

User Guide

Business Story 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
Business Story 2.0	February 21 st , 2016	The first release of the document
Business Story 2.1	May 25 th , 2016	Updated document
Business Story 2.5	November 9 th , 2016	Updated document
Business Story 2.5.3	March 16 th , 2017	Updated document
Business Story 3.0	August 31 st , 2017	Updated document
Business Story 3.0	October 26 th , 2017	Modified document
Business Story 3.2	February 2 nd , 2018	Updated document
Business Story 3.5	April 15 ^{th,} 2018	Updated document
Business Story 3.5.1	July 5 th , 2018	Updated document
Business Story 3.6	August 20 th , 2018	Updated document
Business Story 3.7	October 10 th , 2018	Updated document
Business Story 3.8	December 1 st , 2018	Updated document
Business Story 4.0	December 31 st , 2018	Updated document
Business Story 4.2	March 25 th , 2019	Updated document
Business Story 4.3	April 24 th , 2019	Updated document
Business Story 4.4	June 7 th , 2019	Updated document
Business Story 4.5	August 5 th , 2019	Updated document
Business Story 4.6	November 15 th , 2019	Updated document

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

1.2. Overview

This guide covers:

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

1.3. Target Audience

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

2. Introducing BDB Business Story

2.1. Introduction

The Business Story is an advanced data visualization feature of the BDB Platform. It helps users to create rich, interactive data visualization to present complex, related data. The entire process of creating a



business story out of the selected data is easy, quick, and exciting. Users can choose a data source, 'drag and drop' the required values (Dimensions/Measures), and get promptly generated views based on the selected data values. Users can save relevant views on the storyboard to create their personalized business stories.

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)

2.3. Prerequisites

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

3. Getting Started with BDB Business Story

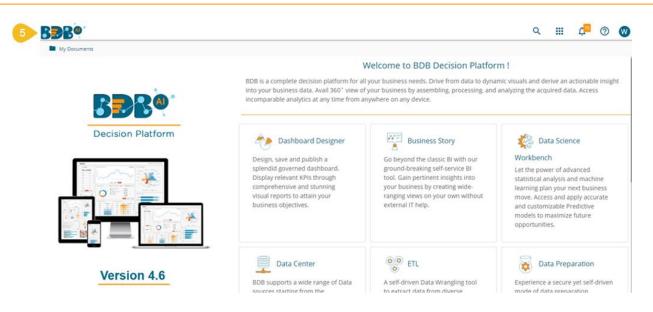
This section covers how to access the Story plugin using the BDB Platform.

- i) Open the BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials to log in to the platform.
- iii) Select an Auth-Type using the drop-down menu ('Enterprise' is the default authentication type).
- 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.

- vi) Click on the 'Apps' menu icon.
- vii) Select the 'Story' plugin from the Apps menu.



Note: The number of plugins displayed in the Apps menu is reliant on the user permissions.

OR

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.



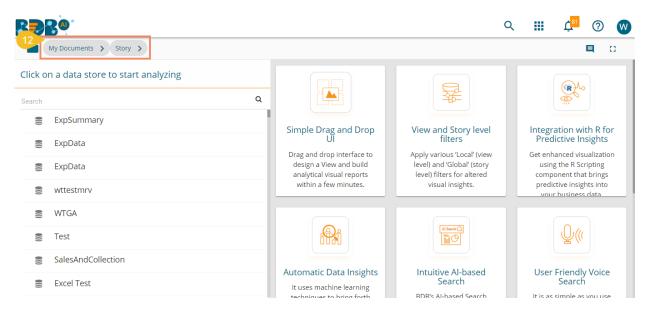
Select the 'Create Story' option from the context menu.

My Documents >				Search	a ≓ (6) []
Create New Fo Link a URL 7 Create New St			BR		Create New Folder Link a URL Create New Story
Shared Documents	Folders	Business Story 4.5	Sam <mark>p</mark> le Folder 4.5	Published Dashboard 3.8	

- viii) The 'Create New Story' window opens.
- ix) Enter a title for the story document.
- x) Describe the story document (optional).
- xi) Click the 'Save' option.

8	Create New Story	×
9	Name * Story	
10	Description	ĥ
L		Close Save

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



- xiii) Navigate back to space where the story document creation was intended (i.e., Navigate to '**My Documents**' space).
- xiv) The newly created Story document gets added to space.



BBB®			
13 My Documents	>		
Shared Documents	Folders	Published Dashboards	Story

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

My Documents > Story >									
Click on a data store to start analyzing									
sample	Q								
Sample Data Store Dhruv Narang Nov 14, 2019	R Q @								
sampleBS									

1. View Design: It redirects the user to the Designing Workspace where through drag and drop of the required dimensions and measures, a new view gets created for the newly-created story.

My Documents	> Story >								0
Sample Data Stor	e Unt	titled	1	Dimensions / Measures	Slicer	Chart	Properties		F
			1	[Drag and Drop Dimension or Measure Here]	[Drag and Drop Dimension Here 1				
earch Dimensions / Measu	res Q Sun	nmary	\$		Hidden		~	_	Ľ
Abc Name	i				[Drag and Drop Dimension Here 1			-	0
Abc Gender	i							\sim	
ube Source	i			Welcome Will!				~	15
.bc ReferralOf	i			The tour of the Designing Workspace guides you through all the steps in creating			<i>3</i> 33		
be Designation	i			a new view.					
bc Team	i			« Prev Next » End tour			0000		
bc PreviousOrganisation	i								
ube Skills	-					=%		_\‰	
								-	
ube Month	1	[Se	elect Dime	nsion or Measure to Visualize D	ata]			Σ	
ALL DATA STORE	f_x		[Change d	hart from right hand side panel:]			2	

Please refer to the '**Designing a New View**' section of this document for a detailed understanding of the View Design option.

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

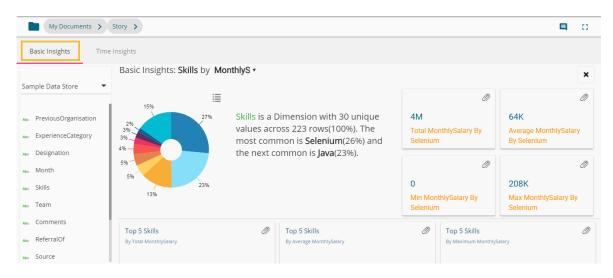


My Documents > Story >			E 0
			•
Data Search		Sample Dat	a Store 🛢 i 💡 🗙
	Welcome, Will!		
Search suggestions	The guided tour of Data Search page points out the key options provided for the conversational analytics.	ata store information	Search Dimensions / Mea 9
Q mean of the Monthlysalary		Abc Name	123 PreviousCTC
Q Mean of Monthlysalary by Team where skill is Seleniu Qaarchitect	« Prev Next » End tour		123 OfferedCTC
Q Mean Of The Monthlysalary		Abo Source	123 ExperiencePerCTC
Q mean of monthlysalary		Abc ReferralOf	123 MonthlySalary
Q sum Offeredctc		Abc Designation	123 UsdBilling
• Mean of Monthlysalary by Team where skill is Seleniu	m	Abo Team	123

Please refer to the '**BDB Search**' section of this document to get the detailed information of the BDB Search.

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

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



Please refer to the '**Data Insights**' section of this document to get detailed information on the data insights functionality.

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

3.1. Guided Tour

This functionality helps new users to understand the Business Story plugin and workflow.

- 1. The users need to click the '**Start Tour**' 💟 icon to begin the guided tour for an existing Business Story. (The Guided tour window opens by default for a newly created Business Story.)
- 2. The user gets a dialog window prompting to lead them through all the significant functionality provided on the page.
- 3. Click the '**Next**' option to proceed in the Guided Tour.

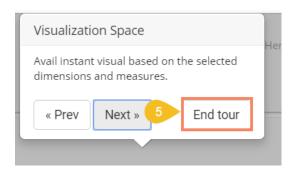


My Documents 👂 S	tory >					I	
Sample Data Store	Untitled 	1	Dimensions / Measures [Drag and Drop Dimension or Measure Here		Chart	Properties	H
Search Dimensions / Measures C	Summary	\$		Dimension Here 1 Hidden [Drag and Drop Dimension Here 1			-
Abc Gender i			Welcome Will!				2
Abc ReferralOf			The tour of the Designing Workspace guides you through all the steps in creating a new view.			<u>*</u>	
Abo Team i			« Prev Next » End tour		×		
Abc PreviousOrganisation 1					-		%

4. Click the '**Prev**' option to go back to the guided tour.

Sample Data Store	Untitled	 Dimensions
	- /	 [Drag and D
Search Dimensions / Measures $ {f Q} $	Summary	• 1
Abc Name	l	
Abc Gender i		
Abc Source i		
Abc ReferralOf i	Dimensions/Measures Lis	st
Abc Designation	Displays all the available dime measures from the datastore	
Abo Team i	« Prev Next »	End tour
Abc PreviousOrganisation i	« Plev Next »	
Abc Skills i		
Abc Month	[Select Dir	nension or N
All data store $f_{\!X}$	[Chang	e chart from

5. Click the 'End Tour' option to end the guided tour.



Note:

- a. The users can end the tour at any given point by clicking the '**End tour**' option from the guided tour window.
- b. The Guided Tour option is provided on the Design, BDB Search, Analyse View, and Storyboard pages to assist the users.



4. Data Insights

The Data Insights option instantly generates the dimension based basic data insights for the selected data store.

- i) Select a Data Store from the story landing page.
- ii) Search and select a Data Store from the available choices.
- iii) Click the 'Data Insights' icon provided next to the selected data store.

My Documents > Story >					
Click on a data store to start analyzing					
sample [Da	Q			
()))	Sample Data Store Dhruv Narang Nov 14, 2019	∠ Q (④)			
0)))	Sample Data Store M	leta Data			
	Sample Data-Store N	letadata			

iv) A new page opens, displaying basic data insights based on the default selection of dimension and measure.
 E.g., Charting components in the following image presents data for a combination of 'Previousorganization' and 'MonthlySalary' respectively selected as dimension and measure.

My Documents > Story				Q 0
Basic Insights Time Insights				
	Basic Insights: Previousorganisation by Mont	hlySala 🔻		×
Sample Data Store 💌	15%		Ø	Ø
Abc PreviousOrganisation Abc ExperienceCategory	Previousorganis values across 22	ation is a Dimension with 97 unique 23 rows(100%). The most common is he next common is Fresher (8%).	2M Total MonthlySalary By BDB	72K Average MonthlySalary By BDB
Ann Designation Ann Month Ann Skillis	57%-5% -2% -2% -2%		Ø 25K Min MonthlySalary By BDB	Image: 160K Max MonthlySalary By BDB
Abs Team				Max Monunysalary by bbb
Abs Comments	Top 5 PreviousOrganisation By Total MonthlySalary	Top 5 PreviousOrganisation By Average MonthlySalary	Top 5 PreviousOrganisa By Maximum MonthlySalary	ation Ø
Alle Source Alle JoinningStatus	3M 2M 2M	300K 233K 200K 201K 181K	400K 321K 300K 250V	к 233К 233К 208К
Abe CurrentStatus Abe Year	1M 004K 571K 502K 475K	100K	200K	

v) The user can alter the displayed data insights by changing the selected dimension or measure.

a. Changing Dimension Selection

- i. Select another dimension by clicking on a dimension value from the displayed list.
- ii. The charts displaying the fundamental data insights get changed instantly.

E.g., The following image displays a change in the data insights based on the selection of a new dimension. The image shows data from various perspectives based on a combination of 'Designation' and

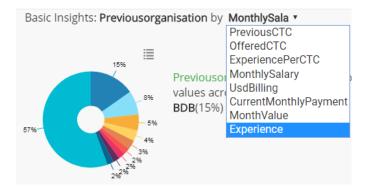


'MonthlySalary'.

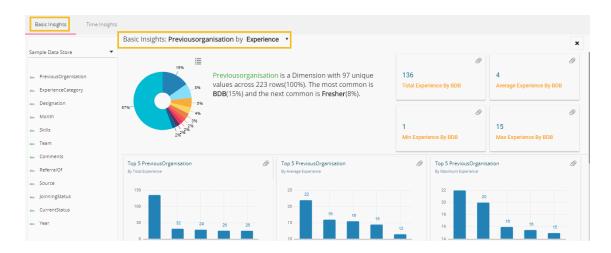
	Basic Insights: Designation	by MonthlySala •				
PreviousCrganisation PreviousCrganisation ExperienceCategory Lead Softwi Month Swills Team	are Engineer titlon) 7 3.14%	across 223 rows(100	ension with 35 unique values %). The most common is Senior 4%) and the next common is 3%).	Software E	lySalary By Senior	208K Max MonthlySalary By Senic Software Engineer
Comments ReferralOf	Top 5 Designation By Total MonthlySalary	Ø	Top 5 Designation By Average MonthlySalary	Ø	Top 5 Designation By Maximum MonthlySalary	
Source	6M		400K 321K		400K	

b. Changing Measure Selection

- i. A drop-down menu on the top displays the available list of measures.
- ii. The user can select another measure.

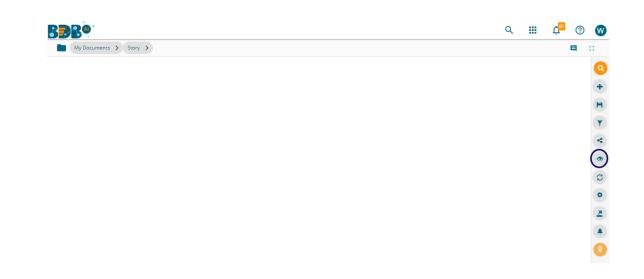


iii. The data insights reflect changes based on the selected measure.



Note: The user can access the Data Insights icon from the vertical panel provided on the Storyboard page.

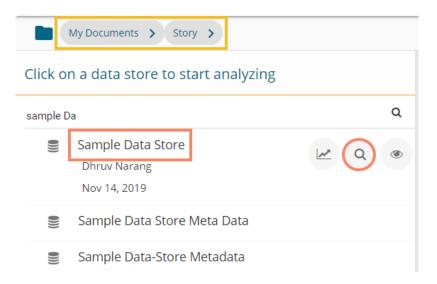




5. Data Search

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

- i) Navigate to the story landing page.
- ii) Search and select a Data Store from the available list.
- iii) Click the 'BDB Search' icon provided next to the selected data store.



- iv) The Data Search page opens (with the Guided Tour dialog window).
- v) The users can take a tour by using the '**Next**' option or close the tour by clicking on the '**End tour**' option.



My Documents > Story >			旦 0
			•
Data Search		Sample Dat	a Store 🛢 i 💡 🗙
	Welcome, Will!		
Search suggestions	The guided tour of Data Search page points out the key options provided for the	ata store information	Search Dimensions / Mea
${f Q}$ mean of the Monthlysalary	conversational analytics.		
Q Mean of Monthlysalary by Team where skill is Seleniu	« Prev Next » End tour	Abo Name	123 PreviousCTC
Qaarchitect		Abe Gender	123 OfferedCTC
Q Mean Of The Monthlysalary		Abe Source	123 ExperiencePerCTC
Q mean of monthlysalary		Abo ReferralOf	123 MonthlySalary
Q sum Offeredctc		Abe Designation	123 UsdBilling
Ο Mean of Monthlysalary by Team where skill is Selenii	im	Abo Team	123

vi) The user gets autosuggestions while typing a query in the Data Search bar.

BBB@		Q		<mark>с</mark> 81	?	W
My Documents > Story >						0
						Q +
me	×	Sample Data Sto	re 🔮	i	8	×
Search suggestions	Data store in	formation	Searc	h Dimens	ions / N	Mea Q
Q mean of the Monthlysalary						. I.
Q Mean of Monthlysalary by Team where skill is Selenium and designation is Lead Qaarchitect	Abc Name		23 Previou23 Offered			511
Q Mean Of The Monthlysalary	Abc Source	1	23 Experie	ncePerCl	ГC	
${f Q}$ mean of monthlysalary	Abo ReferralOf	f I	²³ Monthl	ySalary		
Q sum Offeredctc	Abc Designation	on t	23 UsdBilli	ng		
• Mean of Monthlysalary by Team where skill is Selenium	Abo Team	1	23			

- vii) After typing a specific query, click the '**Search**' \bigcirc icon. viii) The search result instantly reflects beneath the search bar.
- ix) Click the 'Add to story' 🖉 icon.

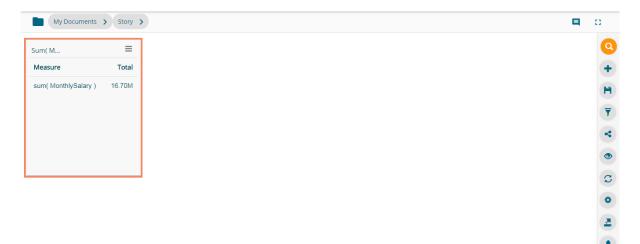
My Documents > Story >							0
							Q +
mean of the Monthlysalary	×	Samı	ole Data Stor	e 🔮	i	8	×
sum of MonthlySalary	் 🧭		0			Ø	
Measure	Total	0 min of MonthlySalary	32 ma:		nthlySala	ary	
sum(MonthlySalary)	16.70M						
			N			Ø	
		17M	75	к			
		sum of MonthlySalar	/ mea	an of Mo	onthlySa	lary	
		Omitted keywords:					



x) A notification message appears.

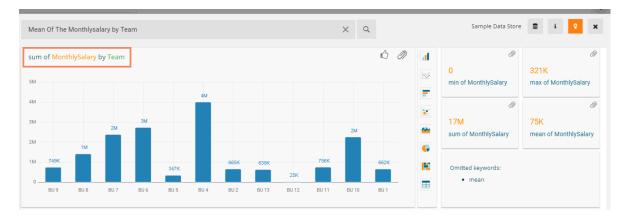
My Documents > Story >				
Sum(M 🗮				Q +
mean of the Monthlysalary	×	Sample [Data Store 🛢 i	v ×
sum of MonthlySalary	1	0		Ø
Measure	Total	0 min of MonthlySalary	321K max of MonthlySalary	,
sum(MonthlySalary)	16.70M	77M sum of MonthlySalary	75K mean of MonthlySala	<i>I</i> IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
		Omitted keywc	added to story	

xi) The selected view gets added to the storyboard.



xii) The user can drill deeper into the selected Data Store by using the BDB Search bar with proper data queries. Refer to the following images to see how instantly the searched data gets displayed with more profound queries:

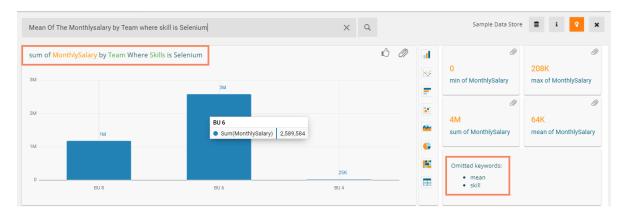
Query 1: 'Mean of Monthly Salary by Team'- Displays team-wise monthly salary



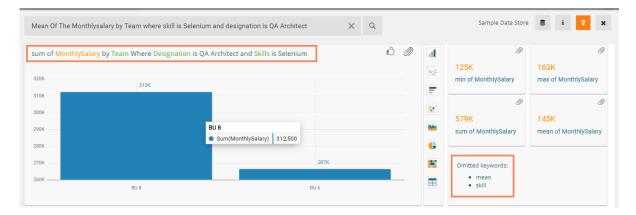
Query 2: 'Mean of Monthly Salary by Team where Skill is Selenium' - Displays team-wise monthly



salary for those employees having Selenium skills



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



Note:

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

Mean Of The Monthlysalary by Team where skill is	Selenium and designation is QA Architect	XQ			Sample Data Store	🛢 i የ 🛪
sum of MonthlySalary by Team Where Designation	on is QA Architect and Skills is Selenium		6		I 25K min of MonthlySalary Ø 579K sum of MonthlySalary	163K max of MonthlySalary 145K mean of MonthlySalary
280K 270K 260K BU 8	Sum(MonthlySalary) 312,500	267K U 6		G K	Omitted keywords: • mean • skill	

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



Mean Of The Monthlysalary by Team where skill is Selenium and designation is QA Architect X Q		Sample Data Store 🛢 🚺 🕈 🗙
Search suggestions	Data store information	Search Dimensions / Measure
Q mean of the Monthlysalary	Alle Name	123 PreviousCTC
 Q Mean of Monthlysalary by Team where skill is Selenium and designation is Lead Qaarchitect Q Mean Of The Monthlysalary 	Ame Gender Ame Source	123 OfferedCTC 123 ExperiencePerCTC
Q mean of monthlysalary Q sum Offeredctc	An ReferralOf An Designation	123 MonthlySalary 123 UsdBilling
 Q. Mean of Monthlysalary by Team where skill is Selenium Q. Mean of Monthlysalary by Team where skill is Selenium,management 	Alle Team	123 CurrentMonthlyPayment123 MonthValue
	Anc Skills Anc Month Anc JoinningStatus	123 Experience

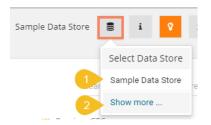
d. Other views close to the searched query also get displayed (on the right). The user can add any of the suggested Views to the current storyboard by using the 'Add to Story' icon provided for the view.

Mean Of Monthlysalary	Ø	Ø	Ø
Measure	Total	0	321K
mean(MonthlySalary)	74.70K	min of MonthlySalary	max of MonthlySalary
		Ø	Ø
		17M	75K
		sum of MonthlySalary	mean of MonthlySalary
	L		

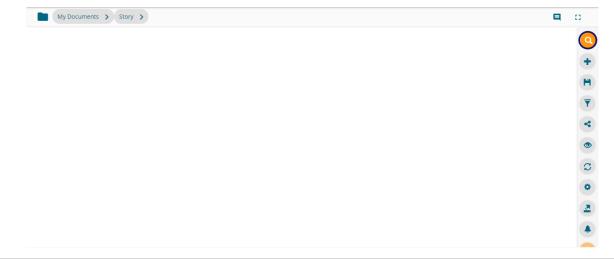
e. Users can alter the data store by using the Data Store 🛢 icon provided on the Data Search page. The users get two choices to choose from:

1) Displays the selected Data Store- to continue with the selected Data Store (in the given case, it is 'Sample Data Store')

2) Show more- to select another Data Store from the list of available Data Stores.



f. BDB Search icon is accessible from the vertical panel provided on the Storyboard page.





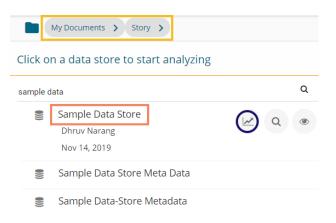
- g. BDB Search supports search terms like 'yesterday,' 'the day before yesterday,' and 'two days ago.'
- h. Measure filter values with k/M/lakh/million unit for the "=is/is equal to" and "is between" operations are supported as search terms.

Icons	Name	Function
Q	Search	Searches the inserted query from the selected Data Store
•)))	Select Data Store	Prompts users to select Sample Data Store or choose from the list of Data Stores
i	Search Suggestions	Displays all the saved search suggestions
8	Start BDB Search Tour	Begins the Guided Tour for the BDB Search page
×	Close NLP Dialog	Closes the Data Search window

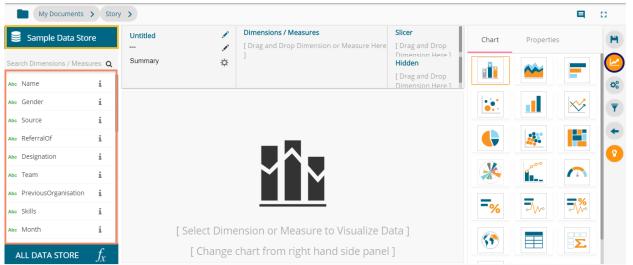
6. Designing a New View

This section explains the steps to create a new view using the drag-drop interface provided on the Design page.

i) Select the 'View Design' icon after selecting a data store.



- ii) The user gets redirected to the **Design** workspace to design a new view.
 - i. The name of the selected Data Store appears on the left side of the screen.
 - ii. A list of available Dimensions and Measures in the selected Data Store get listed below the Data Store name.





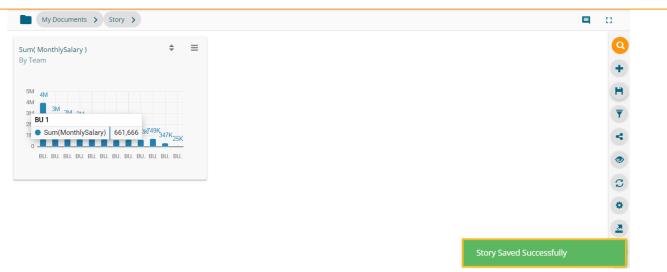
- iii) Drag and drop the required dimensions/measures from the data store (As displayed in the below image).
- iv) A View (graphical view) based on the selected dimensions/measures instantly appears on the canvas (The Mixed chart type gets selected by default).
 - My Documents > Story > 0 Dimensions / Measures Slicer Sum(MonthlySalary) 블 Sample Data Store H Chart Properties [Drag and Drop By Team Team 🚦 🗙 Search Dimensions / Measures Q Summarv ☆ 123 Sum(MonthlySal... 🚦 🗙 Hidden ~ [Drag and Drop o°, Abc CandidateId i • i Abc Year 5M \sim i Abc ExpectedIoinningDa... 4M 4M i Abc BillStartDate 310 123 PreviousCTC X Ĭ... 123 OfferedCTC 2M 123 ExperiencePerCT **%** 1M 749K 638K 665K 662K 23 MonthlySalary 347K 25K 123 UsdBilling ٢? BU 4 BU 6 BU 7 BU 10 BU 8 BU 11 BU 13 BU 2 BU 1 BU 9 BU 5 BU 12 \blacksquare ALL DATA STORE f_x
- v) Click the 'Save' 💾 icon.

- vi) A new view gets created successfully.
- vii) The newly created view gets saved on the Storyboard.
- viii) The users need to click the 'Save' 💾 option from the Storyboard.

My Documents > Story >	E.	0
Sum(MonthlySalary) 🗧 🗮		
By Team		
5M 4M		(
3М 2М 2М		
2M 1M 756K638k665k662k749K347K25K		
BU.		
	View Created Successfully	

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



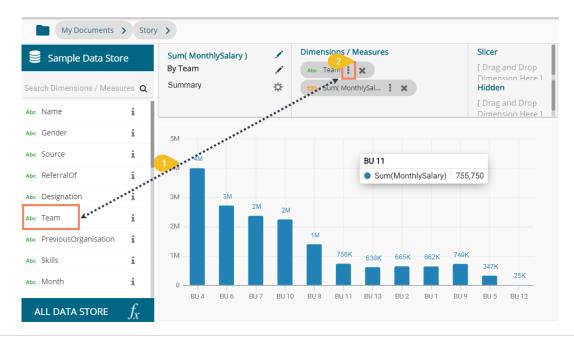


Note:

- a. The user can change a Data Store by using the 'All DATA STORE' option provided on the Design page.
- b. If users move to Storyboard without saving the newly designed view, a pop-up window appears to confirm whether the changes for the View need to be saved to the story or not. Click '**YES**' using the message window to save the view changes.



- c. The user can change the Display name of the selected Dimension by clicking on the Category Properties icon.
 - i) Select and drag a dimension to the specified space on the Design Workspace.
 - ii) Click the '**Category Properties**' icon provided for the dragged Dimension.



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- iii) The Category Properties window opens.
- iv) Change the Display name.
- v) Select the '**APPLY**' option.

3	Category Pr	operties: Team 🛛 🗙	
4	Display Name	Teams	_
	2		
		CANCEL 5 APPLY	3
			_

6.1. Dimension Profiling

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

i) Select the '**Relation'** i icon from the list of displayed Dimensions on the '**Design'** page.

	Sample Data Stor	e
Sear	ch Dimensions / Measu	ires Q
Abc	Name	i
Abc	Gender	i
Abc	Source	i
Abc	ReferralOf	i
Abc	Designation	i
Abc	Team	i
Abc	PreviousOrganisation	i
Abc	Skills	i
Abc	Month	i
A	LL DATA STORE	f_x

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



Data Profile	× n
Count(Designation) By Designation	
	MOVE TO DESIGN

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

Sample Data Sto	re	Count(Designation) By Designation	1	Dimensions /		_	Hidden [Drag and Drop	Chart	Properties	
rch Dimensions / Meas	ures Q	Summary	¢	123 Count(De	signati	i ×	Dimension Here]		~	
Name	i									
Gender	i	Senior Software Engineer Software Engineer Senior OA Engineer		24	- 29		- 75			\sim
Source	i	OA Endinéer Associate Software Endineer Associate OA Endineer Lead Software Endineer	- 7	10 ¹² 19		Software Engineer				
ReferralOf	i	Sr Software Developpe OA Architect Sr OA Engineer Development Manager Sr Big Data Developer	34			Count(Designa	tion) 29		4	
Designation	i	Project Manager Sr Bl Developer AWS Consultant	3							
Team	i	Big Data Developer Business Analyst Data Architect RevOps Engineer								
PreviousOrganisation	i	Lead BI Developer Lead UA Engineer Operation Analyst								
Skills	i	OA Manager REP Analys: Senior Architect Senior Development Manager Senior OA Manager						-%	~///~	-₩
Month	i	Softwarè Developer Solution Specialist Technical Architect IOS Developer								

- v) The user can apply the various modification options to the view from the Design page (E.g., The below given image displays the modified view after applying a view filter and applying them in the ascending order).
- vi) Click the 'Save' 💾 option from the Design Workspace.

My Documents	> Story	(>									0
😂 Sample Data Stor	re	Count(Designation) By Designation	1		nation : ×			and Drop	Chart P	roperties	P
Search Dimensions / Measu	ures Q	Summary	⇔	123 Coun	t(Designati	×	Dimens	ion Here]	General Settings		
Abc Name	i								Style:		- 0°
Abc Gender	i	Senior QA Manager							Base Type: Order:	- 10111	
Abc Source	i	Project Manager	2						Order: Order By:	count(Designa '	-
Abc ReferralOf	i	QA Architect	-						Limit:	0	+
Abc Designation	i		QA	Architect					Exclude Global Filter:		0
Abc Team	i	Sr QA Engineer	12	Count(Design	nation) 4				Show Data Label:		
Abc PreviousOrganisation	i	Associate QA Engineer			10				Enable BaseZero: Show Legend:		
Abc Skills	i	QA Engineer					19		View Filter		-
Abc Month	i	Senior QA Engineer						24	Filter:	None	-
ALL DATA STORE	f_x	0		5	10	15	20	25	Category Axis Title:		



vii) The selected view gets saved to the Storyboard; a success message appears to convey the same.

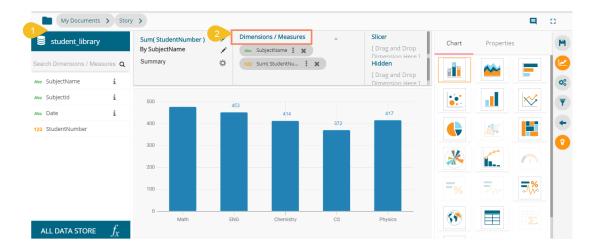
				م 🛄 🗘	?	V
My Documents > Story	>			E	I	0
Count(Designation)		¢	≡			9
By Designation						e
Senior QA Mana. 🔋 1 Project Manager 🛑 2						F
QA Architect 4 Sr QA Engineer 4						5
Associate QA En. 10 QA Engineer Senior QA Engine.	19					
0 10	20	30				•
						2
						*
						3

Note: Click the 'Save' 🛄 option provided on the Storyboard to save the recent updates in the story.

6.2. Data Store Merge at View Level

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

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

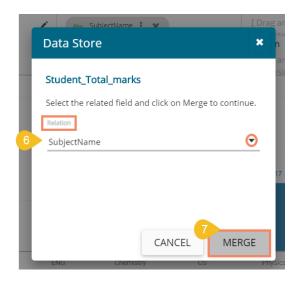


- iii) Click the 'ALL DATA STORE' option.
- iv) Search for a Data Store using the search bar.
- v) Click the '**Merge**' \mathcal{V} icon for the selected Data Store.



		By SubjectName	Abc SubjectName : ¥		[Drag
Search Dimensions / Me	easures Q	Summary	Data Store		×
Abc SubjectName	i		stu		
Abc SubjectId	i	500			
Abc Date	i	400	student_library	~	r
123 StudentNumber		400	Student_Total_marks	~	¥
		300	Student_Total_marks	~ (Y
		200	student_library	~	ų
		100	CustumerOrderdetails	~	ų
		0	student_library_copy	~	r
	ſ	Math	ENG Chemistry	CS	Phy
ALL DATA STORE	Jx				

- vi) The user gets redirected to select a related field from the drop-down menu.
- vii) Click on the '**MERGE**' option.



viii) A success message appears to confirm the merge of the selected Data Stores.



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



- 6		
1	student_library	
Se	Student_Total_m	Q
Abc	SubjectName	i
Abc	SubjectId	i
Abc	Date	i
123	StudentNumber	

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

My Documents > Story	>			
Student_Total_marks	Sum(StudentNumber) By SubjectName	Dimensions /		Slicer [Drag and Drop
Search Dimensions / Measures $ {f Q} $	Summary	Abc SubjectN	udentNu 😧 🗙	Dimension Here 1 Hidden
Abc SubjectName 1		123 Sum(Ma	irks) i 🗙	[Drag and Drop Dimension Here 1
Abo Studentid	500			
Abo Subjectid	414		417	421
123 Marks	Che	emistry		
		· · · · · ·	414 490	
	200			
	100			
	0			
All data store $f_{\!X}$	(Chemistry	P	hysics

- xi) The user can add multiple Data Stores by using the same set of steps.
- xii) Drag the required measures to add the corresponding fields in the view.
- xiii) Click the '**Save**' icon.

student_library_copy	P. C. Li		SubjectName 🚦 🗙		Slicer [Drag and Drop	Chart	Properties	13
Search Dimensions / Measures C	By SubjectName Summary	123 Ф 123	Count(SubjectId) 🕻 🗙		Dimension Here 1 Hidden		**	
Abo SubjectName i	12	123	Sum(StudentNu 🚦 🗙		[Drag and Drop Dimension Here 1			
Abo Subjectid	500					:::		\sim
Abc Date 1	400			421				
123 StudentNumber						Ģ		
	300					X	000	$\overline{\mathbf{O}}$
	200							
	100 42	65	39		40	=%	/v~	-₩
	0							

- xiv) A success message appears.
- xv) The view gets added to the storyboard.
- xvi) Click the 'Save' icon from the storyboard to save the entire story.



BB9°		a 🏭 🤄 🛛
My Documents > Story >	15	E C
ount(Designation) y Designation		•
Senior QA Manager 1 Project Manager 2 QA Architect 4 Sr QA Engineer 4 Associate QA Engin. 10 QA Engineer 19	500	16 C
Senior QA Engineer 2 2		e
		2
		14 View Created Successfully

Note:

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

Count(Designation) By Designation			\$ ≡	Count(Subje By SubjectNa				Q	Analyse Edit
Senior QA Manager 🚦 1				500		Chemistry Count(Subj	ectid)	×	Remove
Project Manager 2 QA Architect				400		 Sum(Marks) 		490	
Sr QA Engineer				300	-	Sum(Stude	ntNumber)	65	
Associate QA Engin.	10			200	-				
QA Engineer		19		100	42	65	39	4	40
Senior QA Engineer			24	0					
0	10	20	30		Che	emistry	F	hysics	

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

<pre>student_library</pre>		Count(SubjectId)	1	Dimensions / Meas	sures		Slicer
		By SubjectName	ľ	Abe SubjectName	i x	123 Count(SubjectId) 🚦 🗙	[Drag and Drop Dimensio Here 1
Search Dimensions / Mea	sures Q	Summary	☆	123 Sum(Marks)	×	123 Sum(StudentNu 🚦 🗶	Hidden
Abc SubjectName	i						[Drag and Drop Dimensio Here 1
Abc SubjectId	i	500					
Abc Date	i					421	
123 StudentNumber		400	Che	mistry			
			• (Count(SubjectId)	42		
		300	• •	Sum(Marks)	490		
			• \$	Sum(StudentNumber)	65		
		200	_				
		100					
			42	65		39	40
		0					

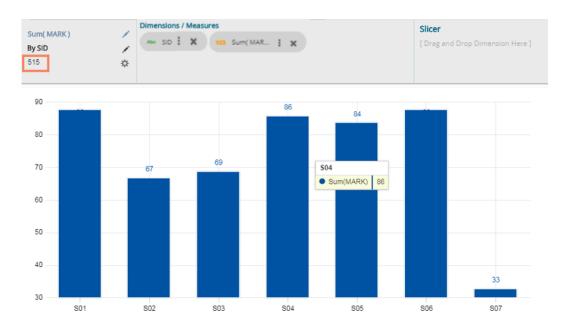


b. The Merged Data Stores do not get saved in the 'ALL DATA STORE' menu, so to add the subsequent new view based on merged data stores into the same business story, the users need to merge the data stores yet again.

6.3. Measure Summary

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

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

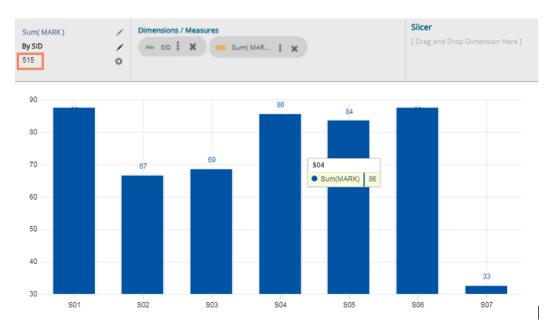


- iv) A window opens.
- v) Set the following details:
 - a) Show Summary: Enable or disable the summary option
 - b) Measure: Select a measure from the drop-down menu
 - c) Aggregation: Select an aggregation type from the drop-down menu
 - d) Format Type: Select a format type from the drop-down menu
 - e) Currency Type: Select a currency symbol from the available choices
 - f) Precision: Select a number to up to what the precision value can be displayed
- vi) Click the '**DONE**' option.



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

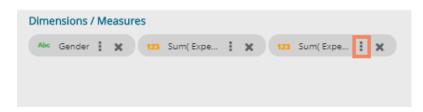
vii) The measure summary value gets displayed on the view page by enabling the '**Show Summary**' option.



6.4. Series Properties

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

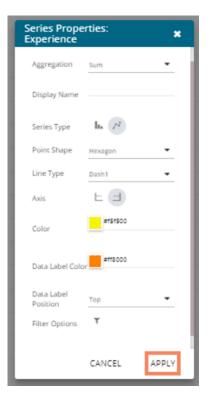
- i) Navigate to the Design New page for a view that has at least one selected measure value.
- ii) Click the 'Series Properties' option ^I provided next to the dragged measure.





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

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



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





Note:

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

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

Sum(salary)	1
By Team	1
Summary	☆

f. The icons provided on the Design workspace are described below:

Icon	Name	Description
H	Save View	Saves and adds the newly designed view to the
		Storyboard
	Design	Redirects the users to the Design workspace
00	Actions	Redirects the users to the Actions tab
Ŧ	View Filter	Opens the view specific filter panel
+	Back	Redirects the users on the storyboard page
0	Start Tour	Begins the guided tour of the selected page
	Comments	Allows users to describe the story



C or	Full	Displays the full-screen view OR Reduces the display
26	Screen/Reduce	of the screen
25	Size	

6.5. Formula Field Editor

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

6.5.1. Creating a Formula

- i) Navigate to the '**Design**' tab after selecting a data store to design a new view.
- ii) Click the '**Formula Field Editor**' f_x icon.

My Document	s 🗲 Story								0
ExpData		Untitled		Dimensions / Measures [Drag and Drop Dimension or Measure Here		Chart	Properties		H
Search Dimensions / Me		Summary	¢]	Dimension Here 1 Hidden [Drag and Drop		~	1	0
Abc PaymentType	i				Dimension Here 1			~~	 Q⁰₀ ▼
Abc Desc Abc Exp_Date	i i			_					•
123 Amount									
						=%	-//~	⊒ ‰	
ALL DATA ST 2	fx	[ension or Measure to Visualize D chart from right hand side pane	-				

iii) The user gets redirected to the 'Create Formula' window.

				Fields
FORMULA Formula Name * Formula Field	RANGE	Level Record Level	Save as ▼ Measure	ExpType Desc Amount Exp_Date
Formula Expression				Operators Equal to Not Equal to Greater than Greater than or equal to Less than Less than or equal to Functions
				toLowerCase toUpperCase substring trim cos

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



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

E.g., The following image displays a new formula field '**Formula Field**' created using the 'ExpType' and 'Desc', fields from the data store. The +(addition) operation is used to create the current Formula Expression.

	Create Formula	×
8	FORMULA RANGE Formula Field 6 Level 7 Save as Record Level Measure • Formula Expression 1 [ExpType]+[Desc]	Fields ExpType Desc Amount Exp_Date Operators / % + . String Concatenation Assignment Functions toLowerCase toUpperCase substring trim trim cos tan
		CANCEL SAVE

vi) The newly created formula field gets added to the selected Data Store.

		ExpData		
S	Sear	rch Dimensions / Measu	ires	Q
,	Abc	PaymentType	i	
,	Abc	ЕхрТуре	i	
,	Abc	Desc	i	
,	Abc	Exp_Date	i	
1	23	Amount		
	(X)	Formula Field	Ô	÷
_				

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

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



5) Click the 'SAVE' option.

Create Formula				
FORMULA RANGE Formula Name * Hike Percentage in CTC	Level Summary Level	Save as Measure 🗸	Fields PreviousCTC OfferedCTC ExperiencePerCTC MonthlySalary UsdBilling CurrentMonthlyPayment	
Formula Expression 1 [OfferedCTC]/[PreviousCTC]			MonthValue Experience Ødddiftion / / % + -	
			CANCEL]

6) A new Formula Field gets created and added to the list of dimensions and measures.

😸 Sample Data Store
Search Dimensions / Measures $ {f Q} $
123 OfferedCTC
123 ExperiencePerCTC
123 MonthlySalary
123 UsdBilling
123 CurrentMonthlyPayment
123 MonthValue
123 Experience
🖂 Addition 🛍 🗄
💌 Hike Percentage in CTC 🍵 🚦
ALL DATA STORE $f_{\!X}$

Note:

- a. Click the '**Delete**' ⁽¹⁾ icon to remove the selected Formula Field.
- b. Click the ⁱ icon to open the '**Create Formula**' window.

6.5.2. Creating a Range

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

- i) Navigate to the **Design** Workspace.
- ii) Click the 'Formula Field Editor' icon.



My Documen	ts 🗲 Busir	ness Story 4.5 💙							0
Student_Total	_marks	Untitled 	1	Dimensions / Measures [Drag and Drop Dimension or Measure Here		Chart	Properties		H
Search Dimensions / M		Summary	÷]	Dimension Here 1 Hidden [Drag and Drop		~	1	
Abc SubjectName	i i				Dimension Here 1			~	- \$ \$ ▼
Abc SubjectId	i			_			45		-
									0
				Ň			Ĭ		
						-%	~//~	₹	
ALL DATA STOKE	f_x			ension or Measure to Visualize D chart from right hand side panel	-			-Σ	

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

	[Dra	g and Drop Dimension or I	Measure Here]	[Drag and Drop Dimension	
n <mark>3</mark>	Create Formula			×	
	FORMULA	NGE			
5	Name *		6	feasures	
	Grade		Marks		
8	Name	From	То		
	А	91	100	Û	
	в	75	90	Û	1
	7 ADD ROW			CANCEL SAVE	i

vii) The selected Data Store gets a new calculated field.



	Student_Total_ma	arks	
Se	arch Dimensions / Measu	ires	۹
Abo	₅ SubjectName	i	
Abo	c StudentId	i	
Ab	c SubjectId	i	
123	3 Marks		
	Grade	Û	:

6.6. Order by and Limit

1

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

- i) Drag and Drop the desired dimensions and measures to create an instant view.
- ii) The Mixed chart gets selected by default to present the dragged data values.



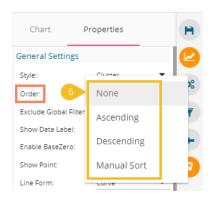
- iii) Open the 'Properties' tab.
- iv) By default, the 'none' option gets selected for the 'Order' field.



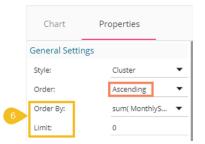
- v) The user gets the following Order option to display the selected data in a chart.
 - a. None
 - b. Ascending



- c. Descending
- d. Manual Sort



vi) The 'Order By' and 'Limit' options get displayed if the selected Order option is either Ascending or Descending.



vii) **Order By**: Select an option from the drop-down list to set the order of the view (the dragged dimension and measure get displayed in the drop-down list)

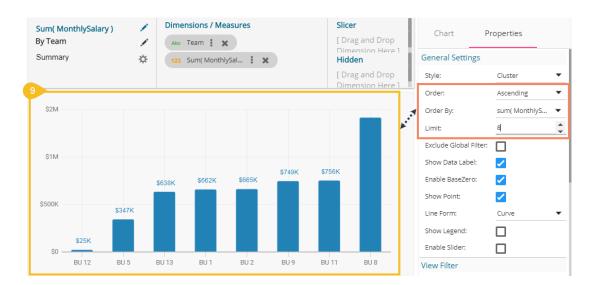
Dimensions / Measures	Slicer [Drag and Drop Dimension Here]	Chart	Properties 💾
123 Sum(MonthlySal : 🗶	Hidden	General Setting	gs 🛛 🗠
	[Drag and Drop	Style:	Cluster 🔻
	Dimension Here 1	Order:	Ascending 🗸
	- 7	Order By:	sum(MonthlySal
638K 662K	665K	Limit:	Team
		Exclude Global F	ilter
			_

viii) Limit: Insert a number to limit the displayed dimension and measured values.

,	Chart	Properties
>] ·	General Setting	s
	Style:	Cluster 💌
2	Order:	Ascending 💌
	Order By:	Team 🔻
8	Limit:	5
	Exclude Global Fi	ter:

ix) The following image displays a monthly salary for the 8 teams in the ascending order.





Note:

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



6.6.1. Sort based on Non-existing Dimension

The Design workspace contains the '**Hidden**' category. The dragged dimension to the '**Hidden**' category gets added to the '**Order By**' drop-down menu from where the user can use it to order the display of the current view.





6.6.2. Manual Sort

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

- i) Navigate to the Design workspace.
- ii) Choose any combination of one Dimension and Measure.
- iii) A chart gets displayed in some order (by default, the 'None' order option gets selected).



- iv) Select the 'Manual Sort' option using the Order drop-down icon.
- v) Click the new icon that appears for 'Manual Sort'.

Chart	Properties	
General Settin	ngs	
Style:	Cluster	•
Order:	4 Manual Sort	•
Manual Sort:	5 3	

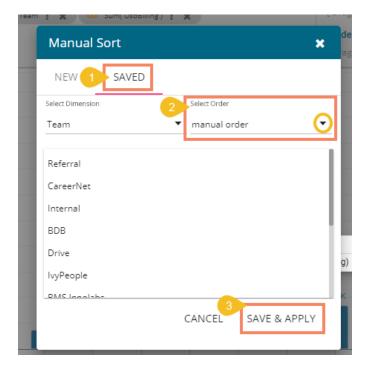
- vi) The Manual sort window opens.
- vii) Select the 'New' tab.
- viii) Enter a title for the Order Name.
- ix) The dragged Dimension appears in the 'Select Dimension' drop-down list.
- x) Arrange the fields by dragging them or using the arrows (move up, move down, move to the top, move to bottom) to arrange them in order.
- xi) Click the '**APPLY**' option after arranging the fields in the desired order.

	1 K 123 S	uni osobilli	18) 1	~					
6	Manual So	ort						×	
9	NEW	SAVED	_						
8	Order Name *		9	Select Dime	ension				1
	Manual Order 1			Team				•	1
	BU 4								
	BU 1			10	^	~	t	ŧ	K
	BU 6					Mo	ve to Te	ър	
	BU 7							-	H
	BU 10								
	BU 8								
	B11.11								1
				CANCE		AP	PLY		



- Dimensions / Measures Slicer Sum(UsdBilling) 1 [Drag and Drop Dimension Here] By Team ľ Abc Team : 🗙 123 Sum(UsdBilling) : 🗙 Summary ☆ Hidden [Drag and Drop Dimension Here] \$100K \$90K \$80K \$77K SROK \$70K \$60K \$48K \$50k BU 5 \$40K \$33K Sum(UsdBilling) \$7,400 \$30K \$17K \$20K \$16K \$16K \$16K \$13K \$7K \$10K \$1K BU 4 BU 1 BU 2 BU 5 BU 6 BU 7 BU 8 BU 9 BU 10 BU 11 BU 12 BU 13 12
- xii) The View fields get displayed in the selected Manual Sort order.

- Note: The '**Saved**' tab lists all the saved order by the user. Follow the below given steps to use a saved order.
 - i) Open the 'Saved' tab from the Manual Sort window.
 - ii) Select a saved order using the Select Order drop-down.
 - iii) Click the 'SAVE & APPLY' option.



iv) The saved manual sort applies to the current view.



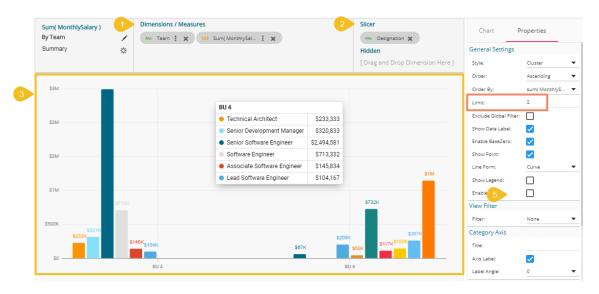


6.7. Adding a Slicer

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

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

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



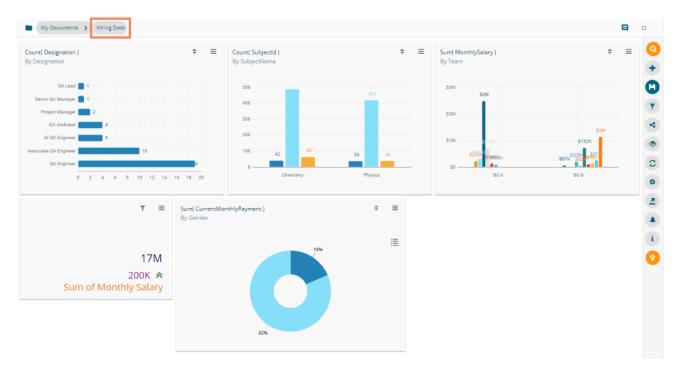
Note:

- a. The Slicer supports the selection of only one dimension and one measure in the **'Dimensions/Measures**' space. Another dimension should be added to the **'Slicer'** space.
- b. The 'Manual Sort' order option does not get supported by Slicer.



7. Storyboard

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



Describing the Storyboard icons:

lcon	Name	Description
Q	Data Search Bar	Searches the queried data from the selected Data Store
+	Create New View	Redirects users to the Design workspace to design a new view
H	Save Story	Saves story with all the added views
T	Global Filter	Filters data from the multiple views saved on the storyboard
T	Applied Filter	Displays the list of applied filters on the selected story
4	Shared Views	Redirects the user to select and add the available shared view(s) to the storyboard
	Data Insights	Redirects the user to the Data Insights page
S	Refresh Views	Refreshes the story with all the existing views
٥	Change Theme	Displays various themes to be applied to the story
	Export	Exports the story as CSV, XLSX, PDF, PPT format
	Alert Center	Redirects to schedule an alert for the story
i	Data Store Information	Opens necessary information for the selected Data Store
8	Start Tour	Begins the guided tour of the selected page
	Comments	Redirects to add a description about the story
0/#	Full Screen/Reduce Size	Displays the Storyboard in the full-screen or reduces the storyboard screen



7.1. Shared Views

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

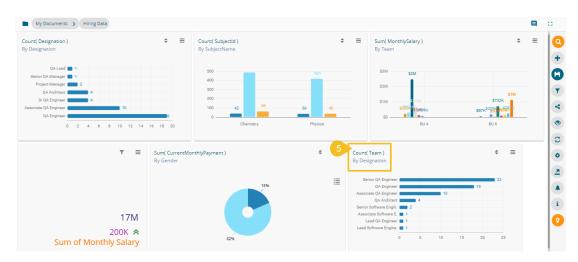
i) Click the 'Shared Views' < icon on the storyboard.



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

			Q					4
Sum(MonthlySalary) ^{By Team}			Count(Team) By Designation			Sum(Experience) ^{By Team}		
Preview Info			Preview Info 3			Preview Info		
Sum(MonthlySalary) ^{By Team}			Mean(MonthlySalary) 			Count(Designation) By Team		
Preview Info		Σ	Preview Info			Preview Info		
Count(Skills)			Sum(UsdBilling)			Sum(Experience)		
Preview Info			Preview Info			Preview Info		
	By Team Preview Info Sum(MonthlySalary) By Team Preview Info Count(Skills) By Team	By Team Preview info Sum(MonthlySalary) By Team Preview info Count(Skills) By Team	By Team Preview Info Sum(MonthlySalary) By Team Preview Info Count(Skills) By Team	By Team Preview info By Designation Preview info By Team Preview info Count(Skills) By Team By Team	Sum(MonthlySalary) By Team Preview info By Designation Preview info Preview info Sum(MonthlySalary) By Team By Team Image: Count (MonthlySalary) Preview info Image: Count (MonthlySalary) Preview info Image: Count (MonthlySalary) Preview info Image: Count (MonthlySalary) By Team Image: Count (MonthlySalary)	Sum(MonthlySalary) By Team Image: Count (Team) By Designation Preview Info By Designation Sum(MonthlySalary) By Team Image: Count (Salary) Dreview Info By Team Image: Count (Salary) Dreview Info Preview Info Image: Count (Salary) Dreview Info Count (Skills) By Team Image: Count (Skills) By Designation	Sum(MonthlySalary) By Team Preview Info Count (Team) By Designation Designation By Team Preview Info Preview Info Image: Count (Designation) By Team Designation (Designation) By Team Designation (Designation) By Team Designation (Designation) By Team Preview Info Preview Info Designation (Designation) By Team Designation (Designation) By Team Count (Skills) By Team Designation Designation Designation (Designation) By Designation	Sum(MonthlySalary) By Team Image: Count(Team) By Designation By Designation By Team Preview Info Image: Count(Team) By Designation Image: Count(Team) By Team Image: Count(Team) By Team Image: Count(Team) By Team Image: Count(Team) By Team Sum(MonthlySalary) By Team Image: Count(Team) By Team Image: Count(Team) By Team Image: Count(Team) By Team Preview Info Image: Count(Team) Preview Info Image: Count(Team) By Team Image: Count(Team) By Team Count(Skills) By Team Image: Count(Team) Preview Info Image: Count(Team) Preview Info Image: Count(Team) By Team By Team Image: Count(Skills) By Designation Image: Count(Team) Preview Info Image: Count(Team) By Team

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

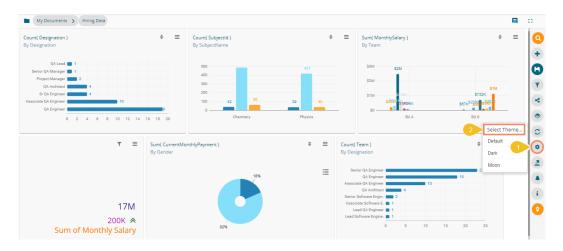




7.2. Change Theme

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

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



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

My Documents > Hiring Data Count(Designation) By Designation			\$ ≡	Sum(MonthlySalary) By Team	= c + = 0
OA Lasd 1 Servic OA Manage 1 Papieci Manage 2 OA Andree 4 5 OA Anginee 1 0 A Anginee 10 0 2 4 6 8 10 12 14	500 400 300 100 42 9 0	Physics 0 3 2 0 Sum(Marks) 421 1 0 Sum(Marks) 421 1 0 Sum(Marks) 421 1 0 Sum(StudentNumber) 40 40 0 30 30 40 emistry Physics 40 1		53M 52M 57M 5715K 5115K 50 60 60 60 60 60 60 60 60 60 60 60 60 60	BUS Select Theme
▼ ≡ 17M 200K	Sum(CurrentMonthlyPayment) By Gender	• =	By Desi Ser Associ Senior Associ	ignation A Engineer A Engineer A A Engineer A A Subject A A Abbate A Abbate Abbate A Abbate A Abbate A Abbate A Abbate A Abbate A Abbate Abb	Dafault D

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

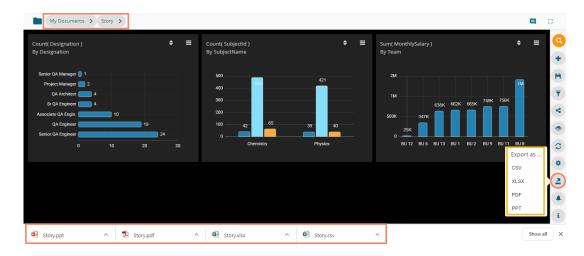




7.3. Export

The user can export business stories in various formats via the '**Export**' option.

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



- iii) The story gets downloaded in the selected export option.
 - a. The story data gets saved in the CSV Excel format by clicking the '**CSV**' option. The collective data of different views get displayed on one sheet.

	AutoSave 💽 🛱 🤘)• (? - ₹	Story -	Excel	<u>ک</u>	Search				
F	ile Home Insert	Page Layout F	ormulas	Data Review	View	Help				
P	aste p z u	- 11 - A^ A - □ → A^ A					General	v 00. 0.→ 0.← 00.	Condition	nal Forma
	~ 🎸 b I <u>0</u>		× _ = = ·		erge & Cen	ter 🗸	<u>~</u> % 🤊	100 →0	Formattin	g∼ Table
C	lipboard 🕞	Font	F2	Alignment		_{الا} ا	Number	r Fa		Styles
A	1 • : ×	√ <i>f</i> ∗ Design	ation							
	А	В	с	D	Е	F	G	н	I	J
1	Designation	count_Designation								
2	Senior QA Manager	1								
3	Project Manager	2								
4	QA Architect	4								
5	Sr QA Engineer	4								
6	Associate QA Engineer	10								
7	QA Engineer	19								
8	Senior QA Engineer	24								
9	sum_StudentNumber	SubjectName	sum_Marks	count_SubjectId						
10	65	Chemistry	490	42						
11	40	Physics	421	39						
12	Team	sum_MonthlySalary								
13	BU 12	25000								
14	BU 5	346666								
15	BU 13	637501								
16	BU 1	661666								
17	BU 2	665418								
18	BU 9	749166								
19	BU 11	755750								
20	BU 8	1418750								
21										i

b. The view specific data gets saved in sperate sheets in the XLSX Excel format by clicking the '**XLSX**' option.



Au	utoSave 💽 🗄 🏷 🖓	∽ ≂ Story - Protecte	ed View - Excel	P	Search			
File	Home Insert Page	Layout Formulas	Data Review	v View	Help			
M12	2 * : × ~	fx						
	А	В	С	D	E	F	G	Н
1	Designation	count_Designation						
2	Senior QA Manager	1						
3	Project Manager	2						
4	QA Architect	4						
5	Sr QA Engineer	4						
6	Associate QA Engineer	10						
7	QA Engineer	19						
8	Senior QA Engineer	24						
9								
10 11								
11								
13								
14								
15								
16								
17								
18								
19								
20								
_71	Count(Designation	n) Count(SubjectId)	Sum(Month	hlvSalary)	+			: •
	count, pesignatio	count(subjectio)	Sumervioliti	ing Salary)				

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

Story.pdf					1	/3							¢	Ŧ	ē
Count(Desig By Designation	nation)														
Senior QA Manager Project Manager															
QA Architect		4													
Sr QA Engineer		4													
Associate QA Engineer	-			-1	0										•
QA Engineer									19						+
Senior QA Engineer	0 2	4	6 8	10	15	: 14	16	6 1	18 :	20 2	2 2	24			
				10											

d. By clicking the '**PPT**' option, the story views are saved in the PPT format.

ile	Save Off	Insert	· 🕐 핖 Design	Transitions	Animations	Slide Show	Review	ج View	Add-ins	Help				_		Sign i	ි Share		mments
	Home		besign	Transitions	Animations	Silde Silow			Add ins	ricip									
Г	Marth Response (
L	1																		
L	3		-		Cour	nt(Designa	ation)												
L					By De	signation													
	-																		
	- -	-			Cou	nt(Designation)													
					Feel	r QA Managor 1													
						ojoct Managor													
						QA Architect													
						QA Engineer													
						QA Ingineer					10								
						QA Engineer										10			
						QA Engineer													
					Dente		2	4	6	5	30	12	14	16	18	20	22	24	
																	-		



<

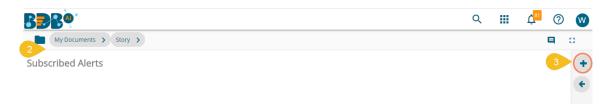
0

7.4. Alert Center

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

- My Documents > Story > Ω. Count(Designation) ٢ = Count(SubjectId) ۵ = Sum(MonthlySalary) ٢ = By Designation By SubjectNam By Team Senior QA Mana. 🏮 1 500 21 Project Manager 🔳 2 400 QA Architect 1M 300 Sr QA Engineer 👥 4 Associate QA En. 200 347K 42 100 OA Engineer 25K ior QA Engine. Cher Physics BU 12 BU 5 BU 9 BU 11 BU 8 0
- i) Click the 'Alert Center' 👇 icon on the Storyboard.

- ii) A new page opens prompting to subscribe alerts (the same screen also displays the previously Subscribed Alerts).
- iii) Click the 'Create New Alert' 🛨 icon.



- iv) The 'Alert' window opens, displaying a list of the available Data Stores (Data Sources for the story).
- v) The user needs to select a Data Store containing a time dimension from the list (the user can use the 'Search' bar to search a Data Store from the displayed list).

My Documents >	Story >		0
Subscribed Alerts			+
4	Alert	×	¢
	Data Source		
	sample da Q		
5	Sample Data Store		
	Sample Data Store Meta Data		
	Sample Data-Store Metadata		
	Sample Data Store	5 Colort Data atoms having time alignersian 1	
	Sample Data Store Meta Data	[Select Data store having time dimension]	
		E Select Dimension or Measure to watch 1	



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

Alert			T 🖪 3
Sample Data Store			
6 Title	Alert1		
Dimensions / Measures	Abs Designation 👻		
Aggregation	Count 👻		
Time Field	BillStartDate 💌	35	
Schedule Intervals	Daily		
Lower Threshold	0		
Upper Threshold	100		
Max Good Value			

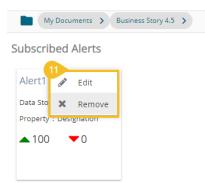
Note:

- a. The user can enable the 'Aggregation' field only after selecting a Dimension/Measure field from the drop-down menu.
- b. The order of colors changes in Semi-Gauge from 'green-yellow-red' to 'red-yellow-green' by enabling the 'Max Good Value' option.
- ix) A success message appears to assure about the alert creation.
- x) The newly created alert gets added to the Subscribed Alert page.

	My Documents > Story >	Ę	0
	Subscribed Alerts		+
10	Alert1 =		+
	Data Store : Sample		
	Property : Designati		
	▲100 ▼0		
	9	Alert Saved Successfully	



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



Note:

- a. Click the 'Edit' option to modify the inserted Alert information.
- b. Click the 'Remove' option to remove the subscribed alert.
- xii) The triggered alerts display under the 'Alert Center' with a brief explanation of the change in the set alert thresholds.

My Documents > Busines	is Story 4.5
1 Alerts	
12	
Alert1 ≡	
0.00	
Current Count(Designation) value is less than or equal to 0. Current Count(Designation) value was 0.00.	
Subscribed Alerts	
Alert1 ≡	
Data Store : SampleDataSt	
Property : Designation	
▲100 ▼0	

xiii) The user can click the 'Show History' option for the triggered alert.

Alerts	_	
Alert1 13	¥2	Show History
0.00 Current Count(Designation)	(MAR	Edit
value is less than or equal to Current Count(Designation) value was 0.00.	×	Remove

Note:

a. Choosing the 'Edit' option redirects users to modify the inserted values for Alert.



- b. A Click on the '**Remove**' option redirects users to remove the subscribed Alert together with the triggered alert.
- xiv) A page opens, displaying the information of previously triggered alerts.

	14 Date	Count(Designation)
	11/11/2019, 12:56:22 PM	0.00
11/11/2019, 12:22:09 PM	11/11/2019, 12:22:09 PM	0.00
Count(Designation) 0		

7.4.1. Applying Filter Condition to Alert

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

i. Click the 'Filter' icon.

Alert		× e v
🛢 Sample Data Stor		
Title	Alert1	
Dimensions / Measures	Abe Designation 🔻	
Aggregation	Count 💌	
Time Field	BillStartDate 🔻	
Schedule Intervals	Daily 👻	35

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

Alert		
Filter	⊘≈ ×	
< Gender		
In	•	
Search	Q	
Male		
Female	\bigcirc	
		35
		0



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

7.5. Data Store Information

The data store information icon helps the user to manage data stores in a business story. This icon is accessible from the storyboard page. By clicking the Data Store Information icon, a new page opens, and the users get some more options to be used on a data store.

- i) Navigate to the Storyboard.
- ii) Click the 'Data Store Information' icon.



- iii) The selected Data Store(s) for the current story appears with some action icons.
- iv) The user can perform the following actions by using the various icons provided for a Data Store:
 - a. Primary Store 🖄 : It marks the selected Data Store as a primary Data Store
 - b. BDB Data Insights 🔍: It redirects the users to the BDB Data Insights page.
 - c. Generate Data Insights C: It starts the insights generation process.
 - d. BDB Search \bigcirc : It redirects the users to the BDB Search page for the selected data store.
 - e. View Design 🗠 : It redirects the users to the Design page for the selected data store.
 - f. Switch to Data Sources 🔤: It opens the Data Store List with all the available data stores for the users to select another data store.

Explore your Data in Seconds!	Sample Data Store	student_library
Create enriching views within a few seconds using our intuitive view builder. Alter the key dimensions and measures, change look and feel of the desired views or the entire dashboard, apply filters to fetch customized insights.	* • C Q 🗠	* @ C Q 🗠



7.6. Options Assigned to a View

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

7.6.1. Analyze

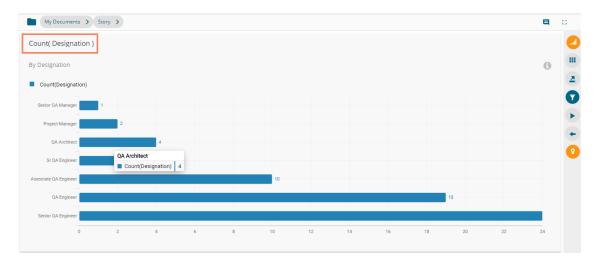
- i) Select a view from the Storyboard.
- ii) Click the '**Options**' \equiv icon.



- iii) A context menu appears with various options.
- iv) Select the 'Analyse' from the context menu.

My Documents > Story >	
Count(Designation) By Designation	Q Analyse
, , , , , , , , , , , , , , , , , , , ,	🖋 Edit
Senior QA Mana. 1 Project Man Senior QA Manager	🗙 Remove
Sr QA Engi 📕 Count(Designation)	1
Associate QA En. 10	
QA Engineer	19
Senior QA Engine.	24
0 10	20 30

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





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

Option	Name	Description		
Chart [Displays data in the chart view		
	Export	Exports the Story as CSV/XLSX/PDF format		
		Displays filter panel to apply or edit view specific filter conditions		
	Timeline Play	Displays changes in the selected data over a period.		
+	Back	Redirects back to the storyboard		
0	Start Tour	Begins guided tour for the Analyse page		

7.6.1.1. Timeline Play

This feature allows the users to see the data changes over time. For this to achieve, at least one Time dimension should be there in the data store.

- i) Navigate to the Analyse view page.
- ii) Click the '**Play**' icon.

um(MonthlySa	alary)										
y Source											
,											
Sum(MonthlySa	lary) 🔵 Su	im(ExperienceP	erCTC)								
16M											
14M											
12M			BDB								
10M			 Sum(MonthlySalary) 	2,439,400							
8M			Sum(ExperiencePerCTC)	8,229,960							
6M 5M											
4M	5M		4M								
		2M	21/		2M						
2М			1M 385K	1M	565K	404K	46K 275K	200K 334K	79K 625K	88K 178K	117K 280K
0											

- iii) The Timeline Play window opens.
- iv) Fill in the required information in the Timeline Play window:
 - a. Time Dimension
 - b. Date Interval
 - c. Date Type
 - d. Start Date
 - e. End Date
 - f. Time Delay
- v) Click the 'START' option.

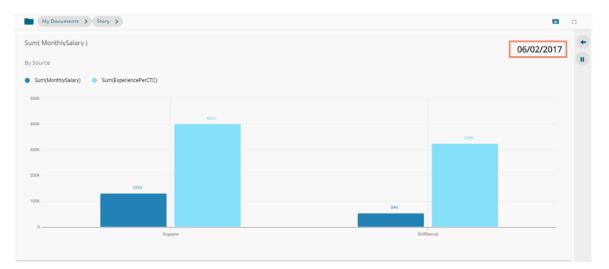


Time dimension	
ExpectedJoinningDate	
Date Interval	
Day	
Date Type	
Current date	
Start Date	
1/1/2017	
End Date	
1/30/2018	
Time Delay	
1	

- vi) The timeline play gets displayed for the selected period.
 - a. E.g., the below image displays data for the date 19th January 2017.

My Documents > Story			Q 0
Sum(MonthlySalary)			19/01/2017
By Source			
Sum(MonthlySalary) Sum(ExperiencePerCTC)			
150K			
140K		130K	
130K 125K			
110K			
100K			
90K			
80K			
70K			
50K	54K		
Orgspire	Refe	rral	

b. E.g., the following image displays data for the date 6th February 2017.





Note:

- a. The timeline play can be paused by clicking the 'Stop Timeline Play' II icon.
- b. The user can resume the stopped timeline play by clicking the '**Resume Timeline Play**' 🕨 icon.

My Documents > Story	>	
ım(MonthlySalary)		
Source		
Sum(MonthlySalary) 🔵 Sum((ExperiencePerCTC)	
300К		
	Peterral	
		91,667
200K		
100K	92K	
100K		
0		

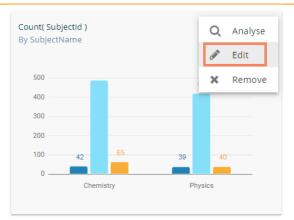
c. Once the timeline play gets over, a '**Replay**' ^C icon appears using which the users can replay the timeline play.

My Documents > Story >	e ::
Sum(monthly_salary)	30/12/2017
ly source	30/12/2017
Sum(monthly_salary) Sum(expyrsper_ctc)	
4	
3	
2	
1	
0	

7.6.2. Edit

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





- iv) The Design page opens for the selected view.
- v) Edit the required details (If required).
- vi) Click the 'Save' icon.

student_library	-	Count(SubjectId) By SubjectName	1	Dimensions / Measure		×	Slicer [Drag and Drop Dimension	Chart P	roperties	
earch Dimensions / M	easures Q	Summary	⇔	123 Sum(Marks) 🚦	123 Sum(StudentNu	×	Here 1 Hidden	General Settings		
be SubjectName	i						[Drag and Drop Dimension Here 1	Style:	Cluster	•
							Herei	Order:	None	•
5 SubjectId	i	500	_					Exclude Global Filter:		
o Date	i					421		Show Data Label:		
3 StudentNumber		400						Enable BaseZero:	 Image: A set of the set of the	
								Show Point:	 Image: A set of the set of the	
		300						Line Form:	Curve	•
		300						Show Legend:		
								Enable Slider:		
		200						View Filter		
								Filter:	None	•
		100		65				Category Axis		
		_	42		39		40	Title:		
		0						Axis Label:		
	-		CI	nemistry		Physics		Label Angle:	0	•
ALL DATA STORE	f_x							Drimanu Valua Avia		-

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

7.6.3. Remove

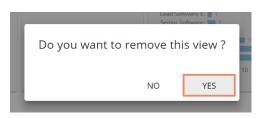
- i) Select a view from the Storyboard.
- ii) Click the '**Options**' \equiv icon.
- iii) Select the 'Remove' option from the context menu.

Sum(Marks) By SubjectNar	me		Q	Analyse Edit
500 400 300 200 100 0	490 65 42 Chemistry	421 40 Phys		Remove

iv) A new window pops-up to confirm the removal of the view.



v) Click the 'YES' option.



vi) The selected View gets removed from the storyboard.

7.7. Data Interactions/Exploration

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

7.7.1. Automatic Data Drill

The Auto Data Drill allows users to drill down in the data values of a saved view on the storyboard for the selected story. The user must define a hierarchical pattern among the data dimensions via the **'Hierarchy Definition'** option of a Data Store.

- i) Navigate to the 'Hierarchy Definition' tab (while creating a data store).
- ii) Drag and drop the dimensions one by one to the 'Drill Def' box. Choose the dimensions among which you wish to define a hierarchical drill path.
- iii) Click the '**Next**' option.

Setting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refre
Fields		Hierarchy Definition			+
Abc Name	1	Drill Def- 1			
ADC INGINE		Team - Designation	Name =		×
Abe Gender					
Abc Source					
Abc ReferralOf					
Abc Designation					
Abc Team					

iv) Create a Data Store successfully by completing the Data Store configuration steps.

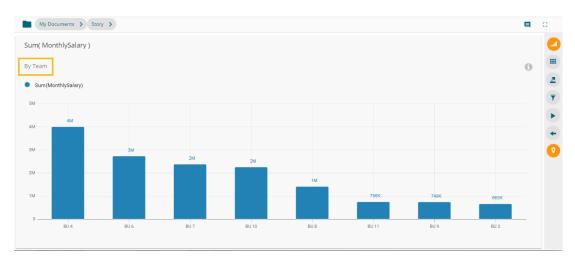
😑 Data Center							New
👸 Home	Data Connector Type Data Connector						
Data Connectors	All -						
Data Sets	Search Data Stores sample D				Show	ring 1 ou	it of 295
🚖 Data Stores	Sample Data Store	6	c c	<	o	1	î
Data Store Meta Data							



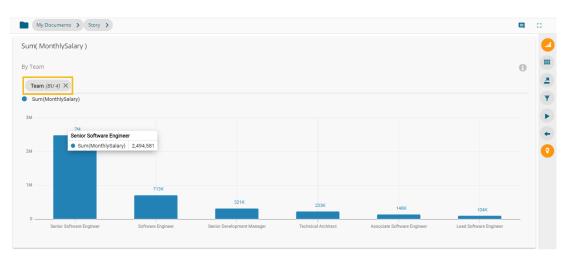
- v) Select the Data Store with the defined drill path to create a new view.
- vi) Select the dimension for which the drill path has been defined and drag to create a view.
- vii) Click the 'Save' icon 🗎 to save the view on the Storyboard.



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

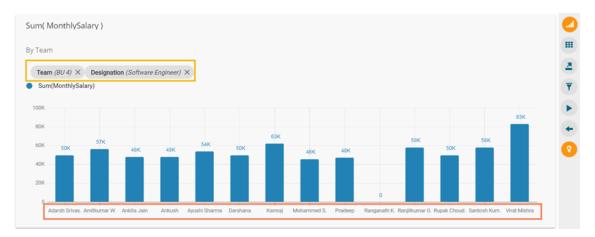


x) Click on a team to display the designation wise break up for the selected team (E.g., The following image displays designations for the *Team BU-4*).





xi) Click on a designation to see the names of the employee (E.g., the following image displays names of all the *Software Engineers* inside the *Team BU-4*).



7.7.2. Automatic Date Drill

The Auto Data Drill allows users to drill down in the time values of a saved view on the storyboard for the selected story. The user must define a hierarchical pattern among the date dimensions via the '**Hierarchy Definition**' option of a Data Store.

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

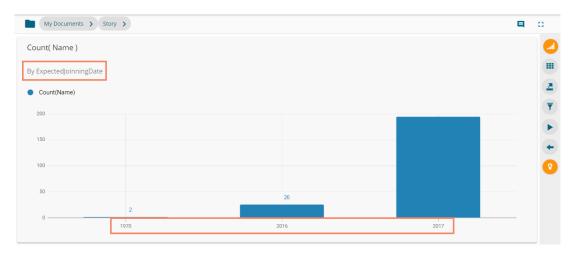
\checkmark	\bigcirc	3	4	5	6
etting Data	Data Type Definition	Hierarchy Definition	Batch Query	Data Restrictions	Schedule Data Refre
Fields		Hierarchy Definition			+
Abc ExperienceCa	ategory	Drill Def- 1			
Abc Comments		Team — Designation —	Name -		×
Abc CandidateId		Drill Def- 2			
Abc Year		ExpectedJoinningDate:	ExpectedJoinningDate:	 ExpectedJoinningDate: date 	- ×
S ExpectedJoin	nningDate				
BillStartDate					

v) Create a Data Store successfully by reaching the final screen of the Data Store creation.

Data Center									New
👸 Home	Data Connector Type Data Connector								
Data Connectors	All 👻 All	•							
Data Sets	Search Data Stores sample D						Show	ring 1 ou	t of 295
Data Stores	Sample Data Store			0	c	<	0	1	Î
😭 🛛 Data Store Meta Data									



- vi) Select the Data Store with the defined drill path to create a new view.
- vii) Select the time dimension for which the drill path has been defined and drag to create a view.
- viii) Click the '**Save**' icon H to save the view on the Storyboard.
- ix) Access the saved view on the storyboard by double clicks on it.
- x) The **Analyse** window opens displaying *Year* as the highest-level granularity of date drill.



xi) By clicking the Yearly granularity of the time value, the user gets the monthly value displayed in the selected view. (E.g., the December 2016's data gets displayed in the below image)

Count(Name)		
By ExpectedJoinningDate		0
ExpectedJoinningDate[year] (2016) × Count(Name)		<u>₹</u> ▼
40		•
30	26	
20		0
10		
0	12-2016	

xii) Click on the monthly granularity to display the exact dates of joining. (E.g., the 1st and 15th December are displayed in the below given image)

ExpectedJoinningDa		
ExpectedJoinningDate	[year] (2016) × Expected JoinningDate[month] (12-2016) ×	
Count(Name)		
30	25	
20	12-01-2016	
10	Count(Name) 25	



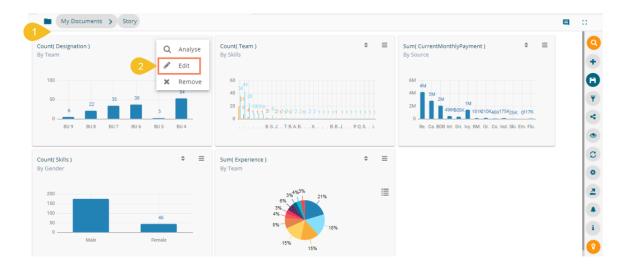
8. Actions

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

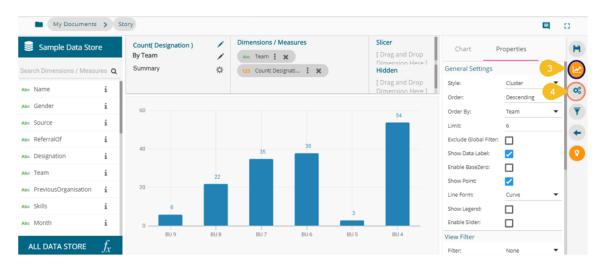
8.1. Interactions

The 'Interactions' option is the next level of applying the Global Filter. The suggested new feature enables users to select multiple views of the storyboard to filter based on a specific view. By default, on a single click, all the views permitted for interactions get filtered.

- i) Navigate to the Storyboard.
- ii) Select the 'Edit' option for a specific view.



- iii) The 'Design' workspace opens by default for the selected view.
- iv) Click the 'Actions' icon.



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



Acti	ion Settings	Interactions							
	Interactions	Select views w	hich hav	e to be p	art of in	teractior	ı		
W	Click based interactions on other views	Drill By						7 Select All	
Custom Fields	Custom Fields	Team						Count(Team)	
f_(x)	Create custom fields from	60					54	By Skills	
f(x) Cus tieve f(x) Cus tieve vieve	WebSocket Custom Websocket Settings	40		35	38			Sum(CurrentMonthlyPay By Source	ment
	custom websocket Settings	20	22					Count(Skills) By Gender	
		6				3			
		BU 9	BU 8	BU 7	BU 6	BU 5	BU 4	Sum(Experience)	

- ix) A success message appears stating that the storyboard views are updated.
- x) Select a dimension value from the view which was selected to develop a dependency; the other views get filtered accordingly.

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



8.2. Web Socket

The Web Socket option under '**ACTIONS**' is provided to refresh the story when an external event occurs. Users can achieve this by configuring a WebSocket. The WebSocket Configuration contains a WebSocket IP and a message. On opening a WebSocket enabled business story, a WebSocket channel is established to receive messages. The story gets refreshed when Web Socket receives the same message configured from this channel.

- i) Navigate to the Action Settings page.
- ii) Choose the 'WebSocket' option.
- iii) Configure the following details:
 - a. Enable the WebSocket functionality
 - b. Provide a WebSocket IP
 - c. Insert a Message based on which the selected view(s) get updated (Enable View restrictions, if required)
 - d. Select the required views from the Available Views list.
 - e. Click the 'APPLY' option.
 - f. Save the configured view.



Acti	on Settings	WebSocket		
الله f(x)	Interactions Click based interactions on other views Custom Fields Create custom fields from view	By enabling the Websocket functionality users will be able to get the latest updated data from the data source. Websocket/P* ws://businessstory.com/websocket/ws 7	3 (a) Available Views	
2	5 WebSocket Custom Websocket Settings	Message * New Joining Dates	By Designation Count(SubjectId) By SubjectName Sum(MonthlySalary) By Team	

iv) The story gets refreshed data based on the WebSocket setting when the event triggers.

Note:

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

9. Applying Filters

BDB Story offers a series of filters to customize your interactive visual report. The filters can be applied to a view or the entire Story by using a dimension, measure, or date dimension from the available data source.

9.1. View Specific Filter

The View Filter icon provided on the '**Design**' workspace allows the user to filter a specific view based on the selected filter condition. A view can be filtered based on the Dimension, Measure, or Date Dimension data values.

9.1.1. Dimension based View Filter

- i) Click the '**Filter**' **T** icon from the design mode of a view.
- ii) A filter panel opens with the list of available filter values.
- iii) Select a dimension/measure/time dimension to display a list containing all the sub-dimensions.
- iv) Select 'In' as the filter condition from the drop-down menu.
- v) Select sub-dimension(s) by putting checkmarks in the box (the user can select multiple values).
- vi) Click the 'Apply' 🗹 icon.





- vii) The View Filter icon gets highlighted.
- viii) The concerned view gets filtered as per the applied (selected) filter condition(s).



ix) If the selected filter condition is 'Not In,' then the view gets filtered by the not selected filter values.

😂 Sample Data Store	Count(Designation) By Designation	1	Dimensions / Measures	Slicer	Filter	✓ 2 × 1
Search Dimensions / Measures (¢	123 Count(Designati X	Dimension Here Hidden		(
Abe Name i	1			[Drag an 9 Dimension Here	Not In	
Abc Gender i				Dimension Herei	Search	٩
Abc Source i	80 69				Male	
Noc ReferralOf i	60				Female	
Abc Designation						
Abc Team i	40					
the PreviousOrganisation i	20	24	16			
the Skills	20		12 9 8	5		
Abc Month i	0					
All data store $f_{\!X}$	Senior Softwa. Softwa	are Eng. Seni	or QA En. QA Engineer Associate So. Associat	te QA. Lead Softwar.		

Note:

a. A '**Search**' bar has been provided in the View Filter panel to search a specific Dimension/Measure/Time value from the available list.



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Filter		~	æ×
st			Q
joining_status			
current_status			

- b. The user needs to click the '**Apply**' button while enabling or eliminating the View specific filter values to reflect the same in the displayed chart.
- c. The user can insert, modify, or remove a view specific filter via the 'Analyse' option.
- d. The View Filter becomes ineffective when the selected view is inserted into a story, and the Global Filter is applied to it.
- e. The maximum selection for the Filter condition is restricted to 30. The users get a notification when they select the permitted number of the filter condition.

<	Filter	Saved Filter	>	0
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Search			۹	(
amit			~	4
anita			~	a
anja	li © babli		~	ě
anjai	li juneja		~	ě
ansh	nu		~	4
ansh	nu d/o		\checkmark	٠
anyl	bobby		~	i
arvir	nd kumar ya	dav		0
barji	raj			
bire	maxim	num selection coun	t reached!	

f. The View Filter also contains 'Like' and 'Not Like' operations. Please refer the section 9.2.4. to learn details about these operations.

9.1.2. Measure based View Filter

The user can add a view filter based on the **Measures** values.

- i) Open the Filter panel on the Design New page.
- ii) All the selected Dimensions and Measures get listed.
- iii) Select a measure as a filter value.
- iv) Select a condition from the drop-down menu and provide the required information to configure it.
- v) Click the 'Apply' icon.





- vi) The View Filter icon gets highlighted.
- vii) The view gets modified according to the selected View filter condition.

😂 Sample Data Store	Count(Designation) By Designation	1		ignation		[[cer Drag and Drop	K : Prope	erties >	
Search Dimensions / Measures	Summary	☆	123 COU	nt(Designati	×		mension Here 1 dden	General Settings		1
Name i							orag and Drop	Style:	Cluster 🔻	
	7						mension Here 1 📕	Order:	Descending 🔹	Ľ
© Gender i	25							Order By:	count(Designa 6	
source i	21							Limit	7	
e ReferralOf i	20							Exclude Global Filter:		1
Designation i	15							Show Data Label:	 Image: A set of the set of the	k
• Team i								Enable BaseZero:		L
-	10							Show Legend:		1
e PreviousOrganisation 1		5						Enable Slider:		
e Skills i	5		2					View Filter		
Month i	0			_	_	_		Filter:	None 👻	
C	Senior Softwar. Senio	r QA Engi. S	r Big Data Dev.	QA Engineer P	roject Manager Le	ad Software .	Lead BI Develo.	Category Axis		1
ALL DATA STORE f_x								Title:		

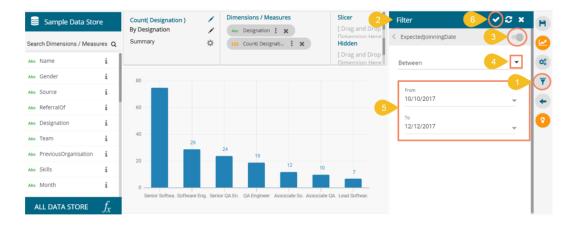
Note: The same set of steps can be followed to apply Global filter based on the Measure values.

9.1.3. Date based View Filter

The users can apply Date based View Filter selecting the Date Values from the Data Store. The user can provide two kinds of conditions on the Date values.

i. Between

- i) Click the filter icon from the Design page.
- ii) The Filter panel opens, displaying the available filter values.
- iii) Select a condition containing Date values to filter the view.
- iv) Choose the 'Between' option from the drop-down menu.
- v) Provide 'From' and 'To' dates.
- vi) Click the '**Apply'** icon.





- vii) The View Filter icon gets highlighted.
- viii) The selected view gets filtered as per the applied filter conditions.

Sample Data Store	Count(Designation) By Designation Summary	Abc	Designation : X Count(Designati : X		Slicer [Drag and Drop Dimension Here 1 Hidden	< Chart General Settings	Properties >
Noc Name i					[Drag and Drop Dimension Here 1	Style:	Cluster
be Gender i	10	9				Order: Order By:	Count(Designa 7
be Source i		9				Limit:	7
be ReferralOf i	8					Exclude Global Filter: Show Data Label:	
• Team i	6					Enable BaseZero:	
PreviousOrganisation i	4					Show Legend: Enable Slider:	
se Skills				3		View Filter	
ibe Month 1	2 Senio	or Software Engineer	Si	oftware Enginee	ſ	Filter: Category Axis	None 🔻
ALL DATA STORE f_{χ}						Title:	

ii. Relative

- i) Navigate to the Filter panel from the Design page.
- ii) Select a Date value as the filter condition.
- iii) Choose the 'Relative' option from the drop-down.
- iv) Insert a period by selecting the required values.
 - a. The user gets 'Last' and 'This' under the drop-down menu to select the past or present time zone.
 - b. There are **4 categories of time pointers** provided in another drop-down menu, which allows the user to select a value out of Years/ Months/Weeks/Days.

E.g., the below given image displays the 'Last 2 years' as the selected time condition.

v) Click the '**Apply**' icon.



- vi) The View Filter icon gets highlighted.
- vii) The selected view gets filtered based on the applied conditions.





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

9.1.4. Measure Filter Via Series Properties

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

- i) Select and drag one dimension, and one measure value from the list of Dimensions and Measures. Drop the Measure value twice on the canvas.
- ii) Click the 'Series Properties' icon from the second measure component.



- iii) The 'Series Properties' window opens.
- iv) Make sure that the 'Aggregation' type is the same for both the selected measures.
- v) Modify the aggregation values and click the '**APPLY**' option; the aggregation values were not the same for the dragged measures.

3	xperience) : × Series Prope Experience	rties: 🗙	H LI H
•	Aggregation	Sum 👻	
Т	Display Name		
	Series Type	h N	
	Point Shape	Point -	
	Line Type	Straight 🗸	
		CANCEL 5 APPLY	



- vi) Open the Series Properties window once again and scroll down to get the 'Filter Options' \mathbb{T} icon.
- vii) Click the 'Filter' icon.

ce)	×		
	eries Prope xperience	rties:	×
6	Line Type	Straight	•
	Color	<u></u>	
	Data Label Colo		-
	Data Label Position	Тор	•
•	Filter Options	۲	
		CANCEL	APPLY

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

Series F Experience) Experie	Properties:	×
Filter		9 ⊘∂ ×
< Skills		
In		-
Search		٩
Selenium		<u>₿</u>
Java		
DotNet		

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



M(Experience) : × Series Prope Experience	erties: 🗙
Color	<u> </u>
Data Label Col	or 🔛
Data Label Position	Тор 🗸
Filter Options	T
	CANCE 10 APPLY

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

Sum(Experience) By Gender Summary	 Dimensions / Measures	n(Experience) : 🗙	Slicer [Drag and Drop Dimension Here 1 Hidden [Drag and Drop Dimension Here 1
700			
600			
500			
400			
300			
200		172	
100	110		88
0	nale	Fema	

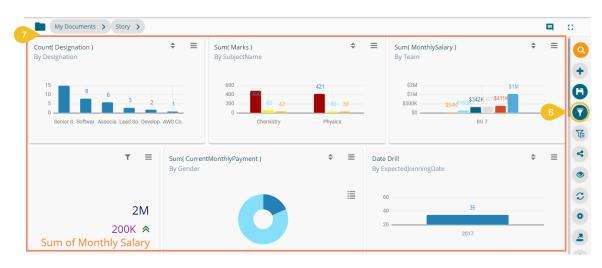
9.2. Global Filter

- i) Click the 'Global Filter' $\overline{\mathbf{T}}$ icon provided on the Storyboard.
- ii) A filter panel opens, displaying a list of values that can be used as a filter condition.
- iii) Click on a Dimension to display a list containing all the sub-dimensions (Clicking a measure or time dimension would display the related fields).
- iv) Select 'In' or 'Not In' option from the drop-down menu to apply the filtering condition. (E.g., the below given image displays 'In' as the selected option so that the story gets filtered as per the chosen sub-dimension(s).
- v) Select sub-dimension(s) using checkmark(s).
- vi) Click the 'Apply' icon.

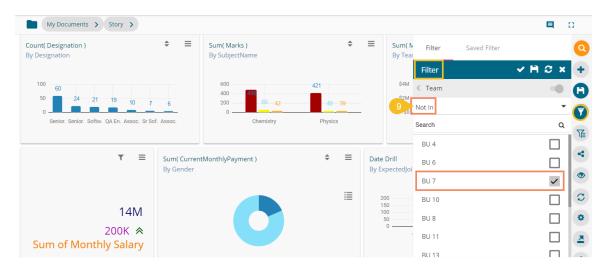


My Documents > Story >				Ξ. 0
Count(Designation) By Designation	Sum(Marks) By SubjectName	\$ ≡	Sum(N Filter S	iaved Filter
100 50 29 24 19 12 10 0 Senior. Softw. Senior. QA En. Assoc. Assoc	0	421 40 39 Physics	S4M < Team 3 In 50 Search BU 4	
▼ ≡ 17M 200K ≉ Sum of Monthly Salary	Sum(CurrentMonthlyPayment) By Gender	By [Intir Team) BU 6 Bu 7 Bu 7 Bu 7 Bu 7 Bu 7 Bu 8 Bu 8 Bu 8 Bu 8 Bu 8 Bu 8 Bu 8 Bu 8	

- vii) The Global Filter icon gets highlighted.
- viii) The concerned views on the Storyboard get customized as per the applied Global Filter condition. E.g., All the displayed views have been filtered in the below given storyboard image.



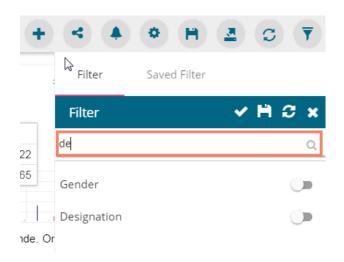
ix) By selecting the 'Not In' option, the story (views) gets filtered by not selected filter conditions (E.g., the below given image displays the data without BU 7 team dimension.)



Note:



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



- b. The global filter can be applied only to those views on the storyboard, where the filter values are used as dimensions.
- c. Global filter, when applied to various views on a storyboard, subdues the view specific filter values.
- d. The user can insert views created via different data stores on one Storyboard. By default, the Global filter panel displays all the available filter values across the data stores.

9.2.1. Exclude from the Global Filter

The Global filter values are applied to all the available views on a storyboard (if they are created using the same data store). The users can exclude a specific view from the Global Filter effect by selecting the **'Exclude from the Global Filter'** option.

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



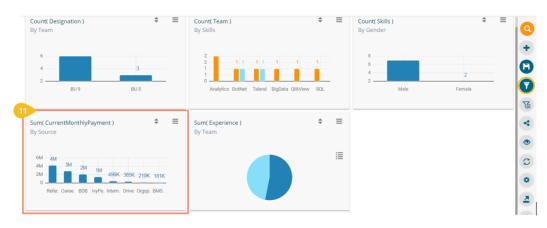
- iv) The user gets redirected to the Storyboard.
- v) Click the 'Global Filter' icon.
- vi) The 'Filter' tab opens by default to create a new Global Filter condition.
- vii) Select a data value from the available list.
- viii) Select the 'In' condition using the drop-down list.
- ix) Select the global filter conditions using the displayed list of the data values (E.g., the below given image displays BU 9 and BU 5 Teams are selected with the '**In**' filter condition).



x) Click the 'Apply' icon.



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



9.2.2. Saving a Global Filter

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

Filter	Saved Filter		9
2 Filter		✓ 🗎 C ×	+
Team		-0	8
In		1	7
Search		۹	T
BU 6			-
BU 7			4
BU 10		~	۲
BU 8			C
BU 11		~	•
BU 13			



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

mean(MonthlySalary)	77.40K		
Save Filter		* "	vail
5 Filter Name * Filter by Team			
n(Us Desig		14/25	
Softw Sr QA r Big D Project Manager (19) 8K	CANCEL	6 SAVE	

- vi) The filter gets stored under the 'Saved Filter' tab. (The same gets notified by a pop-up message.)
- vii) Click the 'APPLY' option to apply the selected Saved Filter.

	Filter 7 Saved Filter	9
	Filter by Team 🕫	+
3	8 APPLY REMOVE	Θ
ľ		- 7

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

		■ 0
nt(Q
2	Applied Filter	S
	Team	+
8 — 6 — 4 — 2 —	• in : BU 9,BU 5	8
4 —		-
2 -		5
		4
		0
		•
		0

9.2.3. Custom View Filter

The user can access this view specific filter option from the chart properties provided on the storyboard when the view is saved.

- i) Create a view by drag and drop of the desired dimension and measure (By default, the Mixed chart gets selected to represent the selected data)
- ii) Open the 'Properties' tab.
- iii) Select the '**View Filter**' option using the Properties panel. (In this case, the filter condition is 'Designation')
- iv) Click the 'Save' option to save the view on the storyboard.

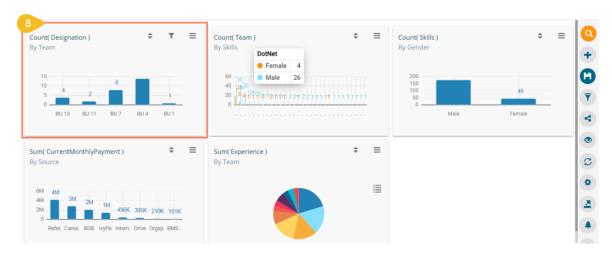


Sample Data Stor	re	Count(Designation) By Team	1	Dimensions / Measu	ires		Slicer [Drag and Drop Dimension Here]	Char 2	Properties	4
Search Dimensions / Measu	ures Q	Summary	¢	123 Count(Designati	. : x		Hidden	Show Data Labe	i: 🔽	
Abo Name	i						[Drag and Drop Dimension Here 1	Enable BaseZero		03
Abc Gender	i	60						Show Point: Line Form:	Curve	
Abc Source	i						54	Show Legend:		
Abe ReferralOf	i				38			Enable Slider:		
Abe Designation	i	40		35			3	View Filter		- I I I I I I I I I I I I I I I I I I I
Abc Team	i		22					Filter:	Designatio	n 🔻
Abc PreviousOrganisation	i	20						Category Axis Title:		
Abe Skills	i	6				3		Axis Label:		
Abe Month	i	o —						Label Angle:	0	-
ALL DATA STORE	f_x	BU 9	BU 8	BU 7	BU 6	BU 5	BU 4	Primary Value Title:	Axis	

- v) Access the view from the storyboard and click the 'Filter' icon.
- vi) Select a filter value.
- vii) Click the '**Apply**' icon.

Count(Designation) By Team		ount(Team) y Skills	\$ ≡	Count(Skills) By Gender	\$	≡	Q +
100 50 <u>6</u> 22 35 3 0 <u>8</u> U9 8U8 8U7 8U	Search Q Senior Software Engineer C Software Engineer 6	24 ⁶ 841113.6255222122		200 150 100 50 0 Male	46 Female		() () ()
Sum(CurrentMonthlyPayment) By Source	Senior QA Engineer	Experience)	\$ ≡				0 0
6M 4M 3M 2M 1M 496P	 385K 210K 181K 1. Drive Orgsp. BMS. 		≣				0 2 4

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



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



Count(Designation) By Team	Count(Team) By Skills	Count(Skills)	Q +
15 10 4 2 0 BU 13 BU 11 BU 7 BU 4 BU 4 BU 1 BU 7 BU 4 BU 4 BU 4 BU 4 BU 7 BU 4 BU 4	60 38 40 21,26 20 8 4 1993 52 952221221111111111 0	200 150 150 0 0 Male Female	()
Sum(CurrentMonthlyPayment) By Source	Sum(Experience) \diamondsuit By Team		0
6M 4M 5M 6M 6M 6M 7M 7M 7M 7M 7M 7M 7M 7M 7M 7			0 3 4

x) The view opens in the Design Workspace, the View Filter (Custom Filter) condition does not remain effective on the view when it opens in the design mode.



Note: The '**View Filter**' choice cannot be used for the Scatter Plot chart, KPI Tile, KPI Comparative Tile, Matrix Summary visualization options.

9.2.4. Like and Not Like Operation in Filter

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

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



		2				0		6	6
Getting Data	Data T	Type De	finition	Hierarchy Definition	Bato	h Que	ery	Data Restrictions	Schedule Data Refresh
Dimensio	ns			Measures				Time	
Name		123 (3	PreviousCTC	Abc	0	•	ExpectedJoinningDate	Abc 123
Gender	\checkmark	123 (J	OfferedCTC	Abc	0		BillStartDate	Abc 123
Source		123 (3	ExperiencePerCTC	Abc	0			
ReferralOf	×	123 (3	MonthlySalary	Abc	0	L		
Designation	~	123 (3	UsdBilling	Abc	0			
Team		123 (J .	CurrentMonthlyPayment	Abc	0	-		

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

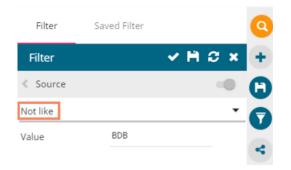
Count(Designation)	₹ ≡	Count(Team) By Skills	≑ ≡	Count(Server	Saved Filter	0 + x 2 H
35		60 40 20 84 4100 34 1113 62 10 82 12 12 12 12 12 12 12 12 12 1	211111111111	3 < Source 150 100 4 Like		е н 1-7
80 Sum(CurrentMonthlyPayment)	\$ ≡	Sum(Experience)	÷ =	Value	5 BDB	<
By Source	• _	By Team		By Gend		0
6M 4M Sum(CurrentM	onthlyPayment) 2, 210K 181K	105,783		800 600 400		2
0 Refer. Caree. BDB IvyPe. Intern. Drive	Orgsp. BMS .			200		

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

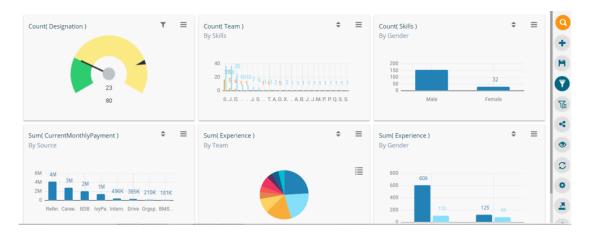
Count(Designation) T =	Count(Team) 🗢 🗏 By Skills	Count(Skills) By Gender	\$ ≡
		20	14
80	Java Biz. Jav. Biz. Jav. Sel. BizV. Biz. Biz. Jav. IOS.	Male Fe	emale
um(CurrentMonthlyPayment) \Rightarrow \equiv y Source	Sum(Experience) By Team	Sum(Experience) By Gender	\$ ≡
6M 4M 4M 3M 2M 1M 496K 385K 210K 181K		100 80 60 47	
0 Refer. Caree. BDB IvyPe. Intern. Drive Orgsp. BMS .		40	3



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



x) The Story (views) gets filtered, excluding the entered values displaying data for the not entered values.



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

9.3. Comments

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

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

Count(Designation) By Designation	≑ ≡	Sum(Marks) By SubjectName	÷	≡	Sum(MonthlySalary) By Team	÷	=
00 50 24 21 19 10 50 50 50 50 50 50 50 50 50 5	7 6 Sr Sof. Assoc.	600 400 200 0 Chemistry	421 40 39 Physics	-	S4M S2M S23335464K< S0 BU 4	57327 S1M S67 K3581 0782K BU 6	-
₹ Ξ	Sum(Curren By Gender	ntMonthlyPayment)	\$ ≡	Date By Ex	Drill xpectedJoinningDate	\$	≡
14M 200K 秦 Sum of Monthly Salary		0	≣	1	00 50 00 0 2 2 26 0 1970 2016	2017	

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



			11
2	Comments		
3	Description of the Story	4	
		4	>

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

	Comments	
5	Me Just now Description of the Story	×
	Type a message	

Note:

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

10. Charts & Properties

This section explains all the available chart types and chart-related properties provided on the Business Story Design page. The animation is added in the charts to show data change and visual effects.

10.1. Mixed Chart

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



The best situation to use Mixed Chart: To compare multiple categories

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

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

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

Properties:

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



Sum(Experience) By Gender Summary	/ / *	Dimensions / Measures Abc Gender : * 1 123 Sum(Expe : *		×	Slicer [Drag and Drop Dimension Here 1 Hidden [Drag and Drop	Chart P General Settings Style:	Cluster 🗸
02	ale				Dimension Here 1	Order: Exclude Global Filter: Show Data Label: Enable BaseZero:	None
80	70	nce)_Skills([object Object])	85 70 75			Show Point: Line Form: Show Legend: Legend Style: Legend Orientation: Legend Checkbox: Enable Slider:	Curve Curve
_	Male		Female			View Filter Filter:	Source 🔻

iii) Category Axis

- a. Title: Provide a title for the axis
- **b. Axis Label**: Enable the Category Axis label by putting a checkmark in the box.
- c. Label Angle: Select a display angle for the axis label.

iv) Primary Value Axis

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

v) Secondary Value Axis

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

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

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



Sum(Experience) By Gender	Dimensions / Measures Alec Gender i X 123 Sum(Expe i X	Slicer	Chart Prop	erties
Summary	☆ 123 Sum(Expe : ★	Dimension Here 1 Hidden	Category Axis	
	123 Sum expe : X	[Drag and Drop	Title:	
		Dimension Here 1	📕 Axis Label: 🗸	
86			Label Angle: 0	•
84			Primary Value Axis	
			Title:	
82			Axis Label:	
80			Format Type: Au	uto 🔻
78			Currency Type: No	one 🔻
76		15	Precision: 0	
74	Male		Secondary Value Axis	
72		70	Enable:	
		70	Title:	-
70			Format Type: Au	uto 🔻
68	Male		Currency Type: No	one 🔻
		115	Precision: 0	

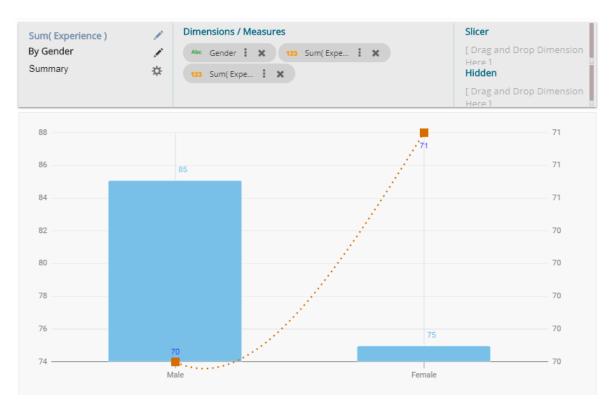
Users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart.

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



Series Prope Experience	rties:	×
Aggregation	Sum	-
Display Name		_
Series Type	h. P	- 1
Point Shape	Cube	-
Line Type	Dot	- /
Axis	EE	
Color	#d66c00	_
Data Label Colo	, 23333 ff	_
Data Label Position	Тор	•
Filter Options	τ	
	CANCEL	APPLY

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



10.2. Area Chart

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

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



Examples:

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

Variations of this chart: Group and Stacked Area graphs

Properties:

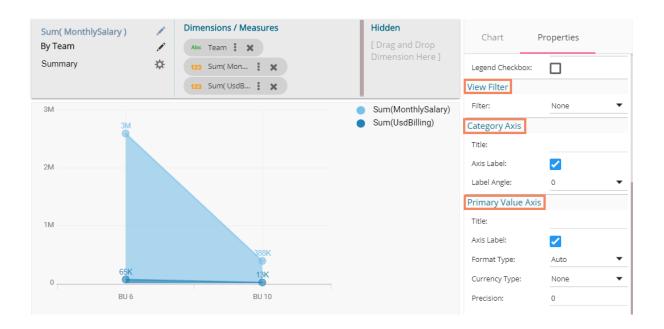
i) General Settings

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



Sum(MonthlySalary)	Dimensions / Measures	Hidden [Drag and Drop	Chart Pr	operties
Summary 🌣	123 Sum(Mon 🚦 🗙	Dimension Here]	General Settings	
	123 Sum(UsdB 🚦 🗙		Style:	Overlaid 🔻
3M		Sum(MonthlySalary)	Order:	Descending 🔹
3M		 Sum(WohtniySalary) Sum(UsdBilling) 	Order By:	sum(MonthlyS 🔻
			Limit:	0
			Exclude Global Filter:	
2M			Show Data Label:	
BU 1			Enable BaseZero:	
	um(MonthlySalary) 387,600		Show Point:	
1M S	um(UsdBilling) 12,725		Line Form:	Segment 🔻
	388K		Show Legend:	
6 <u>5</u> K	ы 13К		Legend Style:	Fixed 🔻
0BU 6	BU 10		Legend Orientation:	Vertical 🗸
60.0	DO IU		Legend Checkbox:	

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





10.3. Bar Chart

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

The best situation to use a bar chart: When the data set is small, it would be more accessible to the enduser to

interpret data. Observations can be performed over a period.

Examples:

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

Variations of this chart:

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

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

Properties:

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



Sum(MonthlySalary)	Dimensions / Measures	Hidden	Chart Pr	operties
By Designation 💉	Abc Designation 🚦 🗙	[Drag and Drop		operties
Summary 🌣	123 Sum(Mon : 🗙	Dimension Here]	General Settings	
	123 Sum(Offer : 🗙		Style:	Cluster 🔻
		Sum(MonthlySalary)	Base Type:	Chevron 🔻
Senior QA Engineer		Sum(OfferedCTC)	Order:	Descending 🔹
QA Engineer 732K	9M		Order By:	sum(Monthly5 🔻
Sr Software Developer	ЗМ		Limit:	0
QA Architect 267K	ig Data Developer		Exclude Global Filter:	
Lead Software Engineer	um(MonthlySalary) 115,200		Show Data Label:	
Lead QA Engineer 117K 11 📕 S	um(OfferedCTC) 1,382,400		Enable BaseZero:	
Sr Big Data Developer 115K			Show Legend:	
Senior Software Engine. 57K 800K			0	-
Associate QA Engineer 50K			Legend Style:	Fixed 🔻
0	4M 8M 12M		Legend Orientation:	Vertical 🔻
2M	6M 10M 14M		Legend Checkbox:	

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

Sum(MonthlySalary)		Dimensions / Measures	Hidden	Chart P	roperties
By Designation		Abc Designation 🚦 🗙	[Drag and Drop		roperties
Summary	☆	123 Sum(Mon 🚦 🗶	Dimension Here]	Legend Checkbox:	
		123 Sum(Offer 🗼 🗶		View Filter	
	м		Sum(MonthlySalary)	Filter:	None 🔻
Senior QA Engineer			Offered CTC	Category Axis	
QA Engineer 🚬 732	2K	9M		Title:	
Sr Software Developer		3M		Axis Label:	
QA Architect 267K		3M			
Lead Software Engineer	214			Primary Value Axis	
Lead QA Engineer				Title:	
		Associate QA Engineer		Axis Label:	
Sr Big Data Developer		Sum(MonthlySalary) 50,000		Label Angle:	• •
Senior Software Engine.	ок	Offered CTC 600,000		0	
Associate QA Engineer 50K	к			Format Type:	Auto 🔻
0		4M 8M 12M		Currency Type:	None 🔻
	2M	6M 10M 14M		Precision:	0

10.4. Bubble Chart

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



The best situation to use a Bubble Chart:

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

Properties:

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



Sum(MonthlySalary) By Designation Summary	Dimensions / Measures Abc Designation : *	Hidden [Drag and Drop Dimension Here]	General Settings Base Type:	Gradient
2M		Sum(MonthlySalary)	Order: Order By: Limit: Exclude Global Filter:	Descending ▼ sum(Monthly5 ▼ 0
1M 500K	272K 267K 208K		Show Data Label: Enable BaseZero: Show Legend: Legend Style:	✓ □ Fixed ✓
0 Senior. Sr S QA Engine	oftware De. Lead Software. Sr Big Data De. Assoc. er QA Architect Lead QA Engin. Senior Softwa.		Legend Orientation: Legend Checkbox: View Filter Filter:	Vertical Vertical

iii) Category Axis

- a. Title: Provide a title for the axis
- b. Axis Label: Enable the category axis label by using a checkmark in the box
- c. Label Angle: Select a display angle for the axis label

iv) Primary Value Axis

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

Sum(MonthlySalary) By Designation Summary	Dimensions / Measures Abc Designation 123 Sum(Mon	Hidden [Drag and Drop Dimension Here]	Chart F	Properties
			View Filter	
		 Sum(MonthlySalary) 	Filter:	None 🔻
2M			Category Axis	
ZM			Title:	
1M			Axis Label:	 Image: A set of the set of the
132			Label Angle:	• •
500K			Primary Value Axis	
	2K 267K 208K		Title:	
0	117K 115K 67K 50K		Axis Label:	
0			Format Type:	Auto 🔻
Senior. Sr Soft	ware De. Lead Software. Sr Big Data De. Assoc.		Currency Type:	None 🔻
QA Engineer	QA Architect Lead QA Engin. Senior Softwa.		Precision:	0



10.5. Column Stack Chart

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

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

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

Variations of this chart

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

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

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

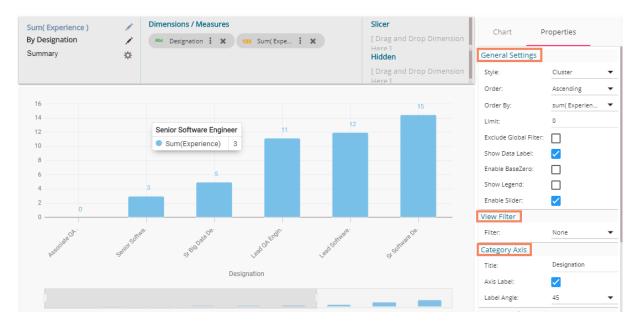
Properties:

i) General Settings

- **a. Style**: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
- **b.** Order: Select a sequence for displaying information
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users need to sort the dimensions by using the indicator signs manually) By selecting an order(ascending or descending), the user needs to configure the following fields:
 - 1. Order By- Select a value option from the drop-down menu to order the sequence of the data
 - 2. Limit- Set a number to display the requested data by this limit
- **c. Exclude Global Filter**: The view gets excluded from the Global Filter condition by putting a checkmark in the box.
- **d.** Show Data Label: Data label gets displayed by using a checkmark in the given box.
- e. Enable Base Zero: Base value gets presented from Zero by putting a checkmark in the given box
- **f.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option appears when 'Show Legend' is enabled, and the selected 'Legend Style' is Fixed. Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend
- g. Enable Slider: Provide a checkmark in the box to enable the Slider.
- ii) View Filter
 - **a.** Filter: Select a filter condition using the drop-down menu (E.g., 'None' option is the selected as a filter condition in the following image)
- iii) Category Axis



- a. Title: Provide a title for the axis. (E.g., 'Designation' is the title for the category axis displayed in the following view)
- **b.** Axis Label: Enable the category axis label by putting a checkmark in the box
- **c.** Label Angle: Select a display angle for the axis label. (the provided choices for this field are: 0, 45, 90 angles)



iv) Primary Value Axis

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

v) Secondary Value Axis

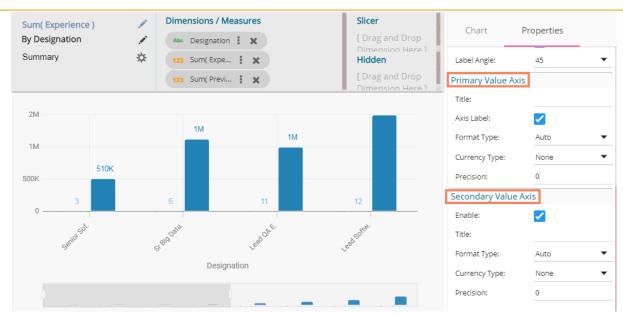
Properties for the Secondary Value Axis gets displayed when two measures are dragged on the canvas.

the canvas

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

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





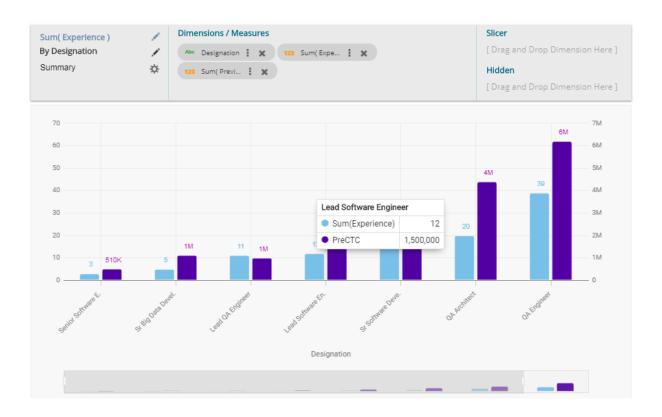
Users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart

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



Series Prope PreviousCTC	rties:	×	
Aggregation	Sum	-	l
Display Name	PreCTC		ł
Axis	ЕJ		
Color	#5200a3		
Data Label Colo	r#a300a3		
Data Label Position	Тор	-	ł
	CANCEL	APPLY	1
and the second s	alleret	ر	iner.

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



10.6. Line Chart

The line chart connects individual numeric data points to create a sequence of values. They are primarily used to display trends over a period.

Best Situation to use Line Charts:



View trends in data over a period

Examples:

To indicate increasing revenue or varying stock price

Variations of this chart

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

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

Properties:

ii) General Settings

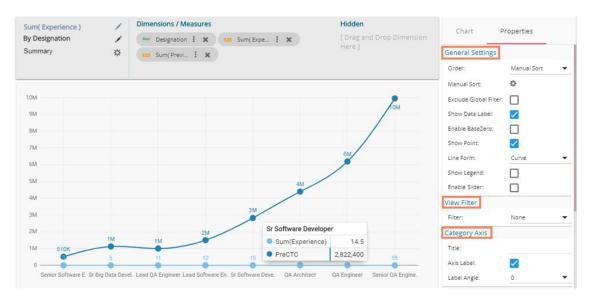
- **a. Style**: Select a style to display the data (the provided choices for this field are: Cluster, Stack, Stack Percentage, Stack Overlaid)
- **b.** Order: Select a sequence for displaying information
 - i. None (default option)
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort (Users need to sort the dimensions by using the indicator signs manually) (If the user selects 'Manual Sort' as the ordering option, they get an icon clicking which the Manual Sort window appears)

By selecting an order(ascending or descending, the user needs to configure the following fields:

- 1. Order By- Select a value option from the drop-down menu to order the sequence of the data
- 2. Limit- Set a number to display the requested data by this limit
- **c.** Exclude Global Filter: The view gets excluded from the Global Filter condition by putting a checkmark in the box
- d. Show Data Label: Data label gets displayed by using a checkmark in the given box
- e. Enable Base Zero: Base value gets presented from Zero by using a checkmark in the given box
- f. Show Point: Enable the Show Point option by using a checkmark in the given box
- **g.** Line Form: Select a line format from the drop-down menu (the provided choices for this field are: Curve and Segment)
- **h.** Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option appears when 'Show Legend' is enabled, and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal
 - iii. Legend Checkbox: Enable this option by a checkmark to add the checkbox beside the Legend
- i. Enable Slider: Slider gets displayed by putting a checkmark in the box
- iii) View Filter
 - **a.** Filter: Select a filter condition using the drop-down menu
- iv) Category Axis
 - **a.** Title: Provide a title for the axis
 - b. Axis Label: Enable the category axis label by using a checkmark in the box



c. Label Angle: Select a display angle for the axis label



v) Primary Value Axis

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

e. Precision: Set the after-decimal value (It displays up to 5 precision)

vi) Secondary Value Axis

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

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

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





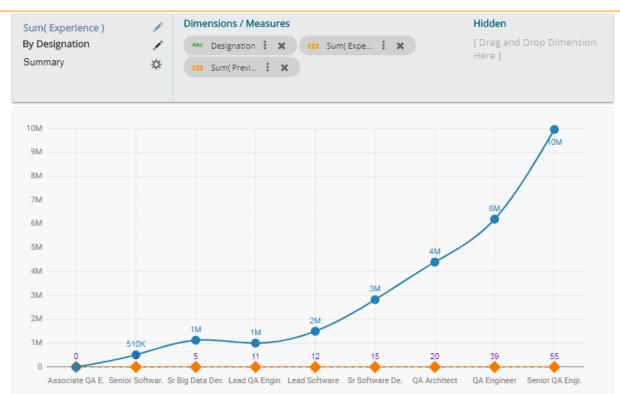
Users must configure the **Series Properties** of the dragged measure after enabling the Secondary Value Axis to display the same in the chart

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

Series Prope Experience	erties:	×
Aggregation	Sum	•
Display Name	Experience	- 1
Point Shape	Quad	•
Line Type	Dash	•
Axis	E =	
Color	#157600	- 1
Data Label Colo	#5200a3	
Data Label Position	Bottom	
	CANCEL	APPLY

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





10.7. Pie Chart

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

The best situation to use Pie Chart:

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

Variations of this chart:

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

Properties:

i) General Settings

- a. Style: Select a style to display data
 - i. Pie
 - ii. Doughnut
 - iii. Semi Doughnut
- b. Order: Select a sequence for displaying data



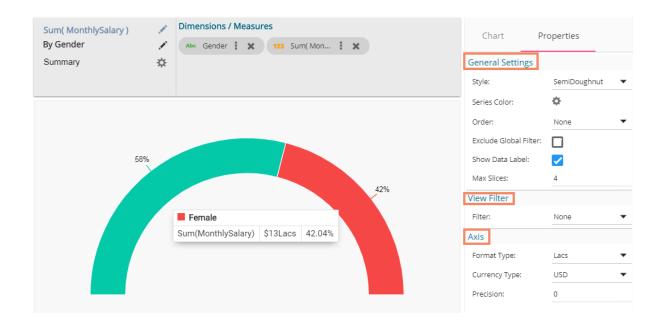
- i. None
- ii. Ascending
- iii. Descending
- iv. Manual Sort

By selecting an order(ascending or descending, users will be required to configure the following fields:

- 1. Order By- Select a value option from the drop-down menu to order the sequence of the data
- 2. Limit- Set a number to display the requested data by this limit
- c. Exclude from Global Filter: The view will be excluded from the Global Filter condition by putting a checkmark in the box
- d. Show Data Label: Data label will be displayed by turning on the radio button
- e. Max Slices: Set a number to limit the maximum displayed slices in the chart

ii) View Filter

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



10.8. Scatter Plot Chart

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

Best Situation to use Scatter Plot Chart:

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



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

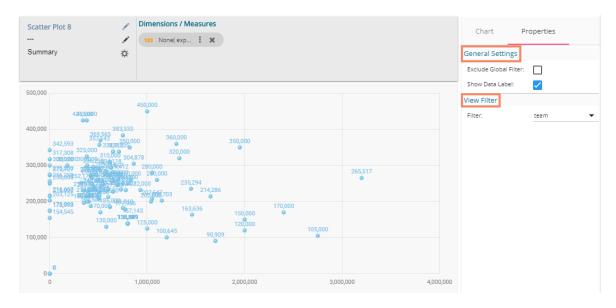
Properties:

i) General Settings

- a. Exclude Global Filter: Use a checkmark in the given box to exclude the Global filter
- b. Show Data Label: Use a checkmark in the provided box to display the data label

ii) View Filter

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



Note:

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

	Series Prope expyrsper_ct		×	
	Data Label Position	Тор	•	
360	Radius Field			
32	Measure	previous_ctc	•	26
03	Aggregation	None	•	I
I				I
,64		CANCEL	APPLY	

b. The Scatter Plot chart displays only Measure values with the '**None**' Aggregation option selected from the drop-down.



10.9. TreeMap Chart

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

Best situation to use TreeMap:

To view all the hierarchical data at one time.

Variations of this chart:

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

Properties:

i) General Settings

- a. Order: Select a sequence for displaying data
 - i. None
 - ii. Ascending
 - iii. Descending
 - iv. Manual Sort

By selecting an order(ascending or descending), users will be required to configure the following fields:

- 1. Order By- Select a value option from the drop-down menu to order the sequence of the data
- 2. Limit- Set a number to display the requested data by this limit
- b. Exclude Global Filter: The view gets excluded from the Global Filter condition by turning on the radio button
- c. Show Data Label: Data label gets displayed by turning on the radio button
- d. Gradient: Enable or disable color gradient effect on the chart by using the checkmark in the box.
 - i. By enabling the 'Gradient' option, the user gets redirected to select 'Start Color' and 'End Color' from the respective menus.
 - ii. By disabling the 'Gradient' option, the user gets redirected to select 'Color' for the Treemap sections.

ii) View Filter

a. Filter: Select a filter condition using the drop-down menu (E.g., 'None' is the selected filter condition in the following image)

iii) Axis

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



Sum(Experience) By Team	1	Dimension / Measure	Slicer Abc Team	Abc	Designation : 🗙		Chart Pr	roperties		
Summary	\$	the point expense a se	Abc Skills		besignation : 4		General Settings			
							Order:	Ascending 🔹		
BU 6 Senior QA Engineer		QA Engineer		QA Architect		BU 10	Order By:	sum(Experien 🔻		
Selenium		Selenium	201	Selenium		Java	Limit:	0		
							Exclude Global Filter:			
						20			Show Data Label:	~
				20			Gradient:	~		
	55					15	Start Color:	#2ECC71		
			ן ו	BU 6	zineer	15	End Color:	#fbe983		
55			gnation	QA Engineer			Position:	Center 🗸		
			3	Selenium	,		View Filter			
		🔳 Su	um(Experience)	39			Filter:	None 🗸		
				.ead QA Engineer			Axis			
			2	Selenium 11		Java	Format Type:	Auto 🗸		
						5	Currency Type:	None 🔻		
							Precision:	0		

10.10. Circumplex Chart

The Circumplex chart, also known as the Polar Area chart or Nightingale Rose chart, is a combination of the Bar chart and Pie chart. Each category may have more than one sub-category, where a section of the disc shows that each subcategory and each section have the same angle. The value of the corresponding sub-category is shown through the area. By changing the radius in a Circumplex chart, users can adjust the area of each segment (based on data).

Best Situations to Use a Circumplex chart:

To display manifold data in the form of a two-dimensional chart of three or more measurable variables represented on axes starting from the same point.

Properties:

i) General Settings

- **a.** Exclude Global Filter: The view gets excluded from the Global Filter condition by putting a checkmark in the box
- **b.** Series Color: Select color for the series using the available color menu
- c. Enable Base Zero: Base gets presented from Zero by using a checkmark in the provided box
- **d.** Clockwise Direction: the data values get displayed in a clockwise manner by enabling a checkmark in the given box
- e. Show Legend: Displays legend by turning on the radio button. After enabling 'Show Legend,' users need to select the following information:
 - i. Legend Style: Select one of the following options by using the drop-down menu
 - 1. Fixed
 - 2. Floating
 - ii. Legend Orientation: This option appears when 'Show Legend' is enabled, and the selected 'Legend Style' is 'Fixed.' Users need to select an option out of the given choices using the dropdown menu.
 - 1. Vertical
 - 2. Horizontal

ii) View Filter

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

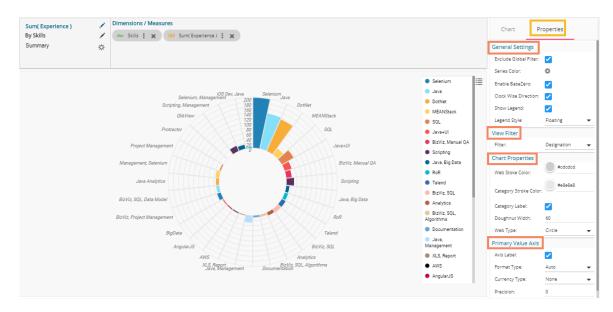


iii) Chart Properties

- a. Web Stroke Color: Select a color from the given menu
- b. Category Stroke Color: Select a color using the given menu
- c. Category Label: Enable the given box to display the category labels
- d. Doughnut Width: Set (increase/decrease) width of the doughnut.
- e. Web Type: Select an option from the drop-down menu
 - a. Polygon
 - b. Circle

iv) Primary Value Axis

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



10.11. Pareto Chart

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

Best Situation to Use a Pareto Chart:

To identify the most frequent defects, complaints, or any other factor that the users can count and categorize to focus on where improvement efforts make the most impact

Variation of this Chart: Pareto Pyramid, Paired Pareto chart

Properties:

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

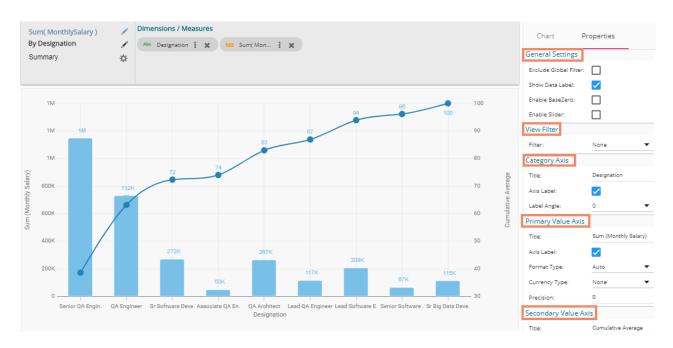


iii) Category Axis

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

v) Secondary Value Axis

a. Title: Provide a title for the Secondary Value Axis (by default it displays the cumulative average of the selected measure



10.12. Semi Gauge Chart

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

Gauges are used in dashboards, real-time monitors, and reports. They can display Key Performance Indicators (KPIs), progress indicators, and quantity indicators.

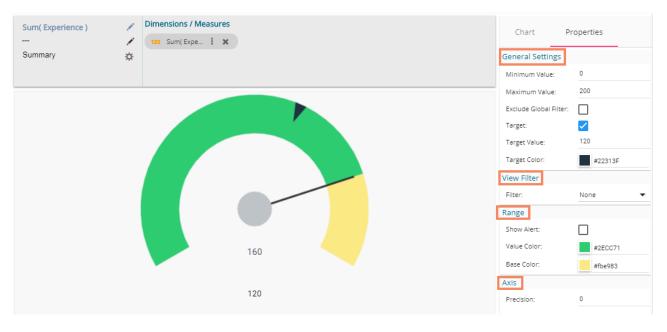
Best Situation to use Semi-Gauge:

To monitor any performance that contains predefined ranges **Examples:** The overall performance of a student/class in an examination. **Properties:**

i) General Settings

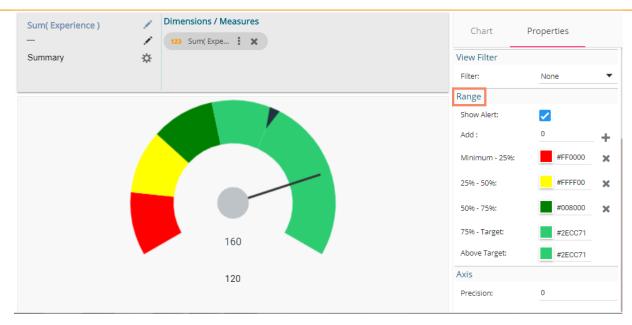


- a. **Minimum Value**: Set a minimum value to be shown on the chart (It should be less than the maximum set value)
- b. **Maximum Value**: Set a maximum value to be displayed on the chart (It should be more than the minimum set value)
- c. **Exclude Global Filter**: The view will be excluded from the Global Filter condition by putting a checkmark in the box
- d. Target: Enable target by turning on the radio button
- e. Target Value: User-defined value to set a target
- f. Target Color: Set a target color
- ii) View Filter
 - a. Filter: Select a filter condition using the drop-down menu
- iii) Range
 - a. Show Alert: Enable various ranges (in %) by turning on the radio button
 - b. Value Color: Set a value color
 - c. Base Color: Set a base color
- iv) Axis
 - a. Precision: Set the after decimal value (It can show up to 5 precision)



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





Note:

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

10.13. KPI Tile

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

Properties:

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

ii) View Filter

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

iii) Primary Value Axis

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



	Dimensions / Measures	Chart P	roperties
		General Settings	
		Label:	Sum of Monthly Sal.
		Label Color:	#0000a3
₹166.639Lacs		Label Font Size:	16 🔻
Sum of Monthly Sal.		Value Color:	#ff9933
cull of monthly cull		Value Font Size:	20 💌
		Exclude Global Filter:	 Image: A set of the set of the
		View Filter	
		Filter:	Team 🔻
		Primary Value Axis	
		Format Type:	Lacs 🔻
		Currency Type:	Rupees 🔻
		Precision:	3

10.14. KPI Tile: Comparative Tile

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

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

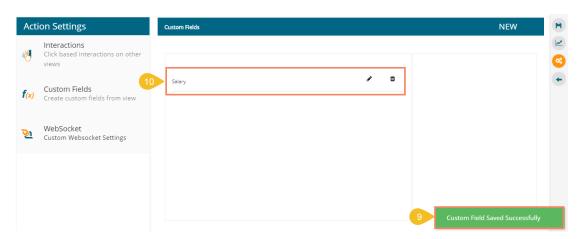
😂 Sample Data Store	Dimensions / Measures		Chart	Properties	e
Search Dimensions / Measures $ {f Q} $				~	
123 PreviousCTC	• • • • •				3
123 OfferedCTC					
123 ExperiencePerCTC					
123 MonthlySalary		17M		22	
123 UsdBilling		0			(
123 CurrentMonthlyPayment		Sum of Monthly Salary	×	6000	
123 MonthValue		5 5			
123 Experience			-1		₹₩
🖂 Addition 🏾 🏛 🗄					
ALL DATA STORE f_X					Σ

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

	Cick the SAVE option.								
	Acti	ion Settings	Custom Fields 5 NEW	•					
	i	Interactions Click based interactions on other views	6 Tide	2					
4	f (x)	Custom Fields Create custom fields from view	Səlary	•					
	21	WebSocket Custom Websocket Settings	7 Value 200000						
			8 SAVE CANCEL						



- ix) A success message appears.
- x) The newly created Custom Field gets saved and added to the **Custom Fields** page.



xi) The user can create multiple custom fields by following the above steps. (E.g., Monthly Salary is another custom field.)

Action Settings		Custom Fields		
Ŵ	Interactions Click based interactions on other views			
f (x)	Custom Fields Create custom fields from view	Salary 1 Monthly Salary	jî Jî	ŵ ŵ
<u>8</u> 1	WebSocket Custom Websocket Settings			

- xii) Navigate to the 'Properties' tab using the Design icon.
- xiii) Configure the following properties:
 - a. General Settings
 - i. Label: Insert text to be displayed as Label
 - ii. Label Color: Select the Label color using the menu
 - iii. Label Font Size: Select the font size for the displayed label using the drop-down menu
 - iv. Exclude Global Filter: Use a checkmark in the box to exclude the Global filter conditions
 - v. Show Trend: Use a checkmark in the box to display the trends

b. View Filter

- i. Filter: Choose a view filter condition from the drop-down menu
- c. Primary Value Properties
 - i. Font Size: Select a font size from the drop-down menu
 - ii. **Format Type**: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
 - iii. **Currency Type**: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
 - iv. Precision: Set the after-decimal value (It displays up to 5 precision)



d. Secondary Value Properties

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

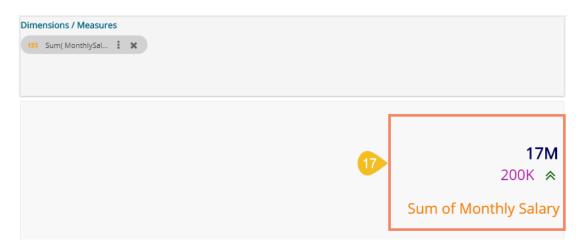
	Chart 12 Pro	operties	A
	General Settings		
	Label:	Sum of Monthly Salar	y 🙀
	Label Color:	#f57b00	~~
	Label Font Size:	20	- (7
	Exclude Global Filter:		
	Show Trend:	 Image: A set of the set of the	
	View Filter		
13	Filter:	Name	•
	Primary Value Prope		
	Font Size:	22	-
	Format Type:	Auto	-
	Currency Type:	None	-
	Precision:	0	
	Secondary Value Pro	perties	
	Secondary Value:	Salary	-
	Font Size:	20	-
	Format Type:	Auto	•
	Currency Type:	None	-
	Precision:	0	
	Rules:	¢	

- xiv) Once the user clicks on the '**Rules**' ^(*) icon, a new screen opens, redirecting the users to set rules for displaying the comparative values.
- xv) Configure the required 'Rules' fields, as shown in the following image:
 - a. Primary Operator: Select an option from the drop-down menu
 - b. Operation: Select an operation from the drop-down menu to be applied as a condition on the selected Primary Operator
 - c. Secondary Operator: Select an option from the drop-down menu
 - d. Primary Value Color: Select a color for the primary value field
 - e. Secondary Value Color: Select a color for the Secondary Value field
 - f. Trend Direction: Select a trend direction using the drop-down menu
 - g. Trend Color: Select a trend color from the menu
 - h. Remove 🕮 : Selecting this option removes the added rules
 - i. ADD: Selecting this option adds a new row to be configured as a rule
- xvi) Click the '**APPLY**' option to apply the configured Rule



	×
ary Operator Primary Secondary Trend Trend Value Color Value Color Direction color	
ry Value 🔻 Up 👻	Ê
16	
CANCEL AP	P

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



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

Dimensions / Measures
123 Sum(Expe : 🗙



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

10.15. KPI Tile: Sparkline

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

Properties:

- i) General Settings
 - a. Label: Provide a label name by using this field
 - b. Label Color: Select a label color from the menu
 - c. Label Font Size: Set the label font size
 - d. Exclude Global Filter: Enabling this option by a checkmark excludes the selected view from the Global Filter condition

ii) View Filter

- a. Filter: Select a filter condition to be applied to the view on the storyboard
- iii) Chart Properties
 - a. Line Color: Select a line color for the Sparkline chart
 - b. Fill Color: Select a fill color for the Sparkline chart

iv) Value Properties

- a. Font Size: Set Font size of the displayed value using the drop-down menu
- b. Format Type: Select a desired format type from the drop-down menu (the provided options for this field are: None, Auto, Percent, Thousand, Lacs, Crore, Million)
- c. Currency Type: Select a currency symbol to be displayed in the view (the provided options for this field are: None, Euro, Rupees, Pound, USD, Yen, Cent)
- d. Precision: Set the after decimal value to be displayed
- e. Value: Select an option from the drop-down menu
 - i. Aggregated
 - ii. Last
- f. Value Color: Select a value color from the menu

Sum(MonthlySalary) By Designation	Dimensions / Measures Mac Designation :	Chart F	Properties
		General Settings Label:	Sum (Monthly Salary)
17M		Label Color: Label Font Size:	#00005c
Sum (Monthly Sala	y)	Exclude Global Filter: View Filter Filter:	None 🗸
	E	Chart Properties	#006488
		Fill Color: Value Properties	#00ffff
		Font Size: Format Type:	20 V
		Currency Type: Precision:	None 🔻
		Value: Value Color:	Aggregated 🔻



10.16. Map Chart

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

Best Situation to Use Map:

To represent any information in the geographical context.

Chart Properties:

- i) General Settings
 - a. Exclude Global Filter: Use a checkmark in the box to exclude the global filter condition

ii) View Filter

a. Filter: Select a filter condition to be applied to the view on the storyboard

iii) Range

- a. Dynamic Range: Enable or disable the dynamic range.
- b. Min Color: Select a color for the minimum value from the drop-down menu
- c. Max Color: Select a color for the maximum value from the drop-down menu

iv) Region

a. Select Map: Select a region using the drop-down menu



Note:

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





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



10.17. Data Grid

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

Properties:

i) General Settings

- a. Order: Users can order the displayed data by selecting an option from the given choices:
 - i. Ascending,
 - ii. Descending



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

ii) View Filter

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

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

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

10.18. Metric Summary

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

Properties:

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

ii) View Filter

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

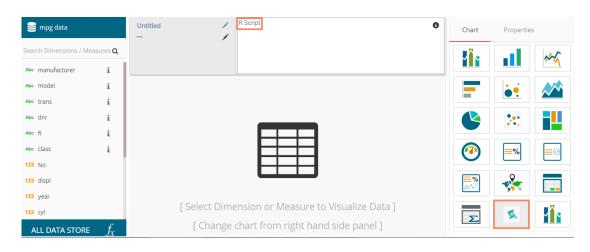


Sum(PreviousCTC)		Dimensions / Measures		Chart Properties
	1	123 Sum(Previ 🚦 🗙	123 Sum(Offer : 🗙	chart properties
		123 Sum(Expe 🚦 🗙	123 Sum(Mon : 🗙	General Settings
		123 Sum(UsdB 🚦 🗙	123 Sum(Curr 🕻 🗙	Measure Description: Measure
				Summary Description: Total
Measure			Total	Exclude Global Filter: 🗸
sum(PreviousCTC)			128.20M	View Filter
sum(OfferedCTC)			200.00M	Filter: None
sum(ExperiencePerCTC)			49.30M	
sum(MonthlySalary)			16.70M	
sum(UsdBilling)			409.20K	
sum(CurrentMonthlyPaymen	nt)		12.30M	

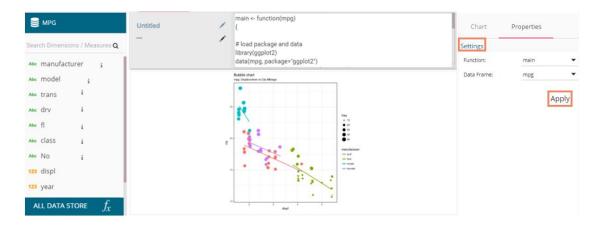
10.19. R Server Visual

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

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



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





11. Operations

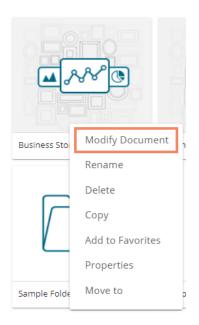
A story created under '**My Documents**' or '**Public Documents**' is credited with various operations. This section describes all the operations assigned to a Business Story document.

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

Business Sto	Modify Document	h	
	Rename	Ē	
	Delete		
$\left \right $	Сору		
	Add to Favorites		
	Properties		
Sample Folde	Move to	D	

11.1. 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.

Modify Story	×
1 Name * Business Story	
2 Description	4
	Close Save

iv) The chosen information for the story gets modified.

11.2. Renaming a Story Document

i) Select the '**Rename**' option from the Operations menu.

Business Sto	Modify Document	
	Rename	
	Delete	
	Сору	
	Add to Favorites	
	Properties	
Sample Folde	Move to	

- ii) Configure the following information to rename the story.
 - a. Enter 'New Name' in the story document.
 - b. Click the 'Save' option.

Rename	×
New Name *	
Story	
	2



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

My Documents >		Document renamed su	ccessfully
			
Shared Documents	Folders	Published Dashboards	Story

11.3. 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 selecte	d document	?
	Close	Delete

iv) The selected story document gets removed.

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

11.4. Copying and Moving a Business Story

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

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

	Modify Document
	Rename
	Delete
Story	Сору
	Add to Favorites
	Properties
	Move to

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

Or



Navigate to 'My Documents' or 'Public Documents' and use right-click on the blank space.

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

My Documents >				
		Create New Folder Link a URL Rename		
Shared Documents	Folders	Delete	d Dashboards	Story
Create New Folde Link a URL Paste Create New Story		Copy Paste Add to Favorites Properties Create New Story Move to		

- v) The 'Paste' window appears
 - a. The **Name** field displays prefix '**Copy of**-' before the original name of the story document (E.g., *Story* gets a new name *Copy of Story*).
 - b. Click the 'Save' option.

Paste	×
Name * Copy of Story	
	Close 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.

My Documents >		
Shared Documents	Copy of Story	Folders

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

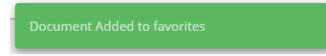
The user can add a business story document to or remove it from the Favorites.



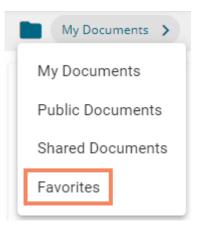
i) Select the 'Add to Favorite' option from the Operations menu.

My Documents >		
	A	Modify Document Rename Delete
Shared Documents	Copy of Story	Сору
		Add to Favorites
		Properties
		Move to

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 >		
₩ ~~~®	₩ ₩®	₩ ~~~®
Copy of Story Document	Story Document 4.3	Copy of 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	Copy of 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
	₩ ₽₽₽ [®] ©	
Copy of Story Document	Story Document 4.3	

11.6. 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	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	×
≁ Story	
< Properties	Share with User Share with Group Exclude >
Created by:	pa-dl
Туре:	Business Story
Version:	4.6.0
Where:	My Documents
	Fri Nov 15 2019 18:04:11 GMT+05:30 (India Standard Time)
2010/22/02/2000	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
L	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	ocument privilege has been upd	lated successfully	×
Story Properties	Share with User Share	e with Group	Exclude Users
alluallu.Thomas			3 🗹
anaghakn			
anil.kumar			
anushree.shinde			
ARC_gmail			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."

15 july 2 AdminPermissionTest All Permission Group Test Anuj Anuj_gupta	×
15 july 2 AdminPermissionTest All Permission Group Test Anuj Anuj_gupta	>
AdminPermissionTest 3	1/826
All Permission Group Test Anuj Anuj_gupta	
Anuj Anuj_gupta	~
Anuj_gupta	
/ind_Dapa	
Archanagrp	
bdb	
4 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	Share with Grou 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				on for	×
 Story Share 	with User	Share with Group	Exclude Users	1 Copy to	>
Search		۹			2/52
alluallu.The allu.Thomas				3	
anaghakn anagha.kn@	bdb.ai				
anil.kumar anil.kumar@	bdbizviz.com				
anushree.s					
ARC_gmail msarchana1	017@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.

	III 🧔	
	Last 3 Notifications See All	Dat
r	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.



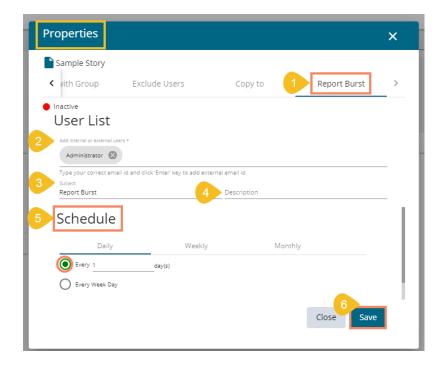
11.6.1. Report Burst

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®							Ĺ
Public Documents >					Search	م	F
							[
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				
< vith Group	Exclude Users	Copy to	Report Burst	>
Inactive				
User List				
Add internal or external users	5 *			
	id and click 'Enter' key to add externa	al email id		
Subject Report Burst		Description		
Schedule				
Daily	Weekly	Monthly		
Every 1	day(s)			
O Every Week Day				
				÷.,
			Close Save	
				_

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

Properties				×
Sample Story	Exclude Users	Copy to	Report Burst	>
Active				_
	* d and click "Enter" key to add extern	al email id		
Subject Report Burst		Description		_
Schedule Daily	Weekly	Monthly		
Every 1	day(s)			
Every Week Day				- 1
			Close Save	Ľ

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.

11.7. Move To

i) Select the 'Move To' option from the Story Options menu.

My Documents >				Sear	ch	٩
	▲ ۸۸°®				Modify Document Rename	
Shared Documents	Copy of Story	Folders	Published Dashboards	Story	Delete Copy	
					Add to Favorites Properties Move to	

- 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.

Move to	×
My Documents	
Search	
Published Dashboards	>
Folders	>
	I
C	Close Save

- v) A new window opens with the selected Folder mentioned on the top.
- vi) Click the 'Save' option.



Move to		×
My Documents		
Search		
Published Dashboards		>
Folders		>
	Close	Save

vii) A success message appears.

My Documents		Document moved successfully		
				
Shared Documents	Copy of Story	Folders	Published Dashboards	

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

My Documents > F	Folders >			Search
Business Stories 3.2.1 to	Sample Folder 3.5	Sample Folder 3.7	Sample Folder 4.2	Sample Folder 4.4
				₩ ~~~®
Dashboard	Sample Form	Sample Folder	Copy of Sample Folder	Story

Note: 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.



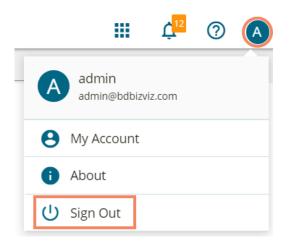
Public Documents >				
BDB SAMPLES	BDB SAMPLES		Business Story	Modify Document Rename Delete Copy
Sample Public Folder	Sample Story	Modify Doct Rename Copy Add to Favo Properties		Add to Favorites Properties Move to SF-INVTR

12. Signing Out

The user can Sign out from the Business Story at any given stage, but it is advisable to sign out after saving your business story.

The following steps describe how to Sing-off from the BDB Platform after the user has saved the story.

- i) Click the 'User Profile' icon on the Platform homepage.
- ii) Click the 'Sign Out' option.

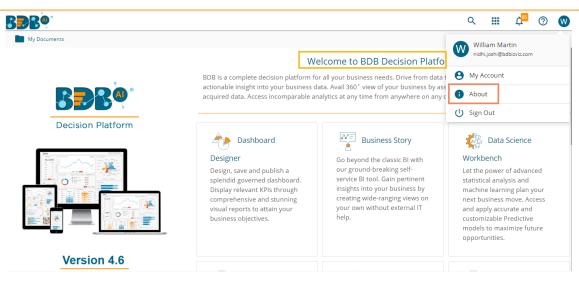


iii) The user successfully signs off from the BDB Platform.

Note:

- a. By clicking the 'Sign Out' option, the user gets back to the Sign-in page of the BDB platform.
- b. Click the 'About' option to open the default homepage for the BDB Platform.





12.1. Forgot Password Option

The user gets an option to change the password on the Login page of the platform.

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

Decision Platform
_{Email} * bdbuser@bdb.ai
Password *
Auth Type Enterprise
Forgot Password ?

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



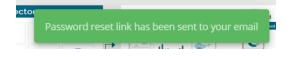


Forgot Password?

Please enter the registered email address to reset your password. Email * bdbuser@bdb.ai Sign in

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



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



Reset Password

You have confirmed ownership of the BDB account. Please reset your password to get access.

New Password *

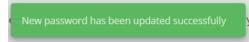
Confirm New Password *



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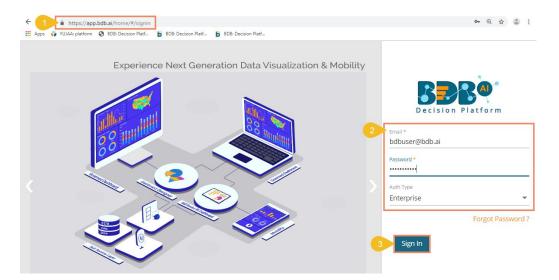
xii) The password for the selected BDB account gets reset, and the user receives a notification to assure them.



12.2. 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 4th session; a warning message appears 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 already consumes the permitted active sessions (3 sessions at a time).
- v) Click the 'Force Login' option.

Welcome	
to BDB Decision platform	
Big Data Pipeline Framework	RPRA °
Dashboard Designer	Decision Platform
ETL (Self-Service Data Preparation)	
Geospatial Analysis (Location Intelligence)	Permitted sessions are already consumed. Do you want to force login? It will kill all the active
Predictive and Prescriptive Workbench	sessions.
Play (Beta Release)	Cancel Force Logi
Self-Service BI (Business Story)	
Social Media Browser	
Sentiment Analysis	
Survey	
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- vi) A warning message appears to convey that the currently active sessions have got killed for the user, and the user gets redirected to the SignIn page of the BDB Platform.
- Note: The user needs to follow the Sign In steps once again for the successful login to the BDB Platform after selecting the '**Force Login'** option.