZ would like to:		
	4	View and manage the files in your Google Drive	(i)	
	8	View and manage your spreadsheets in Google Drive	(j)	
	4	View metadata for files in your Google Drive	(i)	
	accordar	ng Allow, you allow this app and Google to use your information in ne with their respective privacy policies. You can change this and ot Permissions at any time.	her	
		Dony	Allow	

- vii) The Google Sheet Connector page opens with the '**Change Account**' option indicating that a Google account has been selected.
- viii) Provide a name for the Data Connector.
- ix) Click the 'Save' option.

oogle Sheet Connector		
You are Logged in!		
Change Account		
Data Connector Name *		
Sample Google Sheet Data Connector		
Description		

x) A success message appears, and the newly created Google Sheet data connector gets added to the Data Connectors list.

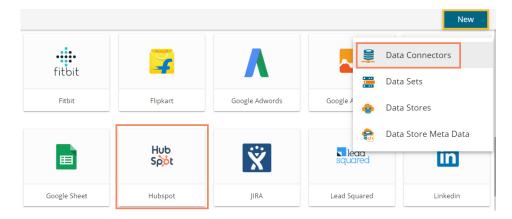
🗮 Data Center								New
🔂 Home	Data Connector added successfully!							
Data Connectors	All							
Data Sets	Search Data Connectors					Showin	g 616 oi	ut of 616
💩 Data Stores	Sample Google Sheet Data Connector		•	۵	С	<	/	•
Data Store Meta Data	Sample FireBase Data Connector	•••	0	¢	С	<	-	Î



## 6.1.2.27. HubSpot

The following set of steps displays how to create a HubSpot Data Connector.

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.

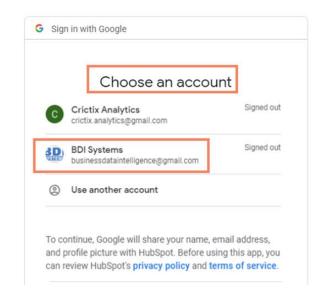
HubSpot Conn	ector
Login to Hub Spot ac	count
Select Account	

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

HubSpot	
Don't have an account? Sign up	
Email address	
Password	Show Password
Forgot my pessword	
Log in	
G Sign in with Google	
Log in with SSO	



v) Choose a Google Account from the listed accounts.



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

Hi BD	I		
businessdataintellige	nce@gmail.c	om	
Enter your password			
		8	
Forgot password?		Next	1

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



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

- ix) The HubSpot Data Connector page opens with the '**Change Account**' option and a notification indicating that the user has successfully logged in to the selected account.
- x) Provide a name for the HubSpot Data Connector.
- xi) Click the 'Save' option.

ubSpot Connector			
You are Logged in!			
Change Account			
Sample HubSpot Data Connector			
Description			
		Cancel	Save

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

🗮 Data Center								New
Home	Data Connector Type	iy:						
Data Connectors	All							
Data Sets	Search Data Connectors					Showin	ig 617 o	ut of 617
Data Stores	Sample HubSpot Data Connector	• ••	•	6	С	<	/	Ĩ
🧙 Data Store Meta Data	Sample Google Sheet Data Connector		•	¢	C	<	1	Î

#### 6.1.2.28. JIRA

Provide the following information to create a JIRA Data Connector.

- i) Click the 'JIRA' connector type icon from the Data Connector page.
- ii) The 'JIRA Data Connector' page opens.
- iii) Data Connector Name: Provide a user-defined name to identify the data connector.
- iv) Description: Describe the data connection.



- v) Username: Enter a Username (It should be the same as given in the connection server).
- vi) **Password:** Enter the password (It should be the same as provided in the connection server).
- vii) Server URL: Enter the server URL link.
- viii) Click the 'Save' option to verify the connection and save the new connector.

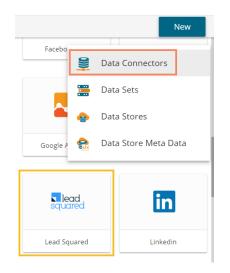
JIRA Data Connector	
Data Connector Name *	
Sample JIRA Data Connector	
Description	
User Name *	
ADI Token *	
	?
Server URL (Example: https://your-domain.atlassian.net) *	•
	Cancel Save

ix) A success message appears, and the newly created JIRA data connector gets added to the Data Connector list.

### 6.1.2.29. Lead Squared

The following set of steps displays how to create a Lead Squared data connector.

i) Click the 'Leadsquared' Data Connector type icon from the Data Connector page.



- ii) The Leadsquared Data Connector page opens.
- iii) Provide the following information:
  - a. Data Connector name
  - b. Description
  - c. Access Key
  - d. Secret Key
  - e. Region Type



- f. Database Name
- iv) Click the 'Save' option.

eadSquared Data Connector	
Data Connector Name *	
Sample LeadSquared Data Connector	
Description	
Access Key *	
Secret Key *	
api-us11USA	~
	Cancel Save

v) A message appears to assure successful authentication.



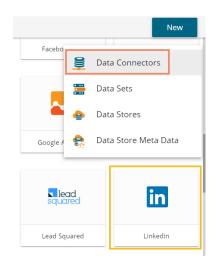
vi) Another success message appears, and the newly created Leadsquared data connector gets added to the Data Connectors list.

📃 Data Center	Data Garaceters added assessed that						New
📷 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	g 618 o	ut of 618
💩 Data Stores	Sample LeadSquared Data Connector	•	۵	C	<	1	Î
Data Store Meta Data	Sample HubSpot Data Connector	0	۵	C	<	1	Î

#### 6.1.2.30. LinkedIn

The following set of steps displays how to create a LinkedIn Data Connector.

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





- ii) The LinkedIn Connector page opens.
- iii) Click the 'Select Account' option.

Linkedin Connector	
Login to LinkedIn account	
Select Account	

- iv) The user gets redirected to a new window to login to a valid LinkedIn account.
- v) Insert the credentials of the LinkedIn account to log in.
- vi) Click the 'Allow access' option to provide permission to BDB for accessing data from the selected LinkedIn account.

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

- vii) The LinkedIn Connector page reopens with the 'Change Account' option indicating that a LinkedIn account is selected (Click the 'Change Account' option if you wish to change the selected account).
- viii) Provide a name for the LinkedIn Data Connector (E.g., In this case, it is defined as 'Sample LinkedIn Data Connector').
- ix) Click the 'Save' option.

inkedin Connector				
You are Logged in!				
Change Account				
Data Connector Name *				
Sample LinkedIn Data Connect	or			
Description				
			Cancel	Save



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

Data Center	Data Connector added success	fully						New
🔂 Home	Data Connector Type	siuny:						
Data Connectors	All							
Data Sets	Search Data Connectors					Showin	ng 620 o	ut of 620
😑 Data Stores	Sample LinkedIn Data Connector		•	۵	C	<	1	Î
🧙 🛛 Data Store Meta Data	Sample LinkedIn Ads Data Connector	_		۵	C	<		

### 6.1.2.31. LinkedIn Ads

The following set of steps displays how to create a LinkedIn Ads data connector.

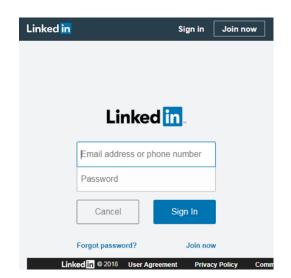
i) Click the 'LinkedIn Ads' Data Connector type icon from the Data Connector page.

				New
Linked	44			Data Connectors
Linked in Ads	Microsoft Dynamics CRM		N 🚆	Data Sets
LinkedinAds	MS Dynamics	MailChimp	MongoD 😑	Data Stores
				Data Store Meta Data

- ii) The user gets directed to the LinkedIn Ads Data Connector page.
- iii) Select an account or add a new account using the drop-down menu.



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





- v) A new page opens, asking permission for BDB to access data from the selected LinkedIn account.
- vi) Click the 'Allow' option to give data access permission.

Linked in							
BD BizViz would like to: • View advertising campaigns you manage							
Retrieve your advertising accounts							
Retrieve reporting for your advertising accounts							
<ul> <li>Use your basic profile including your name, photo, headline, and current positions</li> </ul>							
<ul> <li>Use the primary email address associated with your LinkedIn account</li> </ul>							
<ul> <li>Retrieve your organizations' posts, including any comments, likes and other engagement data</li> </ul>							
Manage your advertising accounts							

- vii) The LinkedIn Ads Data Connector page opens with a notification that the users are successfully logged in to the selected account.
- viii) Provide a name for the Data Connector.
- ix) Describe the Data connection (optional).
- x) Click the 'Save' option.

LinkedIn Ads Connector	
You are Logged in!!	
Data Connector Name *	
Sample LinkedIn Ads Data Connector	
Description	
	Cancel Save

xi) A success message appears, and the newly created LinkedIn Ads data connector gets added to the Data Connectors List.

≡	Data Center	Data Casa atas adala daga setenti liku						New
<b>7</b>	Home	Data Connector added successfully						
9	Data Connectors	All						
 	Data Sets	Search Data Connectors				Showir	ng 619 o	ut of 619
•	Data Stores	Sample LinkedIn Ads Data Connector	• ••	۵	C	<	/	Î
<b>e</b> ,	Data Store Meta Data	Sample LeadSquared Data Connector		æ	C	<		



## 6.1.2.32. MS Dynamics

The following set of steps displays how to create an MS Dynamics Data Connector.

- 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)

MicroSoft Dynamic	
Tanant ID/ Directory ID *	?
Resouce URL *	
	?
Client_Jd / Application ID *	?
Client_Secret / Keys *	?
Login To your Azıre Account as admin ⇔ click Azure Active Directory ⇔ click app registration ⇔ select your app ≫ click settings ⇔ click relpy URL ⇔ add This URL * https://app.bdb.ai/datacenter/oauth-redirect.html	?

- iv) A new page opens asking to log in to the Microsoft Dynamics CRM account by using the 'Select Account' option.
- v) Provide the Data Connector Name.
- vi) Describe the Data Connection (optional).
- vii) Click the 'Save' option.

Login to MicroSoft Dynamics CRM account	Select Account
Data Connector Name *	
Description	

Cancel	Save
--------	------

viii) A success message appears, and the newly created Microsoft Dynamics Data Connector gets added to the Data Connectors list.



## 6.1.2.33. MailChimp

The following set of steps displays how to create a MailChimp data connector.

- i) Select the '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.

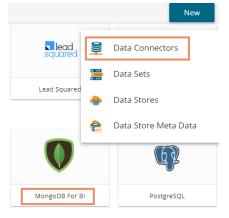
MailChimp Connector	
Data Connector Name *	
Sample MailChimp Data Connector	
Description	
User Name *	
automation_user	
ADI Key +	?
	Cancel Save

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

🗮 Data Center							New
🔂 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Show	ing 2 ou	t of 618
碞 Data Stores	Sample MailChimp Data Connector	•	<b>B</b>	C	<	1	ĩ
🚓 🛛 Data Store Meta Data	Mailchimp CA	-	۵	С	<	1	Ĩ

## 6.1.2.34. Mongo DB for BI

i) Select the 'MongoDB for BI' connector icon from the Data Connector page.





- ii) The 'MongoDB Connector for BI' connector page opens.
- iii) Provide a name for the MongoDB data connector.

Data Connector Name *	ctor For	goDB Conn
Sample MongoDB Connector for BI		Connector Name *
	ctor for Bl	ple MongoDB Cor

- iv) Provide the following information:
  - a. Username
  - b. Password
  - c. IP/Host address
  - d. Port number
  - e. Databased Name
- v) Click the 'Save' icon.

iser Name *			
bizviz			
Use Read only credential assword *			
/Host *			
ort *			
atabase Name			
		Cancel	Save

vi) A success message appears, and the newly created Mongo DB Connector gets added to the Data Connectors list.

Data Center								New
🔂 Home	Data Connector Type							
Data Connectors	All							
_								
Data Sets	Search Data Connectors					Showin	ng 605 o	ut of 605
<ul> <li>Data Sets</li> <li>Data Stores</li> </ul>	Search Data Connectors Sample MongoDB Connector for BI	<b></b>	•	<b>@</b> •	c		-	

#### 6.1.2.35. Postgre SQL

The following set of steps displays how to create a Postgre SQL Data Connector.

- i) Click the '**Postgre SQL**' Data Connector icon from the Data Connector page.
- ii) The Postgre SQL Data Connector page opens.
- iii) Provide a name for the data connector.
- iv) Describe the data connection.



>	ostgreSQL Data C	
	Data Connector Name *	
	Sample PostgreSQL Data Connector	
	Description	

- v) Provide the following information:
  - a. Username
  - b. Password
  - c. IP/Host
  - d. Port
  - e. Database Name
- vi) Click the 'Save' option.

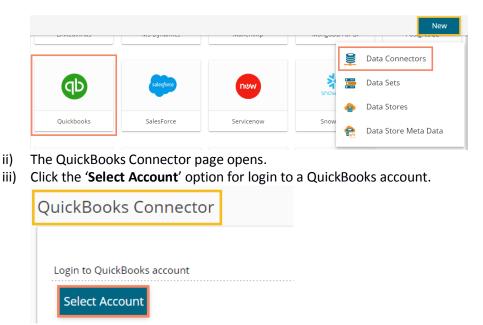
User Name *		
automation_user		
Password *		
IP/Host *		
Port		
Database Name		
	Cancel	Save

vii) A success message appears, and the newly created Postgre SQL data connector gets added to the Data Connectors list.

### 6.1.2.36. QuickBooks

The following set of steps displays how to create a QuickBooks Data Connector.

i) Select the 'QuickBooks' connector type icon from the Data Connector page.





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

quickbo	oks		
Don't have an acc Sign in	ount? Sign up now.		
5	<b>G</b> Sign in v		
	or	_	
Email or user I			
Password			
Remember	me		
🔒 Sign In			
l forgot my user II	) or password		
intuit	simplify the		

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

🕂 ซึ่นแรง and a function of the second sec
Don't have an account? Sign up now.
Let's make sure it's you
We'll send you a code to verify your info. This helps keep your account safe. Learn more
Choose one option:
Image: Set a code texted to: *********2563
Get a code emailed to: v*****(@bdbizviz.com
Onfirm my account a different way (takes longer)
Cancel Continue
Intuit. business of life
Ø turbotax

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.



@ duickbooks.	Welcome, Vivek (Not you?)
Authorize Intuit to securely share your data to BDBizViz_1	
quickbooks.	
Big Data BizViz LLC BDBizVi	z_1
<ul> <li>When you select Connect we will grant BDBizViz_1 access to your QuickBooks Online dat</li> <li>data about your company,</li> <li>data about your customers, suppliers, and/or employees,</li> <li>any updates you may make to your QuickBooks Online data after you connect.</li> </ul>	a. This includes:
You can find a list of data here.	
Intuit and BDBizViz_1 may share the information in my Intuit and BDBizViz_1 accounts. Yo BDBizViz_1 and its use of your information are subject to BDBizViz_1's Terms of Service ar learn more about how Intuit uses your data, see our Privacy Statement.	
Disconnect BDBizViz_1 anytime from your My Apps page.	
Cancel	Connect

- ix) The QuickBooks connector page reopens with the 'Change Account' option indicating that a QuickBooks account has been selected.
- x) Enter a Data Connector Name.
- xi) Click the 'Save' option.

uickBooks Conne				
You are Logged in!!				
Change Account				
ata Connector Name * ample QuickBooks Data Connector	r			
escription				
			Cancel	Save

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

😑 Data Center								New
Home	Data Connector Type							
Data Connectors	All							
Data Sets	Search Data Connectors				s	ihowing	618 out	of 618
💩 Data Stores	Sample QuickBooks Data Connector	* ** • ••	٥	۵	G	<	1	ĩ
nata Store Meta Data	Mailchimp CA	* ** * **	8	۵	C	<	1	Î

# 6.1.2.37. Salesforce

The following set of steps displays how to create a Salesforce data connector.



- i) Select the 'Salesforce' connector type icon from the Data Connector page.
- ii) The user gets directed to the SalesForce Connector page.
- iii) Select an option using the drop-down list (Salesforce/Sandbox).
- iv) Click the 'Select Account' option to select an account.

Sales Force Connector
Salesforce
SandBox
Select Account

- v) The Salesforce login page opens.
- vi) Provide valid credentials to login (Username and Password).
- vii) Click the '**Log In**' option.

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

- viii) The Salesforce Connector page reopens with the '**Change Account**' option indicating that a Salesforce account is selected.
- ix) Provide the Data Connector name.
- x) Describe the data connection (optional).
- xi) Click the 'Save' option.

ales Force Conne				
You Are SuccessFully Logged In				
Change Account Data Connector Name •				
Sample Sales Force Data Connect	r			
Description				
			Cancel	Save



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

#### 6.1.2.38. ServiceNow

The following set of steps displays how to create a ServiceNow Data Connector.

- i) Select the 'ServiceNow' connector type icon from the Data Connector page.
- ii) The Service Now Connector form opens.
- iii) Navigate to the <u>https://developer.servicenow.com/app.do#!/instance</u> 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 it 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.

Service Now Connector		
Data Connector Name *		
Sample Service Now Connector		
Description		
Instance User Name * automation_user		
Password *		
Developer Instance URL *		
sadssfdfdsdfdfdsfdf,mmmm		
	Cancel	Save

x) A success message appears, and the newly created ServiceNow data connector gets added to the Data Connectors list.

#### 6.1.2.39. Snowflake

The following set of steps displays how to create a Snowflake Data Connector.

- i) Click the '**Snowflake**' Data Connector icon from the Data Connector page.
- ii) The Snowflake Data Connector page opens.
- iii) Provide the Data Connector name.
- iv) Describe the data connection (optional).



Snowflake	Connector
onionnance	connicctor

Data Connector Name \*

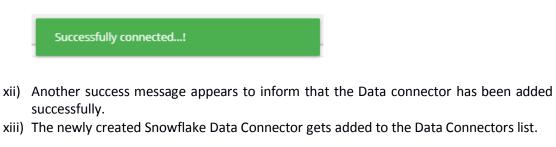
Sample Snowflake Data Connector

Description

- v) Enter the valid username.
- vi) Enter the correct password for the selected account.
- vii) Select a type by using the drop-down menu.
- viii) Provide the account name.
- ix) Provide the Database name.
- x) Click the 'Save' option.

User Name *	
bdb user	
Password *	
Туре	
Without region 🔻	
Account name *	
Snowflake account	
Database Name	
SnowflakeDB	
	Cancel Save

xi) The user gets a message "Successfully connected...!" if the connection gets successfully verified.



😑 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors SNO				Show	ing 1 ou	t of 618
💩 Data Stores	Sample Snowflake Data Connector	0	۵	G	<	/	Î
🚓 🛛 Data Store Meta Data							

#### 6.1.2.40. Twitter

The following set of steps displays how to create a Twitter Data Connector.



- i) Select the '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 (The steps displayed over here guides the user to add a new Twitter account).

Twitter Connector	
Select Account	•
Note: If you are already loggedIn using one account and want to try using another account then first logout from https://twitter.com	

- iv) An authorization page 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.



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- viii) The Twitter Connector page reopens with a notification that you are logged in to the selected account.
- ix) Enter a Data Connector Name.
- x) Describe the Data Connection.
- xi) Click the 'Save' option.

witter Connector				
You are Logged in!!				
Note:If you are already logged! Data Connector Name * Sample Twitter Data Connector	ant to try using another ac	count then first logout from hi	ttps://twitter.com	
Description				
			CANCEL	′E

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

≡	Data Center		Data Con	nector added successfully!						New
7	Home	Data Connector Type	Data Con	nector added successionly:						
9	Data Connectors	All	•							
	Data Sets	Search Data Connectors						Showin	g 620 oi	ut of 620
٠	Data Stores	Sample Twitter Data Cor	nnector		 •	6	c	<	/	Î
8	Data Store Meta Data	online_restaurant			٠	۵	С	<	1	i i

## 6.1.2.41. Twitter Ads

The following set of steps displays how to create a Twitter Ads data connector.

i) Click the '**Twitter Ads**' Data Connector icon from the Data Connector page.

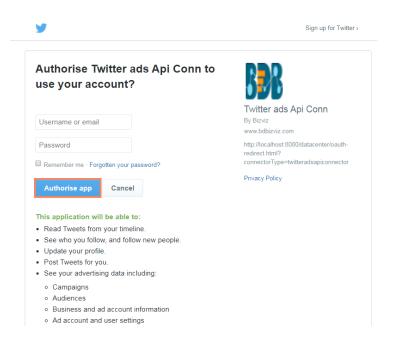


			New
LinkedinAds	MS Dynamics	MailChimp	MongoD Data Connectors
			Data Sets
qD	salesforce	Πΰ₩	snow 💩 Data Stores
Quickbooks	SalesForce	Servicenow	Snow Data Store Meta Data
Tetter Ad	<b>y</b> elp	You Tube	Dono Books
Twitter Ads	Yelp	Youtube	ZOHO Books

- ii) The user gets directed to the Twitter Ads Data Connector page.
- iii) Select an account or Add a new account using the drop-down menu (the steps given below guides the user to add a new Twitter account).

1	witter Ads Connector	
	Select Account	•
	Note:If you are already loggedIn using one account and want to try using another account then first logout from https://twitter.com	

- iv) An Authorization page opens.
- v) Provide the credentials to log in to the Twitter account.
- vi) Click the 'Authorise app' option.



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



tter				
mber me · Forgot password?				
now »				
	now »	mber me - Forgot password? now » a text message? Activate your account »	now »	now »

- ix) The Twitter Ads Data Connector page opens with a notification that the user is successfully logged in to the selected account.
- x) Provide the data connector name.
- xi) Describe the data connector.
- xii) Click the 'Save' option.

vitter Ads Connector					
You are Logged in!!					
Note:If you are already loggedIn using one account and war Data Connector Name • Sample Twitter Ads Data Connector	nt to try using anothe	er account then firs	t logout from http:	s://twitter.	com
Description					
			Car	ncel	Save

xiii) A success message appears, and the newly created Twitter Ads data connector gets added to the Data Connector List.

🗮 Data Center	Data Connector added successfully!						New
Home	Data Connector Type						
Data Connectors	All						
📰 Data Sets	Search Data Connectors			Showing 621 out of 621			
😑 Data Stores	Sample Twitter Ads Data Connector	-	۵	С	<	1	Î
🤮 Data Store Meta Data	Sample Twitter Data Connector		۵	C	<	1	

Note: The user need not go through the steps to authorize BDB for the access of data from the selected Twitter account, if the account is already added before.

# 6.1.2.42. Yelp

The following set of steps displays how to create a Yelp Data Connector.

- 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
- iv) Click the '**Test**' option.

BZ			Q		4 <u>9</u>	?	W
≡						Ne	N
ñ	Home	Yelp Data Connector					
	Data Connectors	Data Connector Name *					
• ••	Data Sets	Sample Yelp Data Connector					
•	Data Stores	Description					
	Data Store Meta Data	Access Key *					
				Cancel	Test	Save	
							_

- v) A message appears to confirm the success of the connection authentication.
- vi) The 'Save' option gets enabled.
- vii) Click the 'Save' option.

AUTHENTICATION Successfull	New
Yelp Data Connector	
Data Connector Name * Sample Yelp Data Connector	
Description	
Access Key *	
Cancel	Test Save

viii) A success message appears, and the newly created Yelp Data Connector gets added to the Data Connectors List.

📃 Data Center	Data Connector added successfully!						New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	ig 622 o	ut of 622
💩 Data Stores	Sample Yelp Data Connector	0	۵	С	<	/	Ē
n Data Store Meta Data	Sample Twitter Ads Data Connector	 •	۵	C	<	1	<b>I</b>

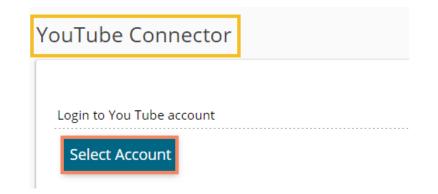
### 6.1.2.43. YouTube

The following set of steps displays how to create a YouTube data connector.

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



iii) Click the 'Select Account' option.



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

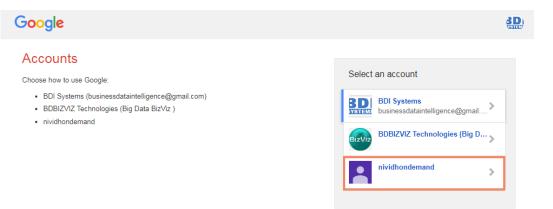
Google

Sign in with your Google Account

Email or phone
Next
Find my account
One Google Account for everything Google

G M 🐹 🖬 🛆 🂠 🕨 🔕

v) After logging in to a 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.

Google			nividhondemand 👻
	BIZVIZ would like to:		
	8 Have offline access	<b>i</b>	
		Deny Allow	

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

ouTube Connector			
You are Logged in!			
Change Account			
Sample YouTube Data Connect	or		
Description			
			Cancel Save

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

📃 Data Center	Data Constants added assessed	dh a						New
🔂 Home	Data Connector Type	niy:						
Data Connectors	All							
Data Sets	Search Data Connectors					Showin	ig 623 o	ut of 623
😝 Data Stores	Sample YouTube Data Connector	• • • • •		۵	C	<	/	Î
🧙 Data Store Meta Data	Sample Yelp Data Connector	• ••• • •••	•	۵	C	<	1	<b>I</b>

### 6.1.2.44. ZOHO Books

The following set of steps displays how to create a ZOHO Books data connector.

- i) Select the '**ZOHO Books'** connector from the Data Connector page.
- ii) The ZOHO Books Data Connector page opens.
- iii) Provide Username.
- iv) Give a valid Password for the account.
- v) Click the 'Save' option after the data connection gets verified.



ohoBooks Data Connector	
Data Connector Name *	
Sample ZOHO Books Data Connector	
Description	
User Name *	
Password +	
	Cancel Save

- vi) A success message appears to assure the connection.
- vii) Another success message appears, and the newly created ZOHO Books Connector gets added to the Data Connectors list.

≡ Data	a Center		Data Caraca	tor added successfully!							New
👸 Hor	me	Data Connector Type		lor added successiony:							
🚊 Data	a Connectors	All	-								
🧮 Dati	a Sets	Search Data Connectors							Showin	g 624 ou	it of 624
😑 Dati	a Stores	Sample ZOHO Books Da	ata Connector		• ••	٩	þ	C	<	1	î (
🤮 Dati	a Store Meta Data	Sample YouTube Data (	Connector			•	<u>b</u>	C	<	1	Î

# 6.1.3. Data Connector List

All the created data connectors are listed on the Data Connectors page provided under the Data Center module. The user can get a list of all the data connectors by clicking on the '**Data Connectors**' option provided on the left side of the page.

🗮 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	g 624 o	ut of 624
💩 Data Stores	Sample ZOHO Books Data Connector	<b>:</b> e	þ	C	<	/	
🧙 Data Store Meta Data	Sample YouTube Data Connector	<b>:</b> e		G	<	-	Î
	Sample Yelp Data Connector	<b>:</b> e	þ	G	<	1	T
	Sample Twitter Ads Data Connector	<b>:</b> e	æ	C	<	1	Î
	Sample Twitter Data Connector	<b>:</b> e	æ	C	<	-	Î

Option	Name	Task
	New Data Set	Redirects the user to create a new Data Set
<b>e</b>	New Data Store	Redirects the user to create a new Data Store



	New Query Builder	Redirects the user to the Query Builder
		functionality
C	Reconnect	Reconnects to the server
<	Share	Shares connector with the selected user(s) or group(s)
1	Edit	Edits the connector fields
Î	Remove	Removes a connector from the list

# 6.1.4. 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.

	≡	Data Center				New
	<b>7</b>	Home	Data Connector Type			
1	9	Data Connectors	MySQL			
		Data Sets	Search Data Connectors ipl	Showing	1 out c	of 332
	•	Data Stores	IPL 2017 🚍 🔮 🕞 C	< .		Î
		Data Store Meta Data				

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

Data Center																																NE	W
Database																															Î		1
IPL2017 4															1-				-														-
		 			- {-								{	 	-		 	-	- 1			- {	 										
Table Q									- 1	-				 	i-			i-	- 1				i				- [ -					į.,	
										_				 	1-				-1									_					
IPL_2017scorecard			j	j.					į.			j.		i 	i.				j.		i.		 į.,						j.				
			1	1	1	IPL	_Pr	evi	ous,	Re	cor	ds	- 1	1	1			1	- 1				1	1					1				
	1		1	i					_		Ì.			i	i -				- i				i										
IPL_Player_Points_Each_Mat			1		5	~		E	Ħ		Э	i-	- 1	 	1-				- 1				1										
		 		-			-	-	-		ŀ			 	-		 	-	- 1			- {					- { -		 • -	•			
IPL_Players_Percentile_Points		-		 	-   -			-						 	-	- (	 	-	- {			- 1	 				-   -	-					
														 	1-				- 1		4-												
IPL_Previous_Records		 Į.,	1	 				Į.	- 1.		l			 	1-		 	1_	- 1	 ļ.,	1		   		_	 Į.,			 			Į	
_				÷.					÷					1	i.				÷		į.								÷				i
IPL_Previous_Records_copy			1	1		1		17	1				1		1	1			1		1					 1							
		 1			- 1-				- 1					 	1-	- 1	 		- 1			-1					- 1 -						

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



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

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



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

Data Center			NEW
Database		6	<b>i</b> >
IPL2017 T			
Table Q			
IPL_2017scorecard	IPL_Previous_Records	· { { {	
IPL_Player_Points_Each_Matc			
IPL_Players_Percentile_Points			
IPL_Previous_Records			

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

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



IPL_P	Previous_Records 🧪					∎ ×
FILTE	R PREVIEW DATA	FOREIGN KEY REF.				
Output		Aggregate				Operator
	$Period\_Yr_{long}$	aggregate function 🔻	select order type 🛛 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	Venue <sub>string</sub>	aggregate function 🔻	select order type 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	No_Six <sub>long</sub>	count 👻	select order type 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	Maidens <sub>long</sub>	sum 🔻	select order type 🛛 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	InningId <sub>iong</sub>	aggregate function 🔻	select order type 🔻	sort order 🛛 🔻	where clause 🔻	and/or 🔻
	player_dismissal_type <sub>string</sub>	aggregate function 🔻	select order type 🔻	sort order 🛛 🔻	where clause 🔻	and/or 👻

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

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

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

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

Decision Platform			<b>p</b> 22	?	Θ
Data Center				N	NEW
Database				Î	>
QueryBuilder	*				
Table	Q				
DEPT					
DEPT_LOCATIONS					
EMP					
Project					
Works_ON					

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



Ce	enter					
	EMP 🧪					×
	FILTER	PREVIEW DATA	FOREIGN KEY REF.			
	Column Nam	e		Reference Column	Reference Table	
		Dno		Dno	DEPT	
ľ						
L						
L						

- xii) Click the 'execute query'  $\geq$  icon.
- xiii) A window pan opens, displaying the '**Result**' tab by default.

RESULT QUERY		
No_Six		Maidens
	0	0
	0	0
	1	0
	2	0
	1	0
	0	0
		58 59 60 >>

xiv) Select the 'Query' tab to see the generated SQL query based on the selection of the data.

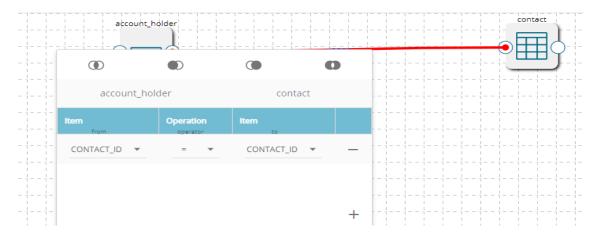
RES	ULT QUERY
1	SELECT
2	t0.No_Six,
3	t0.Maidens
4	FROM
5	IPL2017.IPL_Previous_Records t0
6	LIMIT
7	1000

Note:

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



c. The user gets the 'Create Data Set' or 'Create Data Store' options available after clicking the execute query icon.

🗮 Data Center		New
Database	🚟 🔶	<b>i</b> >
IPL2017 T		
Table Q		
IPL17_Team_Flags		
IPL_2017scorecard	IPL_Previous_Records	
IPL_Player_Points_Each_Mat		

Based on the selection of either of the option (out of '**Create Data Set**' and '**Create Data Store**' option) The configuration forms open accordingly to create a new dataset or data store with the generated query pasted in the '**Query**' space. The user needs to follow the steps needed to complete the creation of a data set or data store based on the selection.

Data	Connectors			•	•	•	•
Data	Sets	Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Data	Stores			Data Connector Name		Database Name	
Data-	-Store Meta Data	Data Store Name *		Myssql		QBuilder	
		Query	ROM QBuilder.Project t0 WHE	RE ((t0.Pno = '')) GROUP BY t0.Pno	o ORDER BY t0.Pno ASC		
			ROM QBuilder.Project to WHEI	RE ((tů.Pno = '')) GROUP BY tů.Pno	ORDER BY t0.Pno ASC		
				RE ((t0.Pno = ")) GROUP BY t0.Pno	ORDER BY t0.Pno ASC		Ø



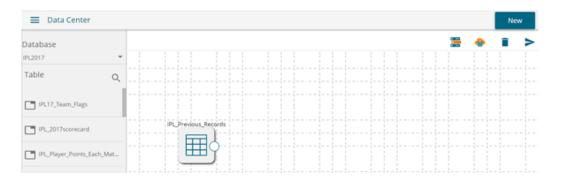
d. Users can use the Query Builder functionality to create basic queries and perform various joins, but it is not possible to create in-depth BI queries using the current Query Builder option.

# 6.1.4.1. Editing Data Store/Data Set by using Query Builder

Data Sets and Data Stores created by queries which are generated by the Query Builder get an option 'edit in query builder' to edit the query using the Query Builder. The following image displays the 'edit in query builder'  $\checkmark$  icon in the Data Store page.

Data Set	
Service Name *	
Description	
Data Connector Name	
IPL 2017 Database Name	
IPL2017	
Query	$\bigcirc$
1 SELECT t0.No_Six,t0.Maidens FROM IPL2017.IPL_Previous_Records t0 LIMIT 1000	edit in query builder

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.



Data Set	
Service Nam	e *
Description	
Data Connector	Name
IPL 2017 Database Name	
IPL2017	
Query	t0.Maidens,t0.No_Six FROM IPL2017.IPL_Previous_Records t0 LIMIT 1000

# 6.1.5. Reconnecting a Data Connector

- i) Navigate to the Data Connector list.
- ii) Select a Data Connector and click the '**Reconnect**' icon <sup>C</sup> provided in the connector list.
- iii) A message appears to assure the action.

Data Center	3 Successfully reconnected!!						New
🛜 Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors			9	Showin	g 624 o	ut of 62
Data Stores	file_connector	 ٩	<b>e</b>	С	<	/	
🌏 🛛 Data Store Meta Data	exl	•	<b>_</b>	C	<	1	Î
	Mssql Test	٠	2	C	<	1	Î
	dataconnlp	٠	<b>b</b>	Reconnect	<	1	Î
	restdbautomationMysql	٠	۵	С	<	1	Î
	mysql	•	(db)	C	<	1	ĩ

iv) The selected data connector gets reconnected.

# 6.1.6. Sharing a Data Connector

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

	≡	Data Center							New
	<b>7</b>	Home	Data Connector Type						
0	000	Data Connectors	All						
	••••	Data Sets	Search Data Connectors				Showin	g 624 ou	ut of 624
	0	Data Stores	Sample ZOHO Books Data Connector		۵	2	$\overline{<}$	/	
		Data Store Meta Data	Sample YouTube Data Connector	0	۵	C	<	1	Î
			Sample Yelp Data Connector		۵	C	<	1	Î

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

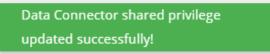
3	Share Data Connecto	r		×
4	USER GROUP	EXCLU	JDE USER	
5	Chetan RestAutomation			
þ	RestAutomation 6 jubilant	>		
p	Vidya krish	<		
9 - 2	Ram	44		
	Nikhil Verma			

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



	Share D	ata Connecto	or ×	:
	USER	USER GROUP	EXCLUDE USER	
	Chetan RestAutoma jubilant Vidya krish Ram Nikhil Verm		7 RestAutomation > >   <	
ē	Sanjeev Nei	maji		
			Cancel Save	

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



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

#### 6.1.7. Editing a Data Connector

- i) Navigate to the list of Data Connectors.
- ii) Select a Data Connector and click the 'Edit' 🖍 icon.

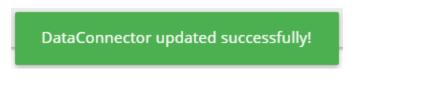
🗮 Data Center							New
Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showir	ng 633 oi	ut of 633
💩 Data Stores	Sample ZOHO Books Data Connector	•	۵	C	<		Î
🌏 🛛 Data Store Meta Data	Sample YouTube Data Connector	•	۵	C	<	1	Î

- 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.



Rome	
i Home	ZohoBooks Data Connector
Data Connectors	Data Connector Name *
Data Sets	Sample ZOHO Books Data Connector Description
😝 Data Stores	
🤤 Data Store Meta Data	User Name *
	Password *
	Cancel Save

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



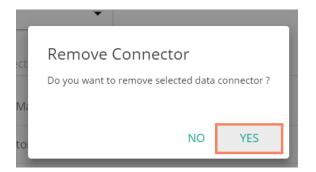
vii) The updated details get saved for the selected data connector.

# 6.1.8. Removing a Data Connector

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

Home	Data Connector Type						
Data Connectors	All						
Data Sets	Search Data Connectors				Showin	g 633 oi	ut of 633
💩 Data Stores	Sample Twitter Data Connector	<b>=</b> 😔	¢	C	<	/	
Data Store Meta Data	online_restaurant	<b></b> 😔	¢	G	<	-	Î

- 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 a set of steps for data set creation based on all the above mention major categories to create a sample data set.

## 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.

≡ D	ata Center				2 New
<b>8</b> I	Home	BDB supports connecting to a wide variety of D	ata. The DataSource might have stored in spi	eadshee	Data Connectors
	Data Connectors	databases, Or to a cloud database source such DataSources and build DataSets and DataStore		sforce. \	
	Data Sets	Click Here To Start Creating A Connecto	pr	•	Data Stores
e (	Data Stores		_	ę	Data Store Meta Data
<b>e</b> [	Data Store Meta Data	• • •		_	
		• • •	9		
		Data Sets	Data Store	D	ata-Store Meta Data
		Bring your data directly from the	Import your data from external	Bring d	lata from external sources
		source systems using parameterized	sources into Data store of BDB		t importing into DataStore of
		SQL queries or API calls. Once you	Platform using SQL queries or API	BDB Pl	atform. It is a database which

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

	≡	Data Center	New
	<b>7</b>	Home	Data Source
4	0))	Data Connectors	MySQL 5
	•	Data Sets	Search Data Connectors
	0	Data Stores	Claim_data Create Data Set
		Data Store Meta Data 6	IPL 2017 Create Data Set

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



Data Set	8
	9
Sample Data Set	
Description	10
Data Connector Name	1
IPL 2017	
Database Name	12
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 Quer			
1	SELECT `IPL_Previous_Records`.`Period_Yr` AS `Period_Yr`,		
2	`IPL_Previous_Records`.`Team` AS `Team`,		
3	`IPL_Previous_Records`.`Players` AS `Players`,		
4	`IPL_Previous_Records`.`Runs` AS `Runs`,		
5	`IPL_Previous_Records`.`Balls` AS `Balls`,		
6	`IPL_Previous_Records`.`Wickets` AS `Wickets`,		
7	ifnull(((`IPL_Previous_Records`.`Runs`/`IPL_Previous_Records`.`Balls`) * 100),0) AS `SR`,		
8	if((`IPL_Previous_Records`.`Balls` <> 0),1,0) AS `BatInn`,		
9	if((`IPL_Previous_Records`.`Over` <> 0),1,0) AS `Bowlinn`,		
*Use	Ctrl+Space for assistance	0	-
	14 Validate	Save	Cancel

- ix) A message appears to inform the successful execution.
- x) The data preview appears at the bottom of the page.

🗮 Data Center							New
Home	IPL2017 15 Suc	essfully Executed!					
Data Connectors	Query 1 SELECT `IPL_Previous_Records	`.`Period_Yr` AS `Period_Y	r`,				
Data Sets	2 "IPL_Previous_Records"." 3 "IPL_Previous_Records"."						
🖕 Data Stores	4 1PL_Previous_Records 11 5 1PL_Previous_Records 11 6 1PL_Previous_Records 11	alls" AS "Balls",					
😝 Data Store Meta Dat		rds1,1Runs1711PL_Previou		alls`) * 100),0) AS `S	R`,		
Preview Result							
Period_Yr Team	Players	Runs	Balls Wi	ckets 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

xi) The 'Save' option gets enabled.



Quer	у
1	SELECT `IPL_Previous_Records`.`Period_Yr` AS `Period_Yr`,
2	`IPL_Previous_Records`.`Team` AS `Team`,
3	`IPL_Previous_Records`.`Players` AS `Players`,
4	`IPL_Previous_Records`.`Runs` AS `Runs`,
5	`IPL_Previous_Records`.`Balls` AS `Balls`,
6	`IPL_Previous_Records`.`Wickets` AS `Wickets`,
7	ifnull(((`IPL_Previous_Records`.`Runs`/`IPL_Previous_Records`.`Balls`) * 100),0) AS `SR`,
8	if((`IPL_Previous_Records`.`Balls` <> 0),1,0) AS `BatInn`,
9	if((`IPL_Previous_Records`.`Over` <> 0),1,0) AS `BowlInn`,
*Use	Ctrl+Space for assistance
	Validate Save Cancel

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

🔂 Home	Data Connector Type	Data Connector	Publish Statu	JS					
Data Connectors	All	All	► All		•				
Data Sets	Search Data Sets					S	howing	3471 ou	t of 347
Data Stores	Sample Dataset			<u>+</u>	0	1	<	/	Î

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

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

# 6.2.1.1. Applying Dynamic Filter in an RDBMS Data Set

The user 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 the filter condition to the 'Query' section.
- iii) Click the '**Validate**' option.



0

alidate

Cancel

Quer	у
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

- iv) A new window opens, asking for the filter value.
- v) Enter a filter value.
- vi) Click the 'CONTINUE' option.

ltemo	ode
A00	5

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 Data Sets list.

Note:

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



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

c. The user can customize the Data Set list by Data Connector Type, Data Connector, and Publish Status.

These customization options are provided on the top of the Data Sets List page.

🛜 Home	Data Connector Type	Data Connector	Publish S	itatus					
Data Connectors	MySQL 🗸	IPL 2017	▼ Publisl	ned	•				
Data Sets	Search Data Sets						Shov	ving 40 o	out of 4
👌 Data Stores	dataservice test 🛛 🛃			<u>*</u>	Ø	1	<	1	Î
😝 🛛 Data Store Meta Data	Sample Data Set 🛛 🛃			<u>*</u>	0	1	<	1	Î

### 6.2.1.2. Restricting Displayed Data for End Users via Data Set

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

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

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

Admin Module				
tom Field Settings				+ C
				1
Custom Field Information				^
Key	Input type	Description	Mandatory	Delete
doj1	Manual	✓ Please add start date	No	- ×
doj2	Manual	<ul> <li>Please add end date</li> </ul>	No	- ×
date_key	Manual	← date_key	Yes	- ×
	Custom Field Information Key doj1 doj2	Key     Input type       doj1     Manual       doj2     Manual	Key       Input type       Description         doj1       Manual       Please add start date         doj2       Manual       Please add end date	Key       Input type       Description       Mandatory         doj1       Manual          Please add start date       No         doj2       Manual          Please add end date       No



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		
1 select * from NLPDATA 2 where DATE_KEY* [ENV.DATE_KEY]		
*Use Ctrl+Space for assistance	0	
	Ø	
	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).

Yearly sales and expense		К.Я К 3
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 09.12.05.110000000 AM		

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



Properties			×
demo < Properties	Share with User	Share with Group	Exclude >
Search	٩		1/41
BDB bdbuser@bdb.ai			
admins admin@rbl.com			
cluster_two cluster2@rbl.com			
clusters cluster1@rbl.com			
		Close	Save

- 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.

My Documents > den	10 >				0
	Yearly sales and expense		К.Я К.И		
	date_key	student_name			
	2018-04-20 09:12:06.110000	Kartik			

# 6.2.2. Creating a New Data Set Using API Connectors

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





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

	≡	Data Center			New
	<b>7</b>	Home	4	Data Source	
3	0))	Data Connectors		Google Analytics	
		Data Sets		Search Data Connectors Samp	
	8	Data Stores	5	Sample Google Analytics Data Connector	Data Set
		Data Store Meta Da	ta		

- vii) The user gets 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: Provide a brief description of the Data Set (It is an optional field).
  - c. Data Connector Name: This option comes pre-defined as per the selected data connector.
  - d. Account: This option comes pre-defined based on the selected google account.

Data Set
Dataset Name *
Sample Google Analytics Data Set
Description
Data Connector Name
Sample Google Analytics Connector
Account :
bdb.artificialintelligence@gmail.com

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



Data Selection		
Web Property *		
BDB.ai UA-1237	205-1	
View *		
All Web Site Da		
Dimensions		
User Type, Cou	of Sessions, Session Duration, Campaign, Source, Keyword Match Typ	e

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 , Organic Searches	-
Selected Metrics gatusers gatbounceRate gatsessionDuration gatorganicSearches	

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:	
	ga:browser==Firefox;ga:operatingSystem==Windows	2

- 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.

10 Date Type *							
Fixed type	e						-
	From date *		To date *				
	11/26/2019	•	12/3/2019	-			

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

10	Date Type *	
	Dynamic type	•
	Select Date Range *	
	30 Days ago	•

h. Click the 'Preview Data' option.





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

						Cancel Preview D	12 Data Save
Preview of 10 rows	are shown below						
ga:userType	ga:sessionCount	ga:daysSinceLastSession	ga:users	ga:newUsers	ga:sessionsPerUser	ga:avgSessionDuration	ga:organicSearches
New Visitor	1	0	28	28	1.0	144.92857142857142	0
Returning Visitor	11	2	1	0	1.0	24.0	0
Returning Visitor	13	24	1	0	1.0	0.0	0
Returning Visitor	2	0	3	0	1.0	7.3333333333333333	0
Returning Visitor	2	11	1	0	1.0	20.0	0
Returning Visitor	2	19	1	0	1.0	0.0	0
Returning Visitor	2	20	1	0	1.0	234.0	0
Returning Visitor	2	23	1	0	1.0	0.0	0

x) A success message appears, and the newly created Google Analytics dataset gets added to the **Data Sets** list.

≡	Data Center	13	Detect area	tod suggestication							New
<b>7</b>	Home	Data Connector Type	Dataset crea	ted successfully!	sh	Status					
	Data Connectors	All	All		All		•				
	Data Sets	Search Data Sets						S	howing	3472 ou	t of 3472
9	Data Stores	Sample Google Analytics Da	ata Set			<u>+</u>	0	1	<	/	
e	Data Store Meta Data	restqueryautomation	4			<u>+</u>	0	1	<	1	Î

# 6.2.3. Creating a New FTP Data Set

- i) Click the '**New**' menu from the Data Center page.
- ii) Select the '**Data Sets**' from the context menu



- iii) The Data Connectors list appears.
- iv) Select an FTP Server using the data source filter.
- v) Select an FTP Data Connector from the list.
- vi) Click the 'Create Data Set' option.

	≡	Data Center		New
	<b>7</b>	Home 4	Data Source	
3	9	Data Connectors	FTPServer	
		Data Sets	Search Data Connectors	
	0	Data Stores 5	Sample FTP Server Data Connector 6 Crea	te Data Set
	e	Data Store Meta Data	ftpserver28 Crea	te Data Set

- vii) The FTP Data Set form opens.
- viii) Provide a name for the Data Set.
- ix) Describe the Data Set (Optional).
- x) The pre-selected Data Connector name appears.
- xi) Click the 'Get All Data' option.

0	Data Set	
8	Dataset Name *	
9	Description	
10	Data Connector Name Sample FTP Server Data Connector	
		Cancel Get ALL Data

- xii) Select a file from the displayed list (Use double-click on a file to select it.)
- xiii) After selecting a specific file, click the '**Get Sheets**' option.

Selected File : FL_insurance_2MB.xlsx			
🖹 ALL DATA TEST SEASON 2	xlsx		
ALL DATA TEST.xlsx			
🖹 DATE TEST 1800.xlsx			
Data of the year xlsx			
IRONMAN.xlsx			
🖹 TEST DATA FOR ALL IN OI	IE.xlsx		
🔋 TestingSpecial.xlsx			
datecheckfornull.xlsx			
		13 Get Sheets	
		Get Sheets	

- xiv) Choose a sheet using the drop-down menu.
- xv) Click the 'Save' option after getting the data preview.



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

	Home	Data Connector Type		uccessfully!	tatus					
	Data Connectors	All	All	✓ All		•				
	Data Sets	Search Data Sets					SI	nowing	3473 ou	t of 347
	Data Stores	Sample FTP Data Set			<u>*</u>	0	1	<	/	Î
8		1 State 1 Stat								

# 6.2.4. Creating a CA PPM Data Set

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

- i) Provide your valid credentials for Login, select the 'CA PPM' as the Auth Type.
- ii) Click the 'Sign In' option.

	Decision Platform
	Email *
1	Password *
	Auth Type CA PPM
2	Sign In

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



			۹ 🜔	)
·c	Home	Admin	User	
3 31 .c	Data Center	O O ETL	Data Prepar	ē
10	Designer	Story	Data Scienc	I
	Data Pipeline	Forms	Survey	

- iv) The Data Center homepage opens.
- v) Click the 'New' option.
- vi) Select the 'Data Sets' option from the context menu.

🗮 Data Center				5 New				
4 Home		Data. The DataSource might have stored in spreadsh	<u> </u>	Data Connectors				
Data Connectors		tabase source such as Google Analytics, Amazon Redshift, or Salesforce. Sets and DataStores, which enables user to provide them with ric 6 Data Sets						
Data Sets	Click Here To Start Creating A Connec	ctor	•	Data Stores				
Data Stores			<b>e</b>	Data Store Meta Data				
Data Store Meta Data								
	Data Sets	Data Store	Da	ta-Store Meta Data				

- vii) The Data Connector list opens.
- viii) 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.

- ix) Select a CA data connector.
- x) Click the 'Create Data Set' option for the CA data connector.

	≡	Data Center		New	
	<b>7</b>	Home	Data Source		
7		Data Connectors			
		Data Sets	Search Data Connectors		
	9	Data Stores	CA 10 Create Data	ı Set	
	e	Data Store Meta Data			

- xi) A form opens to create a new Data Set.
- xii) Provide a Service Name defined by the user to identify the data set.
- xiii) Select a Service URL from the drop-down list.

1 Data Set	
12 Service Name *	
Sample CA PPM Data Set	
13 Service URL	
rqrmnt.requirementsByTheme	*

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

14	Mandat	tory Filter
	quer:	_log_date
	quer:	_log_date_from
	quer:	_log_date_to
	quer	_log_date_in
	quer:	_environment
Ĩ	quer:	_environment_from

xv) Custom Filter: Select the 'Custom Filter' options using the checkmarks in the boxes.

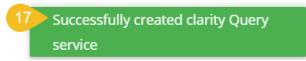


15	Custon	n Filter	
	<b>~</b>	quer:reportid	
	<b>~</b>	quer:reportid_from	
	<b>~</b>	quer:reportid_to	
		quer:reportid_in	
	<ul> <li>Image: A second s</li></ul>	quer:report_name	
		quer:report_name_from	

xvi) Click the 'Save' option.



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



xviii) The newly created Data Set gets added to the Data Sets list.

📃 Data Center								New
🔂 Home	Data Connector Type	Data Connector	Publish Status					
Data Connectors	All	All	✓ All	•				
Data Sets	Search Data Sets				S	howing	3498 ou	t of 3498
Data Stores 18	Sample CA PPM Data Set	4	<u>*</u>	Ø	1	<	1	Î
😝 Data Store Meta Data	Sample FTP Data Set		<u>+</u>	0	1	<	1	Î

Note:

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



	А	в	С	D	E	F	G	н	I	J	к	L	м	N	0	P	Q	R	S	т	
34		1	1.46E+12		1	3.28E+11	152527	0	301747	0	0	1.46E+12	0		0	0	0	2083084	ONLINE	ORDER	
35		1	1.46E+12		1	3.28E+11	152527	0	301747	0	0	1.46E+12	0		0	0	0	2083083	ONLINE	ORDER	
6	0	0	1.46E+12		1		140966	0	301748	0	0		0		0	0	0	2087304	ONLINE_	ORDER	
7	0	0	1.46E+12		1		140966	0	301748	0	0		0		0	0	0	2087304	ONLINE_	ORDER	
в		1	1.46E+12		1	3.28E+11	130558	0	301749	0	0	1.46E+12	0		0	0	0	2070610	ONLINE_	ORDER	
9	0	0	1.46E+12		1		126701	0	301775	0	0		0		0	0	0	2098414	ONLINE_	ORDER	
	0	0	1.46E+12		1		126701	0	301775	0	0		0		0	0	0	2098414	ONLINE	ORDER	
		1	1.46E+12		1	3.28E+11	126701	0	301775	0	0	1.46E+12	0		0	0	0	2098414	ONLINE	ORDER	
		1	1.46E+12		1	3.28E+11	126701	0	301775	0	0	1.46E+12	0		0	0	0	2098414	ONLINE	ORDER	
		1	1.46E+12		1	3.28E+11	126701	0	301775	0	0	1.46E+12	0		0	0	0	2098414	ONLINE_	ORDER	
	0	0	1.46E+12		1		140966	0	301748	0	0		0		0	0	0	2087304	ONLINE_	ORDER	
		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	
		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	
		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	
8		1	1.46E+12		1	3.28E+11	151364	0	3.28E+11	0	0	1.46E+12	0		0	4	0	2081373	ONLINE_	ORDER	
	0	0	1.46E+12		1		158403	0	301775	0	0		0		0	0	0	2089443	ONLINE_	ORDER	
	0	0	1.46E+12		1		158403	0	301775	0	0		0		0	0	0	2089444	ONLINE_	ORDER	
		1	1.46E+12		1	3.28E+11	160693	0	301702	0	0	1.46E+12	0		0	0	0	2084959	ONLINE	ORDER	

### 6.3. Data Store

Data store is a data source for persistently storing and managing collections of data which include not just repositories like databases, but also 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 Stores' option from the context menu.

😑 Data Center				2 New
1 Home	BDB supports connecting to a wide variety o	f Data. The DataSource might have stored in sj	preadshee 掔	Data Connectors
Data Connectors		ch as Google Analytics, Amazon Redshift, or Sa ores, which enables user to provide them with	alesforce. )	Data Sets
Data Sets	Click Here To Start Creating A Connec	ctor	3	Data Stores
👌 Data Stores			<b>e</b>	Data Store Meta Data
Data Store Meta Data				
		9		
	Data Sets	Data Store	Dat	a-Store Meta Data
	Bring your data directly from the source systems using parameterized	Import your data from external sources into Data store of BDB	0	a from external sources nporting into DataStore of

- iv) The Data Connectors list opens.
- v) Select a Connector Type from the '**Data Source**' filter (E.g., MySQL data source is selected in the following image).
- vi) Select a data connector from the Data Connector list.
- vii) Click the 'Create Data Store' option provided next to the selected data connector.

	🗮 Data Center		New
	Home	Data Source	
4	Data Connectors	MySQL 5	
	Data Sets	Search Data Connectors Hirring	
	Data Stores	Hiring	Create Data Store
	Data Store Meta Data	Prod DB BDB_Hiring	Create Data Store

viii) 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) The user gets the Getting Data tab while clicking the 'Create Data Store' option.
- ii) Enter a name for the Data Store. The Data Connector and Database names display based on the selection of the data connector.
- iii) Write the SQL query in the given space (Use '**Ctrl+Space**' for assistance in writing a query).
- iv) Click the 'Next' option to proceed.

(	0 0	3	4	5	6
Getti	Data Data Type Definit	ion Hierarchy Definition	Batch Query		Schedule Data Refresh
Data St	tore Name *	Data Connector Name		Database Name	
Samj	ple Data Store	Hiring		BDB_Hiring_Data	
23 24 25	expyrsper_ctc as ExperiencePerCTC, monthly_salary as MonthlySalary, comments as Comments, usd_billing as UsdBilling, cur_monthly_payment as CurrentMontl bill_start_date as BillStartDate	hlyPayment,			
	FROM				
28	hiring_dat2 ;				
*Use	Ctrl+Space for assistance			(	2
					Cancel No

# 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 checkmark to avail LOV lookup in the filter panel of the Self-service BI Report.
- iii) Click the 'Next' option to proceed.



Contraction that the second se	2 Data Type Definition	3 Hierarchy Definition	4 Batch Qi	Jery	Data Restrictions	6 Schedule Data Refresh
Dimensions		Measures			Time	
Name	1 123 (	Year	Abo	0	ExpectedJoinningDate	Abs 123
Gender	123 (	Experience	Abc	0	BillStartDate	Abc 123
Source	2 2 123 (	PreviousCTC	Abc	0		
ReferralOf	123	OfferedCTC	Abc	0		
Designation	123	ExperiencePerCTC	Abc	G		
Team	123 (	MonthlySalary	Abc	G		

#### Note:

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

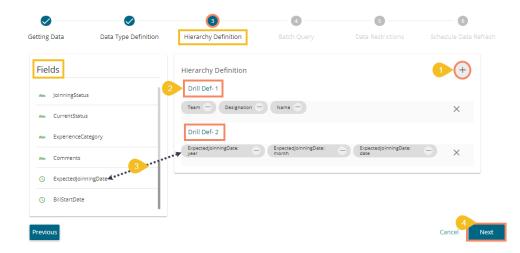
Options	Description
Abc	Move to Dimensions
123	Move to Measures
C	Move to Time

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

# 6.3.1.3. Hierarchy Definition

Define hierarchy using various dimensions and time options.

- i) Click the 'Add' + option provided on the Hierarchy Definition page.
- ii) A new 'Drill Def' box gets added.
- iii) Drag and drop the dimensions or time options to define a hierarchy.
- iv) Click the 'Next' tab to proceed.





Note:

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

The user can define the date-drill by dragging once a time dimension into a '**Drill Def**' box. E.g., Hierarchy for the '**Opening**' time dimension has been defined as shown below:

Drill Def- 2						
ExpectedJoinningDate: year	Ξ	ExpectedJoinningDate:	-	ExpectedJoinningDate:	Ξ	×

d. Each dimension value needs to be dragged and dropped multiple times to create a hierarchy among the dragged values.

# 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). The user can edit the distinct query as per their requirement.

			4	5	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
Select Dimension Gender					Clear
Distinct Quer	У				2 Genera
1 SELECT DIST	INCT gender AS Gender	FROM hiring_dat2			

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

5 Ba	itch Query	4 Generate
1	SELECT candidate_id AS CandidateId	
2	,NAME AS Name	
3	,gender AS Gender	
4	,source AS Source	
5	,referral_of AS ReferralOf	
6	,designation AS Designation	
7	,team AS Team	
8	,previous_organisation AS PreviousOrganisation	
9	,skills AS Skills	
Pr	evious	Cancel Next

# 6.3.1.5. Data Restriction

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



- i) Click the 'Add' + icon to add a new box for inserting the data restriction parameter.
- ii) Select a dimension from the drop-down menu.
- iii) Enter the user/group specific custom field to restrict the data.
- iv) Click the 'Next' option to proceed.

				5	6
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh
2 Dimension	3 User	Property	1	·(+)	
Name	Count	ry		_	
Previous				C	Cancel Next

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

### 6.3.1.6. Schedule Data Refresh

The user can schedule a data refresh interval via the 'Schedule Data Refresh' tab.

- i) Enable the Refresh Now option by using a checkmark in the given box.
- ii) Define a time range to refresh data using the following options:
  - a. Daily
  - b. Weekly
  - c. Monthly
  - d. Yearly

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

					6		
Getting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refresh		
Schedule C	Schedule Configuration						
2 DAILY	2 DAILY WEEKLY MONTHLY YEARLY						
O Every 1	day(s)						
O Every Wee	ek Day						
Start time 12	• : 00	*					
1 Refresh Now	1						



- iii) Enable Email Notification by providing a checkmark in the box.
- iv) Provide a valid email address to receive the notification email regarding the Data Store.
- v) Click the 'Finish' option to complete the Data Store creation process.

3	Chable Email Notification		
4	Email Address *		
	admin.user@bdb.ai		
	Previous	5 Cancel	Finish

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

🗮 🛛 Data Center	Data Store created successfully						New
🛜 Home	Data Connector Type						
Data Connectors	All • All •						
🧮 Data Sets						- 247 -	+ -6 247
Data Sets	Search Data Stores				Showin	ig 317 0	101317
7 Data Stores	Search Data Stores  Sample Data Store	0	C	<		ig 317 0	<b></b>

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

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

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

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

🔳 Da	ata Center				2 New
	lome	BDB supports connecting to a wide variety of	0)))	Data Connectors	
	ata Connectors	databases, Or to a cloud database source such as Google Analytics, Amazon Redshift, or Salesforce. DataSources and build DataSets and DataStores, which enables user to provide them with rich busin Click Here To Start Creating A Connector			Data Sets
D	ata Sets				Data Stores
<b>e</b> D	ata Stores			<b>e</b>	Data Store Meta Data
<u>ର</u> D	ata Store Meta Data	• • •			
			9		
		Data Sets	Data Store	Dat	a-Store Meta Data



- iv) The Data Connectors page opens.
- v) Select a Connector Type from the '**Data Source**' filter (E.g., MySQL data source is selected in the following image).
- vi) Select a data connector from the Data Connector list.
- vii) Click the 'Create Data Store' option provided next to the selected data connector.

	≡	Data Center		New
	Home		Data Source	
4	9	Data Connectors	File 5	
	Data Sets		Search Data Connectors	
	8	Data Stores	Sample File Data Connector	Create Data Store
		Data Store Meta Data	file_connector	Create Data Store

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

#### Step 1- Getting Data

- i) Enter a name for the Data Store. The Data Connector Name displays the pre-selected.
- ii) Click the 'Choose File' option to browse a file from the system.
- iii) Select a sheet using the 'Sheet List' drop-down menu.
- iv) Select an option to display Sheet Layout using the drop-down menu out of Column Headers or Row Headers.
- v) Click the 'Next' option to proceed.

	2	3	4
Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions
1 Data Store Name *		Data Connector Name	
Sample File Data Store		Sample File Data Connector	
2 Choose File Hiring Data.xlsx 3 Sheet List * Hiring_227data			
4 Sheet Layout *	•		5 Cancel Next

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

#### Step 2- Data Type Definition

- i) Define the required Dimensions, Measures, and Time by interchanging the categories.
- ii) Enable the Dimensions by using a checkmark to avail LOV lookup in the filter panel of the Self-service BI Report.
- iii) Click the 'Next' option to proceed.



Getting Data		Da	ta Type Definition	Hier	archy Def	inition	Data Restrictions
oimensions			Measures			Time	
ender		123 🕓	usd_billing	Abc	0	expected_joining_date	Abc 123
ource	2 🗹	123 🕓	experience_Year	Abc	G		
kills	<b>~</b>	123 🕓	candidate_id	Abc	©		
revious_organ		123 🕓	id	Abc	0		
eam		123 🕓	offered_ctc	Abc	0		
ame		123 🕓	previous_ctc	Abc	0		
ble checkbox for LOV filte	ring						

#### 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.

		3	4	5	6
etting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refres
Fields		Hierarchy Definition			1+
Abc JoinningStat	tus	Drill Def- 1			
Abc CurrentStat	us	Team - Designation -	Name -		×
Abc Experience(		Drill Def- 2			
Abc Comments	nningDate4****	ExpectedJoinningDate:	ExpectedJoinningDate: month	ExpectedjoinningDate: date	- ×
S ExpectedJoi	nningDate				
() BillStartDat					
Previous					Cancel Nex

#### 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 the 'Add' icon <sup>+</sup> to add a new box for inserting the data restriction parameter.
- ii) Select a dimension using the drop-down menu.
- iii) Enter the user/group specific custom field to restrict the data.
- iv) Click the 'Finish' option.



<b>~</b>			
Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions
2 Dimension	3 User Property	1+	
team	▼ Country		
Previous			4 Cancel Finish

- v) A success message appears to confirm the data store configuration.
- vi) The Data Stores list opens.
- vii) The newly created Data Store gets added to the Data Stores list.

😑 Data Center	5 Data Store created successfully!	New
Home	Data Connector Type	
Data Connectors	All • All •	
Data Sets	Search Data Stores	Showing 318 out of 318
Data Sets	Search Data Stores Sample File Data Store	Showing 318 out of 318

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

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

🗮 Data Center				2 New
Home	BDB supports connecting to a wide variety of I	Data. The DataSource might have stored in spread	shee 🧕	Data Connectors
Data Connectors	databases, Or to a cloud database source such DataSources and build DataSets and DataStor	ce. `	Data Sets	
Data Sets	Click Here To Start Creating A Connect	or 3	•	Data Stores
🖕 Data Stores			-	Data Store Meta Data
Data Store Meta Data			_	
		9		
	Data Sets	Data Store	Da	ta-Store Meta Data

- iv) Choose an API connector type from the filter panel.
- v) Select a data connector from the displayed list.
- vi) Click the 'Create Data Store' option.

≡	Data Center		New
<b>7</b>	Home 4	Data Source	
	Data Connectors	Google Sheet	
• • •	Data Sets	Search Data Connectors Hirring Data i	
•	Data Stores	Hiring Data in Google Sheet for Demo	Create Data Store
	Data Store Meta Data 5	Hiring Data in Google Sheet	6 Create Data Store

- vii) The '**Getting Data**' tab opens.
- viii) Provide a name for the Data Store. The name of the selected Data Connector gets displayed by default.
- ix) Select a data set using the 'Data Set List' drop-down menu.
- x) Click the '**Next**' option.

1	2	3	4	5
7 Getting Data	Data Type Definition	Hierarchy Definition	Data Restrictions	Schedule Data Refresh
8 Data Store Name *				
API Connector based Da	ata Store			
Data Connector Name				
Hiring Data in Google Sl Data set List *	heet			
Hiring Data Test New				Ψ.
				Cancel Next

- xi) The 'Data Type Definition' tab opens.
- xii) The user can interchange the available Dimensions, Measures, and Time fields to define data.
- xiii) Enable dimension fields with a checkmark to get in the LOV of the Filter pane of the Self-service BI Report.
- xiv) Click the 'Next' option to proceed.

Getting Data	11 Data		Definitio	n Hierarchy	Definition		<b>4</b> Data Restrictions	Schedule Data Refresh
Dimensions				Measures			Time	
currentstatus	12	123	0	offeredctc	Abc	0	expectedjoiningdate	Abc 123
comments		123	0	expyrsperctc	Abc	0		
gender	13	123	0	experience	Abc	0		
referralof		123	0	usdbilling	Abc	0		
source	~	123	0	previousctc	Abc	0		
team		123	G	candidate_id	Abc	O		
nable checkbox for LOV filt	ering							
Previous								Cancel Nex

xv) The 'Hierarchy Definition' tab opens.



- xvi) Add a new Drill Def. box by clicking the 'Add' icon.
- xvii) 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).
- xviii) Click the 'Next' tab to proceed.

Getting Data	Data Type Definition	3 15 Hierarchy Def	inition     Data Restric	tions Schedule Data	Refres
Fields		lierarchy Definition		16 +	
Abc joiningstatus	17	Drill Def- 1			
Abc Skills		team — designation —	name —	×	
Abc name		Drill Def- 2			
Abc previousorganisation		expectedjoiningdate: year 😑	expectedjoiningdate: month — ex	pectedjoiningdate: date — X	
Abc designation					
() expectedjoiningdate					
evious				Cancel	

- xix) The 'Data Restriction' tab opens.
- xx) Click the 'Add' icon.
- xxi) Select a Dimension from the drop-down menu.
- xxii) Enter a User Property based on the inserted custom fields of a specific user(s) or user group(s).
- xxiii) Click the 'Next' option to proceed.

	$\sim$	$\checkmark$	4	5
Getting Data	Data Type Definition	Hierarchy Definition	19 Data Restrictions	Schedule Data Refresh
21 Dimension	22 User Property		20 +	
gender	Country			
Previous				Cancel Next

- xxiv) The 'Schedule Data Refresh' tab opens.
- xxv) The following options are provided to refresh the data:
  - a. Daily
  - b. Weekly
  - c. Monthly
  - d. Yearly

Select any one option from the above-given list and configure the required information to set the data refresh interval.

xxvi) Select the '**Refresh Now**' option by enabling the box to refresh the Data Store immediately after its creation.



G	etting Data	Data Type Definition	Hierarchy Definition	Data Restrictions 24	Schedule Data Refresh
Sc	hedule Configu	ration			
25	DAILY	MONTHLY Y	'EARLY		
(	Every 1	day(s)			
(	Every Week Day				
2	Start time 12 •	: 00 👻			
26	Refresh Now				

xxvii) Enable Email Notification by enabling the option.

- xxviii) Provide the Email Address on which you want the notification email to be sent.
- xxix) Click the 'Finish' option.



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

📃 Data Center	Data Store created successfully!						New
Home	Data Store Created Successfully:						
Data Connectors	All • All •						
Data Sets	Search Data Stores				Showir	ng 324 o	ut of 324
😝 Data Stores	API Connector based Data Store	0	C	<	Ð	1	Ē
			C	<	θ		

#### Note:

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



📃 Data Center							New
Home	Data Connector Type Data Connector						
Data Connectors	MySQL   HiringDatatest						
Data Sets	Search Data Stores				Sh	owing 2	out of 2
💩 Data Stores	NitorData	6	C	<	•	/	Î
Data Store Meta Data	testhiring	0	C	<	Ð	/	Î

# 6.3.4. Adding Synonyms to a Datastore

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

Ξ	Data Center					New	
	🔂 Home	Data Connector Type Data Connector					
	Data Connectors	All • All •					
c c	Data Sets	Search Data Stores Sy			Show	ing 3 ou	t of 324
•	📄 Data Stores	ServiceNow_sys_user_group	C	<	Ð	/	Î
4	Store Meta Data	ServiceNow_sys_user	С	<	•	1	Î
	2	test_nip synonyms	С	<	3 🕀	1	Î

- iv) All the Attributes get displayed in a list form.
- v) Select a field.
- vi) Click the 'Add Synonyms' option.

	NLP Synonyms: test_nlp synonyms					
	Search d	Q				
5	Abc Designation	6 Add Values Add Synonyms				
	Abc Gender	Add Values Add Synonyms				
	Ø BillStartDate	Add Synonyms				
	② ExpectedJoinningDate	Add Synonyms				
		Close				

- vii) A new window opens to add synonyms.
- viii) Insert new synonyms in the specified space.
- ix) Click the **'Save**' option.



NLP Synonyms: test_nlp sy	nonyms		;
Search d	7 Q	Synonyms for : Designation	•
ьь Designation	Add Synonyms		
Abc Gender	Add Synonyms		
Ø BillStartDate	Add Synonyms		
② ExpectedJoinningDate	Add Synonyms		
	8	Add new synonym (Type and press Enter) Official title	
		Close 9	ave

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

10	Synonyms dictionary is updated.
	Buta connector

Note: Steps to Add Synonyms for a Dimension Value.

1. Click the 'Add Values' option for a dimension from the displayed list of the data fields.

NLP Synonyms: test_nlp synonyms		×
Search		٩
Abe Comments	Add Values A	dd Synonyms
Abc CurrentStatus	Add Values A	dd Synonyms
Abe Designation	1 Add Values A	dd Synonyms
t 👞 ExperienceCategory	Add Values A	dd Synonyms
Abc Gender	Add Values A	dd Synonyms
Am LoippingStatus	Add Valuee A	dd Synonyme Close



- 2. A new window opens to search values for the selected Dimension (E.g., Designation in the below image).
- 3. Use the search bar to find specific dimensions.
- 4. Select a Value from the displayed choices.
- 5. Click the 'Add Synonyms' option for the selected value.
- 6. The selected Dimension gets added to the right pane of the window.
- 7. Add synonyms by inserting new synonyms in the specific space.
- 8. Click the 'Save' option to save the added synonyms.

	NLP Synonyms: test_nlp synonyms					
2	Search values for : Designation	n <del>(</del>	Synonyms for : QA Manager	←		
	Search for a value *	3 Q	6 QAManager ×			
4	Abc QA Manager	Synonyms				
	Abc QA Lead Add	Synonyms				
	Abc QA Engineer Add	Synonyms				
t	Abc QA Architect Add	Synonyms	Add new synonym (Type and press Enter)			
			Manager, QA Manager			
			Close	Save		

9. A success message appears to assure that the Synonyms dictionary is updated.

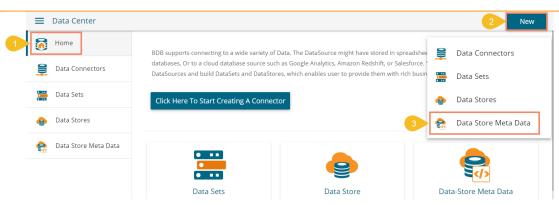
Data Center	9 Synonyms dictionary is updated.						New
Home	Data Connector Type						
Data Connectors	All • All •						
Data Sets	Search Data Stores Sy				Show	ing 3 ou	t of 32
💩 Data Stores	ServiceNow_sys_user_group	6	G	<	¢	/	Î
😪 Data Store Meta Data	ServiceNow_sys_user	0	G	<	Ð	1	Î
	test_nlp synonyms	0	c	<	Ð	1	

#### 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.

1	2	3	4
Meta Store Details	Data Type Definition	Hierarchy Definition	Data Restrictions
Data Store Name *		ES Index Name(Optional)	
Sample Data Store Meta Data	a	salestest	
			7 Cancel Next

- viii) Define the data type (The user needs to insert the fields name manually if the ES index is not chosen. Else, the names of the fields get selected from the chosen ES index).
- ix) Users can interchange the Dimensions, Measures, and Time fields.
- x) Click the '**Next**' option.

Meta Store Details	8 Data	2 Type Definition	3 Hierarchy Definition		<b>d</b> Data Restrictions
Dimensions Name	+	Measure Name	+	Time Name	+
Article_Code	× 123 (19	MRP	X Abc 🕓		
Article_EAN Description_of_Goods	× 123 () × 123 ()	SGST_Rate UOM	× Abc (S)		
Taxable_Value File	× 123 (s)	SGST_Amt Qty	× Abc (S)		
		CGST_Amt	X Abc 🕓		
evious					Cancel N

Note: The user 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.

Meta Sto	<b>O</b> re Details	Data Type Definition	Data Restrictions
Fields		Hierarchy Definition	12 +
Abs	Article_Code	13 Drill Def- 1 Description_of_Goods - Taxable_Value -	
Abe	Article_EAN	Description_of_Goods — Taxable_Value —	×
Abe	Description_of_Goods		
Abs	Taxable_Value		
Abc	File		
Previous			Cancel Nex

- 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 to the data store.
- xviii) Enter a User Property to create a filter parameter based on the user.
- xix) Click the '**Finish**' option.

	$\checkmark$		•
Meta Store Details	Data Type Definition	Hierarchy Definition	16 Data Restrictions
Dimension	18 User Property	+	
Article_Code	▼ country	_	

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



≡	Data Center	Meta Data-Data Store Saved				New
<b>7</b>	Home	Search Data-Store Meta Data		Showin	g 453 ou	ut of 453
	Data Connectors	Sample Data Store Meta Data		0		. 1
	Data Sets	CLV_Yearwise	0	0	-	-
0	Data Stores	CLV_Yearwise	0	Ð	1	
2	Data Store Meta Data	YearwiseCLV	0	•	1	

Option	Name	Task
0	Store Details	Displays the Store information via a pop-up window
Ð	Add Synonyms to Metadata Store	Redirects the user to add synonyms to the selected Metadata store.
1	Edit	Edits the data store metadata fields
Î	Remove	Removes the data store metadata from the list

# 7. Options

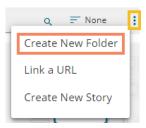
The user can access options like Create New Folder, link a URL or Create New Story on the homepage of the BDB Platform.

The user can access these Options either by clicking the '**Options**' icon or using the right-click on the blank space of the BDB Platform as displayed below.

		1		Search	Create New Folder
-2-	Create New Folder Link a URL	240			Link a URL
28	Create New Story	eseta	a sola	285	Create New Story
no	salesforce	e story created on 14	Copy of Business Story 4.5	Finance Overview	Business Story 4.5

## 7.1. Creating a Folder

i) Select the 'Create New Folder' from the Options context menu.





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

Create New Folder		×
Name * Sample Folder		
Description		11
	Close	Save

- v) A success message appears.
- vi) The newly created folder gets added to the selected document space.

BBB@					Q		Ļ <sup>81</sup>	0	W
My Documents 🗲		Folder has been create	d successfully	Search		۹	≓ Nar	me	:
Shared Documents	Copy of Filter Saver Dash	Folders	Published Dashboards	Sample Folder					

#### • 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 New Folder (Sub-Folder)

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



	Create New Folder
	Link a URL
Sample Folder	Rename Delete
	Сору
	Add to Favorites
	Properties
	Create New Story
	Move to

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

Create New Folder		×
<sub>Name</sub> * Sample Sub-f <mark>o</mark> lder		
Description		/
	Close	Save

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



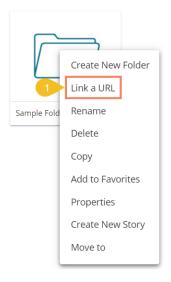
R PRO	
My Documents > Sample Folder >	Folder has been created successfully
Sample Sub-folder	

Note: The user can create multiple folders under a folder.

#### 7.1.2. Linking a URL

The user can connect a URL to the required platform documents.

i) Select the 'Link a URL' option from the context menu that opens by clicking on a folder.



- ii) The Link a URL window opens.
- iii) Enter a name for the URL.
- iv) Provide the URL link that you wish to add in the 'Type URL' field.
- v) Describe the URL (optional).
- vi) Add URL parameters to the linked URL by using the 'Add' option (Optional).
- vii) Click the 'Save' option.

2 Link a URL			×
3 Name * Sample URL 6 URL Parameter Add	4 Type URL* https://bdb.ai/	5 Description BDB Website	Save



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



x) The user can see the linked URL by opening the created sample URL.

	What We Do	Products	Solutions	Data Science	Discover BDB	Connect to BDB	Free Tria
Sports Analytics				*. MC	CIBA		
<ul> <li>Real-time Analytics of a Match</li> <li>Top End Visualization</li> <li>Individual Performance Dashboard</li> <li>Augmented Analytics</li> </ul>	X	1	Ř. 1	Ä	<u>k</u>		1
	6	1					

#### 7.1.2.1. Adding or Removing a URL Parameter:

The user 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**' option, it requires the administrator to select an option from the available system properties drop-down menu. (E.g., in the



below given image, parameter 'Param2' passes the authentication token as system properties to link the URL).

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

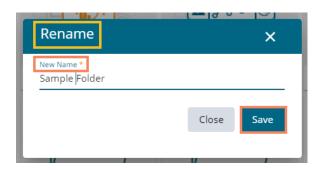
Link a URL						×
<sub>Name</sub> * Sample URL	<sub>Type URL</sub> * https://bdb.a overview	i/produ	ict-	Descrip	otion	11
URL Parameter Add	Select Properties		Enter Name			
Param 1	User Properties	~	city		_	Remove
Parameter Name	Select Properties		Select System Pro	perties		
Param 2	System Properties	•	Token		•	Remove
					Close	Save

Note:

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

#### 7.1.3. Renaming a Folder

- i) Select the 'Rename' option from the Folder context menu.
- ii) The Rename window opens.
- iii) Enter a New Name for the folder.
- iv) Click the **'Save**' option.



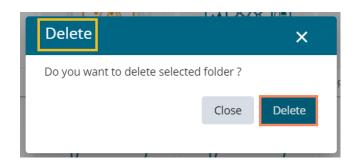
- v) A success message appears.
- vi) The folder gets renamed.

My Documents >		Folder renamed succes	ssfully
			<b>▲</b> &~°®
Shared Documents	Sample Folder	demo	salesforce story created o



### 7.1.4. Deleting a Folder

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



iv) A success message appears to confirm the action.



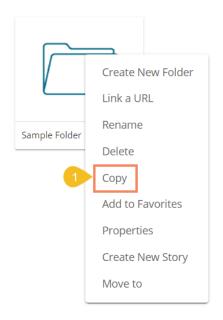
v) The selected folder gets removed from the platform.

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

#### 7.1.5. Copying a Folder

The system user can copy a folder and paste it to a different folder.

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



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



My Docume	nts >
Shared Docume	Create New Folder Link a URL Rename
2	Copy Paste Add to Favorites
Sample Folder 4	Properties Create New Story Move to

#### Or

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



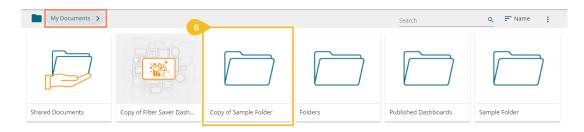
- iii) The 'Paste' window appears.
- iv) The **Name** mentioned in the pop-up window shows prefix '**Copy of-'** before the original name of the folder (E.g., *Sample Folder* gets a new name *Copy of Sample Folder*).
- v) Click the 'Save' option.



vi) The copied folder gets pasted successfully with a different name.



E.g., The following image shows that a folder 'Sample Folder' from 'My Documents' is named Copy of Sample Folder and has been pasted in the same document space.



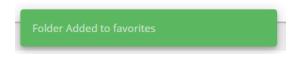
# 7.1.6. Adding/Removing a Folder to/from Favourites

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

i) Select the 'Add to Favorites' option from the Folder context menu.

	Create New Folder Link a URL
Sample Folder	Rename Delete
	Сору
	Add to Favorites Properties
	Create New Story Move to

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



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

Favorites >		
	<b>▲</b> &&	
Copy of Story Document	Story Document 4.3	Sample Folder

iv) Open the 'Favorites' documents space.



- v) Use the right-click on the folder that you wish to remove.
- vi) The 'Remove from Favorites' option.
- vii) Click the 'Remove from Favorites' option.

Favorites >			
	<b></b>	Remove from Favorites	]
Copy of Story Document	Story Document 4.3	Sample Folder	

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

BBB@		
Favorites >		Folder removed from favorites
Copy of Story Document	Story Document 4.3	

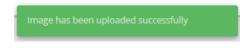
## 7.1.7. Properties

- 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 'Browse' option to update the image.
  - b. Click the 'Save' option to save the update.

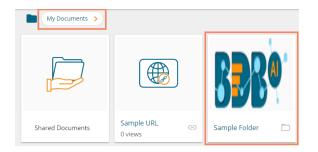
Properties	× •
Sample Folder Properties	
Created by:	pa-di
Туре:	Folder
Version:	4.6.0
Where:	My Documents
Created:	Wed Nov 27 2019 10:52:12 GMT+05:30 (India Standard Time)
Modified:	Wed Nov 27 2019 10:52:12 GMT+05:30 (India Standard Time)
Description:	
Upload Image:	Browse
	Close Save



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



vi) The image gets uploaded.



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

# 7.1.8. Creating a Story

i) Select the 'Create New Story' option from the Folder context menu.

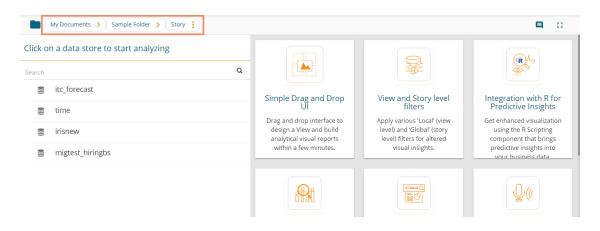


- ii) The 'Create New Story' window opens.
- iii) Enter a title for the story document.
- iv) Describe the story document (optional).
- v) Click the 'Save' option.

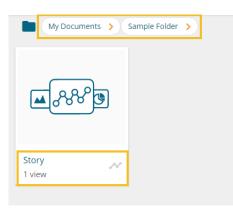
	Create New Story	×	
P	Name * Story		
7	Description	//	
		Close Save	
1			



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

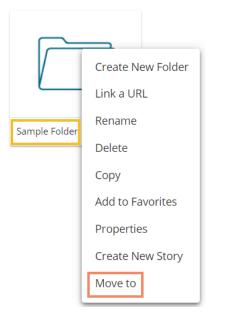


- vii) Navigate to the folder.
- viii) The Story document gets added to the selected folder.



## 7.1.9. Moving a Folder

i) Select the 'Move To' option from the Folder context menu.

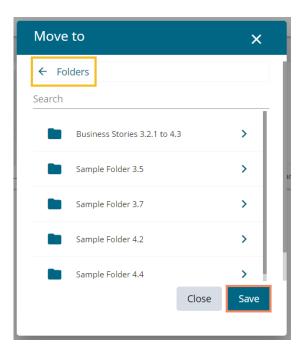




- ii) The 'Move to' window appears displaying the available folders.
- iii) Select a folder.
- iv) Click the '**Move**' > icon.

Move to		×
My Documents		
Search		
Published Dashboards		>
Folders		>
	Close	Save

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

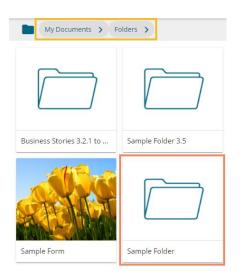


vii) A success message appears.





viii) The folder gets moved to the targeted folder.

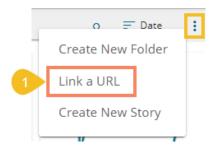


Note: The 'Move To' option is not available to the folders shared as the Public Documents.

#### 7.2. Linking a URL

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

i) Select the 'Link a URL' option from the Options context menu.



- ii) The Link a URL window opens.
- iii) Provide a name for the URL.
- iv) Type the URL link that you wish to add.
- v) Describe the URL (optional).
- vi) Add URL Parameter (Optional).
- vii) Click the 'Save' option.

2 Link a URL		×
3 Name * BDB Overview	4 Type URL * https://www.bdb.ai/produc t-overview //	5 Description
6 URL Parameter Add		Close Zave
		Close

viii) A success message appears.



ix) A document gets added with the linked URL to the selected document space.



x) The linked URL gets displayed by a click on it.

BBø	What We Do	Products	Solutions	Data Science	Discover BDB	Connect to BDB	E Free Tria
<ul> <li>Microservices based Architecture</li> <li>Rest API based Communication</li> <li>Horizontally &amp; Vertically Scalable</li> </ul>	Errich & Prepare Data Data Preparation		Predictive Wor T T T T	a Scientitand	Governed Dash	• Predictive	board

## • Operations Assigned to a URL

# 7.2.1. Modifying a Document (URL information)

- i) Use the right-click on the Link URL for options.
- ii) Select the 'Modify Document' from the URL options context menu.

	Modify Document
	Rename
BDB Overview	Delete
	Сору
	Add to Favorites
	Properties
	Move to

iii) The Modify Linked URL window opens.



- iv) The user can modify the following information (if required).
  - 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.
- v) Click the 'Save' option.

Modify linked UF	RL	×
Name * BDB Overview	Type URL * https://www.bdb.ai/produc Description /	
URL Parameter Add		5
	Clo	

vi) A success message appears to inform that the selected URL has been updated.

My Documents		Link URL has been upda	ated successfully
My bocuments		<b>▲</b> &&@	
Shared Documents	BDB Overview	salesforce story created o	Business Story 4.5

### 7.2.2. Renaming a URL Document

i) Select the 'Rename' option from the URL Options menu.





- ii) The Rename window opens.
- iii) Enter a New Name for the URL document.
- iv) Click the 'Save' option.



- v) A success message appears.
- vi) The linked URL document gets renamed.

My Documents >		Document renamed successfully	
			<b>₩</b> }%%©
Shared Documents 6	Product Overview	salesforce story created o	Business Story 4.5

## 7.2.3. Deleting a URL Document

- i) Select the 'Delete' option from the URL Options context menu.
- ii) A new window appears to confirm the deletion.
- iii) Click the 'Delete' option.

Delete		[] &/	×
Do you want to o	delete sele	cted document	?
		Close	Delete
	_		

iv) The selected URL file gets removed.

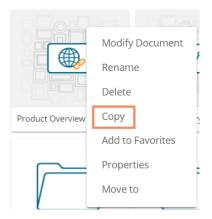
Note: The 'Delete' option is not available for the link URL created or shared as the Public Documents.

#### 7.2.4. Copying a URL Document

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



i) Select the 'Copy' option from the Link URL context menu.



ii) Select a folder and use the right-click.





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

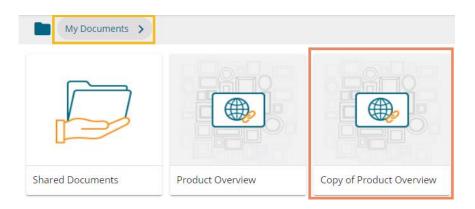
My Documents >
Create New Folder
Link a URL
Paste
Create New Story

- vi) A new window appears.
- vii) 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*).
- viii) Click the 'Save' option.



Paste		×
Name * Copy of Product Overview		
	Close	Save
	/	

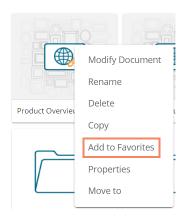
- ix) A success message appears.
- x) The copied link URL gets replicated with a different name.



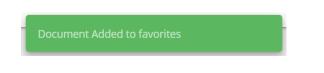
## 7.2.5. Adding/Removing a URL Document to/from Favorites

The user 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 Favorites" appears.



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



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

Favorites >			
<b>▲</b> &&@			
Copy of Story Document	Test Story 4.2.0	Story Document 4.3	Product Overview

- 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.

Favorites >				Search
<b>▲</b> &&	<b>▲</b> &&®®	<b>▲</b> &&		Remove from Favorites
Copy of Story Document	Test Story 4.2.0	Story Document 4.3	Product Overview	

- ix) A success appears stating, "Document removed from Favorites" and the selected document with linked URL gets removed.
- x) The URL file gets removed from the '**Favorites**' section.

Favorites >		Document removed from favorites	
	<b>▲</b> &&@	<b>▲</b> &&	
Copy of Story Document	Test Story 4.2.0	Story Document 4.3	

#### 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 tab of the linked URL document gets displayed.
    - i. Click the '**Browse**' option to upload an image (A success message appears after the image gets uploaded).
    - ii. Click the 'Copy Link' icon to copy the open document link of the Link URL.
    - iii. Click the 'Save' option to save the updates.



Properties			×
Product Overview     Properties     Share	with User Share with	Group Exclude U:	sers
Created by:	pa-dl		
Туре:	Link URL		
Version:	4.6.0		
Where:	My Documents		
Created:	Wed Nov 27 2019 10:53:43 G	MT+05:30 (India Standard	Time)
Modified:	Wed Nov 27 2019 10:53:43 G	MT+05:30 (India Standard	Time)
Description:			
Upload Image:	Browse		
Open document link:	nttps://qa.bdb.ai/home/#/ope	endocument?data=eyJ1c2\	VyljoiMzY3
		I	Close Save

iv. A success message appears.



v. The image gets uploaded.

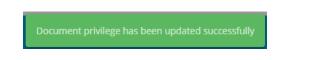
My Documents >		
Shared Documents	Sample Folder 4.6	Product Overview 🕞 1 view

- 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 by using the checkmarks in the given box(es).
  - 3. Click the **'Save'** option.

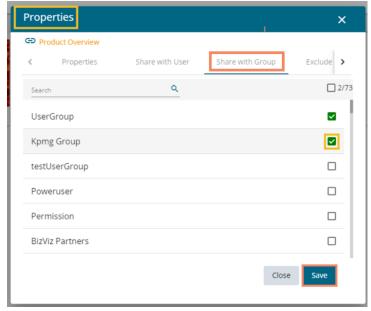


Properties			×
Product Overview			
< Properties	Share with User	Share with Group	>
Search	۹		2/1
killsessionaxh killsession@bdb.ailkt			
migTestUserDestnvao testRestscript@bdb.ailnu			
migTestUserSourcedfs testRestscript@bdb.ailjw			
Chetan chetan.karigar@bdb.ai			
		Close	Save

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



- 5. The document gets shared with the selected user(s).
- c. Share with Group: The linked URL document can be shared with the selected group.
  - 1. Select the 'Share with Group' option from the Properties window.
  - 2. Select one group or all the groups by using the checkmark(s) in the given box(es).
  - 3. Click the 'Save' option.



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

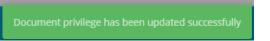
Document privilege has been updated successfully



- 5. The document gets shared with the selected group(s).
- **Note:** If a URL file is shared with the user(s) or group(s) via 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 a user or all the users by using the checkmark(s) in the given box(es).
    - 3. Click the **'Save'** option.

Properties	×
C Product Overview	
✓ perties Share with User Share with	h Group Exclude Users >
Search Q	2/9
vidyaPrdBizvizSpace vidhyashree.bhosale@bdbizviz.com	
Ranjit ranjit.krishnan@bdbizviz.com	
Arun	
Kadandale	
	Close Save

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 the '**Move to**' option from the URL context menu.

	Modify Document	Ì
	Rename	
	Delete	
Product Overview	Сору	v
	Add to Favorites	
	Properties	f
	Move to	ļ

ii) The 'Move to' window appears displaying the available folders.



- iii) Select a folder.
- iv) Click the '**Move**' > icon.

Move to		×
My Documents		
Search		
Published Dashboards		>
Folders		>
Sample Folder		>
	Close	Save

- v) The user gets redirected to the next screen with the selected folder displayed on the top.
- vi) Click the 'Save' option.

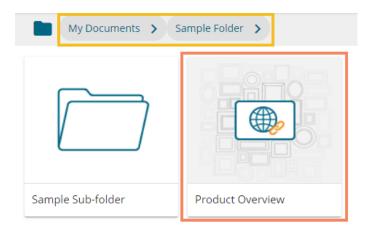
Move to		×
← Sample Folder		
Search		
Sample Sub-folder		>
	Close	Save

vii) A success message appears.



<b>5380</b>				Q
My Documents >		Document moved successfully		Search
Shared Documents	Copy of Filter Saver Dash	Folders	Published Dashboards	Sample Folder

viii) The URL gets moved to the selected space.



# 7.3. Creating a Story

i) Right-click anywhere on the My Documents or Public Documents blank space to get the context menu.

OR

Click the Options icon to open the context menu.

ii) Select the 'Create Story' option from the context menu.

My Documents >				Search	a <i>≡</i> ∎ <mark>1</mark>
Create New Fo Link a URL Create New Sto			BBRO		Create New Folder Link a URL Create New Story
Shared Documents	Folders	Business Story 4.5	Sample Folder 4.5	Published Dashboard 3.8	

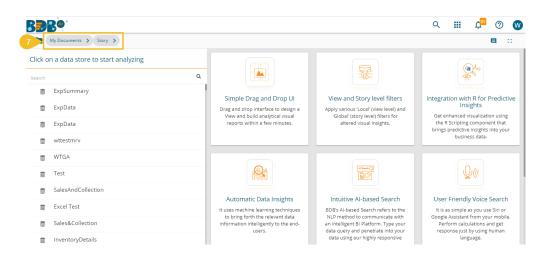
- iii) The 'Create New Story' window opens.
- iv) Enter a title for the story document.
- v) Describe the story document (optional).
- vi) Click the 'Save' option.



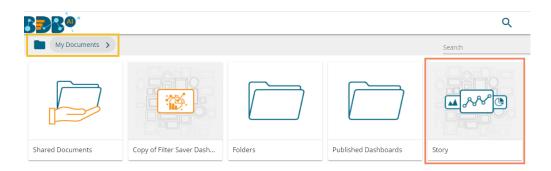
3	Create New Story	×
9	Name * Story	
5	Description	
1		<u> </u>
		Close <b>Save</b>
L		

(

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



- viii) Navigate back to space where the story document creation was intended (i.e., Navigate to 'My **Documents**' space).
- ix) The newly created Story document gets added to space.



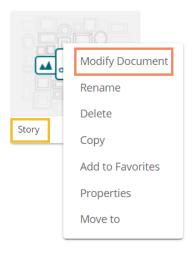
- x) Select an existing story document.
- xi) Use the right-click on it to display the credited operations for a story in a context menu.



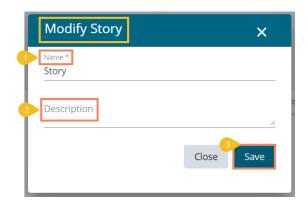
•	Modify Document
Story	Rename
	Delete
	Сору
	Add to Favorites
	Properties
	Move to

# 7.3.1. Modifying a Document

i) Select the 'Modify Document' option from the Story Operations menu.



- ii) The 'Modify Story' window opens.
- 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.

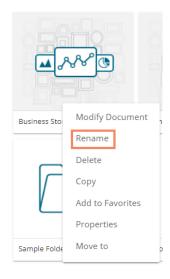


iv) The chosen information for the story gets modified.



### 7.3.2. Renaming a Story Document

i) Select the '**Rename**' option from the Operations menu.



- ii) Configure the following information to rename the story.
  - a. Enter 'New Name' in the story document.
  - b. Click the 'Save' option.

Rename	×
1 New Name * Story Document	
	Close Save

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

My Documents	3	Document renamed su	ıccessfully	<b>Q</b> Search
				<b>س</b> همی و
Shared Documents	Copy of Filter Saver Dash	Folders	Published Dashboards 4	Story Document

# 7.3.3. Deleting a Business Story

- i) Select the 'Delete' option from the Operations menu.
- ii) A new window opens, assuring the deletion.
- iii) Click the 'Delete' option.



Delete	V	×
Do you want to delete sel	ected document	?
	Close	Delete
	close	Delete

iv) A success message appears.



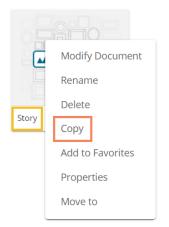
v) The selected story document gets removed.

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

The user can copy a business story document and paste it into the selected place from the BDB Platform.

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



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

$\square$	Create New Folder
Ľ	Link a URL
	Rename
Folders	Delete
	Сору
	Paste
	Add to Favorites
	Properties
	Create New Story
	Move to



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.

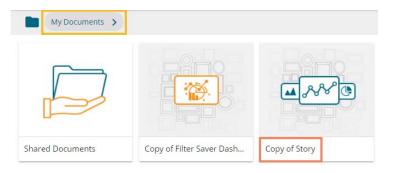
My Documents 🗲		
Create New Folder		
Link a URL		
Paste		
Create New Story		

- v) The '**Paste**' window appears
  - a. The **Name** field displays prefix '**Copy of-**' before the original name of the story document (E.g., Business *Story 4.5 gets* a new name *Copy of Business Story 4.5*).
  - b. Click the 'Save' option.

Past	te		×
Name *	of Story		
		Close 2	Save

vi) The copied story document gets pasted successfully with a different name in the given space.

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



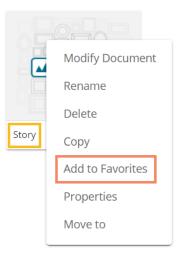
# 7.3.5. Adding/Removing a Story Document to/from Favorites

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

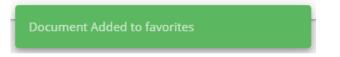
i) Select the 'Add to Favorite' option from the Operations menu.

www.bdb.ai

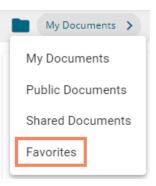




ii) A new message pops-up, "Document added to Favorites."



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



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

Favorites >		
<b>▲</b> ~~~®	<b>▲</b> &**©	
Copy of Story Document	Story Document 4.3	Story

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



Favorites >		
		Remove from Favorites
Copy of Story Document	Story Document 4.3	Story

- vi) A success message appears stating that the document got removed from the Favorites space.
- vii) The selected story document gets removed from 'Favorites.'

BBB®		
Favorites >		Document removed from favorites
<b>₩</b> ,~~~©	<b></b>	
Copy of Story Document	Story Document 4.3	

# 7.3.6. Properties

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

Properties	×
✓ Story	
< Properties	Share with User Share with Group Exclude >
Created by:	pa-dl
Туре:	Business Story
Version:	4.6.0
Where:	My Documents
Created:	Fri Nov 15 2019 18:04:11 GMT+05:30 (India Standard Time)
Modified:	Fri Nov 15 2019 18:04:11 GMT+05:30 (India Standard Time)
Description:	
Upload Image:	Browse
Open document link:	https://qa.bdb.ai/home/#/opendocument?data=eyJ1c2Vy
	Anyone with the link O Can view O Can edit
	Close Save

Note: The users can select via the Properties screen whether the other users to whom the story document has been shared with view-only rights or they can edit the shared copy.

- i) The user can upload an image by using the '**Browse**' option.
- ii) Click the 'Copy link' icon to copy the open document link.
- iii) Select an option out of 'Can view' and 'Can edit' options by using the radio button.



iv) Click the 'Save' option to save the properties settings.

Properties	×
<ul> <li>Story</li> <li>Properties</li> </ul>	Share with User Share with Group Exclude >
Created by:	pa-dl
Туре:	Business Story
Version:	4.6.0
Where:	My Documents
Created:	Fri Nov 15 2019 18:04:11 GMT+05:30 (India Standard Time)
Modified:	Fri Nov 15 2019 18:04:11 GMT+05:30 (India Standard Time)
Description:	
Upload Image:	Browse
Open document link:	https://qa.bdb.ai/home/#/opendocument?data=eyJ1c2Vy
[	Anyone with the link 🔘 Can view 💿 Can edit
	Close Save

- **b.** Share with User: The story document gets shared with the selected user or users.
  - 1. Select the 'Share with User' tab.
  - 2. Search for a specific user(s) using the search bar.
  - 3. Select a user or multiple users by using the tick marks in the given box(es).
  - 4. Click the 'Save' option.
  - 5. A success message appears, "Document privilege has been updated successfully".

Properties 5	Document privilege has t	peen updated successfully		×
Story     Properties	Share with User	Share with Group		<b>&gt;</b>
alluallu.Thomas			3	
anaghakn				
anil.kumar				
anushree.shinde				
ARC_gmail			4 Close	Save

- 6. The story document gets shared with the selected user or users.
- c. Share with Group: The story document gets shared with the selected user group or user groups.
  - 1. Select the 'Share with Group' tab.
  - 2. Search for the specific (user) Group(s) via the Search bar.



- 3. Select a user group or multiple user groups using the tick marks in the given box(es).
- 4. Click the 'Save' option.
- 5. A success message appears, "Document privilege has been updated successfully."

Properties 5	Document privilege has been updated successfully	×
Story     Properties	Share with Use 1 Share with Group	Exclude Users
15 july 2		
AdminPermissionTes	t	3
All Permission Group	Test	
Anuj		
Anuj_gupta		
Archanagrp		
bdb		
		Close Save

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

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

- **d.** Exclude Users: The selected user gets excluded from the privilege to access the story document.
  - 1. Select the 'Exclude Users' tab.
  - 2. Search for the specific user via the Search bar.
  - 3. Select a user or users by using checkmark(s) in the given box.
  - 4. Click the 'Save' option.
  - 5. A success message appears, "Document privilege has been updated successfully."

Properties 5	Document privilege has been updated successfully		×
Story     Share with User     Search	Share with Group 1 Exclude Users	Copy to	>
jubilant		3	
iubilantvr			
Naveen			
Nidhi			
		4 Close	Save



- 6. The selected user or users get excluded from the rights to access the concerned story document.
- e. Copy to: A copy of the story document gets created and shared with the selected users.
  - 1. Select the '**Copy to**' tab.
  - 2. Search the specific user(s) via the Search bar.
  - 3. Select the user(s) by using the tick marks in the given box.
  - 4. Click the 'Save' option.
  - 5. A message appears stating, "Document copying process started. Please check the notification for confirmation."

5 Properties Confirmatio			on for X
Story     Share with User	Share with Group	Exclude Users	1 Copy to >
alluallu.Thomas allu.Thomas@bdb.ai			3
anaghakn anagha.kn@bdb.ai			
anil.kumar anil.kumar@bdbizviz.com			
anushree.shinde anushree.shinde			
ARC_gmail msarchana1017@gmail.co	m		Close Save

6. The user can open the '**Notification**' window to see the updates on the current task of copying the story document. E.g., the following image displays that the Business Story 4.5 document got successfully copied to the selected users.

	# d	
	Last 3 Notifications See All	Dat
ſ	admin Copying Document Document copied with title Business Story 4.5 success	=
le F	admin Copying Document Document copied with title Sample Story successfully!!!	)as
	admin Copying Document Document copied with title Sample Story successfully!!!	

7. 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.

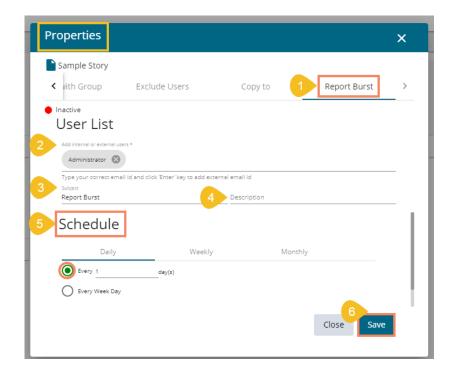
# 7.3.6.1. Report Burst

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) Select a Story document and open the context menu with the available operations.
- iii) Click the '**Properties**' option.

BBB@						<b>III</b> (
Public Documents >					Search	۹ =
		<b>س</b> هبه و				
BDB SAMPLES	BDB SAMPLES	Business Story	con	Public	Sample Public Folder	Sample S Rename
						Copy Add to Favorites Properties

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



xi) A success message appears.

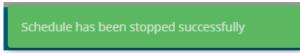


Properties	Updated successfully			×
Sample Story	Exclude Users	Copy to	Report Burst	>
Inactive     User List     Add internal or external user     Administrator     S	5 ÷			_
Subject Report Burst	id and click 'Enter' key to add exter	nal email id Description		-
Schedule Daily	day(s)	Monthly		
Every Week Day			Close Save	

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

Properties				×
Sample Story				
<ul> <li>vith Group</li> </ul>	Exclude Users	Copy to	Report Burst	>
Active				
Type your correct email Subject	id and click 'Enter' key to add ext	ernal email id		
Report Burst		Description		
Schedule <sub>Daily</sub>	Weekly	Monthly		
	Weekly day(s)	Monthly		
Daily		Monthly		
Daily Every 1		Monthly	Close Save	

xiv) A notification message appears to inform the same.

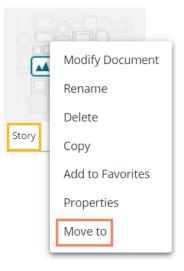




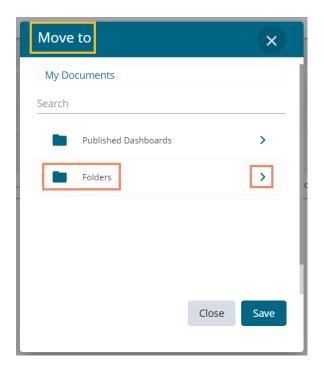
xv) The open doc link of the selected story or dashboard gets shared to the selected user at the scheduled time through the mail.

### 7.3.7. Move to

i) Select the '**Move to**' option from the Story Options menu.

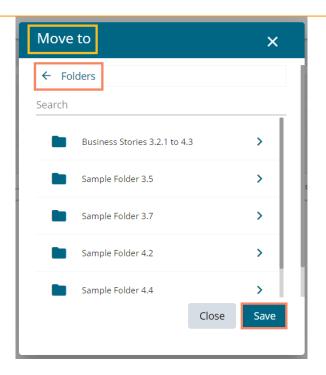


- ii) A new screen opens with the available folder options.
- iii) Select a folder or subfolder.
- iv) Click on the 'Move' > option to open a list of available sub-folders.



- v) A new window opens with the selected Folder mentioned on the top.
- vi) Click the 'Save' option.





vii) A success message appears.

My Documents		Document moved su	iccessfully
Shared Documents	Copy of Filter Saver Dash	Folders	Published Dashboards

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

My Documents > Fo	olders >		
Business Stories 3.2.1 to	Sample Folder 3.5	Sample Folder 3.7	Sample Folder 4.2
			<b>▲~~~</b> ®
Sample Form	Sample Folder	Copy of Sample Folder	Story



#### Note:

a. The documents which are created in the '**Public Documents**' space get the '**Delete**' and '**Move To**' operations, the shared documents in this space do not get these two operations.

Public Documents 🗲					
BDB SAMPLES	BDB SAMPLES		Business Story	Modify Document Rename Delete Copy	
Sample Public Folder	Sample Story	Modify Docume Rename Copy Add to Favorite: Properties		Add to Favorites Properties Move to SF-INV	TR

b. The user can get the '**Story**' option inside the Apps menu as well.





# 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) The user needs to navigate to the dashboard list provided in a workspace.
- ii) Access the '**Publish to Porta**l' option from the list of Dashboards.

BBB O B Des	igner +					
+ New -	Workspaces (3) 🕀 C 🔍	Dashboards (14)				Q
🚊 Manage	All Dashboards			-	-	
🗁 Open 🗸	Finance 🧪 📋	Map chart	(†)	Δ	Î	:
★ Preferences	· · ·	filter_saver	ſſ	٥	Î	÷
H Save as	Workspace1 🧪 🧃	Filter saver	ſſ		Î	:
Help	Campaign Analytics 🧪 🧃	Data Drill	ſ	0	Î	:
🖒 Exit	Trash 🖬	Custom Component	ſ.	0	Î	:
		Drill-Funnel-type	ſŢ.	•		:
		Dimerciniercype	LTJ		-	·
		Hide and Show	ſſ	٥	Î	÷

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

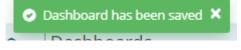
Publish		×
Name Description	Dashboard Published from dashboard designer	
USER LIST	USER GROUPS EXCLUDE USER	<i></i>
Search Nidhi nidhi.joshi@bdb	ai	
deletethisuser jubilantvrr@bab		
testdelete jubilant.vr@babl	o.ai	
	Publish	Cancel

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

My Documents 🗲	
Shared Documents	Dashboard

#### • 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.

	Modify Document	
	Rename	
	Delete	
Filter saver	Сору	
	Add to Favorites	
	Properties	
	Move to	

## 7.4.1. Modifying a Dashboard

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

i) Select the 'Modify Document' option from the Dashboard context menu.



Pr	Modify Document
	Rename
	Delete
ashboard	Сору
Shboard	Add to Favorites
	Properties
	Move to

- ii) The Modify Dashboard window opens.
- iii) Enter the name for the dashboard
- iv) Describe the dashboard (optional)
- v) Upload a dashboard file from the local drive via the '**Choose Files**' option. (The dashboard should be in a BVZ file format)
- vi) Provide Dashboard Parameters.
  - a. Click the 'Add' option to add a new dashboard parameter.
  - b. Click the 'Remove' option to remove the added dashboard parameter.
- vii) Click the 'Save' option.

Modify Dashboard	
Name * Dashboard	Description     Published from dashboard designer
Select Dashboard Choose Files No file chosen	
4 Dashboard Parameter Add	Close Save

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

My Documents		Dashboard has bee	n updated successfully
Shared Documents	Dashboard	Business Story 4.5	Folders



### 7.4.2. Renaming a Dashboard

The Administrator can change the name of an existing dashboard.

- i) Select the '**Rename**' option from the Dashboard Operations menu.
- ii) The Rename window opens.
- iii) Enter a new name for the dashboard.
- iv) Click the 'Save' option.

Rename	1/	×
New Name * Filter Saver Dashboard		
	Close	Save

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

BBR <sup>®®</sup>			
My Documents >		Document renamed su	ccessfully
		ه میک میک	
Shared Documents	Filter Saver Dashboard	Business Story 4.5	Folders

### 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.

Do you want to delete selected document ?	Delete		×
	Do you want to delete selected	document	?
Close Delete		Close	Delete

v) A success message appears.



vi) The selected dashboard gets deleted.



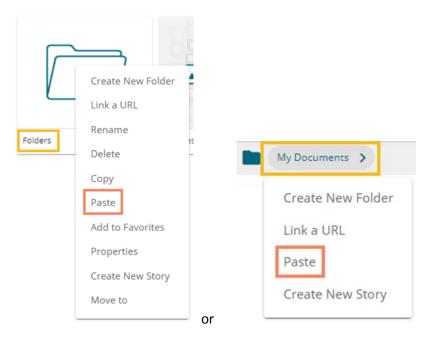
# 7.4.4. Copying and Moving a Dashboard

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.

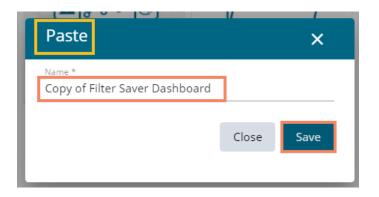
	Modify Document
	Rename
	Delete
	Сору
Filter Saver Dashboard	Add to Favorites
	Properties
	Move to
	Move to

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



- vii) The Paste 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.

My Documents 🗲		
Shared Documents	Filter Saver Dashboard	Copy of Filter Saver Dashboard

# 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 the 'Add to Favorites' operation from the Dashboard context menu.



ii) A pop-up window appears with a message, "Document added to Favorites"



iii) The selected dashboard gets added to the 'Favorites' section.

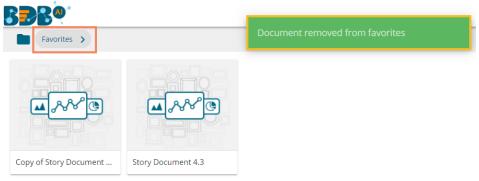


Favorites >		
Copy of Story Document	Story Document 4.3	Filter Saver Dashboard

- iv) Open the 'Favorites' section.
- v) Use right-click on the dashboard to get the remove option.
- vi) Click the 'Remove from Favorite' option.

Favorites >		
<b>▲</b> ~~~@		Remove from Favorites
Copy of Story Document	Story Document 4.3	Filter Saver Dashboard

- vii) A message appears to notify the removal of the dashboard from the Favorites.
- viii) The dashboard gets removed from the Favorites.



# 7.4.6. Properties

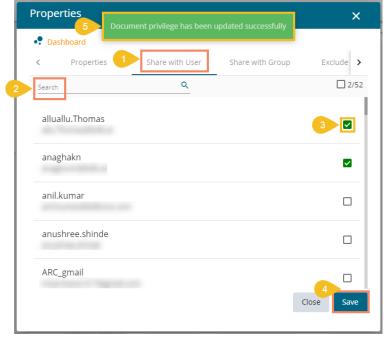
Users can access the properties details of a selected dashboard by using this option.

- 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 'Browse' option to upload an image.
    - 2. Click the '**Copy Link**'  $\Box$  icon to copy the open document link of the published Dashboard.
    - 3. Click the 'Save' option to save the update.



<	Properties	Share with User	Share with Group	Exclude 🔉
	Created by:	Nidhi		
	Туре:	Governed Dashboard		
	Version:	4.6.0		
	Where:	My Documents		
	Created:	Thu Jan 09 2020 12:53	8:19 GMT+05:30 (India Star	idard Time)
	Modified:	Thu Jan 09 2020 13:01	:58 GMT+05:30 (India Star	idard Time)
	Description:	Published from dashb	ooard designer	
	Upload Image:	Browse	1	
Op	oen document link:	https://qa.bdb.ai/hom	= e/#/opendocument?data==	eyj1c2Vy

- **b.** Share with User: The dashboard gets shared with the selected user(s).
  - 1. Select the 'Share with User' option on the Properties window.
  - 2. Search a specific user using the search bar.
  - 3. Select a user or all the users by putting checkmark(s) in the given box(es).
  - 4. Click the 'Save' option.
  - 5. A success message appears stating that the document privilege is updated.



- 6. 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. Search a specific group by using the search bar.



- 3. Select a group or all the groups by putting the checkmark(s) in the given box(es).
- 4. Click the 'Save' option.
- 5. A success message appears stating that the document privilege is updated.

Properties	cument privilege has been upda	ted successfully
• Dashboard		
< Properties	Share with Us	Share with Group Exclude >
Search	٩	2/826
15 july 2		
AdminPermissionTe	st	3 🗹
All Permission Grou	o Test	
Anuj		
Anuj_gupta		
Archanagrp		
bdb		
		Close Save

6. 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 Users: The user gets excluded from the rights to access a dashboard.
  - 1. Select the 'Exclude Users' option on the Properties window.
  - 2. Search a specific user by using the search bar.
  - 3. Select a user or all/multiple the users by putting checkmark(s) in the given box(es).
  - 4. Click the 'Save' option.
  - 5. A success message appears, and the document privilege gets updated to exclude the selected user(s).



Properties	Document privilege has been updated successfully	×
• Dashboard	Document privilege has been updated successionly	
< perties	Share with User Share with Group Exclude Users	>
2 Search	Q [] 1	/4
jubilant	3	]
jubilantvr		
Naveen		
Nidhi	-	
	Close Sav	e

# 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.

	Modify Document			
	Rename			
Dashboard	Delete			
	Сору			
	Add to Favorites			
	Properties			
	Move to			

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



Move to		×
My Documents		
Search		
Published Dashboards		>
Folders		>
	Close	Save

- vi) The user gets redirected to the next screen where the selected folder appears on the top.
- vii) Click the 'Save' option.

Move to X				
← Folders				
Search				
Business Stories 3.2.1 to 4.3	>			
Sample Folder 3.5	>			
Sample Folder 3.7	>			
Sample Folder 4.2	>			
Sample Folder 4.4	>			
Close	Save			

viii) A success message appears.



ix) The dashboard gets moved to the selected space.



My Documents > Folders >				
Business Stories 3.2.1 to	Sample Folder 3.5			
Dashboard	Sample Form			

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.

		2 🔍 🖾
	3	Comments
Year wise Expense & Revenue	Revenue across continents in a decade 6,000 4,000 2,000 0 -2,000 California California California XAXIS Title GDP Ranking (2018) of the top 10 countries	Type a message

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



My Documents > Filter Saver Dashboard >		<b>Q</b> 0
		Comments
Year wise Expense & Revenue	Revenue across continents in a decade 6,000 2,000 California California California California California CALIFORMIA C	me X Just now The dashbard focuses on various visuals focusing on the Expense and Revenue aspects.
USA USA USA USA		Type a message

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 C / 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.

Forms			• Connected
÷	Sample For	rm 🖊	(+1) (2) \$ ●
	Page 1	Save Questions +	^
	Question Select your gender	Select Answer Type Display Name Field Identifier * Checkbox	8:
	option 1 Male option 2 Female	×	
	+ Add option + Add other option with input		
		Save Questions +	

Or

Click the Publish option using the Form Options menu.



Sample Form	:	
	1	Edit
	Î	Delete
	D	Duplicate
	0	Preview
1	٥	Publish
	\$	Settings

- 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.

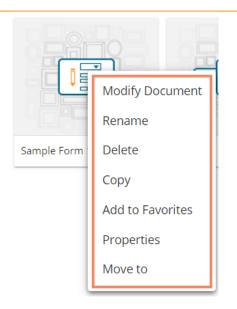


v) The Published form appears under the '**My Documents**' place of the same BDB Platform account.

BBB®®				Q	III 🗘 🖓 💓
My Documents >				Search	Q 📻 Date 🚦
			<b></b>		
Shared Documents	Filter Saver Dashboard	Copy of Filter Saver Dash	Business Story 4.5	Folders 5	Sample Form

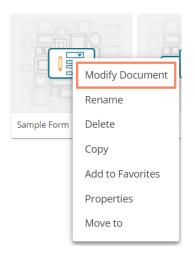
- vi) Each published Form is credited with some operations on the BDB Platform.
- vii) The users can use right-click to access the available Form operations in a context menu.





# 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) A success message appears.





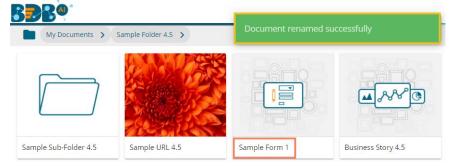
v) The selected information gets modified.

# 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.

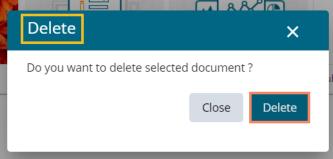
Rename	×
1 New Name * Sample Form 1	
	Close Save

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.

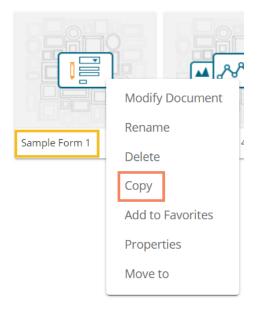


iv) The selected form gets deleted.



# 7.5.4. Copying a Form

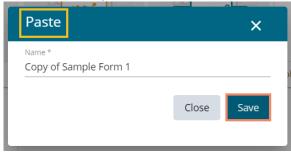
i) Select the '**Copy**' option from the Operations menu.



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

My Documents >			Search	o, 📻 Date 🚦
				Create New Folder Link a URL Rename
Shared Documents	Filter Saver Dashboard	Copy of Filter Saver Dash Business Story 4.5	Folders	Delete Story 4.5
				Сору
		Create New Folder		Paste
		Link a URL		Add to Favorites
		Paste		Properties
				Create New Story
Sample Folder 4.5	Published Dashboard 3.8	Create New Story		Move to

- 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.



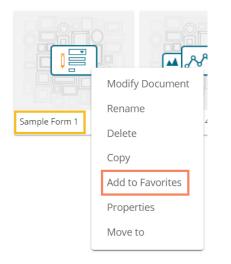
vi) The pasted form gets saved with the new name.



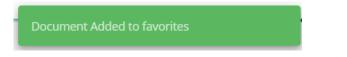


# 7.5.5. Adding a Form to Favorite

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.

Favorites >		
<b>₩</b> ~~~®		
Copy of Story Document	Story Document 4.3	Sample Form 1

- v) Navigate to the Favorite space and use the right-click on the Form.
- vi) The 'Remove from Favorite' option appears.



	Remove from Favorites
Sample Form 1	

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 'Browse' option to upload an image.
    - ii. Click the 'Save' option to save the update.

Properties	×
Sample Form	Share with User Share with Group Exclude >
Created by:	Nidhi
Туре:	Form
Version:	4.6.0
Where:	My Documents
Created:	Thu Jan 09 2020 14:01:36 GMT+05:30 (India Standard Time)
Modified:	Thu Jan 09 2020 14:01:45 GMT+05:30 (India Standard Time)
Description:	
Upload Image:	Browse
	Close Save

iii. A message appears to assure the image update.



iv. The selected image gets updated on the form.

My Documents >	
Business Stories 3.2.1 to	Sample Folder 3.5
Dashboard	Sample Form

- b. Share with User: The Form gets shared with the selected User
  - i. Select the 'Share with User' option using the Properties window.
  - ii. Search a specific user by using the search bar.
  - iii. Select a user or multiple users by putting checkmark(s) in the given box(es)
  - iv. Click the 'Save' option.
  - v. A success message appears stating that the document privilege is updated
  - vi. 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 by putting checkmarks in the given box(es).
  - iii. Click the 'Save' option.

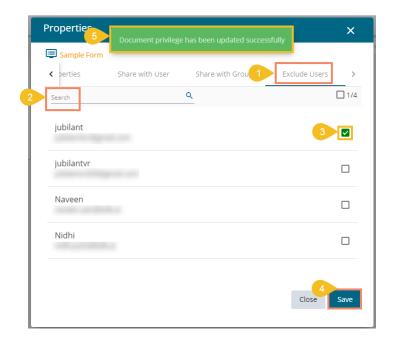


Properties			×
Copy of Sample Form 1	Share with User	Share with Group	Exclude >
Search	٩		2/73
UserGroup			
Kpmg Group			
testUserGroup			
Poweruser			
Permission			
BizViz Partners			
		Close	Save

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 by putting the checkmark(s) in the given box(es).
  - 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.

GTA	Modify Document
atten 1-	Rename
Sample Form	Delete
	Сору
	Add to Favorites
	Properties
	Move to

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

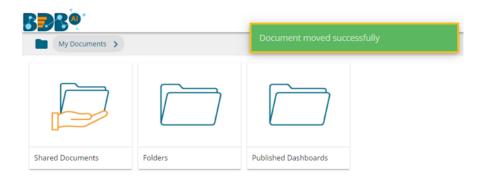
Move to		×
My Documents		
Search		
Published Dashboards		>
Folders		>
	Close	Save

- vi) The user gets redirected to the next screen.
- vii) Click the 'Save' option.

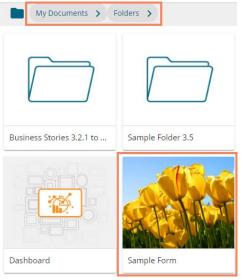


Move to	×
← Folders	
Search	
Business Stories 3.2.1 to 4.3	>
Sample Folder 3.5	>
Sample Folder 3.7	>
Sample Folder 4.2	>
Sample Folder 4.4	>
Close	Save

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.

1 My Documents > Sample Form >		
Page 1	Comments	
Select your Religion.	8	
Mention your religion. * \$ default value @ 13/25		
Submit	4 Type a message	5>

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

	■ 0
	Comments
6	me X Just now Put your comments for the current form here.
	Type a message

Note: Full Screen C / 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) Click the User Profile icon from the Platform homepage.
- ii) Details of the logged-in user display below.



iii)	Click the 'My Account' option.	
	III 🕂 🕐 🔕	
	- A admin admin@bdbizviz.com	
	3 OMy Account	
	i About	
	U Sign Out	

iv) The user gets redirected to the following page:

L Information	Preferences	Change Password		
Inform	ation		ŒEdit	API token access
	Email	admin@bdbizviz.com		Reset
F	Full Name	admin		
Mobile	e Number	MobileNumber		Password Expiry Configuration Password Never Expires O Yes O No
Land Line	e Number	Land Line Number		
	Address	Address		Delist Mobile Device
				You have not register any Mobile device

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.

L Informatio	n * Preferences	Change Password		
			2 CEdit	
	Information			
	Email	admin@bdbizviz.com		
	Full Name	admin		
3	Mobile Number	MobileNumber		
	Land Line Number	Land Line Number		
	Address	Address		
			li li	
			4	Save

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.

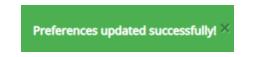
#### Follow the below given steps to change preference settings

- 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.



L Informa	Change Password			
Preferences				
2 Document Settings 3 Select Type	Folder	ODocument	O Shared	
4 Folder	Select Any One			•
				5 Save

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

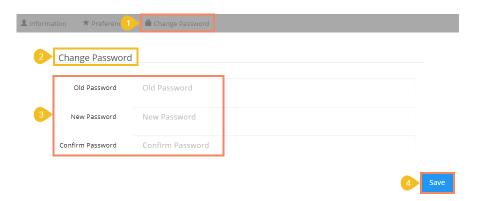


Note: Folders and documents get displayed to the users as per the set preferences by the Administrator.

#### 8.3. Changing Password

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

- i) Click 'Change Password' on the My Account menu row.
- ii) The Change Password window opens.
- iii) Enter the '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

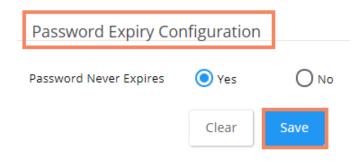
API to	ken access
	n is not availab
Create	

- 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

API token access
Show 64768039628CB22062823C74C0A638051113
Reset

#### b. Password Expiry Configuration

- i. The 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.



iv. A success message appears to confirm the update and the selected configuration gets saved.

Note: By selecting the '**Yes**' option via the password expiry configuration section, the password never expires for the user.

#### 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 'Delist Mobile Device' option helps the user to deregister the registered mobile device.



Delist Mobile Device

You have not register any Mobile device

Note: The user needs 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 Profile' icon on the Platform homepage.
- ii) Click the 'Sign Out' option.

		Ļ <sup>12</sup>	?	
- A admi	n @bdbizv	iz.com		
B My Ace	count			
i About				
U Sign O	ut			

iii) 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.